Employer Advisory Group Meeting Agenda & Minutes

Date: 2/28/2020
Start Time: 10:30 a.m.
End Time: 12:00 p.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~~, ~~Sunitha Downing~~, Jennifer Dujka, Nicholas Gonzalez, Molly Grosskopf, Jill Ivie, ~~Caasi Lamb~~, ~~Andrea Morales~~, ~~Jessica Palvino~~, ~~Barbie Pearson~~, Frances Torres, Katie Tucker, ~~Sarah Valenti~~, ~~Kevin Wakley~~
Sunset Committee Members: *None*

Karen McDade (A&M)
Christine Okanla (ACC)
~~Betty Butler (Dallas County Comm~~ College)
Kathy Rice (Midwestern State University)
~~Katarina Bugariu~~ (South Texas College)
Diana Salami (Texas State)
Debbie Dowdy,Misty Sanders, Texas Tech
~~Mary Davis~~ (Univ of No Texas)
~~Kim Ray, Tiffani Stanley~~ (UTMB)
~~Bete Su Williams~~ (UT Health Science Center at Houston)
JoAnn Townsend, University of Texas System
Rachel Bahnsen, Wharton County Jr. College

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
  - *February edition of the Update will be sent out shortly. When it's available, a message will be posted on the RE Portal.*
    - *Employment after retirement hourly limits are based on the number of Monday's through Friday for the calendar month, whether school is open or closed; examples of Half time or Less are provided in the Update*
  - *Dual Credit*
    - *What's the best way, from your perspective, to report dual credit? No laws or rules govern this and there are a couple of ways to do it. For retirees, it's easier to report based on the job that's being performed, but for Active it's easier to report based on the primary employer. TRS wants to find a way that's beneficial to REs, members, and TRS and will then publish guidelines.*
    - *In the fall workshops, discussion pointed toward having the employer where they work report the time and employer who pays them report the dollars.*
    - *It's important to confirm who the actual employer is.*
      - *Rachel from Wharton said that all of their dual credit is done at the ISD by the ISD's instructor, however they're paid by Wharton. Wharton pays a stipend and reports the pay with 0 hours. Employee is also reported by the ISD.*
      - *Mark asked the group if dual credit is mainly seen at community college level?*
        - *Kathy from MSU said that they have some dual credit; their fulltime employee teaches at an ISD; She isn't involved in payment and assumes that it's handled by the Provost's office. She isn't sure if they pay employees directly or if they pay the ISD and the ISD pays them for the associated classes. Mark asked for names of some of the ISDs involved so TRS can follow-up with them.*
  - *Adjunct membership eligibility: There have been a lot of questions about if/when an adjunct is eligible for membership. Which works best for you – reporting them as eligible only at the beginning of the year or during the year? Not having them be eligible? In statute, it's related to membership eligibility.*
    - *Kathy from MSU prefers they not be eligible.*
    - *Rachal from Warton said that their biggest struggle is when the adjunct has beeen working only at Wharton for an adjunct and then starts working fulltime elsewhere in the middle of a semester. Wharton doesn't find out on a timely basis and have to go back and submit adjustments. Mark noted that this could happen with any employee and Rachael agreed and said that it just happens more often with adjuncts. She has one adjunct who teaches for 5 different institutions. She also noted that eligibility is only checked when the employee is hired but Wharton is trying to implement procedures that'll help them catch it when an employee becomes eligible.*
    - *Mark suggested the possibility that eligibility only be based on a single employer. This would mean employees must meet eligibility for that RE to be reported as eligible by that same RE. If an employee only meets eligibility at one RE, then only that RE would report the employee as eligible. If the employee does not meet eligibility at an RE, then that RE would report the employee as NOT eligible regardless of concurrent employment. However, this would require a statutory change and may not be member freindly.*

  - *Rachael asked Kathy what factors they used on adjuncts. Kathy uses their contract but think it might be 2.5.*
  - *Kathy also commented on the difficulty and work associated with employees who switch from TRS to ORP.*
  - *Mark encouraged everyone to send an email after this meeting with any questions related to dual credit or adjunct eligibility that weren't addressed.*

