

HCM USER GROUP

4-6

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HCM User Group Agenda

- 2:00 – 2:10 User Group Welcome
- 2:10 – 2:15 PERS Updates - David Breckenridge
- 2:15 - 2:45 Local Tax Overview – Deloitte
- 2:45 - 3:15 HCM Benefits – Pam Perry and Staff
- 3:15 - 3:45 Position Changes: Reason Codes and effects on Job Data - Mary Walker
- 3:45 - 4:00 Questions

2



2009 User Group Meetings

Tentative dates:

June 1st

August 24th

October 19th

December 2nd

3

Deloitte.

A Discussion of Employer Local Income Tax Withholding Responsibilities

Ohio DAS
April 6, 2009



**Introduction to the State of Ohio
Local Income Tax and School District Income Tax Directory**

**Click here to go directly to the
Local Income Tax and School District Income Tax Directory**

- General Information
- Liability for Local Income Taxes
- Liability for School District Income Taxes
- Determination and Calculation of Tax Liability
- Payment of Local Income and School District Income Taxes
- Reporting of Local Income Taxes
- Reporting of School District Income Taxes

GENERAL

Section 9.42 of the Ohio Revised Code provides for the deduction of municipal income tax from wages of school and public employees. It says "the state and any of its political subdivisions or instrumentalities shall deduct from the wages or salaries of public employees, as defined by section 9.40 of the Revised Code, and employees of school districts, the amount of municipal income tax levied upon the income of the employee." The law further states that the Director of Administrative Services shall establish procedures for the deduction of municipal income taxes.

This Local Income Tax and School District Income Tax Directory [392K] contains the policies and procedures that are used by the State of Ohio in administering how these taxes are determined, calculated, withheld, paid and reported. In addition, there is a listing which is current as of the publication date of each of the various local income and school district income taxes which are applicable to State of Ohio employees showing address, telephone number, deduction code, rate, reciprocity and county.

This directory is only available via the Internet and is published for the use of the various agencies of the State of Ohio for withholding local income and school district income taxes for its employees. We include information for those municipalities or school districts in which our employees work or live to the extent that we have been notified by the municipalities, school districts or other sources. We cannot guarantee that every applicable tax in the State of Ohio is included or the rates listed are always current. Requests for changes to this information should be addressed in writing to:

Paul Lebica
DAS State Payroll Services,
30 East Broad Street, 29th Floor
Columbus, Ohio 43215-3414
Phone 614 466-9327



for Contractors/Vendors for Government Entities for State Employees for the Public

HRD > Payroll Administration Office >

Local Income Tax & School District Income Tax Directory

Updated June 22, 2007

Municipality or School District	County	Phone	Deduction Code	Rate	Credit
VILLAGE OF ABERDEEN P.O. BOX 579 MT. ORAB, OH 45154	BROWN	800-779-3165	FQM	1	1
VILLAGE OF ADA CENTRAL COLLECTION AGENCY 205 W. ST. CLAIR AVE. CLEVELAND OH 44113- 1503	HARDIN	216-644-2070	FK1	1.15	1
ADA SCHOOLS SCHOOL DISTRICT INCOME TAX P.O. BOX 182388 COLUMBUS OH 43218- 2388	HARDIN		V78	0.75	
VILLAGE OF ADDYSTON INCOME TAX DEPARTMENT P O BOX 72 ADDYSTON OH 45001	HAMILTON	513-941-1040	FGX	1	1
ADENA LSD P O BOX 182388 COLUMBUS OH 43218	ROSS COUNTY		VBA	1	
CITY OF AKRON INCOME TAX DIVISION 1 CASCADE PLAZA 11TH FLOOR	SUMMIT	330-375-2290	F01	2.25	1

<http://das.ohio.gov/hrd/localtax.html>

LIABILITY FOR LOCAL INCOME TAXES

Employees incur primary local income tax liability based upon the place where they work. Secondary liability is based upon where they live.

1. For employees working exclusively in one location, taxes will be withheld at the full rate for the particular municipality.
2. For employees working in more than one location, taxes will be withheld and prorated in relation to the time spent working in each location.
3. Secondary tax liability requires that tax withholdings be made for the place of an employee's residence provided that the municipality of residence has a tax and to the extent that it is not already covered by a reciprocal tax credit from the work location.
4. If there should be a question as to the proper rate or allocation of tax, payroll officers should communicate directly with the municipalities involved.

LIABILITY FOR SCHOOL DISTRICT INCOME TAXES

Employees incur school district income tax liability based upon the school district in which they live.

Form W-4 Employee's Withholding Allowance Certificate OMB No. 1545-0074
 Department of the Treasury Internal Revenue Service **2009**

► Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

1 Type or print your first name and middle initial: _____ Last name: _____ 2 Your social security number: _____

Home address (number and street or rural route): _____ 3 Single Married Married, but without at higher Single rate.
Note: If married, but legally separated or spouse a nonresident alien, check the "Single" box.

