In the Know
with OneUSG Connect

October 09, 2019
Facilitator: Jodi Frazier

✓ Muted on entry. Please remember to chat questions using the Q&A section
✓ Let us know if you have difficulty hearing
Housekeeping Items

- 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.
Agenda

- Fraud Prevention
- Release Information
- Commitment Accounting
- Payroll
- Benefits
- Human Resources
- HRIS
- General Information
- Upcoming Events
- Parking Lot Review
- Additional Q&A (if time permits)
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

• Direct Deposit – Ability to Change Direct Deposit in ESS
  – All institutions have implemented Multi-Factor Authentication (MFA)
  – Nine (9) Institutions have not yet requested their ESS for Direct Deposit to be turned on
  – Institutions should enable Self-Service so employees are responsible for maintaining banking info
Fraud Prevention

• Direct Deposit – Ability to Change Direct Deposit in ESS
  – For institutions to enable Direct Deposit:
    • Confirm implementation of MFA and request access via a letter from the CIO to ITS Senior Leadership
    • Implement communication plan
    • Provide refresher training
    • Stress urgency and importance to reduce this risk
Fraud Prevention

- **Direct Deposit – Practitioner Edit Access in OneUSG Connect**
  - Edit ability to change Direct Deposit removed from two roles affecting 400 practitioners
  - New role with edit ability is available for a limited number of practitioners.
    - Expectation is one person plus a backup
    - Monitored to ensure this ability is tightly controlled
Release Information
Release Information

• USG and GT leadership met recently to review the current status, timeline, and risks associated with the Cohort 6 deployment of OneUSG Connect.

• Meeting focused on outstanding development, overlapping testing cycles, and overall organizational readiness.

• Upon review leadership made the decision to extend the project timeline to March 22nd.
Release Information

• The significant portion of new functionality that benefits all institutions has been developed and will maintain its current implementation schedule on Dec 10\textsuperscript{th} (Release 5.20).

• Georgia Tech specific development items will adhere to the new rollout schedule on March 22nd (Release 6.00).
Proposed Master Schedule

- R5.2 - Build and Unit Test: Jul 29 - Oct 4
- R5.2 - System Test: Oct 7 - Oct 25
- R5.2 - Conversion: Oct 28 - Nov 1
- R5.2 - User Acceptance Testing: Nov 4 - Nov 25
- R5.2 - Go-live: Nov 28 - Dec 9
- R6 - Sprint 4 - Conversion: Aug 19 - Aug 30
- R6 - Sprint 4 - OneUSG & GT Extended Testing: Sep 1 - Oct 18
- R6 - Sprint 5 - Conversion: Sep 30 - Oct 31
- R6 - Build and Unit Test: Jul 29 - Oct 31
- R6 - Sprint 5 - Integration Testing (Critical): Nov 4 - Dec 20
- R6 - Sprint 6 - Conversion: Jan 3 - Jan 10
- R6 - Sprint 6 - User Acceptance Testing: Jan 15 - Feb 28
- R6 - Go-live - Pass 1 Cutover: Mar 13 - Mar 31
- R6 - EDW Integration Testing (Non-Critical): Nov 4 - Feb 28

Development Schedule Revised to end 10/4
Development Schedule Revised to end 10/31
Test Conversion Added

In the Know with OneUSG Connect
Release 5.20 Scope

- Benefits
  - TIAA Stabilization and Hardship Removal

- Careers
  - Branding
  - Onboarding - Equifax Compliance Center
    - No Integration
    - Limited to GSO & GT
  - Accurate Background Check Integration
  - Pre-Hire Provision and Security Role
  - Remove Social when “Not Hired”
  - Auto Rejection Email
  - PUM 28 Enhancements
  - Hiring Party Notifications
  - Hide “Applied” and “Rejected” from Non-Recruiters
  - Job Posting Read Only when Job Profile Exists
  - Search Chair Status of Applicants
  - Query – All Posted Openings
  - Remove Interviewers from Applicant Notification Page
  - Applicant Attachment Required

- Faculty Events
  - Degree Checkbox

- Payroll
  - Regulatory Tax Updates
  - Federal Tax Page Updates
  - NRA Earnings Code Updates

- Self Service
  - Add / Change Position
  - Decision Support for Termination
  - Improve User Experience

- Time and Absence
  - Detailed Leave Report
  - Enrollment Matrix Expansion
  - Task Profile on Timesheet
  - Document Attachment on Absences

