Employer Advisory Group Meeting Agenda & Minutes

Date: 6/18/2020
Start Time: 2:30 p.m.
End Time: 4:00 p.m.
Location: E442

Type of meeting: Periodic
Meeting called by: Sue Richards (Contractor)
Minutes by: Sue Richards
Invitees: Melody Austin, Carol Casey, 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~~

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)~~
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)
Amanda Babcock (UT Systems)

Other Attendees:

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/or input needed from EAG members
    - *TRS is doing an online Introduction to Reporting webcast. A session on July 15th is planned for Higher Education employers and a session on July 22nd is planned for non-Higher Ed. Anyone who will benefit from the sessions are welcome. We don't have the limitations with virtual classes in regard to the number of attendees.*
    - *July Update newsletter will contain a lot of information related to starting the new school year (FY2020-2021)*
    - *Regarding meeting frequency, do you believe we should*

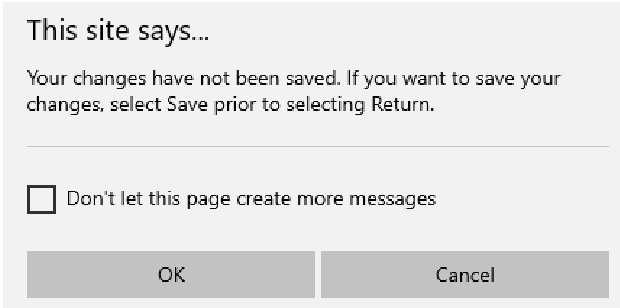
        A. *continue to meet each month (month 1 with Higher Ed, month 2 with non-Higher Ed, and month 3 with everyone) or*

        B. *meet quarterly with Higher Ed EAG members and non-Higher Ed EAG members in separate meetings?*

        Diana from TX State preferred to keep it the same; Lori from Eanes, Claudia, Region 8 all agreed; Lori Ganci prefers once a quarter but she'll go with whatever the majority wants. She asked if it was OK if she wasn't able to attend the combined meeting and whether she needed to let TRS know. Katie said that we can track that through the RSVPs.
- Questions / topics from EAG members

    From Lori Johnson, Eanes ISD

    1. This is an old error since inception: I really don't even think about these anymore until I have 197+ errors that I notice these problems with programming are still present:
    After you select SAVE, you still get this message



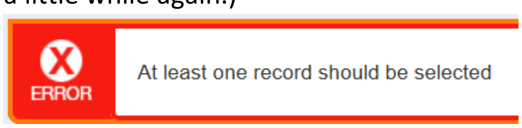
This issue is still on our list, however we've been focusing on improving View Employee Information, and expanding the ability for employers to more easily access information reported to TRS. At this time, there isn't a target date for addressing this.

Lori added that this has been a problem since inception and makes the system seem really clunky. Katie agrees and understands that it needs to be fixed, and explained that the focus has been on problems that impact report completion and enhancements requested by employers. It will be considered for a maintenance cycle.

2. If you delete a record on the 2nd page, it takes you back to the 1st page, so you kind of need to find your place again. This has been reported before.

   We understand the inconvenience and this issue is still on our list, however we've been focusing on higher priority items. At this time, there isn't a target date for addressing this.

3. If you stay on the RP screen for awhile & you go to delete a record, it will not register what you selected & will give you this message: (If you search for the individual employee, you can delete the single record that shows up. Or if you sign out & sign back in, this isn't a problem for a little while again.)



   Interesting. We weren't aware that there was a timing issue. It was discussed with IT and should be addressed in an upcoming release. There is an update planned that will improve deleting records and this may be improved as well.

4. TRS 7 form – I have had 2 retirees that turned in there TRS 7 form & they indicate that TRS told them this form could be sent in as soon as possible. When I tell them I won't send it in until after their final paycheck, they are surprised. I check with TRS on this last summer & I was told that I can send it in before the last check and just estimate the numbers on the form. Can you clarify the best practice?

   The form can be submitted whenever you're able to confirm the numbers for the employee. For reference, please see the article about the TRS-7 in the April 2019 edition of the Update newsletter.

   Lori added, employees are being told by TRS that they can send it in. Nancy from Maypearl has had the same thing happen. Katie said that this will be addressed with front line employees at TRS.

Claudia submitted a TRS 7 incorrectly and resubmitted another one. She didn't get a message to let her know that the form was completed correctly. Katie assured her that the second submission took the place of the first one. She also said that programmers are working to provide an option to print or obtain a copy. Now, printing a screenshot is the workaround.