City or town, state, and ZIP code: _____ 4 If your last name differs from that shown on your social security card, check here. You must call 1-800-772-2213 for a replacement card.

5 Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2) **6** _____

6 Additional amount, if any, you want withheld from each paycheck **6** \$ _____

7 I claim exemption from withholding for 2009, and I certify that I meet both of the following conditions for exemption:
 • Last year I had a right to a refund of all federal income tax withheld because I had no tax liability and
 • This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.
 If you meet both conditions, write "Exempt" here: _____

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Employee's signature (Form is not valid unless you sign it.) _____ Date: _____

8 Employer's name and address (Employer: Complete lines 8 and 10 only if sending to the IRS.) 9 Other use (optional) 10 Employer identification number (EIN)

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Form **W-4** (2009)

Ohio Department of TAXATION Employee's Withholding Exemption Certificate IT-4 Rev. 5/07

Print full name _____ Social Security number _____

Home address and ZIP code _____

Public school district of residence _____ School district no. _____
(See The Finder at tax.ohio.gov)

1. Personal exemption for yourself, enter "1" if claimed _____

2. If married, personal exemption for your spouse if not separately claimed (enter "1" if claimed) _____

3. Exemptions for dependents _____

4. Add the exemptions that you have claimed above and enter total _____ 0

5. Additional withholding per pay period under agreement with employer \$ _____

Under the penalties of perjury, I certify that the number of exemptions claimed on this certificate does not exceed the number to which I am entitled.

Signature _____ Date _____

Welcome to the Ohio Department of Taxation

Ohio.gov

Ohio Department of Taxation Online Services - The Finder



Welcome to Ohio's Tax Finder

- [Municipal Tax](#)
- [School District Income Tax](#)
- [Sales and Use Tax](#)
- [Tax District Summary](#)

Important Tips

- general overview
- tips and information we recommend you read before getting started
- assistance while using The Finder

Email this page | Printer-friendly

http://www.tax.ohio.gov/online_services/thefinder.stm



ESSPRODWEB01

The Finder

- Sales and Use Tax
- School District
- Municipal Tax
- Tax District Summary**
- Contact Us
- Login

Tax District Summary

This site provides tax information for all addresses in the State of Ohio. Choose one of the following options:

Lookup Tax Rate

- ☞ Address
- ☞ Zip Code (5-digit or 9-digit)
- ☞ Latitude/Longitude

Upload Databases - Registered and logged in users may get the appropriate tax rates applied through this secure application.

- ☞ Registration
- ☞ Upload/Return File Instructions

The Finder | Contact Us | Exit | Privacy Policy

https://thefinder.tax.ohio.gov/StreamlineSalesTaxWeb/default_taxdistrictsummary.aspx



ESSPRODWEB01

Lookup By Address

The system has successfully matched the address you entered:

Input Address (Modify)	Found Address
Address: 30 East Broad Street	Address: 30 E BROAD ST
Suite, Apt, Lot:	Suite, Apt, Lot:
City: Columbus	City: COLUMBUS
State: Oh	State: OH
Zip Code: 43215-	Zip Code: 43215-3414
	Physical City: COLUMBUS

Sales and Use Tax				
County	State Tax Rate	County Tax Rate	Transit Tax Rate	Total Tax Rate
Franklin with transit:	5.50%	0.75%	0.50%	6.75%
School District Income Tax				
COLUMBUS CSD (2503):	0.00%			
Municipal Income Tax				
COLUMBUS (18000):	2.00%			

Enter New Address/Date ?

Sales & Use Tax:
For sales and use tax purposes, in conformity with the Streamlined Sales Tax Agreement and the Mobile Telecommunications Sourcing Act, vendors and sellers may rely on this information for use in the collection of sales or use tax based on the date used for the search. By providing this information, neither the State of Ohio nor the Ohio Department of Taxation assumes any liability for any errors or omissions, or in any other respect. If you feel there is an error or have questions regarding the information you have received, please e-mail the Department of Taxation at

https://thefinder.tax.ohio.gov/StreamlineSalesTaxWeb/AddressLookup/lookupByAddressResults_TaxSummary.aspx?m=0309-...

The Finder - Lookup By Address Results - Tax Summary

Thefinderhelp@tax.state.oh.us.

School District, Municipal:

Excluding tax penalties imposed by the Ohio Department of Taxation, neither the State of Ohio nor the Ohio Department of Taxation assumes any liability for any errors or omissions, or in any other respect. Please note that the Ohio Department of Taxation cannot waive additional tax or interest due from an error. However, if a tax filing error occurs based on this system providing incorrect information, no penalty will be imposed or if a penalty is imposed it will be removed. If you feel there is an error or have questions regarding the information you have received, please e-mail the Department of Taxation at Thefinderhelp@tax.state.oh.us.

