What: Brown Bag Lunch Q&A
When: Wednesday, June 28, 2007
Where: CORE at 3812 N. Sante Fe, Ste 100, Oklahoma City, OK

HR Questions	Response
OETA would like to know if they are doing everything they should for a terminated/retired employee	PeopleSoft steps include: • Insert Termination row on Job Data with the effective date plus one day. • Insert a new effective dated row to terminate General Deductions other than Benefits. • Adjust any Comp Time to zero in Weekly Elapsed Time. • Agency sends information to EBC that employee is terminated. • Benefits General Deductions are terminated by EBC.
Department of Health asked how best to submit Help Desk cases	Either submit the request via email to the OSF Help Desk at helpdesk@osf.ok.gov for non-urgent non-priority requests, or call the OSF Help Desk at 405-521-2444. If the issue is urgent, please call the OSF Help Desk.
Department of Health asked about level changes to Positions on Position Data	Agencies maintain their own position data. They can insert a new effective dated row on Position Data for the respective position, use the appropriate Reason code, and update the Position values as required Always check with OPM liaison re: Position Management questions.
Department of Health asked if the Reasons an employee leaves the agency can be expanded to include more information, such as S01 Resignation, is because of returning to school, personal issues, moving out of town/state, etc., to assist them in their Workforce Planning and Employee Retention initiatives	OPM has a Human Resources Management Specialist designated to Workforce Planning and Retention—Ross Tripp. Agencies should work with Ross on how to gather this information from employees. The Exit Interview form is on line and should be utilized by the agencies. The Special Use Fields on MDC Job Data tab are very limited and may not provide enough space to do what an agency would want to do. Employees do not always want their reasons for leaving listed on their employment record. If an employee left for salary reasons and then is rehired by the same agency, or another agency, they may not want to address the initial separation reason.

HR Questions	Response
Department of Health asked two questions about Correct History: When will they get Correct History What if a correction is needed on a future dated row	Correct History is a very powerful tool that impacts records throughout the system. CORE maintains Correct History for the PeopleSoft HCM production system with very limited access even within the CORE team. Correct History should not always be interpreted as true correction of the history of a record. PeopleSoft is an effective dated system; once the effective date has occurred, the data is now considered "history." CORE's current practice for history correction is that certain fields cannot be corrected in history once a payroll has been processed and confirmed. Because of the effects on Payroll and on Financials, there are fields on the HR Job Record and Personal Data record of an employee that should not be changed in the history record. The policy is to have the agency add a row in the current pay period, correct what is necessary on the new row, and explain the correction (if necessary) on the MDC Job Data page in Remarks. The fields that are involved in the Payroll process are explained in the Refresher Course Manual on pages 14 and 15 under the section 'When to Use Correct History and When Not To.' Once a Correct History change is completed there is no audit trail and no explanation of where the information came from that may appear on the employee's Payroll Advice; the Extract the agency did for a particular month; or Payroll and Financials ends up with conflicting information for Account Codes, Departments, etc. Agencies can change any item in a record, and even delete a row if it is future dated. The only issue that has come up with future dated rows is the MDC Job Data page; this is a custom page for the State of Oklahoma and sometimes when fields such as Workers Comp, Division, Special Use fields, or Remarks have been changed, an error message comes back telling the user that Correct History is required to change the value. CORE is looking into fixing the problem. However, the entire future dated row can be deleted and the data reentered.
District Attorney's Council asked if an additional field could be added to Employment Data for 'Next Longevity Pay Date' in addition to the current 'Longevity Date' field, so it could be part of the data entry process	Payroll processes a report that shows when employees are due to receive the next Longevity payment. Some agencies are using the Special Use Date field on the MDC Job Data page, and keeping it updated with the date an employee's next longevity payment is due.

