TEAM PROGRAM
TRS Enterprise Application Modernization

Employer Advisory Group
Meeting Agenda & Minutes

Date: 10/06/20
Start Time: 9:00 AM
End Time: 10:30 AM
Location: Microsoft Teams

Type of meeting: Periodic
Meeting called by: Monique French
Minutes by: Monique French
Invitees: Barbie Pearson, ~~Frances Torres~~, Melody Austin, Katie Tucker, Jennifer Dujka, Molly Grosskopf, Carol Casey, Ashley Conrad, ~~Chris Cutler,~~ Nicholas Gonzalez, ~~Andrea Morales, Jessica Palvino,~~ Sarah Valenti, ~~Kevin Wakley,~~ Carolyn Perez, ~~Rebecca Merrill~~

EAG Members and designated participants:

Karen McDade (A&M)
Ashley Penny (UNT)
Diana Salami (Texas State)
~~Andrea Reveles (UT El Paso)~~
Twila Kirven (Texas Tech)
Kim Ray (UT Med BR Galveston)
Kathy Rice (Midwestern State)
~~Phyllis Deese (Texarkana)~~

Lynn Peters (North Central TX)
Betty Butler (Dallas City Comm)
Christine Okanla, Christine Spencer (ACC)
Bete Su Williams (UT HSC Houston)
Neil Wise (UT System)

Other Attendees:

Microsoft Teams: 737-220-2496
Conference ID: 233 224 035#

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

  - *Carolyn Perez (Communications)- Member Engagement / Policy / Plan*

    - *Two projects in process that look at communication with members and employers.*

      - *What are the topics they're most interested?*

      - *What's the preferred form of communication?*

    - *Conduct research, tabulate results, produce policy; then produce communication outreach plan*

    - *EAG member assistance is needed; tool created where input can be provided; email will be sent tomorrow and it'll contain links to two thought exchanges where information can be provided; respondents will be able to see others' responses and tag those that they agree/disagree with*

    - *Surveys will be available through next Friday; reminder will be sent, and employers will be urged to go back in and provide input on any information on responses from others that were added*

    - *EAG members were urged to contact Carolyn via email or phone if they have questions. Monique, Carolyn might want you to include her contact info in the minutes.*

  - *Upcoming RE Trainings for Higher Education Employers*

    - *Fall Information Session, Thursday, October 8th; refresher training 2:00-4:00 pm, recent RE Portal validation and View Employee Information changes will be discussed.*

    - *Human Resources Training- Higher Ed, Wednesday, October 21st; provides a high-level training of TRS laws and rules, including eligibility and employment after retirement; won't discuss employer contribution information; appropriate for human resource staff or whoever sets up employees in the employer's system.*

    - *November Introduction to TRS Reporting for Higher Education, Tuesday, November 10th; designed for RE contacts that are newer to TRS reporting. Full day of training.*

    - *Training schedule can be found on the TRS website; registration can be completed here:* https://www.trs.texas.gov/Pages/re-portal-virtual-training.aspx

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- *Year-End Close and Annual Statements*
  - *All employers completed all FY20 reports, except 2 for August 2020 Regular Payroll reports.*
  - *Annual Statements- Mailed out in batches, we will begin mailing next week and all statements should be mailed by the end of November.*
  - *There's an updated look to the statement and information that will help members read their statement is available on the TRS website*

- Questions / topics from EAG members
  - *None Received*

- Defects fixed recently
  - *View employee information screen changes: new fields and information were added*
    - *The Fall Refresher training scheduled for Thursday, 10/8 will go in-depth about the changes*
    - *Quick reference documents are available on the website.*
      - *Active Employee Quick Reference: https://www.trs.texas.gov/TRS%20Documents/re-portal-view-active-employee-information.pdf*
      - *Retired Employee Quick Reference: https://www.trs.texas.gov/TRS%20Documents/re-portal-view-retiree-information.pdf*

- Scheduled fixes
  - *Email notifications for password expiration and annual recertification for RE Portal credentials will be sent before expiration and annual recertification are due; someone who has already completed their annual recertification won't receive the annual recertification email until next year.*
  - *Deleted Record Certification; this is a new certification that will let employers enter the reason for deletion within the RE Portal; training material and/or quick reference will be provided when the certification is added to the portal.*
  - *Pop-up Box message regarding "save" after clicking return*
  - *RE overage/shortage emails- are being corrected to reflect accurate balances; now received on the last day of each month and each RE should verify against the RE Ledger balances in the portal.*
  - *Add a new EAR Certification for Full Time employment- will require certification to indicate which months the retiree will work Full Time within the fiscal year. Will be sent the first time the retiree is reported as Full Time in the year. Training material and/or quick reference will be provided to the employers.*
  - *Download CSV- stopped working, fixing the problem*

- RE Report Status- *As of 10/6/2020*

Report Month	# Completed RP Reports	% Complete	# Incomplete RP Reports
August 2020	1,336	99.85%	2
September 2020	624	46.60%	715

Reminder: Penalty fees are applicable to FY 2021 reports beginning with the September 2020 report period. If September Regular Payroll reports are not completed by November 6, 2020, the penalty fee will be assessed.

- Additional Discussion

    o *None*

ACTIONS, DECISIONS, ISSUES from the Meeting

Action, Decision, Issue	Description	Assignee	Targeted Completion Date