[The Finder](#) | [Contact Us](#) | [Exit](#) | [Privacy Policy](#)

https://thefinder.tax.ohio.gov/StreamlineSalesTaxWeb/AddressLookup/LookupByAddressResults_TaxSummary.aspx?m=0309-...

PAYMENT OF LOCAL INCOME AND SCHOOL DISTRICT INCOME TAXES

1. Payments for local income taxes withheld will be made to the municipality or its duly authorized representative on a bi-weekly basis.
2. Payments are made within two weeks of the end of the bi-weekly or monthly collection period. The final payment for the calendar year is made upon completion of the reconciliation of all local income tax records.
3. Payments for withheld school district income taxes are made bi-weekly to the State of Ohio Department of Taxation. The final payment for the calendar year is made upon completion of the reconciliation of all school district income tax records.

REPORTING OF LOCAL INCOME TAXES

1. The State of Ohio will provide an annual Return and Payment of Local Income Tax Withheld report to the municipality or its duly authorized representative upon completion of the reconciliation of all local income tax records. Due to the large number of municipalities involved, a standardized State of Ohio form is used for reporting rather than local forms which might have been provided.
2. An annual report listing each employee's gross earnings and the amount of local income tax withheld for the calendar year will also be provided.
3. In addition, each county seat will be furnished with the County Tax Rosters Report for the preceding calendar year. If the county seat has no local income tax, the reports will be sent to the largest municipality in the county which does have a local income tax. The reports have the following listings:
 - a. County of Employment Roster - employees who work in the county but pay no local income tax in the county.
 - b. County of Employment and Residence Roster - employees who work and reside in the county but pay no local income tax in the county.
 - c. County of Residence Roster - employees who live in the county but do not pay any local income tax in the county.

REPORTING OF SCHOOL DISTRICT INCOME TAXES

Information on total amounts by school district are included with the bi-weekly payments to the State of Ohio Department of Taxation.

Payroll Tax Review

***Ohio Department of
Administrative Services***

Final Report

December 17, 2008

W-2 Review

Scope Area	Sub Process	Observation	Implications	Recommendations
Box 18 – Local wages, tips, etc.	General Configuration	<ul style="list-style-type: none"> ➢ Based on the documents provided which describe the amounts to be reported in Box 18 of the W-2, except as described below we agree with the calculations approach as document. ➢ Also see the Observation comments under Box 20 – Local Reporting, below. 		

W-2 Review

Scope Area	Sub Process	Observation	Implications	Recommendations
Box 18 – Local wages, tips, etc.	Disability Benefit Payments	<ul style="list-style-type: none"> ➢ The State provides disability benefits for employees who become disabled. Employees are not required to pay for this disability benefit plan; it is completely funded by the State. ➢ Such payments are generally payable to employees for up to 1 year, although some employees may be eligible for disability benefits beyond 1 year. ➢ Payments under the State disability plan may commence after the employee is absent from work for 2 weeks (10 business days). The amounts paid under this program are based on a percentage of the employee's wages (typically 70% of base wage). ➢ For the first 2 weeks, employee may use accrued sick time or vacation time to receive paid time off. Also, once receiving the disability pay, employees may supplement their wages up to 100% by using accrued sick or vacation time. ➢ It appears that such Disability payments are currently considered taxable wages to employees for federal, state and local income and FICA tax purposes, regardless of how long such payments are made. 	<ul style="list-style-type: none"> ➢ Effective July 1, 2007, the definition of wages subject to Ohio Local income taxes (per ORC 718.03(A)(2)(a)(ii)) excludes any amount included in wages if the amount constitutes payment on account of sickness or accident disability. Therefore, disability benefit payments made by the state should be excluded from Ohio Local wages and taxes to the extent the locality follows the Ohio Uniformity Code for Local Wage definition. ➢ Employees who use accrued sick pay to receive wages while on sick leave may also have such amounts excluded from local taxable wages, including the supplement amounts paid once an employee begins receiving the disability program benefits. 	<ul style="list-style-type: none"> ➢ Exclude all disability wage payments from Ohio Local wages and taxation, which generally will include: <ul style="list-style-type: none"> • Payments made under the disability plan which begin 2 weeks after the employee first become sick or injured; • Payments made to employees from accrued sick leave, whether paid during the first 2 weeks of the employee's absence or as a wage supplement to the employee's disability pay following the 2 week period. ➢ Excludible wages do not include any amounts paid from accrued vacation time.

W-2 Review

Scope Area	Sub Process	Observation	Implications	Recommendations
Box 19 – Local Income Taxes Withheld	General Configuration	<ul style="list-style-type: none"> ➢ The State plans on reporting in this box the amount of local income taxes (LIT) actually withheld and remitted, based on the local(s) jurisdiction in which employee works (or resides). ➢ This treatment appears appropriate with no further changes required. 		

