

## Personnel/Payroll Association (PPA) Meeting – February 26, 2009

Click here for the February 26 PPA Agenda: [PPA Agenda February 26, 2009](#)

Click here for the February 26 PowerPoint: [PPA Meeting February 26, 2009](#)

PPA Chair, Wendy Harris (ATG), opened the meeting.

### 1. DOP Update

DOP is exploring all impacts of the new Federal Stimulus Bill, and will be advising agencies as particulars become known. DOP will be implementing the new 941-X in HRMS when SAP releases it. DOP is working on revised instructions and other information on PU19 Tax Reporter. DOP is still experiencing issues with agencies not using the Log Manager to review existing forms. OFM and DOP will be partnering to bring you a Tax Reporting class in the near future. More agencies continue to go “no print” for Earnings & Deductions Statements for a total of 12+ agencies currently.

### 2. OFM Update

Per the new Federal ruling, the state will cover 65% of the COBRA expense to employees who are laid off, however this does not include retirement separations. This is preliminary information and the ruling is retroactive back to September 2008. Line 12a and 12b on the 941 “COBRA assistance credit” will be used for this and procedures will be coming out when more is known. Potential process option: HCA will pay state subsidy amount and bill the agencies.

### 3. HRMS Reporting

Patty Peterson, DOP, presented information on Basic Reporting in HRMS. This new reporting series begins at today’s meeting and future meetings will address one or two reports per meeting, depending on the level of detail involved. The focus will be on how HR and Payroll can better use reports. A cross-agency reporting workgroup has been formed to identify reports for presentation. DOP will incorporate the information presented into existing HRMS courses, as appropriate.

Your agency’s system security administrator can tell you what types of access you have for HRMS reporting. You should at least have “inquire” access if you regularly use the information, or have another staff person who can run the reports for you to view. Also, be sure to use the OLQR (On-Line Quick Reference) to review job aids, user procedures, report instructions, and the other training tools available on the new DOP Website. The OLQR is available at:

<http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/default.aspx>. You can save and modify some of the materials to align with your agency’s specific business needs.

**Handout:**      [HRMS Reporting](#)

**Additional notes for HRMS Reporting PowerPoint** (Thank you, Taletha Walker, WDFW, and Mike Watte, L&I):

#### **Slide 4 Key Features and Benefits**

- You can print a section of a report
- Report information updates immediately with data changes
- Customization makes the report work for you through variants and layout options
- Keep in mind the parameters that have been asked for
- Excel 2007 enhancements are helpful: “1 million” lines instead of a 65,000 line limit and you can sort by subtotal, total, and color of row.

#### **Slides 5 & 6 Accessing / Viewing Reports**

- Reminders on deciphering report titles such as ZHR\_RPTTM084:
  - ZHR = custom
  - RPT = report
  - TM = Time Management
  - 084 = report title / how the reported is referred to, i.e., “084 report”
- Run 084 report for one pay period at a time
- Use the same dates for “Period” and “Quota Selection”
- “Selection” section is under-utilized. Ability to include/exclude/choose ranges
- Personnel numbers can be selected or excluded individually or in multiples
- “F8” is the keyboard shortcut to “Execute.” See HRMS Basics handouts for other shortcuts.

#### **Slide 9 Printing Reports**

- The tool bar has page navigation tools
- DOP will discuss printing options more at a future meeting

**Q:** How do you find the specific pages you want to print?

**A:** Narrow your results. HRMS does not have page numbers, so it is cumbersome, and you end up “guesstimating.” Other options are to “print screen” to a Word or PowerPoint doc (Alt + Print Screen selects just the top screen displayed in Windows), or consider purchased software such as Snag-It: <http://www.techsmith.com/screen-capture.asp?CMP=KgoogleStmhome&qclid=CKftl7fx3JkCFRFMagod0w-eVA>, or free utility tools such as Vista Snipping: **How To Capture a Screen Shot with the Snipping Tool in Windows Vista** <http://graphicssoft.about.com/od/microsoft/ht/snippingtool.htm>.

#### **Slide 10 Report Variant**

- It takes only one request submitted to DOP to get a SWV (statewide variant) added in HRMS if it will be of general interest to multiple agencies
- SWVs work well as a starting point where you can add additional criteria for personalized reports, and using SWVs saves expenses both literally and individual work time.
- For a list of the most used SWVs, view the Statewide Variant List on the DOP Website at: <http://www.dop.wa.gov/payroll/HRMS/HRMSSupport/Pages/HRMSResources.aspx>. This list is updated regularly.

