

HCM OAKS User Group

October 19, 2009

Agenda

- User Group Welcome
- HCM Updates
- Payroll Processing
- CRM/Helpdesk
- Questions

Toni Brokaw

Interim Deputy Director

Opening Comments

- Contract/Parity's Effect on HCM
 - Frustration with reprocessing
 - Recognition of agency effort
- New Initiatives
 - New Training Modules
 - HRD Process Manual
- Future Meetings
 - Workshops
 - One-on-One Meetings

Vicki Friesland

Acting Administrator

DAS/HRD/HCM and Agency HR Support

HCM Updates

- Inactivating Positions
- Provider Contact
 - Responsibility of DAS
- Correction Mode
- Health Care Deductions (Payroll Letter 938)

Health Care Coverage Rule

- ❑ Refunds will no longer be issued.
- ❑ EEs enrolled in coverage during the month of June 2009 shall have coverage through the end of the following month in which they separate (e.g. John Doe separates effective October 16, he will have coverage through the end of November)
- ❑ EEs enrolled ON OF AFTER July 1, 2009 shall have coverage through the end of the month in which he/she separates (e.g. Jane Smith separates January 29, her last day of coverage will be January 31st).

User Group Suggested Topics

- ❑ City of Columbus – letters to employees
- ❑ Employee Local Income Tax Withholding Responsibilities – 12 calendar days calculation, depending on the locality
- ❑ Salary Continuation – presentation available online at <http://das.ohio.gov/ocb/oiltraining.htm>
- ❑ Vendor address issue has been resolved – will only include “active” addresses

Janet Wampler

State Payroll Manager

Payroll Processing

- Final, Final Checks and CSD Equalization
- Comp Time Issues – when will they be fixed?
- Fair Share deductions for Intermittents
- How to Update Local Tax Information

Tax Locality Reporting

Federal Tax Data | State Tax Data | **Local Tax Data**

JOHN SMITH Person ID: 10076715

Company: OH State of Ohio

Effective Date Find | View All First 1 of 1 Last

Effective Date: 07/22/2007

States Find | View All First 1 of 1 Last

State: OH Ohio

Locality Find | View All First 2 of 2 Last

Locality: 29204 GALLIPOLIS

Resident Other Work Locality:

Special Tax Status

None

Do Not Maintain Taxable Gross and Do Not Withhold Tax

Maintain Taxable Gross; LWT zero unless specified in 'Additional Withholding' below

Local Withholding Status

LWT Marital/Tax Status: Local Withholding Allowances: 0

Local Additional Amount

Additional Withholding Amount: Percentage:

December Conversion

- ❑ This year's leave conversion will occur pay end date November 21, 2009, payday December 4, 2009; Payroll Letter to be issued the week of October 26, 2009.
- ❑ Agencies will receive the letters in early November. A delivery date will be communicated through HRD Weekly.
- ❑ Each employee should record his or her choices, sign and return the letter to their agency **no later than** November 20, 2009.

December Conversion

- ❑ Agencies will have until November 25, 2009 to process the appropriate entries in OAKS so that the payouts occur on the December 4, 2009 pay check.
- ❑ The letters reflect sick and personal leave balances as of pay end date October 10, 2009. The system will automatically adjust any requests for payment or conversion to reflect sick and/or personal leave used between October 11, 2009 and November 21, 2009.

December Conversion

Who	PL to SL?	SL Conversion?	PL Conversion?	VL Conversion?
OCSEA/Exempt	Yes	Yes	No	n/a
OEA	Yes	Yes	No	n/a
OSTA	Yes	Yes	No	n/a
1199	Yes	Yes	No	n/a
Firefighters	Yes	Yes	No	n/a
FOP	Yes	Yes	No	n/a

Year-End Processing

- ❑ November 6th – a verification letter will be mailed to employees requesting that they verify name, social security number, correct taxes withheld and mailing address.

- ❑ December 28th – Final date for 2009 clean up.

- ❑ By January 31st – W-2's will be mailed.

David Rust

Assistant Administrator
DAS/HRD HCM and Agency HR Support

Top 10 Customer Service Call Issues

- Dependent Benefits Coverage
- Catalyst (Prescription) Coverage
- New Hire Benefits Coverage
- COBRA Coverage
- ePay Accessibility
- How to Log into OAKS
- Open Enrollment
- W2s
- Payroll Deductions
- OHMS

Future Meetings

- December 2nd at 2pm
 - Lobby Hearing Room
 - Webinar

- Schedule for 2010
 - February 22nd
 - April 19th
 - June 14th
 - August 23rd
 - October 18th
 - December 13th

Additional Items Discussed

❑ **Missing SSN's for dependents**

Agencies need to follow up with employees regularly to ensure claims can be processed effectively. The query used to find dependents without a social security number is OH_BN_ENROLLED_DEP_NO_SSN.