W-2 Review

Scope Area	Sub Process	Observation	Implications	Recommendations
Box 20 – Local Reporting	Ohio Municipalities	<ul style="list-style-type: none"> ➢ This box will correspond to the Ohio local jurisdiction(s) to which the employee's local income tax withholding were remitted. ➢ Per discussions with DAS, the Agency Payroll Officer provides new-hire employees with various documents to be completed by employee, which include identification of city/town of work site, as well as, their resident and school district information for all local income tax withholding. ➢ The State's internal policy regarding local withholding is based on information provided by the employee with regard to work-site and resident. If information is not provide by employee, local income tax rates are set to zero. ➢ DAS does courtesy withholding for local city income tax when an employee's resident municipality tax rate is higher then the work location tax rate. 	<ul style="list-style-type: none"> ➢ Local income taxes are to be withheld from employees' gross earnings and remitted by the employer for all employees where work is performed. The state could have exposure to pay local income taxes (and fines and penalties) not withheld to localities where employees have been performing services. ➢ Employees who work outside of there resident jurisdiction do not file a local tax return with their work site municipality unless a refund is expected. Under reporting of taxes to employee's work-site location can result in audit by the local jurisdiction. 	<ul style="list-style-type: none"> ➢ DAS should review its policies with regard to process used by Payroll Officer's for set-up and/or updates of employee information. ➢ Consider establishing training for the Agency Payroll Officer's on local withholding tax information. ➢ Consider creating an automatic system default for local work jurisdiction based on agency location until valid information is received by employee.

W-2 Review

Scope Area	Sub Process	Observation	Implications	Recommendations
Box 20 – Local Reporting	Ohio Municipalities	<p>> DAS payroll system has the capabilities to capture multiple work site locations for each local taxing jurisdiction in order to bifurcate employees' wages based on hours worked. In order for this process to work correctly, the hours for each employee needs to be loaded in to the system by locality.</p> <p>> Currently, the state's process is based on an exception rule: Employee's hours are coded based on regular frequency and only coded to a different earning code (vacation, sick, etc.) when hours per week are different the standard set-up.</p> <p>> There are some Ohio agency's Payroll Officer's who allocate hours based on work location for the group of employee's under their assignment on a regular frequency. Note: These employee's seem to be those in positions that are highly visible in the mobile workforce (i.e. retired judges, elected officials, etc.).</p>	<p>> Ohio localities require reporting of wages and withholding of taxes based on where an employee is performing services.</p> <p>> In general, Employers are required to report wages and withhold local income taxes after an employee has worked in an Ohio local taxing jurisdiction for 12 or more days.</p> <p>> The state could have exposure to pay local income taxes (and fines and penalties) not withheld to localities where employees have been performing services.</p>	<p>> Consider establishing training for the Agency Payroll Officer's along with education at the employee level on providing to the payroll support team when work is performed outside of their standard work location.</p> <p>> Identify the employee groups who generally work in multiple local tax jurisdictions and require multi-local tax jurisdiction reporting of hours for these employees.</p>

Appendix: Additional References

Corrected Slide

Definition of a Day for Purposes of the 12-Day Calculation

❑ Regional Income Tax Agency Rules & Regulations

Chapter 6:00; Payment of Tax

Section 6:02; Collection at Source/Requirements for Employer Withholding

- Paragraph E(4)(b)(iv); For purposes of the 12-day calculation, any portion of a day worked in a RITA municipality shall be counted as one day worked in a RITA municipality.

❑ City of Akron Income Tax Rules and Regulations

Article VI; Collection of Tax at the Source

Section A; Duty of Withholding

- Paragraph 6(d)(2); For purposes of the 12-day calculation, any portion of a day worked in Akron shall be counted as one day worked in Akron.

❑ City of Columbus

Based on discussions with a Representative of the City of Columbus

- Any portion of a day worked in Columbus counts as one day toward the 12-day withholding threshold.

Withholding for Over the Road or Route Drivers

- ❑ Central Collection Agency Rules & Regulations
 - Article 8:00; Payment of Tax
 - Section 8:02; Withholding Collection at Source
 - Paragraph (E)(4) Over the Road Drivers
 - Over the road intrastate drivers and other similarly situated employees reporting to a terminal, warehouse, or office in a taxing community must have a minimum of 25% of wages withheld and allocated to the taxing community where the terminal, warehouse, or office is located.

