



Employer Advisory Group Meeting Agenda & Minutes

Date: 9/17/19
Start Time: 1:00 p.m.
End Time: 2:30 p.m.
Location: E562

Type of meeting: Periodic
Meeting called by: Sue Richards (Provaliant)
Minutes by: Sue Richards
Invitees: Melody Austin, ~~Carol Casey~~, Mark Chi, Ashley Conrad, ~~Chris Cutler~~, Jennifer Dujka, Nicholas Gonzalez, Molly Grosskopf, ~~Andrea Morales~~, Jessica Palvino, ~~Barbie Pearson~~, Frances Torres, ~~Katie Tucker~~, Sarah Valenti, ~~Kevin Wakley~~
Karen McDade (A&M) ~~RL Richards~~ (Muleshoe ISD)
~~Jackie Thomas~~ (Amarillo ISD) ~~David Rastellini~~, Lori Ganci (Northside ISD)
Christine Okanla (ACC) ~~Jeffrey Coats~~, ~~Ginger Gable~~ (North East ISD)
Claudia Alba (Belton ISD) Lana Walls (Ranger ISD)
Theresa Zlotopolski (Clint ISD) Tonya Davis (Round Rock ISD)
Becky Davis (Conroe ISD) Karina Garza (South Texas College)
~~Betty Butler~~ (Dallas County Comm College) ~~Tera Harris~~, ~~Christine Porter~~ (Spring Branch ISD)
Lori Johnson (Eanes ISD) ~~Becky Bunte~~ (TASBO)
~~Dawn Cummings~~ (ESC 3) ~~Diana Salami~~ (Texas State)
Tammy Cunningham (ESC 8) Mary Davis (Univ of No Texas)
~~Emily Youngblood~~ (Flour Bluff ISD) ~~Greta Graham~~ (Uplift Education)
Nicole Dean, Leesa Roberts (Judson ISD) ~~Pamela McDonald~~, Jeannie Farahnak (UT Austin)
~~Mickey Smith~~ (Malakoff ISD) ~~Kim Ray~~, Tiffani Stanley (UTMB)
Cathy Felts (Mason ISD) ~~Beto Su Williams~~ (UT Health Science Center at Houston)
Nancy Wiggins (Maypearl ISD)
~~Bonnie Barnhill~~ (Midland Academy Charter)
Kathy Rice (Midwestern State University)

Conference Bridge: 877-746-4263
Participant Code: 2219128
Host Code: 2265442

Purpose of Meeting: Respond to questions, address concerns, and share information with members of the EAG. Members of this group represent REs from all over the State and all types of entities. They serve as the collective "voice" of all REs.

Expected Outcome: Questions and concerns expressed by members of the EAG will be addressed. EAG members are expected to share information with other entities in their region and bring questions and concerns from those entities to this group.

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Please...

- ✓ Mute your speaker to avoid sharing background noise
- ✓ Do not put this call on hold

AGENDA

- Introductions and roll call
- Input needed from EAG members
 - Videos, along PowerPoints and transcripts, were provided to explain legislative changes; blast emails, custom web messages, and Update articles were also provided. Any feedback on any or all? TRS would like to continue that sort of communication.
 - One EAG member thought she might have seen a video but couldn't remember the content. Mark explained where to find the videos (on the [RE Portal Training page](#) under Web-Based Training) and asked everyone to watch and provide feedback.
 - When videos or other information are posted, a web message is typically posted and information is also sent via email and will typically be mentioned in the Update.
 - Tonya said emails were good because she doesn't always log in to the Portal; Jeannie said that she finds the Portal messages to be helpful.
 - Mark asked everyone to provide suggestions for other mediums that would be effective for training and communication.
 - Web based training was created to help communicate the legislative changes. The original RE Portal training videos are likely outdated but there are plans to update them.
- Questions / topics from EAG members

From Kathy Rice, Midwestern State University

- Any consideration to adding a field in the RE portal for "is member currently contributing to TRS?" with a yes or no answer. This would help schools considerably in knowing whether or not to take the deduction. Right now we are totally dependent on the temporary/part-time or adjunct employee to give us the correct information and we are finding when we present them with the TRS questionnaire that they are not always giving us accurate information.

Mark said that this is a great idea and it's on the list of future enhancements. The current direction is to expand View Employee Information. It's important to note that there could be a timing issue whenever the information is made available because not all REs report at the same time and information about a member's contributions might not have been received.
- Becky asked if View Employment Info could function like the validations? She's getting a lot of her information from the validations.