Agency staff and employee's who create life events using eBenefits should be entering all 9's as a placeholder. As a suggestion, the job aid located at [http://oakspmo.ohio.gov/oaks/training/HCM Job Aids/content/HCMJA199_eBenefits Life Events Birth and Adoption.doc](http://oakspmo.ohio.gov/oaks/training/HCM_Job_Aids/content/HCMJA199_eBenefits_Life_Events_Birth_and_Adoption.doc) should be shared with prospective parents.

Additional Items Discussed

❑ **Are Dependent SSN's required?**

- ❑ Federal Law now requires your health plan to report Social Security Numbers (SSNs) for all covered dependents to the Centers for Medicare and Medicaid Services. In addition, if a covered dependent is also eligible for Medicare, the Medicare Health Insurance Claim Number (HICN) must be reported.
- ❑ The purpose of the law is to permit Medicare to determine whether it should be a secondary payer rather than a primary payer where an individual has both Medicare and other insurance.
- ❑ Health plans that fail to comply with the Law are subject to stiff daily fines for each unreported Social Security Number, so this is an important request that deserves everyone's prompt response.
- ❑ The alert from the federal government is available at <https://www.cms.hhs.gov/MandatoryInsRep/Downloads/CollectionofSSNsHICNsandEINsTINsALERT.pdf> .

Additional Items Discussed

- ❑ **Can retirees opt out of having health insurance coverage for an additional month?**
 - ❑ As there are NO refunds, employees may choose to “opt out” of PERS coverage for the month following separation.

Additional Items Discussed

- ❑ **Why can't agencies do the manual adjustment for Disability and Worker Comp pending related to Cost Savings Days?**
 - ❑ Equalization will be done at the end of the fiscal year. Equalization for separations are done by DAS Central Payroll during the Pay Confirm process to ensure the correct number of deductions and usage are accounted for.

Additional Items Discussed

- ❑ **ePay Accessibility for Separated Employees**
 - ❑ All examples have been reviewed. Access to ePay is still available; the ex-employees needed password resets (one account had 4 failed logon attempts. System availability hours could also be the issue. Please have all ex-employees call 614-644-6625 or 1-888-644-6625 when they cannot log into the system.

Additional Items Discussed

- ❑ **Why Manual Warrants Will Not Be Issued for Supplements?**
 - ❑ Payroll Letter 925 currently states that Off-Cycle Paychecks will not be issued for Pay Supplements Only. All payroll letters are being reviewed; HRD will issue revisions as necessary in the coming months.

Additional Items Discussed

- ❑ **How Will Employees be Notified of Equalization?**
 - ❑ HRD will meet with OBM to determine communication effort. Queries have been made available to agencies through Cognos and PSQuery to manage usage of CSD. See HRD Weekly issued October 19, 2009.

Additional Items Discussed

- Does Equalization Apply to Elected Officials?**
 - Agencies that are NOT participating in CSDs
 - Auditor's Office (AUD)
 - Supreme Court (JSC)
 - Judicial Conference (JCO)
 - House of Representatives (REP)
 - Senate (SEN)
 - Legislative Services Commission (LSC)
 - Joint Committee on Agency Rule Review (JCR)
 - Joint Legislative Ethics Commission (JLE)

Additional Items Discussed

❑ **Who Is Exempt from Equalization?**

❑ Equalization exceptions are as follows:

- Employees who are overtime-exempt AND
 - Are in pay range 15 or above on the E-1 scale OR
 - Annually paid \$63,814 or above on the E-2 scale OR
 - Annually paid \$63,814 on the E-3 scale OR
 - Work in the Governor's Office
- Employees in OCSEA bargaining units 3, 4, and 5
- Employees in OEA

Additional Items Discussed

- ❑ **Can the Manual Check Process be Modified?**
 - ❑ DAS has audit standards that we must meet in order to be in compliance. The process is done within these standards. The process is continually reviewed for improvement and any changes are approved within these guidelines.

Additional Items Discussed

- ❑ **Can an Employee Who Is Laid Off Use the CSD Balance? Does Equalization Occur or Can an Employee Buy Back the Time?**
- ❑ CSD's are not a benefit and as such cannot be "purchased" like service time. CSD's are a payroll deduction applied only to those employees in active pay status.

Additional Items Discussed

- ❑ **Can CSD's be Donated to Other Employees?**
 - ❑ CSD's are programmed as a payroll deduction and as such cannot be donated. Only leave types such as sick, vacation and personal can be donated.