- ❑ Deloitte Tax representatives had discussions of this topic with the following individuals during 2008:
 - Kevin Robison, Assistant Administrator, City of Columbus
 - Mark Taranto, Administrative Manager, Regional Income Tax Authority
 - Bob Meaker, Administrative Manager, Central Collection Agency

- ❑ Each of these contacts indicated that while most municipal codes, rules & regulations do not provide for Intrastate Route Drivers in a similar fashion to the Central Collection Agency above, there is an informal agreement among all Ohio Municipality Tax Administrators that the following approach will be accepted.
- ❑ A minimum percentage of each Driver's wages (the percentages range by city from 10% to 25%) should be withheld and deposited in the city where the Driver's terminal, warehouse, or office is located (the Driver's normal starting point).
- ❑ The remaining percentage of each Driver's wages should have withholding done for the Municipality where the Driver resides.
- ❑ The employer should submit something in writing to the municipality where the terminal, warehouse, or office is located and have the plan approved by that Municipality. If the employer is subsequently challenged by another Municipality, they can provide a copy of the approved arrangement and the other city should not pursue it further.

Odds and Ends

- ❑ Most Ohio Municipalities *do not* require the filing of individual returns, which means that if employer withholding is not done, the chances of non-payment by individuals increase.
- ❑ Typical Failure-To-Withhold penalties are 100% of the amount that should have been withheld.
- ❑ Much can be learned by reading Municipal Tax returns and their instructions – Columbus Form IR-22 for example:
 - Wages paid to workers under the age of 18 are exempt. If the employer withheld and deposited local taxes, the youth can obtain a refund using Form IR-22.
 - If your residence is not located within a Municipality, you can obtain a refund for days that worked that were not spent in a municipality ("days-in-days-out").

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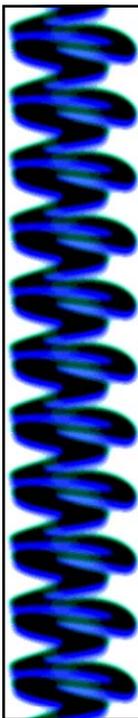
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HCM Benefits

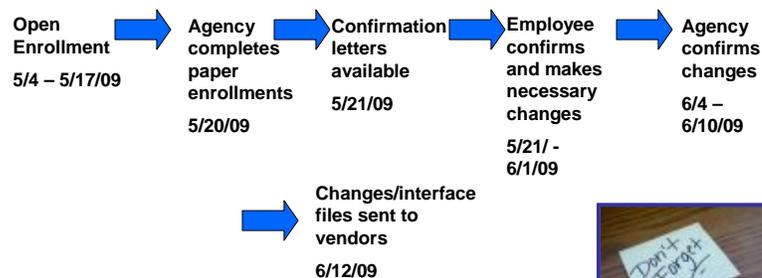
Pamela Perry
HCM Benefits Manager

HCM Benefits

- Open Enrollment
- Timeline and Changes
- Benefit Summary Page
- Removing Dependents
- Dependent Eligibility Audit
- COBRA Stimulus Package

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Open Enrollment Timeline



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New Hires During Open Enrollment

- Between now and July 1, 2009 please process the New Hire and Enrollment Events for new employees
- Employee will also be eligible to change during Open Enrollment

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Changes to Look For When Using E-Benefits

- Spousal Surcharge
- Changes to the Enrollment Forms and Confirmation Forms
- Final Confirmation through EBenefits



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Benefit Summary Page

Benefits Summary

PAMELA PERRY

To view your benefits as of another date, enter the date and click Go:

03/01/2009

(Not an application message) This is used to hold translatable text displayed by the Web application Benefits Summary. It is used to display instructions regarding changing the Summary "As Of" date.

Plan of Benefit	Plan Description	Coverage Level	Coverage Begin Date	Monthly Employee Rate
Medical	DeltaHealthPlan HMO	Family	03/01/2009	\$319.00
Dental	Delta Dental PPO	Family	02/01/2004	\$0.00
Vision	Vision Service Plan	Family	02/01/2004	\$0.00

Supplemental Benefit Plans	Supplemental Plan Description	Amount (Employee/Spouse)
FLMGA	Florida EA Plan-Tax Adv	\$20.04
SMPLP1	Prudential Ins Deep Life	\$12.50

Employees can change this date to 7/1/2009 and it will show their benefits as of that date and confirm any changes made during Open Enrollment

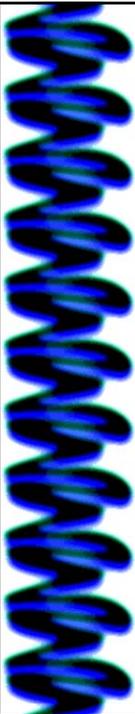
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Removing Dependents

- Remind employees the need to remove any dependent that should not be covered. This includes:



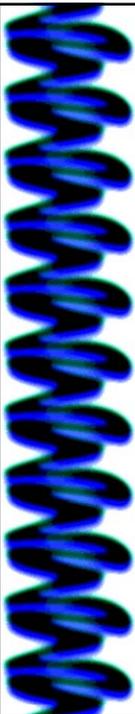
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Examples of Persons NOT Eligible for Coverage as A Dependent:

- A spouse from whom the employee is legally divorced or separated
- Dependents age 19 to 23 not enrolled in an accredited school
- Same sex partners
- Live-in boyfriends or girlfriends
- Parents or parents-in-law
- Grandchildren (unless employee is the court-appointed legal guardian)
- Married children
- Children older than age 22 who are not disabled
- Employee, spouse or child currently in the military service.
- Adults under guardianship of employee
- Common law spouse in which the relationship began after October 10, 1991
- A child who is eligible as an employee of the state or who receives health care coverage through their own employment
- Current and former stepchildren who do not reside with the employee more than 50 percent of the time
- Any other members of your household who do not meet the definition of an eligible dependent

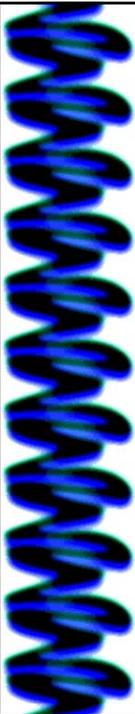
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Dependent Eligibility Audit

- The State of Ohio is in the process of identifying a vendor to conduct a comprehensive Dependent Eligibility verification for the benefit plan year beginning July 1, 2009. It is imperative that all employees, regardless of whether they carry dependents on their benefits coverage, understand who qualifies as an eligible dependent.

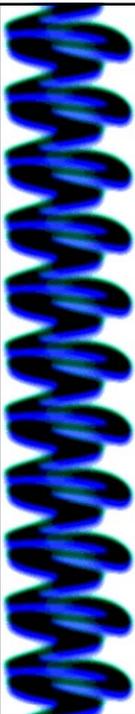
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Dependent Eligibility Audit

- As a first step in the verification process, agencies should provide all employees a copy of the attached:
 - Letter to Employee
 - ‘Explanation of Dependent Eligibility’,
 - the Explanation of Dependent Eligibility confirmation statement, and
 - The ‘Frequently Asked Questions’

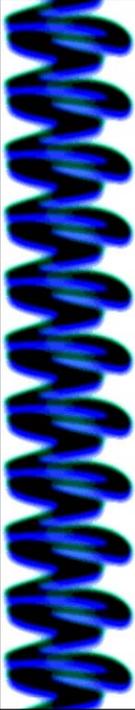
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Dependent Eligibility Audit

- Agency Human Resources offices should track and record employee confirmations to ensure they have received a confirmation statement from each employee by Friday, April 24. *Agencies that have employees out on a leave of absence should also make sure that confirmation statements are obtained from these individuals.*

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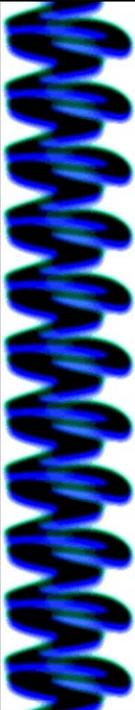


Dependent Eligibility Audit

- Employees that need to make changes to their dependents or health plan will be able to do so during open enrollment from May 4 to May 17.



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Dependent Eligibility Audit

- *Remember:*
The dependent eligibility verification process will begin AFTER the new plan begins on July 1, 2009. Employees will receive joint communications from the Department of Administrative Services (DAS) and the vendor that will provide a description of the verification process and the instructions to assist with the process. A toll-free number will be provided for any questions. Ineligible dependents found on the state's health plan after July 1, 2009, will be removed and the employee will be required to reimburse the state for the costs of any claims incurred.

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Dependent Eligibility Audit

- *Additionally:*
Employees should understand that enrolling an ineligible dependent(s) may be considered fraud, and could result in disciplinary actions up to and including removal. In addition, the state may decide to initiate court or collections action for any fraudulently paid monies.



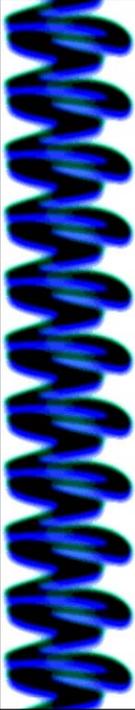
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COBRA STIMULUS PACKAGE

- Notice requirements based off termination dates:
 - 09/1/08—02/16/09
 - 02/16/09—12/31/09
 - Send to former employees and their spouses
 - » Spouses with a different address must be sent separate notice
 - » Not required to send separate notices to dependent children
 - Include “subsidy waiver form” and affirmation form
- **Target Date:** loaded and ready by April 10; sent during week of April 13

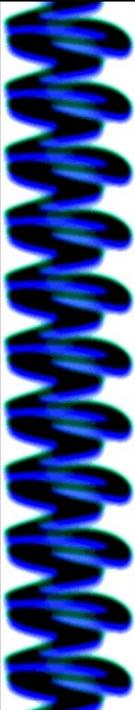
44



COBRA STIMULUS PACKAGE

- Max coverage period (even for individuals who picked up coverage during special “election period”) is 18 months from EE’s original loss of coverage

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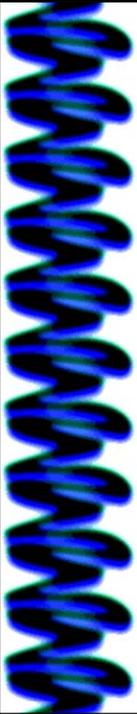


COBRA STIMULUS PACKAGE

TIMELINE:

- 09/01/08: EE must be involuntarily terminated on or after this date to qualify
- 03/01/09: First date EE may receive subsidy payment
- 03/19/09: Model notices from DOL
- 04/18/09: State must push out notices to impacted EEs by this date
- 06/17/09: Special enrollment period for subsidy ends
- 12/31/09: EEs terminated after this date do NOT qualify for the subsidy

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Questions?

