Employer Advisory Group Meeting Agenda & Minutes

Date: 12/17/2024
Start Time: 1:00 PM
End Time: 2:30 PM
Location: Microsoft Teams

Type of meeting: Quarterly Meeting
Meeting called by: **David Green**
Minutes by: *David Green*
Invitees: ~~Barbie Pearson~~, *Mark Chi*, ~~Katie Tucker~~, ~~Ashley Conrad~~, ~~Brandi Gardner~~ *Nathan Farmer*, *Jennifer Almanza*, *Catarina Saucedo*, *Nicholas Gonzalez*, ~~Kevin Wakley~~, *Leslie Barron*, ~~Chris Cutler~~, ~~Erica Villarreal~~, *Jennifer Gasior*, *Megan Van Winkle*

Higher Education EAG Members and designated participants:

Amanda Babcock	University of Texas	P	Eric Kennedy	ACC	P
~~Annel Perez~~	South TX College		Karen McDade	TX A&M	P
Ashly Hester	UT at Austin	P	Kathy Rice	Midwestern State	P
Betty Butler	Dallas Community	P	Kay Johnson	Stephen F Austin	P
Brittany Heim Sgarlat	San Jacinto College	P	Kim Ray	UTMB Galveston	P
Christine Okanla	ACC	P	Misty Sanders	Texas Tech	P

Other Attendees not listed: *Kendall Rocha* (SFASU); *Taylor Williamson* (TTU); *Kristi Kolaja-Jaggers* (UTMB); *Laci Cramer* (TTU);

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 employers. 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 employers in their region and bring questions and concerns from those employers to this group.

Please…

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

AGENDA

- **Questions / topics from EAG members:**
  - **None received prior to meeting.**

- **Information from TRS.**
  - Higher Education Website Content:
    - Based on responses we received from our Member Satisfaction Survey, we are looking at creating additional website content that will focus on members employed in Higher Education.
    - Are there specific resources or information you think will be beneficial to the member?
    - Brainstorm ideas: what are your employees asking that we can put on the site, specific to Higher Education:
      - Ashly, UT Austin- ORP process is confusing to eligible participants, forms are often sent directly to TRS, and then they ask us why it hasn't been submitted. We could use clear documentation for process for flow of ORP between institutions.
        - Jennifer Almanza- we have training for Employers on site, but something similar could be helpful for employees…a timeline for how long each step will take.
        - Mark asked Ashly…in the past, education related to ORP was available for employers, but there was an ORP brochure for members (about) 3 years ago. Are there any topics related to ORP that we need to strengthen?
        - Ashly-haven't reviewed brochure recently, sounds like a good resource. For topics, the Notary process is preventing move to electronic format. Is electronic notarization acceptable? I will review the brochure as well.
        - Mark-we may have missed things; your feedback is super helpful.

    - Nathan Farmer shared a link to ORP brochure for members in the chat.

- Brittany San Jac- Members are hearing from TRS counselors that they can use sick leave to purchase, but if they're working at a community college, that doesn't qualify. Benefits Counselors told them they were eligible to purchase with sick leave, but the REs must give contradictory information due to being at a community college.

    - Betty at Dallas, similar issue. Counselor told they could purchase sick leave time…even though, in one instance, it doesn't seem they'd even have needed it to retire.

    - Mark-we can work with our Counseling dept. Update the Knowledge Base tool. We could add something to our resource related to *sick leave purchase*…or is it better to organize the information by *status* as community college employee? If you're employed at a community college, you don't have the state leave to purchase this. What's the best way to direct the members?

    - Brittany-from our perspective, it's better to say Comm College isn't eligible. State leave, not sure how it works…Are there other categories of entities that this would apply to? It's coming up more, possibly, because the estimate calculator has a check box that's more prominent now than in the past that is misleading people into thinking they have this time. There's no caveat on the calculator that states "you *might* be eligible".

    - Betty-sometimes our employees want to dispute our guidance based on their perceived priority of what TRS says.

    - Mark- informational brochures centered around sick leave to help clarify for a school district vs a junior college may be helpful. Cover the nuances. We want our Higher Ed members to know TRS cares and we want the employees to be aware of the differences to be better prepared for retirement.

- December Maintenance Release Enhancements:

    - Enhancement to allow Search Reports in RE Portal to go back to current year plus 5 prior years.

    - An update was made to our system generated RE Ledger overage/shortage emails to not send out a notification when all balances are at zero. These emails are generated and sent on the first business day of the month and will include a breakdown of all RE Ledger accounts that either contain a shortage or an overage.

- A fix to our defect related to Service Credit Purchase payroll deductions and RE should no longer be seeing error code 402.

  - We have identified a potential new defect which is triggering error code 386 stating "The total amount of Service Credit Purchase Deduction is required as the member has an outstanding service credit purchase installment agreement. In the examples we've identified, the RE has reported the correct payroll deduction amount on the RP record and the participant has an active installment agreement.

  - From what we have seen so far, the impact is lower than what we were seeing with error code 402.

  - Any questions?

