HRMS Refresher
Questions and Answers

January 11, 2007

Human Resources

1. Employee transfers from one agency to another, do you have to change personnel data?

   ANSWER: If the personal data have not occurred, no action is required. It is best practice to review all the data to ensure accuracy. How many times has an employee forgotten to inform HR that they have moved or have changed their phone number?

2. Is there a way to search by previous name?

   ANSWER: No, however, there is the capability to search by National ID or call the Office of Personnel Management to see if the new hire has previously been a state employee.

3. Once and action has been posted in PeopleSoft, what are the steps that OPM goes through in order to approve those actions? Teri Hunter – OTA

   ANSWER: OPM has an audit list that shows the pending transactions to be approved, rejected or returned, just as they did in legacy.

Time and Labor

4. Do you have to run Time Administration before you run payable Time?

   ANSWER: YES, the Time Administration process validates time entered and moves that time to Payable Time if there are no exceptions and if the time doesn't need approval.

5. What is the timing of the accrual change when the employee has an anniversary date?

   ANSWER: In reference to the OPM's letter dated 2-2-07, State Agencies must comply with the usage of the effective date to be used in PeopleSoft for transitioning employees to the higher Leave Accrual levels. If you have not already started using the beginning of the Anniversary Month as the effective date, starting with the February Accruals you should start moving the employees to the next level in their Anniversary month greater than 5 years, but less than 10 years, greater than 10 years, but less than 20 years and 20 years and over. This procedure is not to be made retroactive.

   If you desire further information, you can contact Mr. Tom Patt at OPM, 522-0422. Link to OPM Letter on the CORE Website: http://www.ok.gov/coreoklahoma/

6. If the Time Reporter Page remains active after an employee has left the agency; how does the agency not continue to generate monthly leave statements for the employee?

   ANSWER: When an employee terminates and you are using PeopleSoft to manage your Annual and Sick leave balances, you will need to terminate the Leave Plans to stop leave statements from printing after an employee terminates. The Time Reporter page has nothing to do with Monthly Leave Statements.

Payroll

7. When payroll comes across two (2) jobs for an employee, is there any way to tell which job you are looking at without going to Administer Workforce?

   ANSWER: No, the job code is not on the payline or the check detail, only the "begin" and "end dates" being paid.

8. Why is administration fee not attached to enrollment?

   ANSWER: In order to report the $25.00 state paid SoonerSave and the Administrative Fee separately, the enrollments must remain separate. This is a requirement from SoonerSave. SoonerSave do not want the Administrative Fee reflected on the statements.
   TIP: Always enroll or terminate the Administrative fee along with SoonerSave elections under the Savings Plan Elections.

9. Why can't payroll look up by social security number?

   ANSWER: Payroll Users can search by Social Security Number using the following navigation:
   Home > Compensate Employees > Maintain Payroll Data (US) > Inquire > Search by National ID

10. Leave Without Pay – How do we make corrections to LWOP that has already been processed thorough payroll? Lytle Caldwell – Health Department

    ANSWER: This is one of those cases where you would need to change or delete the time in Weekly Elapsed Time. Run Time Administration, and approve the LWOP rows that will have negative hours. These negative hours will then go through on the next payroll run and add back the hours to the paycheck.

11. Please clarify calendar leave cutoff for annual leave maximum.

    ANSWER: In the PeopleSoft System for those Agencies using the rolling year plan, (employees may accumulate more than the maximum annual leave accumulation limits shown in the schedule (Merit Rules), provided that such excess is used during the same year in which it accrues). Once an employee reaches this limit the system will not accrue leave until the employee has used the time to bring his/her balance below the max. The employee can not be paid for more than the

Annual Leave maximum as provided in the Merit Rules. The same applies for an employee that is transferring from one agency to another, the amount paid plus the amount transferred can not be more than the 240 or 480 cap.

For those Agencies that lose anything above the respective 240/480 at the end of the year. Once the time has been posted for December and the leave accrued for December, you need to run a leave accrual process using the 1-1 date of the current year to roll off the excess leave, letting the employees start the year with 240 or 480 as a beginning balance.

January 23, 2007

Human Resources

1. Please develop a termination check list, (like the payroll processing sheet) that includes all the steps. Elizabeth Sharon – Department of Mines

   ANSWER: This is a great suggestion, and the HRMS Team is in the process of developing a Termination Check List. When the list is complete, an announcement will be made.

