



Employer Advisory Group Meeting Minutes

Date: 07/31/2026
Start Time: 1:00 PM
Scheduled End Time: 3:00 PM
Location: Microsoft Teams

Type of meeting: Quarterly Meeting
Meeting called by: David Green
Minutes by: David Green
Invitees: Ashley Conrad, Barbie Pearson, Brandi Gardner, Brianna Hunter, Catarina Saucedo, Chris Cutler, Jennifer Almanza, Jennifer Casior, Leslie Barron, Mark Chi, Megan Van Winkle, Nathan Farmer, Nicholas Gonzalez, Katie Tucker, Kevin Wakley
Additional Invitees: Jennifer Moon, Alexis Cetina, Alexis Moore, Nikki Guevara, Scott Kerkam

Higher & Non-Higher Education EAG Members and designated participants:

Amanda Babcock	University of TX System	Kendall Rocha	Stephen F Austin
Annel Perez	South TX College	Kim Ray	UTMB Galveston
Ashly Hester	UT at Austin	Kristi Kolaja-Jaggers	UTMB Galveston
Betty Butler	Dallas Community	Laci Cramer	Texas Tech University
Brittany Heim-Sgarlat	San Jacinto College	Lori Johnson	Hutto ISD
Chris Brooks	TX A&M	Lynn Nicholson	Mason ISD
Christine Spencer	Austin CC		
Claudia Alba	ESC 12	Mary Irvin	ESC Region 8
Claudia Wilko	Northside ISD	Mary Ramon	Northside ISD
Eric Kennedy	ACC	Mickey Smith	Crandall ISD
Fran Whitaker	Judson ISD	Misty Sanders	Texas Tech University
Ginger Gamble	North East ISD	Rachel Jimenez	Conroe ISD
Jeffrey Coats	North East ISD	Shennel MaloneLedoux	Spring Branch ISD
Judy Como	Judson ISD	Sherry McGraw	Sulphur Springs ISD
Kamray Runnels	Pflugerville ISD	Tera Harris	Spring Branch ISD
Kathy Henderson	Aransas County ISD	Theresa Zlotopolski	Clint ISD
Kathy Rice	Midwestern State	Tonya Davis	TASBO
Kay Johnson	Stephen F Austin		

Other Attendees not listed: ~~Ashton Kenney~~ SFASU; ~~Scarlet Mcelyea~~ Clint; Kathy Tkathy Tivr;

Purpose of Meeting: Respond to questions, address concerns, and share information with members of the EAG. Members of this group represent Reporting Employers from all over the State and all types of employers. They serve as the collective "voice" of all RE's.

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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.

- Information from TRS:

- 🕒 TRS-Care Surcharge (Leslie)

- We want to make everyone aware of an upcoming change to the TRS-Care surcharge amount. The surcharge will be reduced from \$535 to \$450, effective **September 1, 2027**, which corresponds with the **September 2027 report period**.
 - Although this change is not effective immediately, we encourage you to begin communicating with your software providers so they can evaluate what changes may be needed on their end. Starting those conversations early can help support a smoother transition when the new amount becomes effective.
 - It is also important to note that after the new amount becomes effective, any prior year adjustments will still use the \$535 amount. Please keep that in mind when having these conversations with your software providers.

- 🕒 RE Portal Survey (Leslie)

- We want to start by thanking everyone who responded to the survey sent by TRS Internal Audit regarding the functionality of the RE Portal. We truly appreciate the time you took to provide feedback. Your perspective helps us better understand what is working well, where users may be experiencing challenges, and where improvements may be needed. We are reviewing the feedback received and will use this information to help guide future discussions and potential enhancements.

- 🕒 RE Portal Idle Time (Leslie)

- Currently, the RE portal logs out a user after 60 minutes of inactivity. This means that if the RE Portal is open, but no action is taken within 60 minutes, the user will automatically be logged out.
 - We would like to gather feedback from the group on the possibility of reducing the idle timeout period, potentially to 30 minutes. A shorter idle timeout can provide enhanced security by reducing the amount of time an unattended session remains active. Because the RE Portal contains sensitive reporting and member-related information, shorter idle periods help reduce the visibility of that information if a

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user steps away from their workstation without logging out. We understand this could impact users differently depending on their reporting processes, so we want to hear your thoughts before any decisions are made.

