

SUBJECT: GeorgiaFIRST HRMS Project Release 3.20

PURPOSE: Release of PeopleSoft Tax Update 06-C, PeopleSoft HRMS Bundles 4 and 5, as well as BOR fixes and enhancements (see details below).

TECHNICAL IMPACT:

DATABASE: Your PeopleSoft HRMS database has been upgraded with BOR Release 3.20, and is available. You can verify your release level by navigating to any page, hitting [CTRL][J], and verifying the last three digits of the Application Release field. Please note: during the release process, all server-side cache files are deleted; this may cause performance issues during initial page loads.

WORKSTATION: As with any release, we recommend clearing your internet browser cache files before logging in to your database.

SECURITY: Security modifications are a part of this release. See details below.

Functional Fixes and Enhancements
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Modifications to Existing BOR Functionality:

Age Monthly Maint - Dependent (BORR019A) – This program is modified to only include Dependents who have a birthday during the specified period and who were enrolled in health benefits at any time during that period. An additional column (Cvg) was added to indicate whether the dependent's coverage is currently active or terminated. This process was created in response to Model Change Request #651.

Badge Upload Process (BORI037) – This new process allows users to upload their institution's specific Badge IDs to the PS_BADGE_TBL table in PeopleSoft. Badge IDs uploaded can then be cross referenced with emplid and national ID. The process is located at Board of Regents > BOR HR > Badge Upload Process. This process was created in response to Model Change Request #633.

Charitable Contributions interface (BORI011) – This program is modified at the request of the State Charitable Contributions office in order to populate the county code field in the interface file with the three digit county code used by the Department of Motor Vehicles. The value of the three digit county code is based on the zip code of the employee's home address. This modification was delivered on July 18, 2006, in PeopleSoft HRMS 8.8 Interim Release 3.19a.

Create TRS/ORP File (BORIF04D) – This program is modified to correctly report employees in the ORPLMT and TRSLMT plans who have reached the IRS salary limit for the retirement plan year. This modification was delivered on July 18, 2006, in PeopleSoft HRMS 8.8 Interim Release 3.19a. This program is also modified to pull the retirement rate in effect as of the posting month instead of the reporting month. Before the modification, employee adjustment information appeared incorrectly in the trace file because the program used the current retirement rate to validate the adjustment instead of the rate in effect as of the posting month of the adjustment. The user was unable to correct such error without manipulating the file.

Create TRS/ORP Report (BORIF04F) – This program is modified to correctly report employees in the ORPLMT and TRSLMT plans who have reached the IRS salary limit for the retirement plan year. These employees are identified by '**' on the report. This modification was delivered on July 18, 2006, in PeopleSoft HRMS 8.8 Interim Release 3.19a. This program is also modified to pull the retirement rate in effect as of the posting month instead of the reporting month. Before the modification, employee adjustment information appeared incorrectly in the trace file because the program used the current retirement rate to validate the adjustment instead of the rate in effect as of the posting month of the adjustment. The user was unable to correct such error without manipulating the file.

Edit TRS/ORP Temp Table page – The Edit TRS/ORP Temp Table page is modified to display fields for Summer Gross Amount, Summer DED Amount, and Summer Employer DED Amt. Before the modification, these fields displayed only for faculty with summer pay in the reporting period.

Load External Time Clock Data (BORI016) – This process is modified to allow the file to be reprocessed if required. Previously, the file could only be loaded once per pay end date and employee. A new process, BORI016A is created that will load files that contain Emplid as the employee identifier. The original BORI016 requires SSN as the employee identifier. Users will have the option of choosing either the BORI016 or the BORI016A when they choose the Load External Time Clock Data menu item. These changes were made in response to Model Change Request #634.

Manage Employee Cases – This page is modified to 1) allow the Case Type field to be modified if the user is in Correction Mode. Previously this field could not be modified and users had to submit a completely new case if a new Case Type were required. This change was made in response the Model Change Request #656. 2) The Case Type, Tenure Review, will now require users to populate the Tenure Status field. Previously the Tenure Status field was blank and grayed out for the Tenure Review Case Type. Additionally, a warning message was added to inform the user when a Tenure Review case is entered without the Tenure Status of “Tenured”.

