TEAM PROGRAM
TRS Enterprise Application Modernization

Employer Advisory Group Meeting Agenda & Minutes

Date: 1/16/2020
Start Time: 10:00 a.m.
End Time: 11:30 a.m.
Location: E442

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, Jill Ivie, ~~Andrea Morales, Jessica Palvino, Barbie Pearson, Frances Torres~~, Katie Tucker, ~~Sarah Valenti~~, ~~Kevin Wakley~~
Sunset Advisory Committee Representatives: Tamara Aronstein and Ashley Thomas

EAG Members and designated participants:

Karen McDade (A&M)
~~Jackie Thomas (Amarillo ISD)~~
Christine Okanla (ACC)
Claudia Alba (Belton ISD)
Theresa Zlotopolski (Clint ISD)
Becky Davis (Conroe ISD)
~~Betty Butler (Dallas County Community College~~)
~~Lori Johnson (Eanes ISD)~~
~~Dawn Cummings (ESC 3)~~
Tammy Cunningham (ESC 8)
~~Emily Youngblood (Flour Bluff ISD)~~
~~Nicole Dean, Leesa Roberts (Judson ISD)~~
~~Mickey Smith (Malakoff ISD)~~
Cathy Felts (Mason ISD)
Nancy Wiggins (Maypearl ISD)
Kathy Rice (Midwestern State University)
~~RL Richards (Muleshoe ISD)~~
~~David Rastellini, Lori Ganci (Northside ISD)~~
~~Jeffrey Coats~~, Ginger Gable (North East ISD)
~~Lana Walls (Ranger ISD)~~
Tonya Davis (Round Rock ISD)
Karina Garza (South Texas College)
Tera Harris, ~~Christine Porter~~ (Spring Branch ISD)
~~Becky Bunte (TASBO)~~
Diana Salami (Texas State)
Mary Davis (Univ of No Texas)
~~Greta Graham (Uplift Education~~)
~~Kim Ray, Tiffani Stanley (UTMB)~~
~~Bete Su Williams (UT Health Science Center at Houston)~~

Other Attendees: Barbara Hunter and Judy Kruwell (Stephen F. Austin 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.

Please…

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

AGENDA

- Introductions and roll call
- Information from TRS and input needed from EAG members
  - *Adjusting days reported more than five fiscal years ago; Statute prevents corrections to service credit that was worked over 5 years ago (no updates for work prior to Sept. 2015). More detail information will appear in the February 2020 edition of the Update.*
  - *Regional offices: Survey was sent out to all members and to institutions for the purpose of gathering information; no decision has been made yet; please encourage employees to complete the surveys*
  - *Reminder: For EAR purposes, half time is not 19.5 hours or less per week. It's based on hours per month. For example, using Jan 2020, there are 23 days in the month, meaning that retiree will be considered half time if they work 92 hours or less in the month. An article with more information will appear in the February 2020 edition of the Update.*
  - *Should we continue to hold separate meetings, one for Higher Ed, one for ISDs and Charters, and then a combined meeting? Or, is there a different format preferred?*
    - *Several EAG members spoke up in favor of continuing the current pattern of having separate meetings with Higher Ed and non-Higher Ed, and a combined meeting after that.*
- Questions / topics from EAG members

  From Tonya Davis, Round Rock ISD

  - How should school districts process an employment change in reporting ED records for Substitute hired as an Employee? Should we term with an ED90 record and Rehire with an ED40 record? What impact will our process have on New Hire Surcharges if any?

    If the employee hasn't terminated their employment, submit an ED45 as an "end/add" to end the substitute position and begin the eligible position. Alternatively, an ED45 could be submitted to end the old position and an ED40 to begin the eligible position. Remember, ED90's should only used when someone completely terminates employment.

    Tonya said that Round Rock actually terminates the employee if they switch from substitute to permanent and the employee gets a new hire date.

   - *The software used by Tonya and Kathy doesn't let them enter the change in position; they have to enter it manually, which is time consuming. Mark understands the problem but is concerned about the impact of terminating the employee within the TRS system. It increases the potential of doing a refund for an employee who shouldn't get a refund at all. TRS's definition of substitute needs to be considered as well.*

   - *Kathy said that if there was a position code for Substitute, their system would create the ED45 automatically. Mark understands but there isn't a position code for Substitute. He said that he'll be happy to talk with their software provider and brainstorm ideas to help resolve the issues.*

- *From Cathy Felts, Mason ISD*

   - What is the process if we have a retiree working as a substitute, but they are still showing as a current active TRS member in the TEAMS portal.

     Mark urged anyone who runs into this issue to contact their Coach who will verify whether the employee is really retired and request the account to be closed. This is a current defect that TRS is aware and working on a solution.

     Occasionally, an employee will think they retired when they left their place of employment but they haven't actually completed the retirement process. She mentioned one specific issue and Mark asked her to send details to him.

