SUBJECT: GeorgiaFIRST HRMS Project Release 3.22

PURPOSE: Release of PeopleSoft Tax Updates 06-D & 06-E, as well as BOR fixes and enhancements (see details below).

TECHNICAL IMPACT:

DATABASE: Your PeopleSoft HRMS database has been upgraded with BOR Release 3.22, 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

Modifications to Existing BOR Functionality:

Accomplishment Table – New license code of PSYC – Psychologist is added. In additions, 9 degrees are also added to the ACCOMP_TBL table. Degrees added are:

Degree	Description
AD	Associates Degree
DENGR	Doctor of Engineering in Electrical Engineering
DHS	Doctor of Health Science
MD CM	Doctor of Medicine & Master of Surgery
MHCBA	Master of Health Care/Business Administration
MMSc	Master of Medical Science
MPA	Master of Physician Assistant
MRE	Master of Religious Education
MSD	Master of Science in Dentistry

Action/Reason Table – Two new action/reason sets are added: 1) Retirement with Pay – Involuntarily/Disability Ret' and 2) Promotion – Job Re-classification. This modification was in response to Model Change Request #672.

Advice Print (DDP003) – The program is modified to correctly report earn codes when no home address is present. Before the modifications, incorrect earn codes was printed on the advice if no home address was present for that employee.

Age Monthly Maint - Dependent (BORR019A) – This program is modified to only include Dependents who have a birthday during the specified period.

Benefits Statement (BORR016) – This program and the run page are modified to allow user to select multiple EMPLID's when run. These modifications were in response to Model Change Request #653.

Check Print (PAY003) – The program is modified to correctly report earn codes when no home address is present. Before the modifications, incorrect earn codes was printed on the check if no home address was present for that employee. This program was modified and released via Interim Release 3.20b (9/20/06) to resolve the issue with the escape sequence code used at one of the GaFIRST institutions.

Comprehensive Benefits Report (BORR025) – This program is modified to use the Month End Date entered by the user to pull data instead of using the system date. Trace file of the program is also modified to identify potential data errors.

Create ERS/DEFCON Reports (BORIF28F) – This report is modified to 1) remove SSN from the report; 2) move the File Date from the report section to the header; and 3) add a new column of Benefit Plan. These modifications were in response to Model Change Request #658.

Create Federal File (MMREF) (TAX960FD) – The run control page is modified by PeopleSoft Tax Update 06-E to remove the diskette reporting option section from the page. The program is also modified to remove all references to reporting data on diskettes as beginning with data for tax year 2006, W-2 data may only be submitted electronically to the Social Security Administration and no types of physical media such as diskettes will be accepted.

Create W-2c US (MMREF) (TAX922US) – The run control page is modified by PeopleSoft Tax Update 06-E to remove the diskette reporting option section from the page. The program is also modified to remove all references to reporting W-2c data on diskettes as effective January 1, 2007, files of W-2c data in the MMREF-2 format may be submitted only electronically to the Social Security Administration and no types of physical media such as diskettes will be accepted.

Edit ERS/DEFCON Temp Table – PeopleCode behind the page is modified to correctly report employee birthdates. Before the modifications, when a change was made to the temp table, birthdates of employees who were born in 30's and 40's would be changed from 19XX to 20XX.

Employee SSN Verification (TAX109) – This program is modified to correctly populate the Multiple Request Indicator field with the required "000" values. Prior to the modifications, this field was incorrectly blank-filled.

Garnishment Spec Data 2 page – The search record of the Vendor ID field on the Garnishment Spec Data 2 page is modified to include the vendor status in the search results display. Addition of the vendor status field can help user easily select the active vendors. Before the modification, user was not able to quickly identify the active vendors from the inactive one. User would need to go to the Vendor Table to verify the status instead. This modification was in response to Model Change Request #663.