- From your perspective, would a 30 minute idle timeout create any concerns or challenges? Are there certain tasks in the portal where users may reasonably need more time without actively navigating within?
 - Claudia Wilko-We like the 1 hour idle time.
 - Lorinda Johnson- will a window pop up that is about to log off?
 - Claudia Wilko-many times we spend more than 30 minutes, keeping open helps without logging in again.
 - Is there a pop-up for extending the time window?
 - Mark-currently there is a message asking whether you would like to log off but we can see if a pop-up can generate, for more visibility.
 - Our information security team brought this to our attention.
 - We're trying to gauge your use.
 - Claudia-we're often setting up employees in the system (payroll), on the other window we have TRS portal open to view employee information. We do it at the same time.
 - Mark-if you're active it won't turn off in a half hour, it's only when you're not clicking anything that it logs out.
 - Claudia-we prefer the way it is right now.
 - Misty Sanders- We like the 1 hour, we do a lot of research and the 1 hour is already too short. We are required to lock our computer before stepping away.
 - Kristi Kolaja-Jaggers-I have other applications that have some sort of ability to flash and bring attention to it if I'm working on another tab or window. TRS's notice doesn't flash or anything like that, it's much more

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passive. Is there a way to make it "flash" or have the notification pop up onto the top of any screen I'm on?

- Rachel Jimenez-I do not have any concerns with this change. I understand the security implications.
- Claudia- we also are required to lock our computer, if we step away. We enforce that.
- Mark- we'll take back the preference from EAG members that we'd like to stay at an hour and will follow up with our security team.
- Betty Butler- I am ok with the change and also understand the security enhancement. I agree with a more active (less passive) alert.

RESS Survey Results

- Overall, we did see an increase in survey responses when compared to prior years. In 2025, we received a total of 74% of RE responses and an increase to 81% in 2026.
- REs reported being very satisfied with TRS communication and the RE Portal. Specifically, REs were very satisfied with being able to search reports in the RE Portal through 5 prior years. The addition of the RE Document Upload, and email notifications for reinitiated certifications.
- Satisfaction also improved for nearly all resources which is due to Reporting partnering with our Communication and Benefit Operation Support teams to help improve the quality of our resources for REs. We've added recorded RE trainings to the TRS website and the new TRS website launched which allowed for a fresh organization of resources.
- **Areas of Improvements (Leslie)**
 - **Better Understand Reporting Employer Needs Throughout Reporting Cycle**
 - REs interact with coaches differently during reporting deadlines than they do throughout the rest of the month. We will continue to analyze contact trends, high volume errors, and overrides to help identify REs who may benefit from proactive outreach and individual 1:1 training support.
 - We are also continuing to build training material that focuses on working report warnings to help reduce the overall number of errors and error resolution.
 - **Enhance Resources and Improve Website Usability**
 - Although satisfaction with resources increased, REs continue to request easier access to information. We have gathered website feedback to help improve navigation, searchability, and overall user

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experience and we will go over in the next section what improvements we have already made.

- **RE Coach Ratings**

- Coaches remain the highest rated TRS service area, ratings did slightly decline while overall TRS satisfaction increased.
- We will continue evaluating the impact of the RE redistribution initiative and identify opportunities to strengthen employer/coach relationships.
- We have also implemented Quality Assurance efforts to increase the quality and consistency of customer service the team is providing. We've worked on Soft Skills this year and will be implementing Knowledge Accuracy in the future.

- **Improve RE Portal Performance and Functionality**

- RE Portal speed, usability, and availability remain recurring themes in survey feedback.
- One big area of focus will be related to the RE Portal availability during evening batch processing to help identify ways that we can keep the RE Portal available to REs for a longer period each day.

- Thank you to everyone that participated in the RESS survey and provided feedback. Your insights play an important role in helping us recognize our strengths, identify opportunities for improvement, and guide our efforts as we continue enhancing the overall RE experience.

- Mark-we're in discussion with our IT support to figure out how to keep the portal open longer now that our processes are all in one system.

Website Updates (Mark)

- **Reporting Tips - [Link](#)**

- We are pleased to share that the Reporting Tips page is live on the TRS website. This page includes topic-based information that has previously been shared through Update Newsletters.
- The goal is for Reporting Tips to continue growing into a centralized, searchable resource where employers can locate valuable information related to reporting processes, laws, rules, and other guidance. We will focus on creating more detailed articles within this page and use the

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Update Newsletters to share time sensitive information and announcements.