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Department of Corrections asked specific questions regarding Longevity length of service credit, etc., and how it was calculated	OPM published a guideline book on how to calculate Longevity, which is on both the OPM and the CORE websites. Tom Patt, Director of Compensation, should be contacted with any specific questions regarding Longevity calculations from the agency users. Longevity rules can be found at the OPM website at: http://www.ok.gov/opm/HR_Rules_and_Statutes/74-840-2.18.html.
Office of State Finance asked for the link to the sample Earnings Statement that is on line	The link is: http://www.youroklahoma.com/coreoklahoma/advice_descrip.pdf
Oklahoma Department of Transportation stated they like the new procedure for Detail to Special Duty, but question that if Positions are made Inactive, the Inactive Positions are not being picked up in the extract—a Help Desk Case has been opened but they have not heard a status	The new HRMS Training Manual updated at the CORE website (as of July 18, 2007) has the new Detail to Special Duty procedure. Making the Position inactive is an option and not a requirement.
Oklahoma Department of Transportation asked if the USA Flag could stay open all the time on the pages without having to click it open	This is a delivered design feature of a global system.
Department of Transportation asked if the production system time out feature could be extended longer than the current 60 minutes	This is a security design feature for Production.
District Attorney's Council indicated that when an employee terminates/retires and goes to another agency, they can no longer see the employee's information; this is especially frustrating when doing employment verifications, etc. They have to go to the files to pull the information; the legacy data conversion information is not helpful	Employment Verification questions should be referred to OPM for the history of the employee, or to find out where an employee is currently employed.
Department of Health asked that if agencies want a specific module or modules in PeopleSoft HCM, should they budget for it; plan to pay for it; etc.	If an agency is interested in a module, they should contact the Office of State Finance for information and direction.
Department of Health asked if there was a specific 'Workforce Development' module in PeopleSoft and if so, could the agencies help purchase the module	If an agency is interested in a module, they should contact the Office of State Finance for information and direction.

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Department of Health asked if there was a Performance Management (PMP) module in PeopleSoft and if so, could this module be used for tracking Employee Reviews	If an agency is interested in a module, they should contact the Office of State Finance for information and direction.
Department of Health asked if there was a Training Module within PeopleSoft that was going to be used, and if so, when	If an agency is interested in a module, they should contact the Office of State Finance for information and direction.
OSBI indicated that per House Bill 1185, several Positions no longer count as FTE for their agency (just OSBI is impacted); what else should be reviewed once the Position record has been done?	Complete the update to the Position Data record, and then do the update to Job Data for the employee in that position as necessary.
Department of Environmental Quality asked if the Earnings Distribution page on Job Data was a 'Live' page like Employment Data	The Earnings Distribution page is effective dated and retains history. The Employment Data page is not an effective dated page and reflects real time information. The Time Reporter hyperlink on Employment Data is effective dated and retains history.
Department of Mines indicated that there were many Run Control ID's in the system for reports and processes that they run, and now they are only using a few—can they get rid of the others that are not being used?	Please open a Help Desk Case for Technical review.
Department of Mines indicated the Run Control page to execute reports and processes has too many steps and wants to consolidate steps where possible	State of Oklahoma uses the delivered pages for Run Controls.
Open Topic: correcting Ethnic Group on Personal Data-Identity/Diversity page	The Identity/Diversity page in Personal Data is not an effective dated page. If a correction needs to be done to the Ethnic Group value, simply update the current value with a new selection and ensure the Primary Indicator check box is selected. Do not insert a row unless the employee is claiming two Ethnic values. If the employee is claiming two values, one must be Primary. Appendix F, *"Information to be used for the EEO-4 Report/Affirmative Action Plan,"* has been added to the HRMS Training Manual as of July 18, 2007, which can be found at the CORE website at http://www.ok.gov/coreoklahoma/ under Training.

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Open Topic: which pages are effective dated or not effective dated	The Personal Data-Identity/Diversity page is not Effective Dated. The Employment Data page is not effective dated. Pages that are effective dated show the last row as the most current row of information (e.g., Job Data pages; Personal Data-Name History; Personal Data-Address History; Personal Data-Personal History; Employee Tax Data; etc).