Populate TRS/ORP Temp Table (BORIF04A) – This program is modified to populate the Payment Reason field with ‘02’ whenever the employee has a JOB Action of ‘Pay Rate Change’ or ‘Promotion’ in the reporting period. This program is modified to report summer earnings based on the check date of the Pay Calendar instead of the check date on the off-cycle check. The program is also modified to correct other issues detailed in known issue KI0060. These modifications were delivered on July 18, 2006, in PeopleSoft HRMS 8.8 Interim Release 3.19a.

Modifications to Existing PeopleSoft Processes and Reports:

Add Concurrent Job (Workforce Administration) - The Add Concurrent Job components are modified to retain any Benefit Program Participation entries made in the Benefit Program Participation page, even if the user navigates to another page in the component and then returns to this same page. This happens when entering a new hire and in correct history. Before the modification, the inserted Benefit Program would not save properly if the user navigated to another screen before saving the page. (HRMS Bundles 4 & 5)

Address History page (Personal Data) – 1) The Address History page is modified to retain the date that is entered before opening the Edit Address page. Before the modification, the date defaulted to the system date when the Edit Address page was closed. This correction by PeopleSoft resolves Model Change Request #639. 2) PeopleCode is modified to prohibit the storage of an Address record with no information in both the Address 1 and Address 2 lines. No warning message is displayed; the address reverts to the prior address upon saving the page. 3) With the application of the HRMS Bundles, a phone type “MAIN” is inserted if one does not already exist, taking the value of “HOME” if one exists, or “CELL” if “HOME” does not exist. A phone type “HOME” is inserted if one does not already exist; taking on the value of “MAIN” if this exists. (HRMS Bundles 4 & 5)

Applicant Activity pages (Recruit Workforce) – Layout of each sub page is modified. (HRMS Bundles 4 & 5)

Page	Changes made
Requisition	<ul style="list-style-type: none"> • The Applicant Activity group box has been moved down under the applicant’s information group. • Descriptions of the Position and Job Code are now correctly aligned • The [+] / [-] buttons for inserting and deleting rows in the Job Requisitions group box have been changed to two new buttons named Add New Req. Link and Remove Link. • The Disposition field in the Disposition group box has been changed

	from a look up field to a drop down field
Routings	<ul style="list-style-type: none"> • Descriptions of the Position and Job Code are now correctly aligned
Interview Schedules	<ul style="list-style-type: none"> • Descriptions of the Position and Job Code are now correctly aligned
Interview Results	<ul style="list-style-type: none"> • Descriptions of the Position and Job Code are now correctly aligned
Offers	<ul style="list-style-type: none"> • Descriptions of the Position and Job Code are now correctly aligned • The [+] / [-] buttons for inserting and deleting rows in the Offers group box have been changed to two new buttons named Create Offer and Delete Offer.
Expenses	<ul style="list-style-type: none"> • Descriptions of the Position and Job Code are now correctly aligned

Applicant Contact Info page (Recruit Workforce) – 1) The Suffix field type is changed from a look up to a drop down. 2) When working with an internal applicant, only the HOME email address is brought over from the employee’s Personal Data record. 3) A software change is made to copy diversity and disability information from employee data to applicant data. (HRMS Bundles 4 & 5)

Check Print (PAY003) – This program is modified to print the state tax data on the correct lines. Prior to the modifications, when the state marital status long description exceeded 23 characters, there was a print alignment malfunction in the tax data section. The values for state allowances, additional percent, and additional amount were printed one line lower on the form than they should have which resulted with the last item printing outside the lines of the bordering box on the form. (Tax Update 06-C)

Citizenship/Passport page – This page is modified so that the cursor is on the Country field when the page is brought up to allow user to tab through the fields during data entry. Before the modifications, when user tried to tab to the next field, the cursor went to the Address section of the browser instead. (HRMS Bundles 4 & 5)

Competency Rating Page (Recruit Workforce) – This page is modified with the addition of add/delete buttons to allow users to remove erroneous competency entries of an applicant. Before the modification, only one competency could be entered on the page. (HRMS Bundles 4 & 5)

Create Organizational Report (POS006) – This program is modified to correct an issue with the report not being created when the Report Level on the Run Parameters page is greater than “1”. PeopleSoft reworked this program by creating two new temporary records. The report is also retrofitted to include BOR enhancements included in Release 3.17. (HRMS Bundles 4 & 5)