- We are also developing a Reporting Tips guide that will be made available on the website.
- Are there any specific topics you would like to see added to Reporting Tips? This can also include topics we have not previously published in an Update Newsletter.
 - Mark-screen share website. Practiced use of search feature with term "eligibility". Search by topic, year, month.
 - Lorinda Johnson- Stat Min - calculations, who is subject to it. I know these answers, but I get questions on these from other districts.
 - Mark- this site is currently basic, but we are building it out further.

▪ Recorded RE Trainings - [Link](#)

- We have also published additional recorded trainings on the TRS website for several topics including, Membership Eligibility for both non-higher ed and higher ed REs, Concurrent Employment, and Retirement certification.
- In addition to these training topics, we are currently in the process of adding Employment After Retirement and ORP training videos, and plan to continue adding additional videos over time.
- These recorded trainings are intended to provide REs with flexible access to information that can be reviewed as needed and used as resources when questions come up.
- We ask that you review the vides when you have an opportunity to and send any feedback to REOutreach@trs.texas.gov. Your feedback will help us determine whether the content is clear and whether there are opportunities to improve future recordings.
 - Mark-we can eventually share more complex, advanced training videos.

▪ eLearnings

- Another ongoing project we are working on is creating and adding additional eLearnings to the website. Here is a list of the eLearning topics we are currently working on:
 - Employment After Retirement Higher Ed Instructor
 - Third Party Entity
 - Adjunct Employment
 - Non-Standard Work Week

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- We would also like to take this opportunity to hear from the group about your training preferences. Do you prefer recorded sessions that can be watched on demand, or do you find more interactive eLearnings with knowledge checks to be more helpful?
 - Mark-we will have a section for Stat Min.
 - Lori-Thank you!

▪ Child Nutrition Calculator - [Link](#)

- Thanks to those who provided feedback related to the Child Nutrition Calculator. Based on your feedback, we have corrected the calculation formula and the calculator is now live on the TRS website.
- The goal is for this calculator to eventually replace the Child Nutrition worksheet currently available on the website. However, the worksheet will remain on the website through the calendar year to help support the transition to the calculator.
- We have also published a user guide that will be available on the website soon.

🕒 Website Organization Focus Group (Mark)

- Website Feedback
 - We also wanted to thank everyone who responded to the survey regarding the current TRS website. We appreciate your feedback and time in completing the survey.
- Because of this feedback, we are looking to create a smaller focus group to work alongside Katie on reviewing the overall employer section of the TRS website and identifying opportunities to improve how information is organized.
- We would like to better understand what makes sense from a user perspective and would like to gather ideas on how REs expect information to be grouped, labeled, and accessed when visiting the TRS website.
- The group may meet once and all communication would be through email. We anticipate starting this project in August, and the turnaround time may be fairly quick so that website reorganization can begin. Any new ideas or topics may take longer to implement, but feedback related to organization, navigation, and structure will help guide the initial improvements.
 - Please request to join through the REOutreach@trs.texas.gov

🕒 Software User Group (Mark)

- The next topic we are excited about exploring is creating a Software User Group, similar in concept to our EAG but focused on major software providers. The intent would be to create a space where TRS can communicate upcoming changes, such as surcharge amount changes or reporting requirement updates, and engage with software providers on items that may impact system functionality or RE reporting.

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- We would like to start out with larger software companies we are already aware of and then look for opportunities to incorporate additional providers as the group develops.
- We would like your feedback on how this group could be most effective. Are there specific software-related challenges or communication gaps that you believe this group could help address?
 - Tera Harris- I like this idea. We use a certain software, one of my challenges on ER records, when it generates through software system, it only generates retirees who have pay, it should generate anyone marked as a “retiree”. We had a discussion with the software team, and they suggested it was meant to work this way. I must work with our tech team to generate reports rather than in the software. The software team says the system is aligned with TRS requirements.
 - Mark-this may be a chance for us to advocate for you. We can explain the “why”.
 - Claudia Wilko-same issue with the same software
 - Lori- I would love to be on this committee, especially during summer months when we have non-teachers, child nutrition, and the system doesn’t create ED records for summer hours. Our software team can’t accommodate us due to missing links. I’d value the opportunity to communicate our challenges.
 - Claudia Wilko- another issue we have is the ED45-when we want to add to the same record. In the past it worked, when changing state positions, but changes within same position/contract, the records our software generates don’t have the original position, they’re blank. The software has since changed, we must accept TRS rejections because of missing data, and we must correct it “one by one”. The records are not generated correctly. We communicated with our software, and they said it followed TRS.
 - Tera Harris- agrees. We must manually correct every 45. Regarding 45, for example, our auxiliary people or production assistants in child nutrition, move all the time. For TRS, why do we have to have an hourly rate in those fields, I would like to understand the need for that information. We currently must make monthly adjustments.
 - Mark- most of those data fields were used for a variety of reasons that may have changed since they were implemented, and we may not process them as in the past, and there may be an opportunity to revisit those fields. I can’t commit to adjustments now, but we hear the difficulties. All fields were necessities when initially designated, but we can examine if they’re still required. We would also need to update validations and testing. We don’t want to introduce defects as we make updates.
 - Tera Harris- one more issue is the “name wars.” When someone is leaving, we change it, their next employer changes it and vice versa.