- Workforce Administration
  - Visa/Citizenship Standardization
  - Profile Copy

- Commitment Accounting
  - Express Direct Retro
  - Encumbrance Enhancements
  - Accounting Adjustment Enhancements
  - Change Funding Enhancements
  - Remove Budget Retro Triggers
OneUSG Connect will be unavailable from 5 p.m. December 6 until 7 a.m. December 10, 2019.
Release 5.20 System Testing (Focus Testing)

- Manager Self Service (Add and Change Position)
- Commitment Accounting (Express Direct Retro & Encumbrances)
- Careers (Branding, New Functionality and PUMs)
- Faculty Contract Delivery
- Workforce Administration: Visa, Citizenship
- Payroll: Federal Tax Updates
- October 8-25
Release 5.20 UAT Schedule

• Core: 11/4 – 11/6
• Workforce Administration & Payroll: 11/15
• Commitment Accounting: 11/7 – 11/8
• Careers: 11/13 – 11/14
• Self Service: 11/11 – 11/12

UAT Sessions will be held at ITS Athens
Proposed 6.00 Items

- **Benefits**
  - TIAA & Alight Transition (GT)
- **Commitment Accounting**
  - Georgia Tech Budget Import (GT)
  - Budgeting of Multiple Components of Pay (Global)
  - New - Align Departments and Cost Centers (GT)
  - Effort Reporting (GT)
  - Encumbrance Support for Academic and Summer Pay (Global)
  - PERS_SERV_BOR - Payroll Accounting Archival (Global)
  - Employee Cost and Project Cost Report (GT)
- **Faculty Events**
  - New - Contract at New Hire (GT)
  - Faculty Contract Delivery Enhancements and Deployment (Global)
- **Workforce Admin & Payroll**
  - Academic and Summer Pay (Global)
- **Self Service**
  - System Manager Reporting tile enhancements (GT)
  - Hire Forms (GT)
- **Careers**
  - Onboarding (Equifax) Integration (Global)
  - Affiliate Access to Careers (GT) / Staffing Firms for GTRI
Commitment Accounting
Release 5.20 Updates

• MCOP and Encumbrances
  – KI9.2-014-CA: MCOP Encumbrances should be resolved in the 5.20 update
  – Department Budget Table will need entries for MCOP Earns Codes
    • Confirm that DBT has entries for MCOP Earns codes
    • MCOP Earns Codes that will distribute to the same Combo Code as REG will require a DBT entry to encumber (this is a change from prior training).
Payroll
REL 5.2 Payroll Updates

• Federal Tax page updates for Non-Resident Aliens
  – Income Codes aligned to IRS Income Codes provided on the GLACIER form
    • New Income Codes will be displayed with REL 5.2
    • Query developed to validate
  – Eligible to Participate check box no longer displayed
    • Logic has been create to populate this check box behind the scenes
    • Query developed to validate

• NRA Earnings Codes updated to reflect IRS Income Codes
  – NRA Earnings Codes for Income Code 17 inactivated
  – NRA Earnings Code for Income Code 20 created
    • Mapping to PeopleSoft Income Code updated
Payroll

REMINDER: Bi-Weekly Payroll Processing Updates

• Emphasis on Efficiency

• Minimal Changes
  - New Vacation Pay Out Request
  - New OneUSG Payroll Workbook

• OneUSG Communication dtd 10.03.2019 for more details
Payroll

• TAX – 3rd Quarter, 2019 Quarterly Payroll Tax Returns
  – Final 3Q2019 tax returns will be submitted to ADP Tax Services for processing today, Wednesday, October 9, 2019
  – 941 returns will be available on https://smartcompliance.adp.com/ later this month.
  – If you have questions, please contact the SSC Customer Support Team at oneusgsupport@usg.edu
Payroll

TAP – Tuition Assistance Program Reporting Update

• See OneUSG Connect Payroll Communication sent Tuesday, 09/17/2019 for details.

• Spreadsheets for 2019 Summer TAP reporting have been loaded to FTP for completion by TAP coordinators and are past due.

• SSC is still working with a couple of Institutions to complete.

• Expected consolidated report distribution this week.