- Statistics for Benefits:
 - 18 Out of Sequence Events
 - No EE with Family Coverage and No Dependents
 - 58 Events Assigned/Notified Over 31 days (out of 1094)

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HCM Position Management

Mary Walker

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Topics

- Position Management Reminders
- Position Reason Codes

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POSITION REMINDERS

- **THE 'POSITION CHANGE' ACTION SHOULD ONLY BE USED IN JOB DATA FOR ACTIONS THAT ORIGINATE IN POSITION MANAGEMENT.**
- **Coming Soon:** EVERY row in Position and Job Data will have to have a Reason Code before it can be Saved.
 - No more rows with blank Reason Codes.

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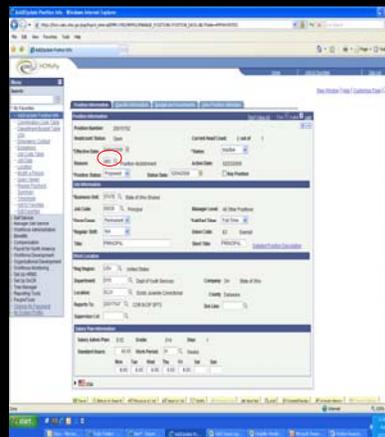
Position Reason Codes

- Position Abolishment (ABO)
- Conversion (CNV)
- Class Plan Change (CPC)
- Department ID Change (DPC)
- General Information Change (GIC)
- Job Re-Classification (JRC)
- Position Location Change (PLC)
- Part-Time Standard Hours Update (PTS)
- Position Re-Classification (RCL)
- Position Status Change (STA)
- Title Change (TTL)

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Position Abolishment (ABO)

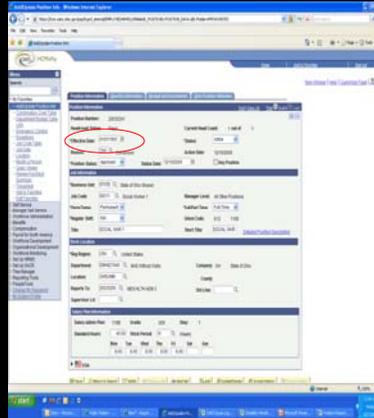
- Can be used on vacant positions to indicate abolishment
- **PLEASE** reuse position numbers (PNs) whenever possible.



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Conversion (CNV)

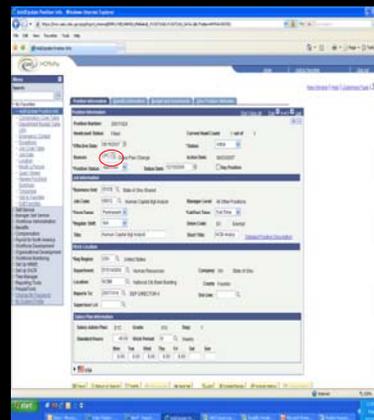
- Do **NOT** use this Reason Code
- Reason Code was only used during conversion to OAKS
- CNV rows are **always** dated 01/01/1901



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Class Plan Change (CPC)

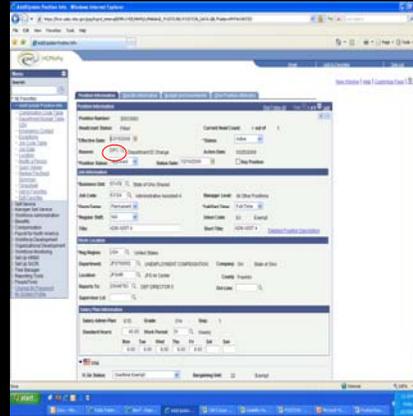
- **Only** use when a class plan change occurs
 - Ex: When the Department of Administrative Services reclassified the Personnel Officer series of positions as the Human Capital Management Analyst series.



