



September 23, 2003

Payroll Letter 843

To: HR Administrators, Payroll Officers, Personnel Officers, Fiscal Officers, Labor Relations Officers, and EEO Officers of All Departments, Institutions, Boards and Commissions

From: Dan R. Parks, State Payroll Administrator

Subject: HR2K Payroll/Personnel System Upgrade

During 1999, DAS HRD Payroll Administration updated the legacy payroll and personnel system to make it year 2000 (Y2K) compliant. This system upgrade resulted in revised payroll and personnel screens. During the past several years, numerous fields have been added to the Payroll and Position Control files and screens to support new or expanded functionality. As a result, this expansion has consumed our available capacity to make further enhancements. Currently due to physical size constraint of employee payroll records, no available space exists for expansion; an upgrade to our HR2K system is needed.

Due to recent collective bargaining agreement changes, the need to capture improved employee personal information such as full legal name and military status, and the need to accommodate additional employee voluntary deductions, we must now move ahead with making upgrades and enhancements to our existing payroll and personnel system, resulting in new Payroll (PAYU) and Position Control (POSU) screens.

Effective Monday, September 29, 2003, the PAYU and POSU screens in the HRDPROD region will be updated to reflect our new screen layouts. It is our intent that this upgrade will not require extensive end-user training. The only change you may realize is that data may have been moved from one location or to another, or to another screen. This letter will preview the upgraded PAYU and POSU screens, as well as announce the release of the HRID screen.

I. Added Functionality

As a result of our HR2K system upgrade, the following items have been added or expanded:

1. An expanded full legal employee name (first, middle and last name). This is to satisfy a requirement to ensure that the employee name we submit to the Internal Revenue Service, matches the name the Social Security

Administration has on file by employee social security number. The employee's full legal name will be displayed on the new HRID screen. From the full legal name, we will also derive a short employee name that will be used for display purposes on other screens and reports.

2. Added capability to capture employee military status and branch. In the aftermath of 9/11, it became increasingly apparent that we need the ability to accurately report on state employees who may be called to active military duty. Military status designations will be G=Ohio Guard, R=Reservist and V=Veteran. Military branch designations include A=Army, C=Coast Guard, F=Air Force, N=Navy, and M=Marines. This information will be maintained on the employee's HRID screen.
3. Expanded the number of employee voluntary payroll deductions to 20. Increasingly, state employees had reached the limit of voluntary deductions to the point where Payroll Offices had to begin prioritizing, then removing lower priority deductions in order to process payroll accurately. In addition, several new programs to be offered to state employees will require the need for posting new deductions. Employee voluntary deductions will continue to be displayed on the main PAYU1 screen. When an employee reaches ten deductions, "F10=Toggle for more deductions" will be displayed allowing the entry and viewing of up to 20 deductions.
4. Expanded employee home address and city. We have expanded the employee's home address to accommodate up to 30 characters, and expanded the city to accommodate up to 25 characters. This information will be maintained on the employee's HRID screen.
5. Expanded employee education major. We have expanded the employee's education major to accommodate up to 20 characters. The education years and degree remain unchanged. This information will be maintained on the employee's HRID screen.
6. Added capability to capture employee work address and location information. Previously, we had been requested to capture accurately where an employee works. This will now provide us the ability to do so. This information will be maintained on the employee's HRID screen.
7. Added capability to capture employee work email address. Increasingly, a means of capturing and utilizing employee email addresses was needed. This will provide us the opportunity to communicate via email to state employees when the need arises. The email address will be maintained on the employee's HRID screen.
8. Added capability to capture employee medical and emergency contact information. Also in the aftermath of 9/11, it became apparent we needed ability to maintain employee medical and emergency contact information in the event we would be required to utilize this information to aid an employee in need. This information will be maintained on the employee's HRID2 screen, which is accessed via F9 from the main HRID screen. NOTE - This information will be available as soon as security profiles have been established, and policy adopted.
9. The assignment of a unique employee identification number for each active and inactive employee payroll record. Per recent trend to protect an individual's identity by eliminating the use of employee social security

numbers on data exchange, especially through the Internet, an employee identification number has been assigned which will remain constant and attached to an employee throughout his/her employment, and subsequent retirement with the state. As soon as policy is adopted regarding the use of employee identification numbers, its impact to users of the system, and the impact to actual employees, a separate Payroll Letter on employee identification numbers will be forthcoming. Employee identification numbers will be automatically assigned by computer, and displayed on payroll and personnel screens.

10. Provided space for future expansion of additional payroll exceptions. Space has been allocated in the expanded payroll file to allow for expansion beyond the current 8 pay exceptions. This functionality is targeted for implementation the first half of 2004.