    - Mark- it was announced in our Board Meeting that the final system enhancements will be rolled out in March of 2026. There will be one more release in February, but after, we must do a black out period…we won't be able to add any enhancements, but we will fix defects with emergency releases. In the February release, we want to…

      - 1) ret cert process in Portal, additional info was needed, but no notification was available.

      - 2) Create a new status that a certification was re-initiated, for tracking purposes to tie to status.

      - Once everything is in the new system, we can consider keeping the system open longer when back bridging is no longer required. That's an advantage of having the payroll system in our TRUST system.

- Report Completion Data for Due Date and Grace Period:

Report Month	# of REs Completed by Due Date	% Completed by due date	# of REs Completed by Grace Period	% Completed by due date and grace period
September 2024 RP	878	65.57%	336	90.66%
October 2024 RP	956	71.40%	356	97.98%

- This data was provided as a follow up to a question from the previous EAG meeting on October 23, 2024. We will look at this information each month.
- Kathy Rice—we pay the month following, December in January, but I can't start Jan report until I've run the previous month. Can't start until the 20s of the month, end of the month. I'm delayed to even start report.
- Jennifer Almanza-this is related to the next topic on the agenda, and we are talking to other employers with similar system parameters. Talking to software providers…what info is available and what options are available. Would like to talk to Kathy outside the meeting, and maybe talk to their software provider to help them get closer to the due date.
- Kathy- agreed to scheduling some time, after the holidays.
- Mark-as we get further from the 10/2017 roll out, things will improve. The matter of the due date always comes up. Feedback helps, and we can start exploring these issues with more ability to consider what couldn't be considered prior. New Reports, data requirements, but lessen impact while addressing issue as well.

- Training Initiatives:
  - In person sessions: In Spring 2024, we piloted one-on-one RE trainings with 40 Reporting Employers. Our goal was to provide personalized training based on topics the RE specifically requested additional trainings on and reviewing some of their common errors related to TRS Reporting. Because of the success we have seen, we are beginning to plan the next round of sessions.
  - Our current plan is to schedule these one-on-one sessions starting in February and ending in April. Additional information will be going out to REs who have been selected at the beginning of January. If you are interested in participating in this next round of sessions, please email me your request at Jennifer.Almanza@trs.texas.gov
    - Mark example: a higher ed helped us find out about a certain error they were getting. We did research to find out that it was an IT issue on their end, and they ended up with fewer errors.
  - We are also currently working on creating recorded topic-based training that will be available online for you to review in Spring 2025.
    - The first two recorded sessions will be on the Retirement Certification and View Employee Information.
    - The plan will be to create a library on our TRS website for you to access all our topic-based training.

        - Mark- as we do recorded training, we will not cease other training formats. We're opening availability for your new hires, so the training can be shown to new staff without having to wait.
    - How to request member-based trainings for your RE
        - There's a link on our website to request training. Sharing link in the chat.
- Summer/Fall Workshops.
    - We are planning on visiting all 20 Education Services Centers starting the last week of July through the month of August. During these sessions, we will provide legislative updates that may affect TRS Reporting and offer topic-based training.
    - What topics do you think would be beneficial to present during these sessions?
        - No response but requested emails for any requests later…share requests through email to Jennifer or coaches.

- **RE Report Status (Jenn)**

Report Month	# Completed RP Reports	% Complete	# Incomplete RP Reports
November 2024	1219	91.04%	120

- **Questions**
- Kathy Rice- **overage report, I get it twice back-to-back.**
    - Mark-two emails immediately following one another?
    - Kathy-yes.
    - Mark- we can look into this.
- Kathy-**At beginning of semesters, we have challenges to find out if employees are working anywhere else** and we don't find out until we see it on the report, and we get penalized and it causes late reporting, despite doing our due diligence.
- Kathy-**New member 90 day issue,** still had to do this again this week. A person works 2 weeks, and they terminate, but now we can't process them as a new member, that has to be TRS. The report is simple, but, on our end, it's difficult. We must void payments, re-issue with deduction, because we must keep our system in sync with what happened. Clean-up is difficult on our side. Moving money,

deposit is considered late when it really wasn't…it was just in another bucket. It doesn't make sense because they are in their 90 days and should be a new member.

- Mark-is this the new member contribution we're talking about?
- Kathy-yes.
- Mark—need to void and re-issue?
- Kathy- we deduct as new member, but TRS doesn't accept it as "new member" anymore. To make our system in sync, I must void check it happened on and re-issue with the other deduction. It gets messy, especially if it crosses fiscal years.
- Mark- we looked at trying to prevent paying more in employer contributions. We can go back and revisit that.
- Kathy- the only time we wouldn't is if it's fund one. It won't come out of deposits. We go back and charge deposits, triggering another journal entry. It's a lot of work, and we're a small school.
- Mark- are other colleges experiencing this process?
- Ashly-UT Austin-I shared with Katie that this is also a big problem for us. The only good source of record is TRS…we don't know if they closed their accounts or reemployed. We could only think of passing the data to make determination before payment happens…but that's not sustainable for us.
- Mark the data can change based on what's in the system at the time.
- Kathy-our department has a worksheet, but my issue is the terminated people who never make it past the 90 days, but we can't report them as the 90 days. We're trying to keep it all in balance, in the right funds, and are trying to make our system match what TRS has.
- Ashly- we write a new member wait period; the end date reflects the termination date.
- Kathy-we don't let TRS know the member is terminated until the final deposit goes in, but we're trying to do this right.
- Mark-no clear answer at this moment, but we want to reach out based on the other topics. We do want to revisit this. We can find ways to make it happen.
- Kathy-I shared lengthy details with Katie via email.
- Mark- we can revisit this separately.
- Brittany HS- we have a different issue, but we have the same software programmer.