2. When searching for a vacant PIN by job code in the Develop Workforce> Manage Positions>, we need the list of PINS for that job code that comes up after the search to include whether or not the PIN is open or filled, so that I don't have to click on every PIN to find a vacant PIN number. Currently, you have to click on the first PIN and go to the incumbents tab then if that one is filled you have to either push the back button twice and then go to the next PIN or go back to inquire and restart the search entirely by entering the job code. It would be helpful if it had the PIN, Title and Open/Filled and location and also whether that PIN was Temporary, Seasonal or Permanent. Jasmin Manschel – Tourism

   ANSWER: There is a report in the HR Reports:

   Home > Reports Menu > Ocp Reports > HR > Agency incumbent by Pos (0077)

   This report will help you immensely, as well as the other reports already developed in HR. The view for the position management menu as you requested will not be modified. When a modification of this sort is requested, it becomes a customization, which is not only quite expensive, but when a system is upgraded, it would have to be another cost in the upgrade to keep the customization.

3. OPM Bridge – Does the losing agency need to make OPM-14 before building bridge to new agency?

   ANSWER: Yes, however, if there is a timing issue to expedite the hiring for the gaining agency and an OPM-14 cannot be printed, OPM will print out the OPM-14 and send to the losing agency. Just contact your OPM liaison and request the OPM-14.

4. How do you adjust service date to have the correct date when there is a break in service?

   ANSWER: The service date is the leave accrual date. It should be the total amount of time the employee is entitled to with the State of Oklahoma and this determines what leave group they belong in at the time of hire or rehire with your agency. The Employment Data page is open to users and this date can be adjusted at any time as necessary. There is no change in how service dates are determined now that we are using PeopleSoft, the same method is used as was used in legacy system. If you need clarification on determining an employees' service date, please check with your OPM liaison.

Time and Labor

5. Can we please develop a more time efficient way to process leave, other than running a whole off-cycle pay roll? Now that the system has slowed, since the conversion of Group 4, it is very time consuming. Elizabeth Sharon – Department of Mines

   ANSWER: All sick and annual leave must be confirmed through payroll. This cannot be changed and maintains the integration inherent in the system. However, there are steps that can be taken to improve efficiency in your agency. Annual and sick time can be reported weekly by the employee and can be posted to Time and Labor well in advance of running the payrolls.

6. Leave Accrual Reports are cumbersome process and data is always "behind", i.e., only a snapshot for previous period and can't determine 'real time" balances. Adjustments should be "counted" during month entered and not "in limbo' until next Leave Accrual Report Run, or Leave Accrual Reports should be allowed to run several times between off-cycle and regular payrolls to capture adjustments. (Is this possible if Accrual Process Date can be 01-28-07, 01-29-07, and 01-30-07)?

   ANSWER: The accrual is designed to be a balance as of the end of the period. The process is currently designed to allow all time for the period to be posted on one off-cycle and confirmed through a payroll before the leave accrual process is run. Ideally this time could be reported by employees and posted on a weekly basis to ensure all time for the month is reported. It is inefficient to continually be posting leave time, confirming off-cycle payrolls and running multiple accruals without having a set schedule for the agency to shoot for. The use of one off-cycle payroll to process leave time would eliminate the 'always being behind' as long as the agency enforced the timely reporting of time by the employee and or manager.

7. We need a way that once leave is posted and Time and Labor run, that we can get a current leave balance without having to get the beginning balance and manually subtract leave used since the first of the month. Need this on an individual or an agency report. Lisa Newmeyer – CompSourceOK

ANSWER: All specific reports or data needed should be detailed and submitted in a help desk case to ensure it is assigned and resolved. The more detailed the request the better. Include in the request the specific fields to be reported and the criteria of who should be reported and when. The CORE team is currently looking at creating a custom online tool that can be used to view the current balance including what has been posted to Time and Labor. To submit a help desk case e-mail: helpdesk@osf.ok.gov.

8. How do you monitor the longevity date change when there has been a break in service?

   ANSWER: The longevity date, on the Employment Data page, is not an effective dated page and is open to users at all times. The longevity date on a new hire, or someone who has had a 30 day break in service, and must wait two (2) years before getting a longevity check, is the date they are newly hired or rehired with the State of Oklahoma. If the employee has had previous service, then a tickler file of some sort must be maintained by your agency to keep track of this verified service. Please refer to the Longevity Guidelines provided by OPM and is located on the OPM website for appropriately crediting and documenting creditable service toward longevity. OPM Website: http://www.ok.gov/opm/HR_and_Employee_Services/index.html

9. In Time a Labor what do you mean when you refer to buckets?

   ANSWER: A "bucket" is more of a long-time payroll term. Often the earnings or deduction balance for any given earning or deduction is stored in a field and referred to as going into a "bucket" where you see month-to-date, quarter-to-date and year-to-date balances. This could also be true for balances of leave. It is simply where the total value is combined and summarized.