II. Conversion of Payroll Data to HRID Database

The new HRID employee identification database will be the single repository for all information pertaining to an individual. The majority of the data fields residing in the database and displayed on the HRID screen, will be populated from the payroll (PAYU) file. The list of fields which will now reside on HRID include: employee identification number, social security number, employee name (last, first, middle), home address, city, state, zip, county, gender, date of birth, education years, degree and major, and work phone number. Each state employee will have one HRID record. For employees working in more than one agency, only one HRID record will be created and maintained. For these employees, the agency where the employee works the majority of hours should be considered the home agency for the employee. As such, the work address and location, along with the work phone number and email address should be that of the home agency designation.

III. Conversion of U.S. Savings Bonds and Charity Pledge Information

When expanding the payroll file to include 20 employee voluntary deduction occurrences, we decided to remove the separate fields used to capture U.S. savings bonds and combined charity pledges, and include these as employee voluntary deductions. Effective with the implementation of the new PAYU1 screen, you will now see U.S. savings bonds captured as a "G01" voluntary deduction. The frequency for deducting savings bonds will be set to "A", denoting all pay periods. You will also see combined charitable campaign amounts as a "CCC" voluntary deduction. The frequency for deducting charity amounts will be set to "A", denoting all pay periods. DAS HRD Payroll Administration has automatically converted savings bonds and charities for all affected employees as mentioned above. For all future posting of U.S. savings bonds, please utilize the deduction code "G01", and the appropriate amount. For future posting of Combined Charitable Campaign pledges, use deduction code "CCC", and enter the sum of all employee designated charity amounts. Franklin County United Way receives a file of all employees who had Combined Charitable Campaign deductions. They in turn disburse monies to various federations and organizations as designated by the employee's pledge card. We will continue to print the total of all Combined Charitable Campaign amounts on employee W2 withholding statements.

IV. HRID Access and Security

Using current RACF user ID security information, we have copied the appropriate payroll range access, PAYU and POSU access/update privileges to each user requiring access/update to the HRID transaction. We have revised the Human Resources (HR2K) Security Access Request Form to include HRID as a requested transaction. For agency personnel with access to view the SECU Employee Security Detail screen, the HRID transaction and granted permissions can be viewed. Our intention was to grant users who currently had update capabilities on PAYU or POSU, with the same level of update capability on the HRID screen. HRID update flags have been set to permit updating of employee personal data, as well as update of employee name and social security number. The revised "Human Resources (HR2K) User Security Access Request Form" can be obtained from the following link: <http://www.state.oh.us/das/dhr/pdf/userf.pdf>.

V. System Navigation

Users may continue to access employee records by means of entering the employee's social security number or last name, following the appropriate transaction (PAYU, POSU, or HRID). Additionally, users may also utilize the employee identification number to access employee records for most payroll and personnel applications. From most HR2K system screens, function key F9 has been added to allow navigation to the new HRID screen.

VI. New Hire Process

The procedure for processing an approved personnel action (PA) to hire a new employee has changed. In the past, agency personnel offices would post a personnel action code and effective date, along with the employee's name and social security number to the respective vacant position, then approve and update the record. The subsequent Payroll/Position Control maintenance process would then create a payroll record for the new employee, thereby permitting the agency payroll office to complete the payroll posting process including specification of employee address, date of birth, etc. With the implementation of the HRID screen and employee identification number, the personnel office will now have the means to enter additional employee information. The revised new hire process is as follows:

1. Agency personnel office will access vacant position using POSU transaction. User is prompted to "Enter Empld# or SSN and Press Enter". User tabs to SSN and specifies data as requested, then hits enter. A resulting POSU screen is displayed.
2. HR2K system checks to see if an existing HRID record exists, based upon the social security number entered.
 - a. *If an HRID record is not found*, the following message is displayed "HRID record not found; to create press F9". User presses F9 and a blank HRID template is presented. User then populates the employee's full legal name (required), social security number (required), address, date of birth (required), gender, and education year, degree and major. Additionally, the employee's work address may be specified. F1 key is pressed to add the record. User can then press F5 to return to the POSU record to

complete the PA process. An active payroll record is created during the subsequent biweekly Payroll/Position Control maintenance process.

- b. *If an HRID record is found* (meaning the individual works at another agency, or was previously employed by the state), the employee identification number is presented, along with the employee's name and social security number on the POSU screen. At this time the user may press F9 to navigate to the HRID record. Employee information such as address, date of birth, education, and work address, can be verified/updated. If updates were applied, press F1 to update the HRID record. User can then press F5 to return to the POSU record to complete the PA process. An active payroll record is created during the subsequent biweekly Payroll/Position Control maintenance process.