- BHS- **We'd like information specific to Adjuncts on the website.** Adjuncts don't use the materials to figure out eligibility, and each entity does it differently, on the website under active member. (We call them "part time faculty" …not adjuncts…they're still an employee if we have classes for them or not.) This causes delays in our reporting. Our issue isn't what Kathy said, but ins and outs. It causes confusion, delays and going back and forth to determine eligibility.

- Mark-one coach will share **concurrent employees** with other coaches…looking for ways to expand this to help you all through this process. Make this a regular practice among all our coaches. Concurrent employment is a big challenge.
- Jennifer Almanza-another way to help, via our coaches. Warnings will come and if you look at the warning list, you can start identifying those who are potentially working elsewhere. The big yellow box appears ahead of time before it becomes an error. Can shorten the number of months.
- BHS-we use the warning system, but our file is strictly from the payroll. Education on the websites would be valuable, with something that makes it clear that this is for them—adjuncts. Their info is lost among the ISDs.
- Mark-yes, we can be clear about specific employments. "Hey, are you an adjunct or part time faculty…keep clear about this…"

- BHS- **Another issue…certification for retirement**, is that very intentional/needed? We have people who leave in the middle of the month, and we **have to wait for the end of the month**…we're in a holding pattern because we're waiting for the cert to come. Does it have to be the 31st?
  - Mark-re: certification, I see your point. At one time, before we put this limitation on, we were going to put the certification out earlier…but we were concerned about it being too early for employers. How do we fit everyone's needs? We looked at the majority and found the end of the month was better than sending out whenever we had something available. We'll have to think this one through.
  - BHS- notifications arrive for part time faculty as well, and we tell them they have to resign from everywhere. "You can't teach a class because you're retiring this month." **Can an alert come to us for these situations?**
  - Mark- we see applications and then people changing their mind. We've reduced the length of time from retirement revocation, to interrupting the payments. We're hoping to make this process easier for employees.
- BHS-we may not make it on time this month, **how do the dates count?** Does Christmas count as a late day for fees?
  - Mark-we're looking at Business days (confirmed by Jennifer A.). This does include federal holidays.
  - BHS-we may have to work during the break, needed to know what days count.
  - Mark- offered help to the group.
- Kathy Rice-employee retired January 31st, report not due until February, he didn't get his payment. **TRS said it was because they didn't get the report. Do you really wait for the reports to process**

retirement?

- Mark- no, we do not wait. Payroll process does not wait for the final report month…you tell us what the final month is, and assuming everything is here…we don't wait, but we won't pay until the last day of the month. If the final report month is January, we can't issue it until February. February 1st we will set them up in payroll and that person will get that January retirement check.
- KR-Not what he says he was told; we're seeing them go almost two months without retirement insurance.
- Mark-can't speak to insurance, but payroll we can set them up the final month. We go ahead and pick that person up.
- KR-conflicts with what member was told.
- Mark-If it's a December retirement date, the earliest he'd receive it would be January 31st…it's always last day of month. We can check with Counseling that they're understanding the process. Assuming everything is processed on our end, we can put him on payroll. We can do a better job of communicating to help them set their expectations.
- KR-they said TRS needed everything from me first.
- Mark- shared efficiency of add to payroll process.
- BHS-We let our retirees know not to expect their first annuity payment until the middle of the month following the month after their retirement month. For Dec 31, do not expect it until mid to late Feb.
- Mark appreciates Brittany's comment.

- We will follow up with Kendall Rocha's comment from the chat:
  - Kendall Rocha SFASU- I am about to have to jump off to another meeting, but one of our pain points is for e**mployees who are less than half time working too many hours in a month that has holidays.** These are typically Athletics employees who work a lot during their season, regardless if there are holidays. I was given a snip from a TRS Newsletter from March 2022 which outlined the number of holidays in a month, which I use to help them determine how many hours in a month the employees can work. Is this the best way to handle this? And are the number of holidays the same each year or is there a newer one I should be aware of after March 2022? I am from SFA and my email is rochaka@sfasu.edu if someone could follow-up. Thanks!
  - Jennifer Almanza- I will reach out to you Kendall to discuss your question.
- Jennifer Almanza shared:
  - Link to request a TRS member presentation.

    - https://www.trs.texas.gov/Pages/active_member_presentation_request.aspx
    - Submit a Presentation Request
- Mark—will reach out to many of you for follow up, thank you for sharing feedback. Happy Holidays!