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Department ID Change (DPC)

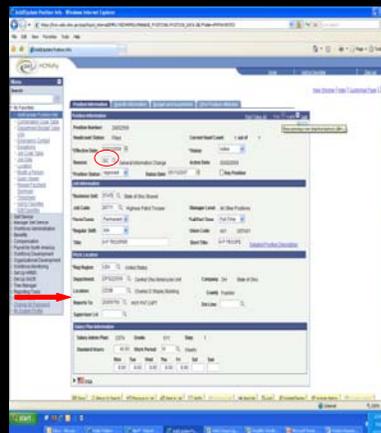
- Use when changing a position's Department (Dept) ID
- **Reminder:** When making a Dept ID change in Position, a new Department (Dept) Budget Table will need to be created for that Position.



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General Information Change (GIC)

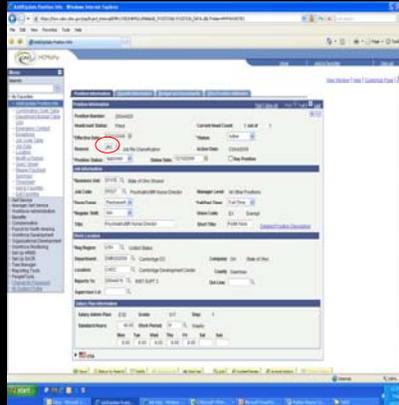
- Use for all other position changes that aren't covered by other Reason Codes
- Ex: Reports To, Bargaining Unit Flag, Mail Drop ID, FTE changes



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Job Re-classification (JRC)

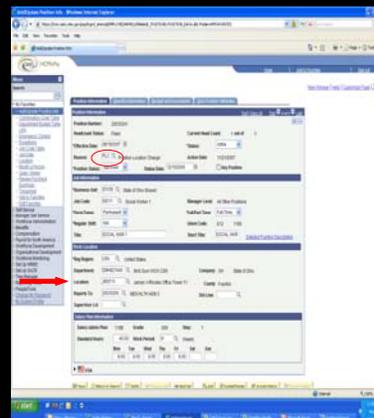
- Use when reclassifying a **FILLED** position
- A Job Reclassification changes information in Job Data.



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Position Location Change (PLC)

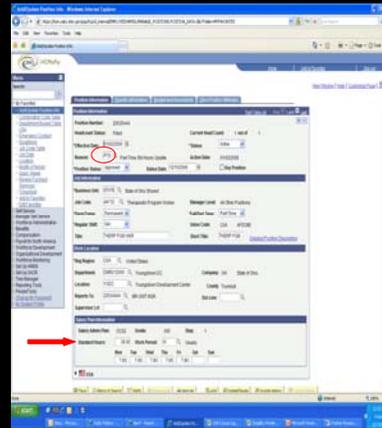
- Use when changing the Location Code of a position
- Keep in mind that if the position is filled, the Location Code change may change the employee's Benefits options
 - Each location code is tied to a zip code, which is what determines Benefits eligibility



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Part-Time Standard Hours Update (PTS)

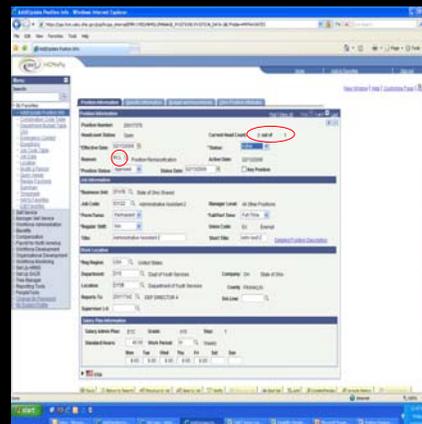
- Should **not** be used
- Used **only** for Batch Job
- Creates a Benefits event
- These rows should **never** be edited or removed without approval from DAS benefits.



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Position Reclassification (RCL)

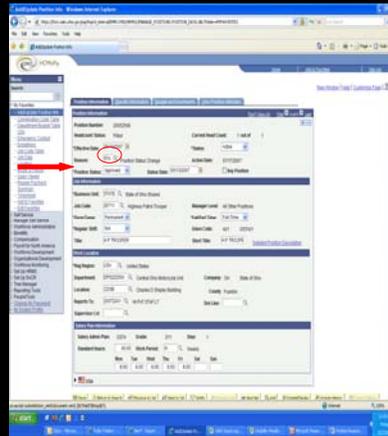
- Use when reclassifying a **vacant** position



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Position Status Change (STA)

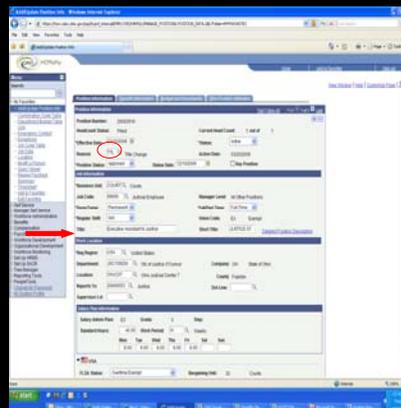
- Use when changing the Status, Position Status or Appointment Type of a position



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Title Change (TTL)

- Use when changing a position's working title



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QUESTIONS ?

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