In the Know with OneUSG Connect

November 12, 2019
Facilitator: Jodi Frazier
Housekeeping Items

- Everyone had been muted on entry. Please chat your questions using the Q/A Feature.

- This WebEx is being recorded and the archive/presentation will be available on the OneUSG Support Website. The recording will be sent out within 48 hours of the presentation.

- Please chat us your questions. We will review those at the end of the presentation during our Parking Lot Review.

- There will also be a time during the end of the presentation for additional Questions & Answers (if time permits).
Agenda

- Fraud Prevention
- Release Information
- Commitment Accounting
- Common Remitter
- Payroll
- Time & Labor
- Benefits
- Human Resources
- Faculty Events
- HRIS
- General Information
- Upcoming Events
- Parking Lot Review
- Additional Q&A
Fraud Prevention
Fraud Prevention

• The USG is at risk of fraud every day
• Must treat the current environment very seriously to reduce risk
  – Make every effort to review and tighten controls
  – Establish clear procedures and controls
  – Train employees and reinforce importance and urgency of controls
Fraud Prevention

• Tips from Dr. Todd Watson/USO
  – **Slow Down** – Think about the message. Does it make sense?
  – **Read Carefully** – Does the email address agree with the purported sender?
  – **Think Critically** – Would the invitation or request seem typical in our organization?
  – **Verify separately** – If a request in the email is unusual, can you call the sender and verify before responding or opening?
Release Information
Tentative Release 5.20

Scope

• Benefits
  - TIAA Stabilization and Hardship Removal
• Careers
  - Upgrading module to classic plus
  - Branding
  - Profile Copy
  - Onboarding: Equifax Compliance Center
    - No Integration
    - Limited to GSO & GT
  - PUM 28 Enhancements
  - Hiring Party Notifications
  - Query – All Posted Openings
  - Remove Interviewers from Applicant Notification Page
  - Applicant Attachment Required
• Payroll
  - Regulatory Tax Updates
  - Federal Tax Page Updates
  - NRA Earnings Code Updates
  - 1042S Report for GLACIER
• Self Service
  - Add / Change Position
  - Decision Support for Termination
  - Improve User Experience
• Time and Absence
  - Enrollment Matrix Expansion
• Workforce Administration
  - Visa/Citizenship Standardization
• Commitment Accounting
  - Express Direct Retro
  - Encumbrance Enhancements
  - Accounting Adjustment Enhancements
  - Change Funding Enhancements
• This and other release items can be found here:
  https://www.usg.edu/oneusg_connect/practitioner_services/releases
• OneUSG Connect will be unavailable from 5 p.m. December 6 until 7 a.m. December 10, 2019.
Release 6.0 Schedule

• Tentative Blackout Dates
  – March 13, 6pm until 18, 7am 2020, Pass 1
  – March 27, 6pm until 31, 7am 2020, Pass 2

• Last Go Live- Georgia Tech
  – March 22, 2020!
Commitment Accounting
5.2 Release

• Express Direct Retro (EDR) Functionality
  – Will replace Budget Retros and Direct Retros
    • Regression Testing in Macon on 11/13 and 11/14, with Integration to GL reconciliation on 11/20.
    • Not linked to Payroll Calendars

• Accounting Adjustment Enhancements
  – Fields have already been added to better align with EDR
    • Check Number, Position Number, Pay Period End Date, Pay Group, Pay Run ID
    – TRANS_TYPE_BOR will be “AADJ”
    – Accounting Template will be PAYROLL-AA and will create journals masked with “AA”
5.2 Release

• Encumbrance Enhancements
  - “J” Paygroup
    • Hourly rate calculation is corrected
  - MCOP Encumbrances
    • Requires Department Budget table entry for MCOP Earn Codes
  - Changes Only Encumbrance Processing

• MSS Change Position Funding
  - Budget Retro Trigger removed
Common Remitter
# Common Remitter Processing Schedule

<table>
<thead>
<tr>
<th>Pay Run ID</th>
<th>Plan</th>
<th>Adjustment Window Opens</th>
<th>Adjustment Window Closes</th>
<th>Final Extract</th>
<th>Files Submitted</th>
<th>Funds Pulled</th>
</tr>
</thead>
<tbody>
<tr>
<td>9CY1 – Dec Adjustment</td>
<td>ORP/ TSA</td>
<td>12/20/2019</td>
<td>To be determined</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>December</td>
<td>ERS/ TRS</td>
<td>12/23/2019</td>
<td>01/03/2020</td>
<td>01/06/2020</td>
<td>01/07 &amp; 01/08</td>
<td>01/07/2020</td>
</tr>
</tbody>
</table>
ERS Reporting

