

SUBJECT: GeorgiaFIRST HRMS Project Release 3.30

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

TECHNICAL IMPACT:

DATABASE: Your PeopleSoft HRMS database has been upgraded with BOR Release 3.30, 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 by Module
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BENEFITS

Plan Type Additions – The following Plan Types are added:

- Plan Type 2X – Additional Supplemental Life Spouse
- Plan Type 2Y – Additional Supplemental Life Dependent
- Plan Type 5U – Unscheduled Holiday

Plan Types 2X and 2Y are added in response to Model Change Request # 686.

Create ERS/DEFCON Temp Table (BORIF04A) – This program is modified to exclude **new employees** who were hired but are not paid during the current month. Prior to the modifications, new employees with zero compensation were included in ERS/DEFCON Report (BORIF28F) and ERS/DEFCON File (BORIF28D). With the modifications, new employees receiving pay for the first time since the hire date will be included in Create ERS/DEFCON Report (BORIF28F) and Create ERS/DEFCON File (BORIF28D) with the eligibility date. Employees having zero compensation after hire date and active enrollment in the plan will continue to be included.

HUMAN RESOURCES

Action/Reason Table – A new action/reason set is added to the Action/Reason Table: Termination – Inactive

Degrees – The following degrees are added to the ACCOMP_TBL Table:

DNP – Doctor of Nursing Practice

MSOD – Masters of Science in Organization Development

Termination Process Report (BORR055) – This report is modified to ensure that new employees who have not received a paycheck will correctly show on the report with a blank last paycheck date. Prior to the modifications, the Last Paycheck date was being populated incorrectly on the report for the new employees who had not received a paycheck.

Leave Taken by Employee Report (BORR070) – This is a new report created to allow users to generate leave accrual history for an employee enrolled in any leave plan for a specified period of time. The report will include: Accrual dates, Hours carried over from previous years, YTD Hours Earned, YTD Hours Taken, YTD Hours Adjusted, Hours Taken in Process, Hours Adjusted in Process, and Balance. This new report is created in response to Model Change Request # 702

Path: Board of Regents > BOR Benefits > Leave Accrual > Leave Taken by Employee

A new business process RPT 365 – Leave Taken by Employee Report has been created to detail the steps required to run the report.

PAYROLL

Modifications to Existing BOR Functionality:

Earnings Table – A new earnings code UHM (Unscheduled Holiday Monthly) is added to the Earnings table to facilitate the tracking and accrual of the Unscheduled Holiday plan.

Employer's Quarterly Tax and Wage Report (TAX810GA) – This program is modified to include negative earnings created by balance adjustments in the .lis file as noted in the Conditions for Business Process RPT320 – TAX810GA . Prior to the modifications, negative amounts resulting from balance adjustments for earnings and 403 special accumulator were not identified. The verbiage in the trace file is also modified as follows to alert users that additional action is required:

***** Negative Wages are created by Check Reversals and/or Balance Adjustments*****

Review this list to determine whether a DOL-3C is required. The DOL-3C is necessary for those employees with earnings less than zero (negative earnings).

Create Federal W-2c File US (TAX922US) – This program is modified in responds to PeopleSoft Tax Update 08-A. Trace file is modified to replace all references to MMREF-2 with updated generic federal references. A new field, Software Vendor Code, is also added to the TAX922US.001 file. That field is a numeric four-position code that is assigned by the National Association of Computerized Tax Processors (NACTP), used to identify the vendor of the software that was used to generate the EFW2C wage file. The Software Vendor Code is "1414" for PeopleSoft.

Create State W-2 File (TAX960ST) – This program is modified in responds to PeopleSoft Tax Update 08-A. The modifications have no impact to the GaFIRST model and should be transparent to our users.

Federal W-2c File Audit US (TAX923US) – This program is modified in responds to the changes made to the Create Federal W-2c File US (TAX922US) described above.

State W-2 File Audit (TAX962ST) – This program is modified in responds to PeopleSoft Tax Update 08-A. The modifications have no impact to the GaFIRST model and should be transparent to our users.

Time Entry Exception Report (BORR118) – This report is modified to correct Known Issue KI0088, which related only to combined payrolls that included biweekly pay calendars with a pay period end date equal to the pay period end date on the preceding monthly calendar.