### Slide 13 Creating a Variant

- You can add or exclude details
- Wage Types can be chosen individually or as a range
- Before executing the variant, take a screen shot for future reference of fields you have defined

### Slides 18 through 21 Retrieve a Variant

- There are three ways to retrieve a variant:
  - Menu path: "Goto," "Variants," "Get"
  - Keyboard shortcut (shift + F5)
  - Icon button
- To get SWVs after opening the "find Variant" screen:
  - Delete your ID in the "Created by" field
  - Type "SWV\*" in the "Variant" field to get available list
- There is also a "Find" tool (binocular icon)
- DOP will discuss the ALV toolbar more at a future meeting

### Slides 23 through 26 Exporting Report Data

- Allows you to share data electronically
- Need to Save again once you have exported the data

#### 4. VEBA MEP

Brian Rihs, Service Representative, VEBA Service Group, presented information on VEBA MEP.

**Handouts:**     [VEBA MEP](#)  
                  [Summary of Benefits](#)  
                  [Qualified Expenses and Premiums](#)

**Additional:**   [VEBA MEP Flyer](#) (this was handed out at the 3/26/09 PPA) – this flyer announces special VEBA presentations in April.

**Q:**           What happens if I die with funds remaining in my account?

**A:**           If you are survived by a spouse or dependent children (or other dependents as defined by the IRS), they may submit requests for medical expense reimbursements until your account is used up. If you have no surviving spouse or eligible dependent(s), the funds remaining in your account will be paid as medical expense reimbursements to the heir(s) of your estate. Payments to heirs will be taxable. Effective July 1, 2009, payments to heirs will no longer be permitted, and unused account balances will forfeit to the Plan.

*NOTE: IRS Revenue Ruling 2006-36 requires the Plan to discontinue providing reimbursements to heirs for expenses incurred on or after July 1, 2009. This ruling only affects benefits paid to heirs; reimbursements to a surviving spouse or dependent(s) will continue.*

**Q:**           Can the funds be used for the 35% portion of COBRA payments if I should experience a layoff?

**A:**           Yes

## 5. PEBB Appeals Process

Larry Cade, PEBB/Health Care Authority, presented information about a new process for how employees and their dependents can appeal eligibility and enrollment decisions about their health care.

**Handout:** [Appeals Process](#)

**Q:** If an employee has an issue with ASIFlex, can they contact PEBB?

**A:** Yes

**Q:** We are currently being charged an administrative fee for a former employee – why?

**A:** Send a FUZE e-mail to PEBB.

**Additional notes for Appeals Process** (Thank you, Taletha Walker, WDFW, and Mike Watte, L&I):

- HCA staff is reduced right now
- It would be helpful if agencies can assist employees to use the right forms – employees often don't know which form(s) to fill out, and must use the correct forms when on LWOP so that they don't lose their optional coverage.
- LWOP – employees lose optional life insurance if not self-paid while off
- FMLA – employees keep optional life insurance while off
- FAN – Final Action Notice – these are required to be kept by the agencies now; more responsibilities are moving to the agencies
- Divorce decrees are now required documentation

### **Slide 3 When is it an Appeal?**

- Previously an agency error required an appeal – not an appeal issue anymore, such as misplaced forms causing a timing delay
- Reminder: it takes three days to process a change – agencies should not make corrections to PAY1 past ninety days

### **Slides 4 through 6 The Appeals Process**

- The “Employer Decision Notice” is a form
- The employee appeals process is the same as it has been – see Slide 6

**Q:** Where are Appeals Forms located?

**A:** Forms are on the PERS/PAY Website at <http://www.perspay.hca.wa.gov/appeals.html>

### **Slide 11 Plan Appeals**

- ASI issue – sometimes a miscommunication can cause a claim to be denied and then it is difficult to catch up with the documentation required – let Larry know if communication issues arise – this is a vendor issue
- ASI is not the easiest process, and response times of more than three weeks have occurred
- Billing issues regarding departed employees should be forwarded to Larry Cade
- Employees can contact HCA if ACI is not responsive

### **Slide 12 Account Adjustments**

- It is important for employees to get packets in a timely manner
- Agencies cannot accept late forms after timely delivery

- