

SUBJECT: GeorgiaFIRST HRMS Project Release 3.27

PURPOSE: Release of BOR fixes and enhancements (see details below).

TECHNICAL IMPACT:

DATABASE: Your PeopleSoft HRMS database has been upgraded with BOR Release 3.27, 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:

B07/B08 Mass Rate Chg Update (BORM010) – This program is modified to use the Employee’s Empl Rcd as a key field. Prior to the modifications, a unique constraint error would be received when employees with multiple jobs were included.

Action Reason Code Table – Four new values are added to the Action/Reason Code Table:

- TER/REC – Termination/Resignation : Collegiate Employment
- TER/RPP – Termination/Resignation : Private Practice
- TER/RGS – Termination/Resignation : Government Service
- POS/RNK – Position Change/Position Change: Rank

Advice Register (DDP004) – The BOR version of the SQR is no longer required as the latest vanilla version delivered by Oracle/PeopleSoft already includes the modifications BOR previously worked on. This report will not include reversed advices and will allow users to validate amount transmitted to the financial institution for disbursement.

Approved Agenda Report (BORM019) – This program and its run page are modified to include a new option of “Campus Approved”.

Benefits Encumbrnce Projection (BORIF15) – This program was modified to correct the issue of posting the projection to the incorrect fund code or program. This modification was delivered on August 10, 2007, via Interim Release 3.26a.

BlueCross/BlueShield Interface (BORI021) – This program was modified to change the product code for the Indemnity Plan. This modification was in response to the announcement of Product Code change sent from USO to the Chief Human Resource Officer at the institutions. This modification was delivered on August 10, 2007, via Interim Release 3.26a.

Case Review page – This page is modified to add the Gender, Date of Birth, and Ethnic Group fields. This is in response to Model Change Request #698. In addition, the Annual Rate displayed on this page is modified to pull the annual rate from the employee’s most recent non-zero compensated Primary Job row.

Check Reconciliation process (BORR015A) – This program is modified to allow spaces at the beginning or the end of the account number coming from the input file. Prior to the modifications, the spaces had to be replaced with zero’s.

Comprehensive Benefits Report (BORR025) – This program was modified to correct the issue of pulling the incorrect rates from the rate table on the report. This modification was delivered on August 10, 2007, via Interim Release 3.26a.

Create ERS/DEFCON Temp Table (BORIF28A) – This program is modified to include benefit plan ERSCON.

Create ERS/DEFCON Report (BORIF28F) – This report is modified to identify out of balance employees with the # symbol instead of **. In additions, this report is modified to correctly state the first GDCPA benefit participant when preceded on the report by participants enrolled in ERS benefit plans. Prior to the modifications, amounts from the last ERS benefit participants when present would be displayed on the first GDCPA benefit participant.

Note: The fix applied to the report only, the ERS/DEFCON File (BORIF28D) is already working correctly.

Direct Deposit Register (DDP002) – This report is modified to include a Grand Reversal Total and a Grand Net Total. Prior to the modifications, the report listed reversing advices which were not included in the totals summary. This modification will allow user to cross reference amounts with the Payroll Register Report (PAY002) and the GL Interface Report (BORIF01).

Distribute Actuals program – A subprogram of the Distribute Actuals program, PSCPFDDST, was modified to allow the Distribute Actuals program (PSPPFUND) to run the Success if an employee has more than 15 employee records. Prior to the modification, if an employee had more than 15 employee records, the Distribute Actuals program would run to Error. This modification was delivered on August 10, 2007, via Interim Release 3.26a.

Edit ERS/DEFCON Temp Table – This page is modified to allow users to insert new rows WITHOUT adding a new page. Prior to the modifications, users could only insert new rows by creating a new page. This page now works similarly to the Edit TRS/ORP Temp Table page.

Employee Case Status Extract (BORM012) – The report generated by this program is modified to provide users the choice of sorting results by Emplid or Alphabetically. This is in response to Model Change Request #674.