VII. Employee Name Change Process

When you receive notification to change an employee's name, the change will occur using the HRID screen. Access the employee's HRID record by employee identification number, social security number, or existing last name, first name. Based upon the user's RACF security profile, assuming name change is permitted, change the appropriate full legal name field and update the record via the F1 key. The following message will be displayed: "Verify Name and if correct, press F1 Again". User will press F1 again and the name will be updated. Users will access the affected employee's HRID, PAYU and POSU information using the new employee name. During biweekly maintenance, a comparison of employee name from last pay period to the current pay period will be made. When a name change has been identified, a history (EHOC) record will be inserted denoting the name change event. The posting of a C07 "Name Change" is no longer needed.

VIII. Social Security Number Change Process

If an employee's social security number is found to be in error, the correction will be made using the HRID screen. Access the employee's HRID record by employee identification number, current social security number, or employee last name, first name. Based upon the user's RACF security profile, assuming social security number can be updated, correct the social security number and update the record via the F1 key. The following message will be displayed: "Verify SSN and if correct, press F1 Again". User will press F1 again and the SSN will be updated. Users will access the affected employee's HRID, PAYU and POSU information using the corrected social security number. During biweekly maintenance, a comparison of employee social security number from last pay period to the current pay period will be made. When a social security number change has been identified, a history (EHOC) record will be inserted denoting the SSN correction event. The posting of a C26 "SSN Correction" is no longer needed. HRD Payroll Administration will be provided reports when an employee's social security number has been corrected, so that we can correct employee earnings information (EARN) accordingly.

IX. Updated/New HR2K Screens

PAYU 100-200=016100		Pay Period 09 06 2003		Leave Balance	Accrual	Usage
Name	PUBLIC, JOHN Q	Appt	01 10 05 1998	News	93.54	3.10 .00
Id#	SX111053P	SSN	111 - 11 - 1111	Prom	10 05 1998	Olds .00 .00 .00
			Ends	00 00 0000	Vac	88.14 4.60 .00
Gross	1,615.20	Stat C	CSeq 284	Serv	05 - 196	PLv 15.90 .00 .00
Ftx	S2 130.00	CAS Refno	02302	FzSrv	05 - 142	Comp .10 .00 .00
OH:	2 41.77	Eft Flag	3	FzInd	7	Donl .00 .00 .00
Sd	2503 .00	Supp #PPs	1	PA1	00 00 0000	End 00 00 0000 VSX .00
DefC	100.00			PA2	00 00 0000	End 00 00 0000 PSX .00
Retr P	137.29	Hours	----	PA3	00 00 0000	End 00 00 0000 CSX .00
Attmnt	.00	Hrs Paid	80.00			----
GrosUp	.00	Less Hrs	.00	ST PAY SPEC	1	CBU 14 - 9 F Code Amount/%
Ded Tot	180.70	OT Hrs	.00	Class	16521	---Pay Rates--- A MD1 22.24
Net Pay	1,025.44	Paid _ Ind	11	Step	06	Rate 30 16.00 A F15 32.30
				Base H		19.79 A D01 19.79
				Lngv		.40 1 A11 81.37
				Educ	0	.00 A OH 10.00
				PROF	00.0	.00 A CCC 15.00
				Lang	0	.00 B G01 25.00
				Haz	0	.00 .00
				SUPP	00.0	.00 .00
				Total		20.19 .00
F1=Updt F2=EHOC F3=Exit F4=PAYU2 F5=POSU						
F6=EARN F7=Prev F8=Next F9=HRID F12=Rstr CAR .00 OBM-Tax						