Time Sheet Creation (BORR126) – This Crystal report is modified to allow valid earn codes to be printed for employees in the S01 paygroup. The time sheet for the employees in the B06, B07 and B08 pay groups is unchanged.

Modifications to Existing PeopleSoft Processes and Reports:

Year End Record Error Report (TAX910ER) – This program is modified to correctly validate reportable data for employees for whom there are blanks in the W2_STATE field on the PS_YE_DATA table. Prior to the modifications, employees with W2_STATE = blank were excluded in the Year End Record Error Report, and as a result, potential errors were not evaluated and flagged for employees in states that have no state withholding tax.

MISCELLANEOUS

Department Search Records – The department search record is modified to resolve the Known Issue KI0081– Issue with pulling up Department Budget Table when entering a DeptID in the search field. Prior to the fix, a timeout situation would arise when users attempted to search a position or a department budget table by using the Department field using the default operator of “Begins with”.

Internal Audit Queries – The Internal Audit Department requested the deployment of the following queries across all databases:

- BOR_INT_AUDIT_CURRENT_EMPLOYEE
- BOR_INT_AUDIT_POS_OF_TRUST

Note: Users should not make any modification to these delivered public queries, but may run them or if modification is desired open and save them under a different name.

Translate Table – Three values for the CAMPUS_CODE_BOR field are added to the translate table to facilitate the Banner PT Fac Comp process used by a GaFIRST institution.

Self-Service Functionalities

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

Employee Home

- My Leave Balances – This is a new page created to allow employees to view their leave balances and accrued details for the past 12 months for the leave plan they are enrolled in. This new page is created in corresponds to the new Leave Taken by Employee Report made available on the EMPLOYEE portal as a result of Model Change Request # 702.

Payroll and Compensation Home

- Direct Deposit – A verbiage is added to the Direct Deposit page to alert self service users that their account may be set to require prenotification automatically whenever a change is made to the Direct Deposit record

Security Fixes and Enhancements

Modifications to Model Security:

BORBPY30 (BOR Pay - Rpt) – This permission is modified to turn on the access to the new Leave Taken by Employee Report (BORR070).

BORHSS20 (User Self Service) – This permission is modified to turn on the access to the new My Leave Balances page in the Self-Service application.

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 230 – COBRA Process – Modified to include notes regarding moving COBRA participants in the FTF benefit program to the PAS benefit program once enrollment is complete
- HR 415 – Create Faculty Transactions – Modified to revise the matrix on page 9 to validate Board Approval, Mandatory USO Review, and Campus Approval requirements by Status Change Type.
- HR 425 – Running the Case Status Mass Update Process – Modified to the General Information section regarding the Run Control IDs used for the Extract and Update processes
- PAY 475 – Wages Paid After Death – Modified to add notes regarding wages not subject to both federal and state income tax withholding.
- RPT 360 – Employee Termination Processing Report – Modified to include more information regarding the Reporting Period Begin and End Dates
- RPT 365 – Leave Taken by Employee Report – This new business process details the steps required to run the new Leave Taken by Employee Report.

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:

- HRMS Self-Service – (Project Information>HRMS Self-Service (eApps) Phase I>Sample Training & Communication)
 - End User Manual and Employee Self-Service Help document – Updated to reflect changes to Self Service included in this release (Release 3.30).
 - Employee Self Service Quick Reference Guide – Modified to include information on reviewing Leave Balance Information through Self Service.

Note: Please note that if you are using these two documents Self Service Training manuals on your school’s Self Service website, you will need to make any institution specific changes and re-post to your website.

- Known Issues – (Documentation>Known Issues)
 - KI0090 - 1/1/08 Job Data Rows with pay increases and 12/29/07-12/31/07 Holiday pay
 - KI0091 - 3rd Biweekly Payroll Should Not be Combined with Monthly Pay Groups
- Metrics – (Documentation>Metrics)
 - Added Metrics Document for December 2007. This document contains the statistics for each school regarding self service usage and check prints process.
- Training – (Documentation>Training)
 - Updated the Employee Self-Service Help document to reflect Self Services changes from this release.

NEXT SCHEDULED RELEASE: The next scheduled release for Version 8 – 3.31 – is tentatively scheduled for April 21, 2008.