Mark said that the bulk of the work will be involved in updating the screen to display the additional information and ensure that it's reported from the same information that's associated with validations.
- Kathy from MSU said that a question about dual credit was submitted but isn't on the agenda. Question was "In the June update (page 4) we received information regarding instructors teaching at an ISD for dual credit students, but being paid by the college. This is not something we were aware of and neither was one of the ISD's that we spoke to. The reverse could also be

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true, where a high school teacher works on the college campus and teaches dual credit students. This can affect their eligibility if some courses are taught on the college campus and some are taught at the ISD, but all paid for by one entity. They may not qualify at either institution, but they would if reported all by one entity. As the ISD doesn't actually "HIRE" the instructors, they do not have the demographic info they would need to submit the hours. Is there a way to find out how this ruling was made or where it is in the TRS code?"

- Mark explained that the entity who pays the employee should report the salary, contributions, etc., but not the hours/days. The entity where the work is done should report the hours/days. For example, if work is done at an ISD by an instructor who is paid by the college, the college should report the salary/contributions and the ISD should report the hours/days. The college wouldn't report hours or days because the employee isn't working there.*
- Kathy explained that only one of the two entities has the employee's demographic information.*
- Mark pointed out that an entity won't be able to submit an RP report if there isn't an ED20 and ED40 on file.*
- Kathy's concerned because probably won't know about a person unless she's paying them. Mark asked if any other EAG members have the same problem and Tonya said that Pasadena ISD has the same problem. Mark said that TRS can reach out to Pasadena ISD.*
- Mark suggested that the college look at a process that can help provide the necessary information to all of the involved entities.*

- Defects fixed since the last EAG meeting

- ✓ *Penalty fee grace period changed from 2 months to 1 month for FY2020 reports. Mary asked if payment for Penalty Interest and Penalty Fees should still be paid through Texnet; yes, they should*
- ✓ *SB12 Updates: Contribution rates, name change for Non-OASDI to Public Education Employer Contribution, name change for Adjusted State Minimum Compensation to State Minimum Compensation, and updated/added validations for Public Education Employer Contribution and Statutory Minimum (to include Charter Schools).*
- ✓ *Added AI (TRS-Active Care Penalty Interest) and CI (TRS-Care Penalty Interest) as options in the RE Ledger.*
- ✓ *RE Ledger will now show all transactions when querying the "Deposit/Receivable Date".*
- ✓ *Updated coach information for REs who were not assigned a coach due to change in staff.*
- ✓ *Retirees on the RP report were causing 4th level validations, added error message back to notify RE if an employee is a TRS retiree.*
- ✓ *Validation 462 (ED40 not found for this reporting period) will no longer kick on ED or ER reports.*

Mark shared that 920 changes have been made to RE-related functionality since the Portal went live (101 enhancements were made and 819 defects were fixed). Current focus is on stabilizing the system. TRS will fix critical defects however further enhancements are likely to be postponed until after Phase 2 of the modernization project.

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- Scheduled fixes *(being put into place on 9/22 between 6:00-8:00 pm so RE Portal will be down during that time.*
 - *Original Name/Social Security Number will show on Error/Warning screen – currently it shows the new field and if the new field is blank then it does not display anything; starting 9/23, it will now display the original name and original Social Security Number.*
 - *Adding validations to ensure that student employment is never reported as TRS eligible, even if in another TRS eligible position.*
 - *It will no longer be possible to change the employment type code for a retiree*
- Summary of defect/enhancement activity
 - *As of September 5th, 424 changes remain on the list (195 enhancements and 229 defects)*
- RE Report Status

<i>Report Month</i>	<i># Completed RP Reports</i>	<i>% Complete</i>	<i># Incomplete RP Reports</i>
<i>May (and earlier)</i>	<i>1,325</i>	<i>99.92%</i>	<i>1</i>
<i>June</i>	<i>1,323</i>	<i>99.77%</i>	<i>3</i>
<i>July</i>	<i>1,275</i>	<i>96.01%</i>	<i>53</i>
<i>August</i>	<i>1,040</i>	<i>78.08%</i>	<i>292</i>

- Additional Discussion
 - *Mary from UNT asked if she understood correctly that she doesn't need to report Students. Mark said yes – although students can be reported, they don't have to be. Flexibility is there because students can't be omitted by the software that's used by some REs*
 - *Workshops are starting today; view schedule and sign up on the TRS website under RE Portal training; Mark encouraged everyone to sign up. There will be representation for all regions; all but Region 4's workshop will be at the Region's Education Service Center. The session for Region 4 will be held at Houston ISD.*
 - *Payroll manuals have been updated for FY20*
 - *The defect/issues list is being continually maintained and will be a good place to look first whenever you run into an error that you haven't seen before.*
 - *Creditable Compensation webpage was revamped so you can skim for primary topics and then drill down to what you need. Mark encouraged EAG members to provide feedback on the redesigned page.*
 - *TRS is available to provide workshops at Conferences and User Group meetings that are held by software providers. Please reach out and if we're available, we'll work it into our schedule.*

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ACTIONS, DECISIONS, ISSUES from the Meeting

Action, Decision, Issue	Description	Assignee	Targeted Completion Date