Employer Advisory Group Meeting Agenda & Minutes

Date: 10/16/19
Start Time: 9:30 a.m.
End Time: 11:00 a.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, Sunitha Downing, Jennifer Dujka~~, Nicholas Gonzalez, Molly Grosskopf, ~~Caasi Lamb, Andrea Morales, Jessica Palvino~~, Barbie Pearson, ~~Frances Torres~~, Katie Tucker, ~~Sarah Valenti, Kevin Wakley~~
Sunset Committee Members: Tamara Aronstein and Michelle Garza

~~Karen McDade (A&M)~~
Christine Okanla (ACC)
~~Betty Butler (Dallas County Comm College)~~
Kathy Rice (Midwestern State University)
Karina Garza (South Texas College)
Diana Salami (Texas State)
Mary Davis, Ashley Penny (Univ of No Texas)
Jeannie Farahnak (UT Austin)
Kim Ray, Tiffani Stanley (UTMB)
Bete Su Williams (UT Health Science Center at Houston)

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 serve as the collective "voice" of those REs.

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

Please…

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

AGENDA

- Introductions and roll call
- Information from TRS
    - *As mentioned in the last TRS Board Meeting, employers are now referenced as Reporting "Employer" rather than Reporting "Entity"; this is mentioned in the October Update and the TRS website will be updated*
    - *Fall workshops are in progress; please attend if possible; time reserved to cover areas of interest to Higher Ed*
    - *TRS is still working through some ORP updates; working with various departments to ensure statuses are correct; please submit ORP info as soon as possible and do not delete any ORP participants. If you have questions about ORP or about the TRS28, see the Higher Education Payroll Manual (starting on page 33) for details. This will also be discussed in workshops.*
    - *Some of the manuals have been updated; see the October Update for more information*
    - *Mark asked the group for their thoughts about adding Region# to the EAG web page so other REs can contact a member who's in their Region regarding questions or topics for an upcoming meeting.*
        - *Bete Su Williams thought it was a great idea*
    - *Mark mentioned notifications to retirees. When they're reported to TRS for the first time in a fiscal year, they receive a notification that reminds them of the rules for working after retirement.*
    - *TRS will be closed Nov 11, Nov 26-28, Dec 24-27, and Dec 31 (1/2 day) and Jan 1; RE Portal will be up on those days and processing will continue on the normal schedule*
- Information needed from EAG members
    - *The group brainstormed best practices that may be helpful to REs who still struggle with reporting (What do you do to make it easier to complete the reports?). TRS would like to publish tips that will help others.*
    - *Karina Garza and Jeannie Farahnak said that they hired additional employees to handle the different report types.*
    - *UT Austin has been downloading a CSV file each month, building a file that provides them with a full history. It's helpful to be able to look back to see what was reported. They do this with all report types.*
    - *Mary Davis said that they make sure to update the Portal with changes that are made on their system; a spreadsheet helps them do that. Also, her programmers knew that they'd have a lot of changes and provided a CSV file. They make adjustments to that and then get a text file.*
    - *Kathy Rice gets her data into a Text file and uses PSPad (http://www.pspad.com/en/) where she has a ruler across the top that helps her know where she is in the records. She's able to sort by column or row, and she can highlight cells as needed (she sorts records so eligible employees are at the top and ORP are at the bottom and individuals are sorted alphabetically). She also has a spreadsheet to help track where changes were made (her system or Portal).*
- Questions / topics submitted by EAG members
    - No questions received prior to this meeting; Mark opened the floor for current questions.
    - *Christine Okanla asked about most recent cash overage email; what's the timeframe of that information? She also asked who received the information. .*

    - *Mark explained that when the new system went live a notification was developed to inform institutions that they have additional funds or that they owe funds to TRS; there was a problem at first but issues were fixed and the notices recently went out again. Notices go out the next day following completion of the RP or ER report.*
    - *Christine said that she saw some discrepancies; Mark will have her Coach contact her.*
    - *Regarding distribution, Mark says it goes out to the Reporting Official and Payroll Contact. She asked how she can receive it. Mark said that if her role is changed or is added as Reporting Official or Payroll Contact, she'll receive the notices. She can still remain the Web Administrator and have Administration permissions in addition to being added as the Reporting Official and/or Payroll Contact.*
  - *Tiffani Stanley said that they got a lot of errors on a recent ED file because of special characters and asked when it changed. It changed in mid-December 2018.*
    She also asked about timing of getting corrections made for ORP employees; Mark said that TRS will work around those issues until all corrections can be made

- Defects fixed since the last EAG meeting (9/22-10/13)
  - ✓ *Error/Warning screen now displays the "original" SSN and Name for errors found in ED25 records*
  - ✓ *RE Ledger summary balance will now match the detailed balance*
  - ✓ *Validations were updated to ensure that student employment will never be considered eligible*
  - ✓ *New validation #797 – "Employment Type Code change is not allowed because prior postings exist with time worked under Employment type Code of <<Original Employment Type>>" was added to prevent Emp Type from being changed if multiple months have been reported (applies to working retirees)*
  - ✓ *General error will no longer appear for RP reports on the Query All Reports, View Reports, and Maintain Reports screens*
  - ✓ *TRS-Care surcharge information will now appear correctly on View Employee Information*

- Defects planned to be addressed in next release(s)
  - o *TBD – currently in review; identifying top issues*
  - o *One of the top items is a correction to issues related to position association. In some cases, the system tries to associate data to a prior position rather than the current active position. It's not a widespread issue but the IT team is working on a fix.*

- Regular Report Status

Report Month	*# Completed RP Reports*	*% Complete*	*# Incomplete RP Reports*
August	*1,330*	*92.92%*	*1*
September	*969*	*72.69%*	*364*

- Additional Discussion
  - o *Barbie told everyone that Annual Statements are starting to be printed and mailed*

- *Barbie also mentioned that MyTRS will be updated with FY19 balances, and data for employees who started after Sept 2017 will be available. Those individuals will now be able to register on MyTRS. Changes are currently planned for October 27th*
- *Kathy Rice discussed some problems noted with a recent report. She received an error saying that an employee was working for another entity; they updated their report and then got a message about the employee being a new member.*
  Mark said that TRS hopes to enhance the employee Information screen to show the # of days worked by a new member or the # of days left to work under that status. Even then, the data can change without notice as reports are processed throughout the day. It's in the pipeline but in the meantime he urged everyone to reach out to their Coach if there are questions about a particular employee.

ACTIONS, DECISIONS, ISSUES from the Meeting

Action, Decision, Issue	Description	Assignee	Targeted Completion Date