- Defects fixed in last two releases (April xx, 2020 and June 14, 2020)
    - *MC26 VEI and MC27 VEI*
        - *VEI Search Results for Retirees – updated message to clarify when surcharges are due & added "as of date" to display the search date*
        - *VEI Search Results for Non-Retirees –*
            - *added "as of date" to display the search date,*
            - *new field for "new member days completed as of the 1st of the month" to assist with new member contributions,*
            - *added "in a TRS eligible position" field to verify if the participant is in a TRS position as of the search date, added "TRS eligible date range" field to display any TRS eligible contract dates (from any RE the member is employed with) that cover the "as of" search date and added a field to indicate if the employee is subject to IRS salary cap.*

              Question related to Salary Cap: Is there any chance it could be lowered to 75%? Because of the timing it would be helpful. Now, it's at 85%. TRS will consider lowering the amount to 75% so employees will appear on the View 401(a)(17) Limit screen sooner.
        - *Added with previous MC26 was the "View ED Contract Info" screen to display all contracts under the current employment for the particular employer. And with MC27, we added "View RP Payroll Info" to display all RP transactions completed for that participant and the specific employer. This screen will display all fields completed on the RP transactions including days, hours, salary, member contributions and employer contributions. It will only display transactions from the RE Portal Go-Live.*
          After the enhancement went live, TRS received word about some issues. Those will be addressed.

      Katie said that a communication will be sent out, with information about all of the changes to the View Employee Information screen
    - *Updated validation 800 defect related to temporary employment was fixed; it was looking at all employment rather than just for the fiscal year, and also counting time incorrectly; If contract is less than 18 weeks, validation 800 shouldn't appear*
    - *Overage/shortage emails will be activated; only one email notification will be sent on the last business day of each month.*

      New validation warning (801) for transactions not reported in a TRS eligible position. For example, if a contract is reported with a start date of 08/15/2019 and the first RP transaction is reported on the November RP20, this warning will kick due to missing transactions for August – October. For now, this is just a warning, but at some point will be turned into an error.

Lori G. asked if this is where, if they're missing a record, they're supposed to send a zero record. Katie said that a zero record should be sent if the employee was employed in a month when they didn't have any hours or salary. Lori tried that but got errors. Katie suggested to Lori that she contact her Coach and Lori said that she did that. Katie will look into the errors that were received for the zero records.

Question: Is this only TRS eligible or also substitutes?

Answer: It only applies to TRS Eligible positions.

- *New validation error (802) will kick if days are not reported on the first month of a TRS eligible contract. For example, if the contract start date is 01/15/2020 and the RP20 for January has zero days then this error will kick.*
- *New validation warning (803) to prevent an RP or ER report from completing if the previous month's contributions are not paid in full. Please check your RE Ledger to verify that account balances for all accounts are equal to or greater than $0.00. For now, this is just a warning, but at some point in the future it will be turned into an error.*
- *Updated validation 345 "The period being reported is after the Final Payroll Transaction Report Period" to allow for non-eligible pay to be reported after the final report month for TRS contributions.*
  Katie asked EAG members to let their Coach know if they've seen this validation this week.

- Scheduled fixes (August 2020)
  - *Addition of Employment After Retirement transactions and positions to VEI*
  - *Web Administrator will be added to the RE Report Status emails*
  - *New Employment After Retirement Certification to verify the months in which a retiree is expected to work fulltime*
  - *New Deleted Records Certification screen. When records are deleted in the RE Portal, users will be instructed to include the reason for deletion. Once the report is complete, user will certify those deleted records. This will eliminate the need for coaches to send spreadsheets to request the deletion reason after the report is completed.*
  - *New report level validation warnings. Warning message 544 "For regular payroll report <report month>; no records found for <name & social>. If the employee has terminated, please submit ED90" will only be for non-eligible positions. New warning message 804 will act the same but for TRS-eligible positions. For now, this is a warning, but will be turned into an error at some point. The expectation would be for a TRS-eligible position, if there were no days worked and no pay issued to submit a zero record to confirm.*

The next release is scheduled for Sunday evening, August 23, 2020.

RE Report Status

Report Month	*# Completed RP Reports*	*% Complete*	*# Incomplete RP Reports*
March	*1,332*	*99.85%*	*2*

Report Month	*# Completed RP Reports*	*% Complete*	*# Incomplete RP Reports*
April	*1,318*	*98.8%*	*16*
May	*1,169*	*87.57%*	*166*

- Additional Discussion
  - *Diana from TX State – in the past there was a grace period; The grace period for incomplete reports set for FY 2020 will continue for the upcoming FY 2021. The current grace period is one month after the report's due date.*
  - *Is there any way that we can confirm that a TRS-7 was received by TRS if it's mailed rather than submitted online? Would Coach be able to provide information? There are some employees who just need reassurance.*

    Lori G. has been avoiding submission online because there isn't a confirmation and she isn't confident that it was really received. Frances understands and wants to raise the confidence level; online submission is a good way to get the forms to TRS; we'll look into adding a confirmation

    Having a default for semester dates so they don't have to be entered every time, would be helpful

    Katie said that there isn't an automated way in place for the employer. Frances recommended having the member contact TRS and the Benefit Counselor can let them know if it's on file.

    Ashley mentioned that there are quite a few enhancement requests pending that are related to the TRS-7 and TRS-8, including printing and a way to confirm the employees for whom TRS hasn't received the form.

ACTIONS, DECISIONS, ISSUES from the Meeting

Action, Decision, Issue	Description	Assignee	Targeted Completion Date