GL Interface (BORIF01) – This program is modified to insure that EmplIDs and Names are correctly matched in the BORIF01 log file.

One -Time Deductions – This page which can be accessed from both the By Paysheet and By Payline is modified to verify enrollment in the health (plan types of 10 and 11), retirement (plan types of 7V, 7W, 7X, and 7Z), life (plan types of 20, 21, 23, 25, and 27) and disability (plan types of 30 and 31) plans. This is in response to Model Change Request #668. The following warning message will occur if the user tries to make a payline adjustment for an employee with a plan type that employee is not enrolled in.

“Warning – Benefit Plan need to be verified. Employee is not currently enrolled in this Benefit Plan. Verify Benefit Plan selection prior to saving.”

Note: User will not be prevented from saving but should make adjustments based on enrollment. Failure to select the correct benefit can result in a DBI for correction.

Payroll Deduction Register (BORR022) – This report is modified to remove the SSN. This modification is in response to Model Change Request #682.

Person Checklist page – The security access of the page is modified to allow users to enter data and save the page. This is in response to Model Change Request #703.

Populate TRS/ORP Temp Table (BORIF04A) – This program is modified to include deduction code ORPLMT and check the service credit eligibility check box as follows:

- M03 Paygroup will be flagged as service credit eligible for May if SUM earnings are present for May;
- M03 Paygroup will be flagged as service credit eligible for August if SUM earnings are present for July;
- SUM Paygroup will be flagged as service credit eligible for June if SUM earnings are present for June;
- Do not check flag for May or August if only M03 earnings are present.

Prior to the modifications, all M03 earnings were checked as service credit eligible.

Position Status Report (POS001) – This report and its run page are modified to allow users to run the report by a specific Department. This is in response to Model Change Request #697.

Positive Pay File (BORI034) – This program is modified to prevent a combination payment in the form of both check and advice from mimicking prior rows of “Void”. Prior to the modification, the combo check in the file was displayed as a void when it should have been displayed as a confirmed check.

Print Advice Forms (DDP003) – This program is modified so that the correct State Allowances will print correctly when an employee has a marital status of “M”.

Premium Reconciliation Report (BORR025A) – This report is modified to include paygroup in the header of the report if specific paygroups were selected on the run page. In additions, the parameters page is modified to eliminate verbiage referencing the BORBEN, which is now obsolete. This reference was replaced with instructions to run the Refresh Benefits Snapshot, which is required to receive accurate results on this report.

Print Checks (PAY003) – This program and its run page are modified to provide users options of sorting the checks. Prior to the modifications, the checks were automatically sorted by Mail Drop, then Form ID, and lastly by Paycheck number. Users now have two sort options to choose from. The default option is the Mail Drop option, and the new option is Employee Type which sorts the check by Employee Type first (Salaried vs. Hourly), Mail Drop, and lastly by Name. This is in response to Model Change Request #665. This program was also modified previously to resolve issues with the escape code sequence used at one of our GaFIRST institution. That modification was delivered on August 10, 2007, via Interim Release 3.26a.

PT Bulk Reappt Populate (BORM017) – This program is modified to update part time appointment cases to a case status of “Campus Approved” since these cases no longer require board approval.

Retirement Plan Table – This page is modified to allow users to insert new rows. Prior to the modifications, user would receive error “Data being added conflicts with existing data”, and would not be able to save the inserted row.

State Audit Queries – The State Department of Audits requested the deployment of the following public queries across all databases:

- BOR_AUDIT_CKS_AFTER_TERM
- BOR_AUDIT_EMP_PD
- BOR_AUDIT_EMP_PD_W_ADDRESS
- BOR_AUDIT_EMP_PD_W_SSN

Note: Users should only run the queries but not make any modifications. Should any modification is desired, users are recommended to open and save the queries under a different name.