PAYU1 SCREEN

PAYU 100-200=016100		Pay Period 09 06 2003		Dec Conv:	Ded Calc	Amts:
Name	PUBLIC, JOHN Q	Ret Serv	00 - 000	SC	00.0	MD1 % 1.45
SSN	111-11-1111	Lv-Acc-Flg	_	Vac Serv	00 - 000	PC 00.0 F15 % 2.00
Id#	SX111053P	Union-Flg	3	LServ	00 - 000	PS 00.0 D01 19.79
PCN	23356.0	Medb-Flg	_	UServ	-	HC .0 A11 81.37
Hq Cnty	FRAN	Spec-Flg	_	Prob Hours	.0	Ben YTD Sic: OH 10.00
Empl Age	52-082	Pail-Flg	_	Emer Srv Bal	40.0	ACC 58.90 CCC 15.00
Home Addr Flg		Unif-Flg	_	Military Bal	176.0	USE 23.40 G01 25.00
						.00
Ref #	02302	Fund	125	SpRC	HPA2	SAC 6PJ1 AdRC HRP A Prog _____ .00
Grnt	_____	Proj	_____	Sub	___	MRU ___ RCat _____ Loca _____ Act _____ .00
Agency						
Year To Date Bals:	Attachments:	Seniority Data:	Employee Benefits:	Data		
Gross	28,518.40	Sup	_.00	State	10 05 1998	Hosptp FAM Tier 1 A _____
Fed Tax	2,416.00	Gar	_.00	St Crdt	128.0000	Pt Hosp Hr .0 B _____
St Tax	947.28	IRS	_.00	St Rank	000	GLI Amt 0 42,000 C _____
SDIT	.00	Wag	_.00	Inst	00 00 0000	GLI Tax .00 D _____
DefComp	1,800.00	Bnk	_.00	In Crdt	0.0000	GLI Cost .00 E _____
Hosp	637.16	Total	_.00	In Rank	000	D/V Elig 2 F _____
Medicare	404.29					Dental 1F 50.00 G _____
City Tax	570.31	Transfer From	000 - 000	0.0		Vision 1F .00 H _____
Retirmt	2,424.07					DCSA N CCV N I _____
Last Terminal Update:	XPAL			20030905 13:49	New/Seq	16200 J _____
F1=Updt F2=EHOC F3=Exit F4=PAYU1 F5=POSU F9=HRID						

PAYU2 SCREEN

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POSU 100200=023356.0      Position Control Detail (1) 09/23/2003 10:39:17
POSITION IS FILLED      Old Pcn _____
Name PUBLIC, JOHN Q      New Pcn _____
EmpId# SX111053P      SSN 111-11-1111      County FRAN LJ 07 Hours 2080
Class 16521 Step 6 Status C Title ST PAY SPEC 1 Range 30 TWL 00000 - 0
Appt 01 10 - 05 - 1998 StpDte 03 - 21 - 2004 Ind 011 FzInd 007 Serv 05 196
C/B 014 - 9 Sub-Unit 013 - 03 Ustrv 00 000 Rsrv 00 000 Lsrv 00 000 FzSrv 05 142
*****
Rate-Type Indicator Factor Step-1-Rate Amount * Position Cost For
Base = 19.79 *
Longevity 05 X 0.50 % X 16.00 = .40 * DAS A This FY/Next FY
Bilingual 0 X 5.00 % X 16.00 = .00 * Qrtr 1 0 16,446
PROF 0.0 % X 16.00 = .00 * Qrtr 2 16,050 14,486
Educ-Attain 0 X 2.50 % X 16.00 = .00 * Qrtr 3 14,090 16,446
Hazard 0 X 2.50 % X 16.00 = .00 * Qrtr 4 16,182 14,486
SUPP 0.0 % X 16.00 = .00 * Total 46,322 61,866
Background ST ST2 Total-Rate = 20.19 * In Process 2,736
*****
Act Date ___-___-___ Code ___ Log X Appr ___ Ending ___-___-___ TR-Dpt ___-___
Act Date ___-___-___ Code ___ Log Y Appr ___ Ending ___-___-___ TR-Dpt ___-___
Act Date ___-___-___ Code ___ Log Z Appr ___ Ending ___-___-___ TR-Dpt ___-___

F1=Updt F2=EHOC F3=Exit F4=PAYU F5=POS2 F6=EARN F7=Prev F8=Next F9=HRID
F12=Roster F14=POSC (Shift & F2)
    
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POSU1 SCREEN

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HRID      EMPLOYEE INFORMATION      09/23/2003 10:42:55

EmpId: SX111053P      PUBLIC, JOHN Q      Empl Status: CURRENT EMPLOYEE

SSN 111 - 11 - 1111
Name PUBLIC      JOHN      Q      _____
(last)      (first)      (middle)      (suffix)

Home: Addr 123 BROADWAY      City COLUMBUS
St OH Zip 43232 0000      County FRAN Phone# ___ - ___ - ___

Work: 100 - 200 DAS - HUMAN RESOURCES
Addr 30 E BROAD ST 40TH FLOOR      Addr2 _____
City COLUMBUS      St OH Zip 43215 3414
E-Mail _____
Phone# 614 - 555 - 1234

Gender M DOB 06 / 26 / 1957 Educ: Yrs 16 Degree BS Major BUS ADMIN
Military: Status(G,R,V) R RESERVIST      Branch(A,C,F,N,M) F AIRFORCE

Record Last Updated: CONV      20030922 08:00

F1=Add/Update      F2=EHOC      F3=Exit      F4=PAYU      F5=POSU      F6=EARN
F7=Prev      F8=Next      F10=New Screen      F11=PAYM      F12=Roster
    
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HRID1 SCREEN