DDP Advice Print (DDP003) – This program is modified to print the state tax data on the correct lines. Prior to the modification, when the state marital status long description exceeded 23 characters, there was a print alignment error in this section of the advice. The values for state allowances, additional percent, and additional amount were printed one line lower on the form than they should have been, resulting in the last item printing outside the lines of the bordering box on the form. (Tax Update 06-C)

Direct Deposit – The application can process a maximum of ten active direct deposit accounts for one employee, including the account with a Deposit Type of ‘Balance’. An error message has been added to the Direct Deposit page to prevent the entry of eleven or more active direct deposit accounts for an employee. If an employee’s direct deposit accounts exceed the maximum number, the Pay Confirm process will generate an error message to report that the maximum number of pay distributions (direct deposit accounts) has been exceeded, and that the employee’s check will be skipped for confirmation. In addition, the Forms Table will not be updated with the last check or direct deposit number processed, resulting in a duplicate check number error message during the Pay Confirm process. **To ensure that you do not encounter these issues, review the direct deposit data for all active employees to make sure that they have ten or fewer direct deposit accounts specified for each current and future effective-dated entry. If you have difficulty in making this determination, please contact the OIIT Helpdesk for assistance.** (Tax Update 06-C)

Direct Deposit Prenotification (DDP006) – This program is modified to correct an alignment issue with the Prenote Memo. (Tax Update 06-C)

Direct Deposit Register (DDP002) – This program is modified to successfully process employees with more than nine direct deposit distributions. Prior to the modifications, the program erred when an employee had ten direct deposit distributions. (Tax Update 06-C)

EEO-1 Employer Information (PER016) – HRMS Bundles 4 & 5 fix the EEO-1 Employer Report in order to accurately report all “Active” employees. (HRMS Bundles 4 & 5)

Exception/Override reports (POS008) – This program is modified to include the Rcd# field and uses PS_POSITION_DATA table to pull the Union Code instead of PS_JOB table. (HRMS Bundles 4 & 5)

Federal Tax Data Changes for Nonresident Alien Employees – The Federal Tax Data page is modified to provide improved functionality for specifying the status of nonresident alien employees for purposes of the withholding tax calculation. The field previously labeled, “Exempt Withholding Rules” (which had been a Yes/No checkbox) is now labeled “NRA Withholding Rule” (and is now a drop-down box). In addition, PeopleCode on the Federal Tax Data page is modified to permit Tax Marital Status = Married for a nonresident alien employee when Form W9 Recd = “Yes” or when NRA Withholding Rule = “Not Applicable”. Please refer to Business Process PAY 440 – Maintain Employee Tax Data for additional information. (Tax Update 06-C)

Hire process (Workforce Administration) – The Hire components are modified to retain any Benefit Program Participation entries made in the Benefit Program Participation page, even if the user navigates to another page in the component and then returns to this same page. This happens when entering a new hire and in correct history. Before the modification, the inserted Benefit Program would not save properly if the user navigated to another screen before saving the page. (HRMS Bundles 4 & 5)

Job Posting page (Recruit Workforce) – A new posting type “Contingent” has been added to the posting type dropdown field in the Posting Information group box on the Job Posting page. (HRMS Bundles 4 & 5)

Job Posting Summary report (APP014) – This program is modified to use a separate procedure to pull the prior work experience and highest education level required for each job requisition in the report. (HRMS Bundles 4 & 5)

Job Requisition number (Recruit Workforce) – The field format of the Job Requisition number has been changed. Job requisition number for any new job requisition created will no longer have the leading zeros in front of the number. Such change will affect queries which use the Job Requisition number as a criterion. (HRMS Bundles 4 & 5)

Name page (Update Dependent/Beneficiary) – The Suffix field type is changed from a look up to a drop down. (HRMS Bundles 4 & 5)

Name History page (Personal Data) – The Suffix field type is changed from a look up to a drop down. (HRMS Bundles 4 & 5)

Pay Calculation Process – Pay Calculation is modified to successfully process in the following situation: 1) An employee has multiple jobs; and 2) After pay sheets have been initially created, the Benefit Record Number is changed for both jobs. Prior to the modifications, in this situation, Pay Calculation would produce the following error message: “000362: This employee has no Primary Job for Benefits in effect as of the Pay End Date for the indicated Benefit Record”. With the modifications, the employee’s Pay sheet will be regenerated if the program determines that the Benefit Record on the employee’s Job Record does not match the Benefit Record reflected on the employee’s Pay sheet. (Tax Update 06-C)