- Questions / topics submitted by EAG members
  - No questions received prior to this meeting
- Defects fixed since the last EAG meeting
  - ✓ *Changes were put into place on February 23rd*
  - ✓ *Provide an option to download CSV containing records from ALL ED, RP Adjustment, and ER Adjustment reports that are submitted for the report month for a maxiumum timeframe of 12 months. The ability to do this was requested by REs.*
  - ✓ *Provide an option for the RE Ledger Screen to be downloaded/printed in CSV format. The ability to do this was requested by REs.*
  - ✓ *New validation to prevent more than 24 hours being reported for each day reported.*
  - ✓ *Multiple issues with View RE Ledger screen were resolved (e.g., no results when there were transactions, RE Ledger balance doesn't always display, results differ hour to hour with no new transactions).*
  - ✓ *Validations 345 & 777 would kick when deleting ORP transactions in order to correct a contract. Now, if the "D" Delete zero days reason code is used when deleting an RP record, the ORP validations will not kick, allowing REs to correct these records without getting an override from TRS.*
  - ✓ *ED45 ending contract left RP transactions with days posted after new contract end date. Expected validation 776 (ED40 required when days are reported).*
  - ✓ *Validation 790 was fixed and now allows for 09 Summer School position code to be used outside of summer school in certain situations (e.g., year round ISD have summer school all year). Requires override from TRS.*
  - ✓ *RE Ledger search criteria was fixed and balance now shows current amount regardless of search type*
  - ✓ *New validation was added to prevent temporary position dates to be longer than 4 ½ months. This will also take into multiple temporary positions in one school year. Can be overridden if TRS approves. A few issues were noticed with this where the 4 ½ months isn't counted correctly. Mark asked anyone who comes across this to contact their Coach.*
  - ✓ *Validation 407 (Member already has a year of service credit for current school year) was kicking in error when an employee did not have 90 days reported for the school year.*
  - ✓ *Added a new validation for days reported after termination. Message will say "A contract end date exists for this participant in the previous report month. Days cannot be reported without a new contract."*

- ✓ *Validation #799 was an new validation added but a defect was encountered. As of Friday morning, 2/28, the error can now be overridden (Validation" "A contract end date exists for Position Code <<position code>> in the previous report month. Days cannot be reported without a new contract."). Coaches will need to confirm that RP Posting is within the contract period and can then override. A permanent fix is pending.*

- Defects and enhancements planned to be addressed in next release *– list is tentative and could change*
    - *Next release is on April 19th*
    - *When 401(a) Limit information is viewed, omit employees who are no longer with the RE*
    - *Some RE Contacts have multiple accounts (i.e., different REs) with different names but with the same email address. This causes issues when contacts are updated and steps will be taken to prevent the Web Admin from changing a user account to an email address that already exists.*
    - *When using "Search for Contact' to add an existing RE User as a contact, the name fields will be greyed out.*
    - *When Delete Record(s) is selected, RE will need to enter the reason for deletion. This change is needed in ordert o meet requirements of the State Auditors Office.*
    - *Corrections will be made to the banner that appears for overdue ER reports.*
    - *Fix the issue that's preventing multiple ER records to be saved. Validation 792 is kicking in error.*
    - *Notification of ORP participation that's sent to RE via email will be encrypted*
    - *Verbiage on the email containing the RE Portal temporary password will be updated. It's currently outdated.*
    - *Prevent warning message related to Refund Certification that shouldn't appear*
    - *Validation will be added to prevent zero days from being reported for the first month of employment in a TRS eligible position.*
    - *Validation will be added to prevent an employment start date that's month's prior to first RP report posting. This will prevent situations where, in January, RE submits a contract that started in 9/1 and submitted an RP20 for January but no RP25s for prior report months. There's still discussion on this one to determine whether it'll be a warning or error.*
    - *New email will be sent to REs who participate in ActiveCare and have a premiumthat's past due or a credit*
    - *In addition to work in progress, changes to the View Employee Information screen are being planned. Input from this group and other employees is being considered in those discussions. This will be handled in a phased approach with some changes coming before others.*
        - *Kathy said it'll be helpful to what jobs are in the system and knowing when a new member started in an eligible position at any employer. Mark said that these will be included in the new and improved View Employee Information screen.*
        - *Any REs who couldn't complete a report due to error #799 were urged to contact their Coach regarding overriding those errors.*

- RP Report Status

Report Month	*# Completed RP Reports*	*% Complete*	*# Incomplete RP Reports*
December	*1330*	*99.7%*	*4*
January	*1,184*	*88.76%*	*150*

- Additional Discussion
  - *This is Mark's last EAG meeting because he's moving into a different department.*

ACTIONS, DECISIONS, ISSUES from the Meeting

Action, Decision, Issue	Description	Assignee	Targeted Completion Date