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When employees terminate and go to another agency, especially in the middle of a pay period, duplicate earnings and deductions can occur on the pay checks	Usually the gaining agency has to turn off 'Ok to Pay' on the paysheet, since the employee would receive BEA/RBA additional pay, and BAS deductions on the losing agency pay check. Users will have to coordinate with each other for which agency is taking what deduction, or providing BEA/RBA on the pay check for the employee.
DOC is having issues with duplicate overtime payments	Users need to be careful about data entry for Overtime.
Department of Mines asked about tax withholding for employees who indicate EXEMPT on a W-4 form, or for employees who change their withholding just prior to the Longevity process	As stated in training, Withholding of '99' no longer means no tax will be withheld; it can still take out some taxes; don't worry about the warnings when saving the record. The state does not report individuals to the IRS if they exceed 10 withholdings over a period of time Employees can change their W-4 withholding at any time; depending on payroll cycle the change may or may not be picked up until the next payroll cycle **DO NOT** touch the button on either Federal or State Tax Data that indicates 'Do Not Maintain Taxable Gross and Do Not Withhold Tax'; this causes other problems in Payroll processing.
District Attorney's Council asked about the fix for running split funded employees on an off cycle payroll, where the information does not show splits on the Funding Distribution report	One fix is in Production; pending a second fix after the new fiscal year. There will be an announcement to users when new report is published.
District Attorney's Council stated they are going to use 'Operating Unit' as one of their fields for Account Codes	A 'look up' customization has been done and is in Production which added three fields for Account Code table look up on Job Data/Earnings Distribution page.

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Office of State Finance asked for additional explanation on the Workers Compensation Report for the 'Experience Modifier'	Information provided by CompSource: "The National Council on Compensation Insurance (NCCI) is an organization recognized by most states that collects Workers' Compensation information for entities concerning their policy coverage and claims reported to carriers. Carriers report multiple items to NCCI including, but not limited to, payroll, premium and claim information. NCCI evaluates this data and develops a factor referred to as an Experience Rating Modification Factor, commonly referred to as an "EMOD". The EMOD is a factor assigned to a company that all carriers recognize and apply towards the premium rating algorithm. The factor can either reduce premium or increase premium, depending upon the company's loss history. The EMOD is applicable for 1 policy period and is re-promulgated annually using updated claim information. EMODS are generally promulgated 6 months prior to the next policy renewal effective date. Because NCCI evaluates full policy terms to determine an EMOD, an EMOD for an upcoming policy renewal does not consider current policy term data. The previous 3 full policy terms are considered to generate an EMOD. Following is an example: An insured renewed their policy 7/1/2007-7/1/2008. The policy years used to determine the EMOD effective 7/1/2007 were: 7/1/2003-7/1/2004; 7/1/2004-7/1/2005; 7/1/2005-7/1/2006. The 7/1/2006-7/1/2007 policy was not used to help determine the 7/1/2007-7/1/2008 policy because it was not a full policy term at the time of promulgation. NCCI has set certain parameters on who will qualify for an EMOD. At a very basic level, an insured who has maintained an average standard premium above $5,000 for the 3 subject policy years will qualify for an EMOD. Other qualifications exist but, hopefully, this will help give you an idea as to who will qualify. When NCCI has promulgated an EMOD, a copy of the EMOD is sent directly to the entity as well as the carrier of the entity. CompSource Oklahoma does not provide a separate notification to the entity of the newly promulgated EMOD. CompSource does include the renewing EMOD on the renewal information sent to the insured approximately 45 days prior to renewal."
Department of Environmental Quality HR members were told by their payroll representative that HR could not enter transactions until all payrolls were complete for the month	It is best to coordinate with your Payroll team for HR data changes during payroll processing.

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Department of Labor asked about options for tracking FMLA transactions to know how much time an employee has taken, charged to FMLA	Agencies that use the PeopleSoft leave system for Annual Leave and Sick Leave would use the FMLA TRC's. Agencies not using leave in PeopleSoft and dock employees pay for FMLA would only have the FMLA DOC TRC available.
Office of State Finance asked if there are any issues with multiple execution of the Update Tax Method process	This is no longer an issue with the change that went into effect where the new Tax Method process is automatically run whenever a calc is kicked off.
OK Indigent Defense System indicated that when insurance deductions are stopped they still appear on the Earnings Statement	The nightly BAS update will update health insurance deductions, either starting or stopping or changing; if the deduction has stopped, a Year to Date (YTD) balance would still be on the Earnings Statement.
Department of Corrections indicated that the field 'Budge Date' on the MDC Allocation extract is blank	The Budget date on mdc_allocations extract is being fixed and should be in production by 8/27/2007.