Health Benefit Elections page – The Health Provider ID link is modified to direct users to the correct section of BCBSGA website to search for health providers. The PeopleCode behind the page is also modified to generate the correct warning message when the benefit plan is changed from a HMO plan to a non-HMO. Before the modification, if an employee was enrolled in a HMO health plan with the Health Provider ID populated, user would get an erroneous warning message about "Deleting All Checks" when changing the benefit plan from a HMO one to a non-HMO.

Identity/Diversity page – This page is modified to hide the National ID group box completely from the view if user has the new permission list BORAWFDS29 assigned to their roles. This modification was in response to Model Change Request #647.

Load External Time Clock Data (BORI016 and BORI016A) – These two programs are modified to clean out the errors from the trace file and include them in the .PDF report instead. These two programs were modified and released previously via Interim Release 3.20a (9/7/06) and 3.20c (10/5/06).

My System Profile page – This page is modified to remove the Alternate User section.

Premium Reconciliation Report (BORR25A) – This program is modified to correctly reconcile the BORR025 and BORR022 reports. Two new fields are also added to the working table PS_BORR025 to aid the reconciliation.

School Table – This table is modified to correct the typo in the SCHOOL_TBL for Baylor College of Dentistry, school code of 00494801.

Teacher's Retirement Audit (BORR095) – This report is modified to identify exceptions based on one cent difference instead of a dollar difference.

W-2c Audit MMREF US (TAX923US) – The run control page is modified by PeopleSoft Tax Update 06-E to remove the diskette reporting option section from the page. The program is also modified to remove all references to reporting W-2c data on diskettes as effective January 1, 2007, files of W-2c data in the MMREF-2 format may be submitted only electronically to the Social Security Administration and no types of physical media such as diskettes will be accepted.

Modifications to Existing PeopleSoft Processes and Reports:

6559 Transmittal Totals Rpt (TAX914) – This program is eliminated because employers may no longer submit W-2 data on magnetic media such as tapes or diskettes, Form 6559 is no longer required.

BOX field on PS_TAXFORM_BOX table – The field length has been changed from 3 to 4 in order to accommodate the new two-character alphabetic codes for W-2 boxes 12 and 14 for tax year 2006. The changes are also made to the Tax Form Definition Table and Tax Form Printer Parameters pages.

Update Year End Reporting Info (TAX504) – This program is modified to allow this process to be run at any time during the year as well as in preparation for year-end reporting. Three new input parameters are added to the run control page:

1. Year End Process checkbox. If this box is selected, all employees will be selected for processing. If this box is not selected, only specified employees will be selected for processing. The default value of this checkbox is "not selected".
2. Effective Date for Updates field. This field will default to the system date when a new run control ID is entered. The field cannot be blank, but can be changed to a date other than the system date (entered as MM/DD/YYYY) if desired.
3. Employee Status grid. This feature is visible only when the Year End Process checkbox is de-selected. When running this program other than for year-end processing, the user may specify which employees should be selected for processing by payroll status (e.g., terminated employees only).

W-2c US/Territories Print (TAX920US) – This program is modified to correctly print an "x" in box "C" on Form W-2c when there is a change in or correction to the employee's name suffix. Prior to the modifications, if the employee name suffix (e.g., Jr.) was the only change entered, Form W-2c was created without printing the "x" in box "C", and the employee's previously reported name information was not printed.

Year End Date Audit Report (TAX910AU) – This program is modified to correctly exclude amounts from voided W-2 records from the grand totals. Prior to the modifications, the report correctly identified an employee's voided W-2 record with an asterisks (*), but the amounts from the voided W-2 record were incorrectly reflected in the report's grand totals.

Self-Service Functionalities

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

Self Registration

- o Modifications of the look-and-feel of the self service application so that it is closely resembled to the look-and-feel of the employee portal side of the application
- o When registering for a new account, the zip code validation has been modified to validate against the first five digits of the zip code only. This will eliminate the current error message that an employee receives in Self Registration when entering their five digit zip code if they have a nine digit zip code in Personal Data.
- o Additional instructions have been added to the Self Registration pages to further explain what should be entered in the required fields.
- o A temporary password sent to an employee through the "Email New Password" link will expire on initial login and will require the employee to create another password.
- o During Self Registration, the employee will be required to confirm his/her e-mail address once it has initially been input.
- o The "Email New Password" link has been moved so that it is separated from the section that allows employees to answer the secret question and reset their password. Previously many employees thought that the "Email New Password" link was part of the password reset process.
- o Issues with the Back Button not taking customers back to the previous page have been corrected.