Position Active/Inactive List (POS002) – This crystal program is modified to correctly return inactive positions. Before the modification, no inactive positions appeared on the report. (HRMS Bundles 4 & 5)

- Position Data – Specific Information page – This page is modified to add a new group box named Incumbents and a new checkbox Include Salary Plan/Grade. The Update Incumbents checkbox is also moved into that new Incumbents group box. (HRMS Bundles 4 & 5)
- Prior Work Experience page (Recruit Workforce) – PeopleCode is modified to correctly calculate the total years of work experience entered on the Prior Work Experience 1 page. Prior to the modification, the Years of Work Experience remained 0.0. (HRMS Bundles 4 & 5)
- Quarterly UI Wage Tape (TAX810GA) – This program is modified to correctly report the employer’s Georgia state unemployment account number when the number entered on the Company State Tax Table page includes a dash (-). Prior to the modifications, the dash was correctly removed, but the account number was incorrectly truncated. (Tax Update 06-C)
- Refresh Employees Table (PER099) – This program is modified to correctly populate the MIDDLE_NAME field in the PS_EMPLOYEES Table. Before the modification, the MIDDLE_NAME field would be blank, even if a middle name had been entered for the employee on the Name History page. (HRMS Bundles 4 & 5)
- Salary Plan page (Workforce Administration and Recruit Workforce) – The Salary Plan information is now editable at the Job level. Prior to the modification, the Salary Step field could not be modified when using Position Management. (HRMS Bundles 4 & 5)
- Update Year End Reporting Information (TAX504) – This program is modified to insert a new row with an effective date equal to the last day of the tax balance year into the Federal Tax Data record, if data with that effective date does not already exist. If an employee has existing State Tax Data and Local Tax Data with an effective date prior to the last day of the tax balance year, data will be copied forward and a new row with an effective date equal to the last day of the tax balance year will also be inserted into these records. Prior to the modification, the Federal Tax Data record with an effective date prior to or equal to the last day of the tax balance year was updated, and as a result, other tax data changes (e.g. from self-service transactions) could not be distinguished from Retirement Plan updates made by TAX504. (Tax Update 06-C)
- VETS-100 Veterans Employment Report (PER027) – This program is modified to correct existing format and logic issues and to accommodate the ‘Newly Separated’ category during report processing. (HRMS Bundles 4 & 5)
- W-2c Audit Report US/Territories (TAX921US) – This program is modified to correctly report the total for Box 14W and the label for Box 14T. Prior to the modifications, the Box 14W amounts were correctly reflected in the employee detail but not included in the W-2c totals, and the label for Box 14T printed “BOX” instead of “BOX 14T”. (Tax Update 06-C)
- W-2c US/Territories Print (TAX920US) – This program is modified to support two changes in the most recent version of Form W-2c (Rev. 1-2006) published by the Internal Revenue Service. The changes are 1) A separate field is added to Box E (employee’s name) to print employee name suffixes such as “Jr.” or “Sr.” on Form W-2c.; and 2) The title of Box C is revised to “Corrected SSN and/or name”, and must be checked if the Form W-2c includes a correction to either the employee’s name or Social Security Number. **Note:** Only the most recent version of Form W-2c (Rev. 1-2006) may be used with the new version of TAX920US. The program is also modified to print only the employee’s first and middle initials followed by as much of the last name as space permits in the combined name area in cases where the length of the employee’s complete name would exceed the available print space. In this situation, name suffixes are not printed. The 1-2006 version of the W2-c can be found on the IRS website at <http://www.irs.gov/pub/irs-pdf/fw2c.pdf>. (Tax Update 06-C)

Security Fixes and Enhancements

Modifications to Model Security:

BORBHR40 (BOR HR and Ben - Prc) – This permission list is modified to allow HR users to access the new Badge Upload Process (BORI037).

RELEASE DOCUMENTATION: Detailed Release documentation is available at the HRMS/GeorgiaFIRST website: <http://www.usg.edu/gafirst/hrms> - Release Information - Current Release.