Self-Service Functionalities

This section lists the enhancements and fixes delivered in this release for the Self-Service functionalities:

Self Registration

- Self Registration is modified to prevent employees who have been terminated for over two years from self-registering if they have not already registered a self-service account for themselves.
- Self Registration is modified to prevent employees that have been terminated longer than 24 months from self-registering and logging into Self Service. Previously, employees were prevented from registering for Self Service after 24 months, but were not prevented from logging in.

Please note that it is imperative that institutions terminate employees that are no longer working so that this functionality will work as designed. Currently many institutions allow employees to remain active in the PeopleSoft system and receive zero compensation checks even though they have not worked for some time.

- The Forgot My Username or Password function is modified to allow users to unlock their account if and only if they could answer the Password Hint Question correctly. This is in response to Model Change Request #701.

Payroll and Compensation Home

- W4 Page – The W4 page is modified so that retirees are prevented from making W4 changes. Previously, retirees were able to access and modify their federal tax allowances using Self Service. Now, employees with an Empl_Status of “Retired” or “Retired With Pay” will receive a message stating “If you are a retiree, you must contact TRS or your financial institution to make changes to your tax allowances” when they access the W4 page in Self Service. This is in response to Model Change Request #684.
- G4 Tax Form Link– The URL of the G4 Tax Form link is updated in response to the recent changes on the Georgia Department of Revenue website.
- On-Line Paycheck – The bank account number on the on-line paycheck is masked in the same manner as the Print-Friendly paycheck. This is in response to Model Change Request #685.
- The Direct Deposit Help page and the Direct Deposit Check example are both modified to include verbiage cautioning users that they should not use credit card convenience checks when entering Direct Deposit information.

Worklist Related

- Name Change Request Worklist – In the Employee Portal, the worklist link is modified to correctly display the Name Change Effective Date.

Miscellaneous

- The error message on the login screen is modified to display “Self Service is currently unavailable” when the application server is down. Prior to the modification, self service users received the message of “The application server is down at this time”.
- The banner on the login screen is changed from “HRMS Self Service” to “Self Service”. This modification is in response to the HR/Finance Integration project to promote a seamless single sign on view.

Security Fixes and Enhancements

Modifications to Model Security:

BORAWF20 (Adm Workforce – Mnt) – This permission is modified to turn on the Update/Display access to the Person Checklist.

BORAWF21 (Adm Workforce – Mnt co) – This permission is modified to turn on the Update/Display access to the Person Checklist.

Payroll Query Access Group – This query access group is modified to include the BOND_SPEC_DATA record so that payroll users can query against it.

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:

- BEN 205 – COBRA – Termination – Page 5: Revised Path in Step 12.
- BEN 230 – COBRA Process – Page 2: Revised Path in Step 4. Page 6: Revised Paths in Steps 11 and 12.
- GEN 105 – Maintaining User Options – Page 1: Revised Description section to delete the "configuring your portal homepage" reference and add a new "modifying your system profile" reference. Revised path in Adding Favorites Path section to include a second path to the Add to Favorites path. This change is in response to the PeopleTools 8.48 Upgrade.
- HR 105 – Department Setup – Page 2: In Step 4, changed the third bullet point to "Click on the Insert Child Node icon." This change is in response to the PeopleTools 8.48 Upgrade.
- HR 120 – Creating New Positions – Page 3: In Step 2, added new information about the Include Salary Plan/Grade check box in the Specific Information group box on the Specific Information page.
- HR 135 – Maintain Existing Positions – Page 2: Added new information to Step 2 on the Include Salary Plan/Grade check box in the Specific Information group box on the Specific Information page.
- HR 235 – Disability – Modified to include the recent changes to the BOR Policy Manual on disabled employee insurance. Also added a new General Information section on how to handle employees with more than or fewer than 9.5 years of continuous benefited service, etc.
- HR 255 – HR Task List – This is the HR task list extracted from PAY 230 – Payroll Task List. It was determined that to move the list to the HR 200 business process series.
- PAY 215 – One-Time Adjustments on the Payline – Added new bullet item in the General Information section regarding the Warning Message that displays when a user tries to save a Payline adjustment for a benefit in which the employee is not enrolled on pages 1 and 2.
- PAY 230 – Payroll Task List – Modified to highlight important notices and remove any reference to an obsolete Security Lockout process.
- PAY 520 – Fiscal Year End Checklist – Modified to delete all references to the 6559 Transmitter Totals Report
- PAY 525 – Fiscal Year Begin Checklist – Modified to delete references to specific dates and fiscal years, and add generic references to dates and fiscal years.
- RPT 305 – TRS_ORP Retirement Process – Modified to clarify the service credit faculty members receive and add new Note to the IRS Salary Limit bullet item, regarding contribution deductions. Added a new bullet item on ORP salaries and contributions being included in the TRS file for reporting purposes.
- RPT 310 – ERS_DEFCON Retirement Reporting – Modified in the second bullet item in the General Information section to change the symbol used to flag employees in the ERS Defined Contributions Report from ** to #. Revised the steps on page 3 to edit information on the Edit ERS/DEFCON Temp Table page.
- RPT 350 – TIAA-CREF Electronic File Exchange Process – Modified to refer users to the TIAA-CREF website for online file submission instructions.