Employee Home

- o Verbiage on the Employee Home page in Self Service has been modified to :
  - ▪ Remove references to Changing E-mail Address under Personal Information Home
  - ▪ Remove references to Compensation History under Payroll and Compensation Home.
  - ▪ Remove references to Changing Dependent Information under the Benefits Home

Benefits Home

- o Verbiage was modified on the Benefits Home page to eliminate references to FSA claims information
- o Dependent Personal Information has been modified to only allow employee's to update their dependent's contact information.

Personal Information Home

- o Modifications of the address page so that incomplete address will not be saved
- o Modifications of verbiage to the notification email sent out to the employee whenever a Name Change or Marital Status Change request is received

Payroll and Compensation Home

- o Addition of another line of verbiage to the W4 changes page
- o Changing the Default Address to 'HOME' on the W-2 Reissue Request page
- o Removal of Compensation History
- o Modifications to the PeopleCode behind the Payroll and Compensation Home page so that the default label of viewing paycheck is "View Paycheck". Currently the default label is "View Payslip" if a new employee who has not received their first paycheck at that institution.
- o Modifications of the warning message received when a W4 change is made in the middle of the payroll process

Worklist Related
- o Modifications to the workflow settings so that the Payroll Administrator will NOT receive the email notifications for the Name Change and Marital Status Change requests

Miscellaneous

- o Removal of the Alternate User section from the My System Profile page
- o The hand symbol will no longer be visible when employee's mouse-over the SSN field. The hand symbol was mistakenly causing employees to click on this field.

Security Fixes and Enhancements

Modifications to Model Security:

BORAWFDS29 (Adm Workforce Dept Sec- Mnt RO) – This new permission list is created in response to Model Change Request #647. This new permission list can be assigned to any custom user role to restrict user assigned to that role from viewing the National ID section on the Identity/Diversity page.

BORHSS20 (User Self Service) – This permission is modified to remove the Compensation History section from the Self Service application.

HR Query Access Group – The HR Access Group under the BOR_QUERY_TREE is modified to add the EMAIL_ADDRESSES table to the group to allow HR users to be able to query against the EMAIL_ADDRESSES table. Before the modifications, only Recruit Workforce users had access to that table.

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 240 – Stopping COBRA – Revised Step 1 on page 1 to add a new note that the Coverage End Date is not updated when you save the Participant Term page, but the new termination date is noted on the Health Benefits Election page.
- HR 205 – Hiring a New Employee – A new General Information section has been added on p. 6 to the procedure for employees with an out-of-state HOME address to clarify what steps need to be followed when hiring a new employee or modifying an existing employee.
- HR 430 – Running the populate Tenure Data Process – Added more information to the items updated on the Tenure Data page in the Description section on page 1.
- PAY 545 – W-2c Processing – Step 12 was revised from selecting the MMREF Reporting Parameters to verifying that the MMREF Reporting Parameters are correct.

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:

- Foundation Table Changes/Additions – (Documentation>Foundation Table Changes/Additions)
    - o Foundation Table Changes/Additions - FY07.02 – 12/11/2006
    - o Spreadsheet to Calculate Faculty Rate – 12/11/06

- HRMS Self-Service – (Project Information>HRMS Self-Service>eApps Project Phase 1
  - Employee Self-Service Help document (updated)
  - Self Service FAQs

- Known Issues – (Documentation>Known Issues)
  - KI0067 – Inserting 1/1/06 row for Tax Form ID W-2 in the Tax Form Definition Table prior to Release 3.22 scheduled for December 15, 2006.

NEXT SCHEDULED RELEASE: The next regularly scheduled release for Version 8 – 3.23 – is tentatively scheduled for January 12, 2007.