The following business processes have been recently created or updated, and are available for viewing on our website:

- HR 310 – Creating a Job Requisition – Revised the path to Job Requisition Information page on Page 1 due to the menu name change as a result of the application of HRMS Bundles 4 and 5)
- PAY 410 – Handle Garnishments – Added a new General Information section on Pages 1 and 2 regarding Wage Garnishments for Student Loan Repayments effective July 1, 2006. Added new Notes on Pages 2 and 3 on inserting a new row if the employee is already enrolled in a general deduction or in a garnishment deduction.
- PAY 435 – Set Up and Maintain Direct Deposit – Added a new item on Page 1 in the Conditions section regarding the maximum of ten (10) active direct deposit accounts that PeopleSoft can process.
- PAY 440 – Maintain Employee Tax Data – Added a Note on Page 3 to the Tax Marital Status field in the Federal Withholding Status group box in Step 1, regarding the conditions when Married can be selected for a nonresident alien employee. On Page 4, the Exempt Withholding Rules check box in the Tax Treat/NR Data group box in Step 1 has been replaced with a new NRA Withholding Rule field and the options for this field explained.
- PAY 441 – Withholding for States Other Than GA – This is a new business process describing the steps to set up state taxes for an employee who physically works in a state other than GA.
- PAY 465 – Adding a General Deduction – Added a new item to the Conditions section on Page 1 regarding TIAA-CREF Deduction Codes and Plan Types.
- PAY 505 – Quarter End Checklist – Deleted Step 13 on Page 4 (Run the TAX504.SQR Process). All following sections and steps were renumbered to reflect this change.
- PAY 530 – Calendar Year End Checklist – Added a new note to the General Information section for Step 10 on running the TAX504 process to update the retirement plan check box on W-2 box 13. This new note describes a new row that will be inserted in FED_TAX_DATA with an effective date equal to the last day of the tax balance year so that any other changes made can be distinguished from the Retirement Plan updates made by TAX504.
- PAY 545 – W2-c Processing – A new note was added to the General Information sections of Item IV and Item VI regarding the options available on the IRS Business Services Online website.

- RPT 305 – TRS_ORP Retirement Reporting – Added a new item to the General Information section on Page 1 regarding the IRS salary limit for the retirement plan year. Added new Notes on Page 6 to Payment Reasons 01 Regular Payment and 02 Increase Due to Promotion. Added a new Note on Page 7 regarding the Summer Gross Amount.
- RPT 306 – TRS Locator Code File – Revised Step 3 on sending the TRS Locator File to TRSGA per new instructions from TRSGA.
- RPT 315 – Continuous Audit – A new note was added to Step 4 on Page 7 recommending that the XXXSALYY.csv file not be opened, edited or saved in any other application prior to submission to the Department of Audits. All changes to the file should be made using the Edit Temp Table instructions in Step 3.

Note: A summary of changes to the Business Processes may be viewed by clicking the ‘here’ link displayed at the top of the Business Process when opened directly from the HRMS web site. The changes may also be viewed by opening the Business Process and going to File>Properties>Summary>Comments.

The following other documentation has also been recently created or updated, and is available for viewing on our website:

- Foundation Table Changes/Additions – (Documentation>Foundation Table Changes/Additions)
 - Spreadsheet to Calculate Faculty Rate – 7/28/2006
- HRMS Self-Service – (Project Information>HRMS Self-Service)
 - August 2006 Newsletter for eApps project Phase 1

Note: Login will be required to access this section. Please check with the campus coordinator for this project to obtain the login information.

- Known Issues – (Documentation>Known Issues)
 - KI0060 – TRS Reporting for summer faculty incorrect in some instances.
 - KI0061 – Request for TRS Locator Code File
 - KI0062 – Request for State Charitable Contributions Pledge Card File
 - KI0063 – Announced updated Spreadsheet to Calculate Faculty Rate
 - KI0064 – Prior Period Adjustments inserted into the TRS/ORP Temp Table (TRS_CONTRIB_BOR) for a Posting Month before TRS/ORP Rate Changes (7/1/06) show as an incorrect calculation in the Trace File of the Create TRS/ORP Report process (BORIF04F)
- Kronos – (Project Information>Kronos) – Kronos Current Status – 08/15/2006

Note: Login will be required to access this section. Please check with the campus coordinator for this project to obtain the login information.

NEXT SCHEDULED RELEASE: The next regularly scheduled release for Version 8 – 3.21 – is tentatively scheduled for October 6, 2006.