Please contact us at oneusgsupport@usg.edu if you have questions or if you need additional 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>09/22/19</td>
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<td>11/16/19</td>
<td>11/18/19</td>
<td>11/19/19</td>
<td>11/22/19</td>
<td>9NB2</td>
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</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 11:00 AM</th>
<th>OneUSG Confirm Date</th>
<th>Pay Date</th>
<th>Pay Run ID</th>
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</thead>
<tbody>
<tr>
<td>10/01/19</td>
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<td>11/30/19</td>
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<td>11/29/19</td>
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</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>
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<tbody>
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<td>10/28/19</td>
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<td>11/01/19</td>
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<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>
</tbody>
</table>
Benefits
OE Resources

• Per BeNedra’s email communication from 10/3
  – Comparison Guides and posters will be delivered to institutions by 10/11
  – Electronic copy of the Comparison Guide and the OE presentation were attached to the email
  – USG website with 2020 OE changes is expected to be live 10/7

• Benefits WebEx, Thursday, 10/10 at 2:00pm
Dependent Audit

- Dependent Audit ended **Thursday, September 26**

- For employees who already began the verification process, an extension was granted to allow additional time to submit their verification documents

- For employees who did not respond, they have the ability to appeal the coverage termination and submit their eligibility documents

- Please direct employees to contact the Dependent Verification center by calling 844-587-4236 to start the appeals process

- Appeal process includes submission of the required documentation and can take up to 30 days to complete
Human Resources
Citizenship/Passport Standardization

**Current State**
- Country: USA
- Citizenship Status:
  - Native
  - Naturalized
  - Alien Permanent
  - Alien Temporary
  - Permanent Resident
  - Employment visa
  - Canadian Citizen
  - Other
  - Not Indicated

**Future State**
- Citizenship Country: One of 256
- US Status:
  - Foreign National Alien
  - US Citizen
  - US Lawful Permanent Resident
  - US Noncitizen National
  - Unknown
- Date Entered
- E-Verify Date
- Use Dummy Passport Number
Visa/Permit Standardization

• Visa Permit
• Country:
  - 100% “USA”
• Type
  - Select from the US visa types on drop down menu
  - List is updated
  - Will sort by Effective Date instead of Type

**All parking lot questions for this topic will be addressed after the presentation. Please feel free to submit a ticket with those questions to oneusgsupport@usg.edu**
Data Changes

• With the increased threat of scammers/criminal activity, remember to validate that requests for changes are legitimate

• 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?
FLSA Update

• The Department of Labor released a new salary threshold on 9/24/19 for the Fair Labor Standards Act (FLSA)

• The new threshold is $35,568 and effective 1/1/20

• The salary threshold is used in conjunction with the FLSA duties test to determine exemption status for employees

• The USO is developing guidance for institutions to complete a self-audit and implement the ruling
Alight/Critical Data Fields

- First Name <=20 characters
- Birthdate & Gender
- SSN
- Address Type, Address, State & Zip
- Citizenship Data (J1 Visa)
- Organizational Relationship
- Primary Job Indicator
- Intent to Retire
- Job Codes (GRA & Rehired Retirees)
- Reg/Temp Status
- Standard Hours / FTE

- Annual Benefits Base Rate (ABBR)
- Benefits Program and EFFDT
- Grandfathered RET Plans
- Grandfathered SUPL Plans
- Ret-Rehire Flag

➢ “NORET” and “Exclude from Auto-Enroll” flags are sent to TIAA as of 7/1/19.
➢ Changes made in Correction Mode should be promptly communicated to SSC Benefits Rep.
Alight/Data Impacts

• Primary fields that determine benefits eligibility:
  – Reg/Temp
  – Standard Hours/FTE
  – Benefits Program
  – GRA Job Code (907)
  – Citizenship (J1 Visa)
• Alight will question eligibility if they receive Reg/FT Status with Standard Hours less than 40
• ABBR does not determine eligibility, but it is used to determine salary based premiums
  – Alight notifies SSC when there are employees without an ABBR, but this is usually because there is another data element in question
Alight/Data Impacts

• Leave of Absence/Unpaid Leave With Benefits
  – Only action/reason that instructs Alight to bill employees for the full premium amount (EE and ER portion)
  – Do not use this code if the employee should only pay their portion of premiums
  – Difficult to correct billing if this code is used inadvertently

• Benefit Program is needed in Job Data for employees
  – Seeing new employees without a Benefit Program
  – Make sure the Effective Date aligns with the Hire Date

• Be sure to add a new Job Data row when there are Personal Data Changes
  – Use Data Change/Update Date for the action/reason code

• Review and update addresses when employee is rehired
  – Effective Date should be the same date as Rehire Date
Alight/Data Impacts

- Personal Data “Effective Date” should be the same as the Home “As Of Date”
Alight/Data Impacts

• Causes delays, negatively impacts the employee experience

• Causes coverage calcing issues on the Alight System for newly eligible employees

• Need to accurately offer an employee the options that they are eligible to receive

• Employees expecting to enroll in an HMO plan will not have that option available because the plan is service area driven

• System looks for a zip code with a valid Effective Date and doesn’t see it so available plans will not include the HMO plan
Parking Lot Question Update

• We tested ESS to make sure changes flowed to Alight without adding a row in personal data. We tested phone number, email address and home address. These all flowed over correctly.