• ERS Work Table Load not capturing termination dates
  – Issue - data rows where the BOR_EMPL_STATUS = T, termination dates were not populated
  • Correction - deleted an “else” statement in PeopleCode which prevented termination dates from being pulled from job data
UGA- CAES Reporting

• CAES add and adjustment pages limited to single data rows
  – Issue - data rows for EMPLIDs working in multiple locations were prohibited
    • Correction – added a new record view: BOR_CAES_LOC_VW to provide a user friendly view of the Location Codes
    • Correction – modified both CAES Add and CAES Adjustment pages to show the Location Codes in drop down list and allow multiple data row inserts
TSA Reporting

• TSA Add and Adjustment pages limited negative amounts
  – Issue – negative amounts in excess of -9999.99 were prohibited
    • Correction – updated amount field to allow entry of negative amounts in excess of -9999.99
  
  • Note: the previous limitation was not due to a Common Remitter requirement but was a VALIC processing requirement
Common Remitter Detail Online Query

• Online inquiry reports returning a “No matching values were found” message
  – Issue – retirement inquiry reports containing detail data rows did not return data where required.
  • Correction – the Record View: BOR_CR_EMPL_VW was changed to use the Security Record View: PS_BOR_CO_SEC VWCLS
HRAL Staging Query
Created in PS Financials

• BOR_CR_DATA_NOT_JGEN_HRAL – Data not JGen
  – Navigation: Reporting Tools > Query > Query Viewer
  • Note: Query was created to assist users in verifying that data staged
    by the Create XXX Accounting Entries process in HCM have been
    successfully messaged to PS Financials via Integration Broker
Payroll
Payroll Year End Updates

• Tax Update 19-D
  – Scheduled to be included in REL 5.2
  – Includes required year end updates for 2019 W2 processing

• Tax Update 19-E
  – Scheduled to be an Ad Hoc release after REL 5.2
  – May include the new 2020 W-4 contingent upon final approval from the IRS
  – If 2020 W-4 is not included there will be an additional Ad Hoc release after 5.2

• 2020 Tax Rates
  – Will be released by PeopleSoft on 12/20 and loaded prior to the biweekly payroll processing on 12/27
  – Any tax rate changes received later will be in future releases
2020 Form W-4

• The IRS is releasing a newly designed Form W-4 for the 2020 tax year

• Why redesign Form W-4?
  - The new design reduces the form’s complexity and increases the transparency and accuracy of the withholding system. While it uses the same underlying information as the old design, it replaces complicated worksheets with more straightforward questions that make accurate withholding easier for employees.

• What happened to withholding allowances?
  - Allowances are no longer used for the redesigned Form W-4 to increase transparency, simplicity, and accuracy. In the past, the value of a withholding allowance was tied to the amount of the personal exemption. Due to changes in law, currently you cannot claim personal exemptions or dependency exemptions.

For FAQs, visit the IRS Website:
https://www.irs.gov/newsroom/faqs-on-the-draft-2020-form-w-4
2020 Form W-4

• Are employees hired after 2019 required to use the redesigned form?
  - Beginning in 2020, all new employees must use the redesigned form. Similarly, any employees hired prior to 2020 who wish to adjust their withholding must use the redesigned.

• Are all employees required to submit a new Form W-4?
  - No. Employees who have submitted Form W-4 in any year before 2020 are not required to submit a new form merely because of the redesign. Employers will continue to compute withholding based on the information from the employee’s most recently submitted Form W-4.

• For more information on the draft Form W-4, visit the IRS Website:
REL 5.2: Federal Tax Page for Non-Resident Aliens (NRAs)

• Updating online view of Income Codes to the IRS Income Codes 18, 19, 20 instead of the PeopleSoft Income Codes 17, 18, 19

<table>
<thead>
<tr>
<th>PeopleSoft Income Code (Current State)</th>
<th>Description</th>
<th>IRS Income Code (After Release)</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>Dependent Personal Services</td>
<td>18</td>
</tr>
<tr>
<td>18</td>
<td>Teaching</td>
<td>19</td>
</tr>
<tr>
<td>19</td>
<td>Studying and Training</td>
<td>20</td>
</tr>
</tbody>
</table>

• UAT for these changes is Friday, November 15th and invites have been sent

• Job aids will be created and distributed
Payroll

3Q2019 Quarterly Payroll Tax Returns available in Smart Compliance

• Log in to Smart Compliance, select Processes / Employment Tax / Tax Records
• If you have questions, please contact the SSC Customer Support Team at oneusgsupport@usg.edu.
Payroll

Payroll: 2019 Quarter & Year-End Processing

• Early Tax Clean-up – Utilize November and December for any final 2019 data cleanup related to tax.