- *From Becky Davis, Conroe ISD*

   - Why did we receive the tax warning below with a certification?
     "Refund Gross Amount is less than $200. Review tax year payments to Payee to determine if tax withholding should be adjusted."

     This was related to the refund certification screen and was an internal message that shouldn't have displayed on the RE Portal. The problem was addressed on October 30, within a week of when the message appeared. Has it been seen since then? She saw one on January 6th. Mark asked for details and Becky said that she'll send a screenshot. [Update: Defect logged and prioritized]

   - Would it be possible to provide more calculation examples such as new member and stat min, stat min with multiple docked days, etc. The example should detail all required deductions and employer contributions included on the RP 20 record. When looking for an example with new member contributions for someone subject to stat min I could not find an example that included all fields such as the Public Education Employer Contribution. This would be a helpful reference when training employees working with TRS.

     Mark thinks this is a good idea and would like some additional examples of what will be helpful? If so, we'll try to add examples for those. We can do an example of Stat Min for new members and Stat Min with multiple days docked, but more examples will help. Stat Min for New Member with Federal. Mark suggested adding examples under New Member rather than Stat Min since Stat Min has a lot of detail already, and cover the *scenarios that are possible related to New Members. Becky thinks it would be fine to just provide examples in its own section and will be happy to send some examples.*

- Defects fixed since the last EAG meeting
  - *Issues that were seen when processing ED45 records for participants with multiple positions were fixed, along with RP20 association errors when there was an eligibility change in the middle of the month. Fixed in mid-December.*
- Scheduled fixes

  Changes will be released on Sunday evening, February 23rd; although all are planned, some might not make it into that release and will be pushed to the next.
  - *Option is being added to download CSV containing records from all ED , RP Adjustment, and ER Adjustment reports that were submitted for the selected report month. Up to 12 months can be included in a single file.*
  - *Allow the RE Ledger screen to be downloaded/printed in CSV or XML format*
  - *New validation to prevent more than 24 hours being reported for each day*
  - *Issues with View RE Ledger were addressed (e.g., query didn't show results when there were transactions, Ledger balance wasn't always appearing, RE Ledger column was empty, results differ hour to hour with no new transactions)*
  - *Validation 776 (ED40 required when days are reported for summer months) didn't kick*
  - *It needs to be possible to submit summer school contract outside of summer school dates and this can currently only be done with an override.*
  - *New validation to prevent position dates longer than 4½ months for Temporary position*
  - *Validation 407 kicked when participant didn't have a year of service credit*
  - *Additional changes were made that relate to New Member to deal with members who have multiple escheatments and/or a contract that starts 9/1 but first contribution isn't until January*
  - *New validation so days worked can't be reported after an employee is terminated. An adjustment for a period prior to termination will be fine, as long as the member hasn't refunded.*
- RE Report Status

Report Month	*# Completed RP Reports*	*% Complete*	*# Incomplete RP Reports*
September	*1,330*	*99.7%*	*4*
October	*1,330*	*99.7%*	*4*
November	*1,313*	*98.43%*	*21*
December	*1,069*	*80.13%*	*265*

- Additional Discussion
    - *Tonya said that she's had issues with New Member. If she notices any issues with New Member Contribution, she'll reach out to Jennifer. She said that she researched on her end and said that she thinks that it has something to do with the name that's used in the query. Mark said that it's helpful to use SSN and Date of Birth instead of name when a query is done. If employers think it would be best to remove the name fields from the query screen, TRS will consider that. Tonya prefers being able to get results by entering only one piece of information and not both SSN and Date of Birth. Mark explained that multiple pieces of information are needed in order to better secure member data. Perhaps a different message can appear.*

      Kathy suggested allowing entry of SSN and Region#. Or, SSN and some other piece of information that isn't generally known outside. She also said that there seems to be a disconnect and it shows that they're a new employee but when a report is submitted an error appears because they aren't new. Mark said that the discrepancy could be due to timing.

      Mark asked everyone to check with their Coach if discrepancies are seen. Although all scenarios that TRS is aware of have been addressed, it's possible that there are others that need attention.
    - *Kathy from MSU – regarding emailing, the secure email is difficult to use because of the inability to search. Mark said that TRS has the same trouble. He suggested copying herself on the emails as a way of seeing the information. Coaches are doing that at TRS.*
    - *Becky asked about an error she saw this month. The system told her that an ED40 wasn't found for position code 07 but there was a position record on file. I.e. – "An ED40 record is not found for reported position code 07. A different position code 07 exists for the employee with the Reporting Entity."*

      Katie said that we often see this error when time worked has been reported and the position end date is in the prior report month. If an employee has ended the position in the prior month, then time worked must be removed and the appropriate zero day reason code added to the record. In this case, the error message does not match the scenario. Katie and Mark said that this is on the list to be addressed by creating a new validation.

ACTIONS, DECISIONS, ISSUES from the Meeting

Action, Decision, Issue	Description	Assignee	Targeted Completion Date