• However, we do advise that institutions enter a data change row when practitioners make changes in personal data (recommended best practice). We have seen many cases where the change did not flow to Alight unless a data change row was entered in Job Data.
Correction Mode

• Correction Mode must be used as a last resort or on the same day before 5:00 when the data was entered

• Data changed in correction mode usually will not flow to Alight

• Best practice is to add new rows to correct historical data
  – Example: Historical budget rows are deleted, data will be out of sync because the row has already been sent to Alight

• USG Service Dates and Benefits Service Dates are flipping when correction mode is used, be sure to watch for this
  – Check the Override box next to the date field to correct the dates
  – Checking the Override box should prevent the date from flipping on future correction mode changes
Future Dated Rows

- Be sure to check for future dated rows when entering data into OneUSG, data may need to be updated.

- Receiving tickets where data elements are changing back to the prior values if the future dated row is not corrected.

- Example: Employee had a pay change and row was inserted between current row and future dated 7/1 merit row, the future dated 7/1 row was not corrected so the pay flipped to the rate listed on the 7/1 row.
Miscellaneous Items

• Leave balances for employees transferring to another USG institution
  – Do not zero-out employee leave balances, these will transfer with the employee
  – Only enter adjustments for partial VPOs, document the adjustments on the Transfer Letter

• When changing pay groups/frequencies, work closely with your payroll team so they can monitor employees closely during payroll processing
  – Be sure to review/consider items such as benefits premiums paid, pay already processed during the pay period, etc.
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)
Revised Job Tools

• Revised Job Tools:
  – Multiple Components of Pay Job Aid
  – Hire a New Employee Job Aid

• Job Tools are located under ‘Documentation’ at https://www.usg.edu/oneusg/training
HRIS
### Historical Data Queries in OneUSG Connect

- List of queries for common historical data requests

<table>
<thead>
<tr>
<th>Query Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BOR_HISTORICAL_JOB</td>
<td>Job Information</td>
</tr>
<tr>
<td>BOR_HISTORICAL_EMPLOY</td>
<td>Employment History</td>
</tr>
<tr>
<td>BOR_HISTORICAL_FEDTAX</td>
<td>Federal tax Information</td>
</tr>
<tr>
<td>BOR_HISTORICAL_PAYCHK</td>
<td>Paycheck Information</td>
</tr>
<tr>
<td>BOR_HISTORICAL_PAY_EARN</td>
<td>Payroll Earnings Information</td>
</tr>
<tr>
<td>BOR_HISTORICAL_PERS_PH</td>
<td>Phone Information</td>
</tr>
<tr>
<td>BOR_HISTORICAL_STATETAX</td>
<td>State Tax Information</td>
</tr>
<tr>
<td>BOR_HISTORICAL_NAMES</td>
<td>Name Information.</td>
</tr>
</tbody>
</table>
HRIS

Historical Data Queries in OneUSG Connect

• We will be sending out invites soon to discuss these queries in greater detail.

• Discussion Points
  ➢ What data is expected to be returned
  ➢ How and when to use the optional prompts
  ➢ Locating employees when you don’t know their Employee ID
  ➢ Any other questions/concerns you may have
General Information
Change Request

• Continue to submit change requests
  – Form can be located: [https://www.usg.edu//oneusg_connect/practitioner_services/model_change_request_information](https://www.usg.edu//oneusg_connect/practitioner_services/model_change_request_information)
  – Submit form via a ticket to oneusgsupport@usg.edu
  – Use the short description – Change Request

• We will be concentrating on the aging ones and working our way up to newer ones
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

• Monthly Benefits Update
  • October 10, 2019
  • 2:00pm-3:00pm

• ServiceNow Upgrade
  • October 17-18, 2019
  • 8:00pm-6:00am

• Common Remitter Practitioner Training
  • October 17, 2019
  • 2:00pm-3:30pm
  • Skype Session

• In the Know
  • November 13, 2019
  • 11:00am-12:00pm
  • WebEx Event (invite sent out the week before)
Review Parking Lot