• Tax 900 – Payroll for NA/US Annual Processing / Audit and Error Reports / Error Listing.

• Watch for final approval date coming soon. **Projected** date for 4Q2019 and 2019 W-2’s approvals due to SSC approximately January 8, 2020 by 5pm.
Payroll

Payroll: Reporting 2019 Taxable Fringes

• Include all Taxable fringes for 2019 with employee earnings. These include things such as relocation, auto allowances, taxable memberships, and taxable TAP benefits that have not already been included with 2019 payrolls.

• Refer to TAP communication Monday 11/11/19.

• Use the remaining payrolls of 2019 to report additional taxable fringes and collect taxes as needed.

• Contact us at oneusgsupport@usg.edu or call 877-251-2644 if you have questions or need further assistance.
# Payroll

## Bi-Weekly On Cycle Payroll Schedule

<table>
<thead>
<tr>
<th>Pay Period Begin Date</th>
<th>Pay Period End Date</th>
<th>Time Detail and Adjustments to SSC by 1:00 PM</th>
<th>OneUSG Confirm Date</th>
<th>Pay Date</th>
<th>Pay Run ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/03/19</td>
<td>11/16/19</td>
<td>11/18/19</td>
<td>11/19/19</td>
<td>11/22/19</td>
<td>9NB2</td>
</tr>
<tr>
<td>11/17/19</td>
<td>11/30/19</td>
<td>12/02/19</td>
<td>12/03/19</td>
<td>12/06/19</td>
<td>9DB1</td>
</tr>
<tr>
<td>12/01/19</td>
<td>12/14/19</td>
<td>12/16/19</td>
<td>12/17/19</td>
<td>12/20/19</td>
<td>9DB2</td>
</tr>
</tbody>
</table>

## Monthly On Cycle Payroll Schedule

<table>
<thead>
<tr>
<th>Pay Period Begin Date</th>
<th>Pay Period End Date</th>
<th>Pay Groups to SSC by 9:00 AM (Paysheets Created)</th>
<th>Time Detail and Adjustments to SSC by 11 AM</th>
<th>OneUSG Confirm Date</th>
<th>Pay Date</th>
<th>Pay Run ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/01/19</td>
<td>11/30/19</td>
<td>11/21/19</td>
<td>11/22/19</td>
<td>11/25/19</td>
<td>11/29/19</td>
<td>9NM1</td>
</tr>
<tr>
<td>12/01/19</td>
<td>12/31/19</td>
<td>12/19/19</td>
<td>12/20/19</td>
<td>12/31/19</td>
<td>9DM1</td>
<td></td>
</tr>
</tbody>
</table>

## Off-Cycle Payroll Schedule

<table>
<thead>
<tr>
<th>Pay Period Begin Date</th>
<th>Pay Period End Date</th>
<th>Off-Cycle Request to SSC by 11 AM</th>
<th>OneUSG Confirm Date</th>
<th>Pay Date</th>
<th>Pay Run ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>N/A</td>
<td>11/11/19</td>
<td>11/12/19</td>
<td>11/15/19</td>
<td>9NX2</td>
</tr>
<tr>
<td>N/A</td>
<td>N/A</td>
<td>11/22/19</td>
<td>11/25/19</td>
<td>11/29/19</td>
<td>9NX3</td>
</tr>
<tr>
<td>N/A</td>
<td>N/A</td>
<td>12/09/19</td>
<td>12/10/19</td>
<td>12/13/19</td>
<td>9DX1</td>
</tr>
<tr>
<td>N/A</td>
<td>N/A</td>
<td>12/20/19</td>
<td>12/23/19</td>
<td>12/27/19</td>
<td>9DX2</td>
</tr>
</tbody>
</table>
Employees Claiming Exempt from Withholding

• Employees claiming exempt from withholding must complete new Federal and State withholding forms by Feb. 14, 2020. If employee fails to comply by the deadline, Institutions should default the employees withholding back to Single-0.