10. Office of Juvenile Affairs has terminated employees that are posting holiday pay. How do we get this issue resolved?

    ANSWER: If the employee is already terminated, the time reporter status needs to remain active until payroll has finished processing the pay. If holiday was posted in error, then it would need to be deleted off weekly elapsed time, the employee would need to be added back to the static group and Time Admin would need to be run to delete the holiday time. In checking the files, we see that all these issues have been resolved. However, if this happens in the future, since each scenario could be different, it would be easiest if a help desk case was created where notes and a resolution could be posted.

11. How do we get real time leave balances for each employee?

    ANSWER: Real time balances can best be achieved if the leave time is reported by the employee on a weekly basis, posted to Time and Labor in a timely manner then processed by Time Admin. You can then use the balance from the leave accrual page showing the balance as of the end of the last pay period and subtract any leave time posted (use the GO_PAY_TIME_BY_EMPLID public query) that is in an "Estimated – Ready for Payroll" status. If time has not been reported by the employee or posted and processed in Time and Labor, then this process of capturing real time balances would not be accurate.

12. Is the team planning on redesigning the Leave accrual pages? It is hard to determine what vacation has been taken because you have to scroll through potentially hundreds of lines of data.

    ANSWER: We understand the scrolling is not ideal and it will only get worse as more amore data is added with each accrual run. <u>Helpful Hint</u>: Do not click on "View All". While viewing only one line of data, you can click on the Find Link, next to the small yellow arrows in the blue bar. Type in VAC and the first row of vacation will be displayed. You can then use the arrow to navigate to the next or previous accrual rows.

13. When you confirm a payroll and the accrual of leave process with the main payroll, do you have to do the leave accrual process on the same day?

    ANSWER: NEVER RUN LEAVE ACCRUAL UNTIL <u>*ALL*</u> PAYROLLS FOR THE PERIOD ARE COMPLETE!!! This includes all supplemental and off-cycle payrolls! Plan on only running leave accrual process once after you have confirmed that all payrolls for the period are confirmed, and before you start the next months payroll processing.

<u>Payroll</u>

14. Within an agency one of their divisions administer comp time on a separate system. How can Water Resources Board begin using PeopleSoft to track Comp Time for these 20 employees?

    ANSWER: Once these employees have been identified, you would need to enroll them in the "Compreg" comp plan, put in their balances through weekly elapsed time and run Time Admin. Once the plan has the balances updated, they will be able to start posting time taken. Then from this point on, post all earned and taken through the system and it will show up on the monthly leave statements.

HRMS Refresher
Questions and Answers

<u>January 30, 2007</u>

<u>Human Resources</u>

1. When an employee has a concurrent employment with a Higher Education Institution, (say someone is teaching a night class), do you still do all described for concurrent employment, i.e., Does it matter if the second employing agency is Higher Ed?

   ANSWER: Currently, Higher Education institutions are not on the statewide PeopleSoft application; therefore, a concurrent job would not be necessary. Once Higher Ed is converted, then yes, a concurrent job would be required.

<u>Time and Labor</u>

2. If an employee has already had a paygroup change on the previous payroll, what pay group should be used with the next payroll, old or new?

   ANSWER: Paygroups are used by Payroll, not in Time and Labor. If a paygroup is changed during the month and stays an "M" for monthly main payroll or "S" Supplemental payroll, both paygroups will create a payline, however they will be combined for one check. If the paygroup changes from an "M" to and "S" or just the opposite, it will pay part of the period on the Main monthly payroll and part on the Supplemental payroll, thus creation of TWO (2) different checks. <u>You will need to watch and make sure you do NOT double pay the Benefit Allowance and take the Benefit Deductions double</u>. You can make the compensation changes mid month and the system will calculate money due employee correctly and wait until the first of the period for the paygroup change to ensure you do not overpay the Benefit Allowance or take out too much in deductions.
   Comments: Mid month pay group changes … more tests in works.

3. Which report shows how much comp time an employee is losing?

   ANSWER: Compensation Time Age Report
   Navigation: Home> Report Menu> OCP Reports> TL > Comp Time Age Report 0063

4. Is there a report for Comp Time Earned?

   ANSWER: Yes, it is a public query called, Go_Comp_Day_Bal. If you have access to time administrator queries then you should be able to access this public query by following this navigation:
   Home > PeopleTools > Query Manager > Use > Query Manger > Go_Comp_Day_Bal

Base Benefits

5. Can you post in advance?

   ANSWER: Do not post time for the following month until all payrolls for the current period have been confirmed. No leave time should be posted for future dates until the time has actually been taken.