- SEC 105 – HRMS Security Overview – Modified to remove references to a list of roles institutional security administrator currently has NO access to.
- SEC 110 – Maintaining HRMS User Profiles - Page 1: Added a new bullet item on details for the User ID to the Conditions section, giving the number of allowed characters and the characters that are not allowed. This change is in response to the PeopleTools 8.48 Upgrade.
- SEC 120 – Maintaining HRMS Permission Lists – Page 3: Deleted Step 7, Message Monitor, and renumbered all following steps accordingly. This change is in response to the PeopleTools 8.48 Upgrade.

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:

- FAQ – (Support>FAQ)
 - Modified to remove the obsolete Q&As and add a few new ones
- Foundation Table Changes/Additions – (Documentation>Foundation Table Changes/Additions)
 - FY07.03
- HRMS Newsletter – (Documentation>HRMS Newsletter)
 - Added Summer 2007 edition
- Known Issues – (Documentation>Known Issues)
 - KI0074 - Instruction Clarification concerning the addition of New Fund Codes for FY08
 - KI0075 - Faculty Members TRS Service Credit Eligible check box should be checked on only if Faculty Member taught Maymester
 - KI0076 - Adding/Updating User Profile for the State Department of Audits and current Audit Requirement listing
 - KI0077 - Changes to Software Distribution for PeopleSoft HRMS PeopleTools Upgrade
 - KI0078 - Problem identified effecting 1st Biweekly Payroll for FY08
 - KI0079 - 7/1/07 Job Data Rows with pay increases and the 2nd July Biweekly with pay increases
 - KI0080 - Reminder to update Faculty benefits rates for August payroll
 - KI0081 - Issue with pulling up Department Budget Table when entering a DeptID in the search field
 - KI0082 - Request for State Charitable Contributions Pledge Card File
 - KI0083 - Issues with Queries after the PeopleTools 8.48 and Oracle 10g upgrade
 - KI0084 - Foundation Table Changes/Additions for High Deductible/Health Plan availability
- MFE and HRDM – (Documentation>MFE and HRDM)
 - Added META Data Spreadsheet
- Model Change Review – (Documentation>Model Change Review)
 - Model Change Review Meeting/September 20, 2007/Agenda
- Releases – (Release Information)
 - Added Release Announcement for Interim Release 3.25a (5/18/07)
 - Added Release Announcement for the PeopleTools 8.48 Upgrade Release 3.26 (7/24/07)

- Added Release Announcement for Interim Release 3.26a (8/10/07)
- Training – (Documentation>Training)
 - Added Basic and Intermediate Query Training manuals
- Workshops and Presentations – (Documentation>Workshops/Presentations)
 - Added five presentations from GA Summit 2007

NEXT SCHEDULED RELEASE: The next scheduled release for Version 8 – 3.28 – is tentatively scheduled for November 30, 2007.