• Institutions may use Query report titled “BOR_PY_SPEC_FED_TAX_STATUS” for a listing of employees impacted. For employees with an effective date of Jan. 1, 2020 or greater on your report, no action is necessary.

• Please submit confirmation of completion to oneusgsupport@usg.edu by Feb. 14, 2020.
Time & Labor
Enrollment Matrix Expansion

- TL Matrix expanded to include Department, job code, TCD Group ID, Auto Meal Deduction, Web Clock, Taskgroup, and Task Profile ID.

<table>
<thead>
<tr>
<th>#</th>
<th>Paygroup Ending With</th>
<th>Department</th>
<th>Job Code</th>
<th>*Employee Type</th>
<th>*Time Reporter Type</th>
<th>TCD Group ID</th>
<th>Punch Reporting Template</th>
<th>Expansed Reporting Template</th>
<th>Auto Meal Deduction</th>
<th>Web Clock</th>
<th>Workgroup</th>
<th>Taskgroup</th>
<th>Task Profile ID</th>
<th>Time Zone</th>
<th>TL Approval Flag</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>H</td>
<td>H1000502</td>
<td></td>
<td>Hourly</td>
<td>Punch</td>
<td>TCDG180003</td>
<td>00EE_PUNCH</td>
<td>00EE_ELPSD</td>
<td>R000ED</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>EST</td>
<td>E</td>
</tr>
<tr>
<td>2</td>
<td>H</td>
<td>H1000213</td>
<td></td>
<td>Hourly</td>
<td>Punch</td>
<td>TCDG1800003</td>
<td>00EE_PUNCH</td>
<td>00EE_ELPSD</td>
<td>R000ED</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>EST</td>
<td>E</td>
</tr>
<tr>
<td>1</td>
<td>T</td>
<td>H1000469</td>
<td></td>
<td>Hourly</td>
<td>Punch</td>
<td>TCDG180002</td>
<td>18P_JOB00F</td>
<td>188_JOB00F</td>
<td></td>
<td>18HRDTV</td>
<td>18D_CAMPUS</td>
<td></td>
<td></td>
<td></td>
<td>EST</td>
</tr>
<tr>
<td>2</td>
<td>C</td>
<td>H1000469</td>
<td></td>
<td>Hourly</td>
<td>Punch</td>
<td>TCDG180002</td>
<td>18P_JOB00F</td>
<td>188_JOB00F</td>
<td></td>
<td>18HRDTV</td>
<td>18D_CAMPUS</td>
<td></td>
<td></td>
<td></td>
<td>EST</td>
</tr>
</tbody>
</table>
Enrollment Matrix Expansion

- ABS Matrix expanded to include Department and Job code
KABA Time Clocks

- Potential Time Clock User Group
  - Expect a quick survey from us reaching out for Technical and Functional Contacts
    - Backups
    - Your opinion
Benefits
TRS Start Date

- Census program was attempting to enter TRS start date as 1st of month instead of first day of employment
  - Example: Start date 8/12 but TRS start date is 8/1- would error out because the TRS start date is before the first day of work
  - TRS start date will now enter automatically as first day of employment
Who to Contact

• OneUSG Connect - Shared Services Center
  – Contact Information
    • 877.251.2644 or oneusgsupport@usg.edu
  – Payroll and HR Data Issues
    • Data did not update in Alight correctly
    • Guidance on data corrections
    • Data entry “how to” questions
    • Rescind/suspend retirement
    • Aon retiree health exchange escalations
Who to Contact

- OneUSG Connect Benefits - Alight
  - Contact Information
    - 844.587.4236 (US) or 312.843.5248 (International)
    - E-Service (Upoint/Alight’s ticketing system)
      Navigate to Manage My Benefits > Contact Us > Submit a Request
  - Employee Benefit Escalations
    oneusg.connect.escalations@alight.com
  - Financial Escalations (premium issues, BCAF, reconciliation)
    usgfinancialmanager@alight.com
Who to Contact

• OneUSG Connect Benefits / Alight
  – Appeals (initial appeals, status check, etc.)
  – Confirmations (elections, terminations, documentation receipts, etc.)
  – Update EE information with vendors
  – Tobacco surcharge status questions
  – Reinstatement requests
  – Haste enrollment requests
Who to Contact