   If this question is regarding changing annual leave plans to the next level due to the employee reaching the 5, 10 or 20 year anniversary, then no, do not post in advance. Ideally, after the payrolls for the prior period have been confirmed and the leave accrual process for the prior period has been run and leave statements have been printed, then leave plans for the next period can be changed. If this is done once per month, there won't be too many to do at once and accuracy on the leave statements will be maintained.

   Leave Plan Report Navigation: OCP_BB 0136

6. On leave plans, can the employees' benefit plan (different annual leave levels) be changed for the whole year or must they wait until their month to be changed?

   ANSWER: It is best for the agencies to change the employees that need to be moved up to the next level of leave during the month that the employee should be moved and not future date any rows for level changes.

   The report to use to verify the benefit time change for the benefit levels is: Home>Reports Menu>OCP Reports>BB>Leave Plan Enrollment Report - OCP_BB 0136

7. With adjustments after posted, what is the process?

   ANSWER: When there is a need to change posted time for sick leave, annual leave or any of the comp time plans. <u>Do not insert another row with the negative amount</u>. Actually change or delete the incorrect value. This may create an offset row if the time was already processed by payroll. This offset must be approved as soon as Time Admin has been processed so it will be confirmed on the next payroll. Balances will be updated when the offset is approved and processed through payroll and after the next leave accrual is processed.

8. Can you run approval any time?

   ANSWER: If this question is regarding approval of time in Time and Labor, yes, time can be approved any time but ideally should be checked and approved after each Time Administration run.

Payroll

9. Do you have to make a deduction for each kind of refund?

   ANSWER: All deductions taken through payroll need to be refunded through the payroll system, to correctly update balances and ensure the W-2 earnings are reported correctly. Each deduction that is to be refunded should be the same deduction code that was deducted. For example, if you are refunding an insurance code 0550, the refund would use the 0550 code.

10. One time deduction code, does it default to RBO?

    ANSWER: "RBO" is an earnings code for Remaining Benefit Allowance override. There are NO defaults when you are using a one time deduction code.

11. What situations do you have to create pay sheets?

    ANSWER: Terminations from the previous month, Retirement from the previous month, Supplemental Pay and Missed on previous payroll where no time was posted in Weekly Lapsed Time.

On-Line Check

12. After reviewing an on-line check, do you need to delete to ensure the pay sheet does not create and error for the next payroll?

    ANSWER: Yes, failure to delete an online check will result in your payroll not confirming. If on an off cycle process, it can actually create a check that will need to be cancelled.

Garnishments

13. We had a 55% child support order. Why and when do you put percent and how does that affect child support?

    ANSWER: If you have a child support that is in arrears, on the Garnishment Spec Data 1 tab, you need to set the garnishment support type to "arrears". On Garnishment Spec Data 3, you need to select the radio button "%DE + Amount" and put in the amount specified. On Garnishment Spec Data 6, put in the state code for the Garn Law Source, and then on the Garnishment Rule ID select "Support/Depndnts/12 Wks Delinq".

14. How do we match the differences in the Worker's Comp Report?

    ANSWER: This current report is being revised by the Technical Staff, the format is changing and the totals will reconcile.

Payroll to AP Process

15. Advantage to sending Credit Union (0104) Report to Credit Union?

    ANSWER: By creating this file and sending it to the Credit Union, it allows the credit union to post the deposits to the employees account without manual intervention, thus making the funds available to the employee faster with less chance for error.

16. When will the agencies have the capability to not have to send checks to the credit unions?

    ANSWER: The Office of State Finance is working on vendor EFT. Since we already are creating a file for the Credit Unions, it is possible that they could be the first set up.

17. When will agencies not previously using Legacy be converted to Time and Labor? Norma Floyd CLEET

    ANSWER: A date has not been determined for all Agencies to start using PeopleSoft to maintain Sick and Annual Leave balances. All Agencies currently use the Time and Labor System. Our longevity payments and leave without pay must be entered into weekly elapsed time in Time and Labor.

18. Can e-mail addresses be added for individuals who are not PeopleSoft users? If so, how?

    ANSWER: Yes, when you are at the Process Scheduler Request page, you need to select EMAIL on the Type* box, click on the Distribute To icon and it should move you to the Distribution Detail Page.

    The Email information is at the bottom if you select Email on the type, and the boxes are open for input.

    Complete the following:
    - **A) Email Subject**
    - **B) Message Text**
    - **C) Uncheck the Email with Log**
    - **D) Type in Email Address**

    Navigation: Process Monitor> Choose Report> File Send> enter e-mail addresses> send report.