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- Mark-this is a recurring problem. Different SSN cards. With these issues, we recommend reaching out to those employees and make sure they report their information consistently. We may need to collaborate with you all, the EAG members, to figure out a best practice.
- Tera Harris-they are allowed to provide the information they choose, we can't mandate. Is there a opening, new member, why do districts have to manage name, unlike addresses?
- Mark-in conversation with other pension systems, if the onus is on the system, they have a lot of struggles and this bogs down the reporting process. I share that in Texas, we get the names from the employer. I've seen there are greater difficulties when the pension system must track down demographic information with the members. I understand that it puts more on the districts, but the districts are reporting to others outside of the TRS system, like the IRS. Maybe we can strengthen our communication with members to ensure they provide accurate information to the employers, because that's where the information comes from for TRS. We sometimes must correct them and help them understand as well. The responsibility lies with the individual. We can try to reach out to our membership.
- Tera-appreciate it.
- Nathan Farmer-on the coaching end, for competing name changes, we generally advise employers that if we see names changing, we let them know to reach out to their coach. We can find out which employer is providing the most up-to-date information. Reaching out to your coach can minimize that back and forth.
- Claudia Wilko- regarding demographic changes, sometimes this includes date of birth as well. Usually, when we try to ask for help, we are told to get with the employee, and the employee must talk to both employers, the one where they have it wrong, we must directly reach out to employees.
- Mark- we can make sure our coaches are on the same page with advising on this process.

- To help begin this process, please email REOutreach@trs.texas.gov with your software partner contacts (name, email address, phone number).

Year End deadline (Mark)

- As we approach year end, we would like to share our expected timeline. This year, the year-end deadline falls during the last weekend in September rather than the first weekend of October.
 - This allows us to keep the RE Portal available the weekend of October 3rd since it is closer to the report due date on October 6th.

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- The grace period deadline is Friday, September 18th and all reports must be complete by Friday, September 25th.
- Annual statements are scheduled to run Saturday, September 26th through Sunday, September 27th.

Payroll Manual (Mark)

- The Payroll Manuals have been an ongoing project that we have been evaluating ways to improve. A current idea that we are exploring is to convert the manuals into topic-based web pages within the Employer section of the TRS website. Before we move forward with this idea, we wanted to determine how many of you prefer to still have a PDF version of the manuals to print?
 - Mark-for example, would it be helpful to return to “topic based” organization?
 - Claudia Wilko-we do use the Payroll Manual as a reference, usually we don’t print it. We save the pdf.
 - Rachel Jimenez- I like the pdf because I can search the entire document, if needed.
 - Others agree with Rachel.
 - Mark- we want to make sure the current version is helpful for how you are using it. Leslie and our team, we’ll discuss and we can share in multiple formats that are updated coordinately.

• Questions

- Rachel Jimenez- While on the topic of reporting resources, is there an updated version of the Error and Warnings List? The latest version I can find was published June 2021
 - Mark-there are a few error messages we need to update, we can go ahead and make sure.
- Shennel MaloneLedoux- Are you all still considering the name change to make it more HR friendly?
 - Mark-yes, we will make a name change that is more all-encompassing.
- Mark-remember you can send further questions to REOutreach@trs.texas.gov, the REOutreach email inbox. Please provide feedback for topics: child nutrition, and the focus groups for website and software—even peers are invited, other employers can participate.
- Leslie Barron- Thank you, everyone, for joining us. Please feel free to reach out if you have questions. You can reach me at leslie.barron@trs.texas.gov and Jennifer Almanza at Jennifer.Almanza@trs.texas.gov

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- Mark- thank you and enjoy your weekend.
- **Meeting adjourned at 2:08PM**