• OneUSG Connect Benefits / Alight
  – Death claims for retirees (deaths for active employees should be processed in OneUSG Connect)
  – Retiree and survivor information/updates/questions
  – PIF issues (discrepancies in general deductions)
  – Benefits billing and direct bill questions (retirees, survivors, LOA, COBRA)
  – Issues with Open Enrollment 2020
Human Resources
FLSA Update

• The USO is developing materials to assist with implementing the new ruling
• SSC will be sending out queries this week to assist institutions with identifying impacted employees
• FLSA Data Changes Job Tool is forthcoming
Terminating Primary Jobs

• In order for a termination to flow to Alight, IDM, etc., you must leave the Primary Job Indicator on the record until after the termination action flows.
• You will then need to enter a Data Change row to change the Primary Job Indicator to Secondary.
Entering Multiple Data Rows

• If there are multiple rows that need to be entered for an employee, recommended practice is to wait until after the first action flows before entering an additional row.

• If multiple rows are entered on the same day, many times Alight’s file will abend or only pick up the top of stack row.
SSN Lookup

- Use the lookup feature to identify
  - Existing employee ID numbers
  - Primary Job Indicators
  - Employee status (active at or terminated from a OneUSG institution)

- Navigation is Workforce Administration > Personal Information > Biographical > Search by National ID

- Notify OneUSG Connect when you have SSN changes, notifications of name changes are not needed
Transfer Reminders

• SSC is responsible for data entry of transfers between USG institutions
• SSC monitors various systems, leave balances, etc.
• Submit a ticket as soon as a transfer is identified
• Separate tickets for Primary Job Flag changes are not needed, this step is included in the initial transfer ticket
• Be sure to submit transfer documents (PAR, Transfer Letter) as quickly as possible so that SSC can expedite the transfer process
Data Cleanup Projects

- Multiple Primary Job Flags
- Benefits Service Date and USG Service Date Mismatch
- Employee status mismatch with OneUSG and Alight (terminated with OneUSG, active with Alight)
- Pay Frequency Issues (employees with potential pay frequency issues)
- Mismatches between FLSA status and Pay Groups

Clean all the data?
Faculty Events
Reminder

• Create Tenure Data and Assigned Effort
  – When entering and/or updating please do not delete rows belonging to other institutions
  • Click on the ‘+’ button to add your row (if a blank row doesn’t automatically appear)
HRIS
W-2 Electronic Consent

• Due to the additional cost and risk associated with mailing W-2 statements, we encourage employees elect to receive their W-2 statements online through OneUSG Connect.

• For an employee to receive their 2019 W-2 electronically, they must consent to electronic delivery by **Tuesday, Dec. 31, 2019**.

• Resources:
  – Refer to the OneUSG Connect Communication distributed Nov. 6, 2019 for templates to share this information with your employees.

  Additional reminders will be distributed in Nov./Dec.

  – The job aid, *How Do I Submit My Consent to Receive an Electronic W-2 Form*, is available on the OneUSG Connect Support website, [https://www.usg.edu/oneusg_connect/](https://www.usg.edu/oneusg_connect/).

  **Select Employee Services > Self Service Training > Training for Employees > Employee Self Service – Pay.**
General Information
Historical Document Requests

There will be expected delays for fulfillment of documentation requests leading up to and during this tax season. This includes:

- All paystubs and W2s housed in OneUSG Connect or previous environments for retired and terminated employees.
- Current employees’ W2s and paystubs from prior to their institution’s conversion to OneUSG Connect.

Upon receiving requests, employees will be advised of the expected wait time to receive the requested documents via secure email.

Employees should be instructed to call OneUSG Connect Support directly to verify their identity.
Ticket Reminder

• Alight
  – When sending emails to the Alight escalation inbox oneusg.connect.escalations@alight.com, do not copy oneusgsupport@usg.edu
  – Multiple tickets are being created with Alight and SSC

• SSC
  – Submit all questions/inquiries to the oneusgsupport@usg.edu rather than emailing analysts directly
  – Responses could be delayed as many of our team members are traveling
  – We want to ensure that requests receive a quick response
Upcoming Events
Upcoming Events

• SSC Call Center Closed
  • November 13, 2019
  • 10:00am-11:00am

• Monthly Benefits Call
  • November 14, 2019
  • 2:00pm-3:00pm

• USO Thanksgiving Holiday
  • November 28-29, 2019

• In the Know (Abbreviated)
  • December 11, 2019
  • 11:00am-12:00pm
  • WebEx Event (invite sent out the week before)
Review Parking Lot
Wrap Up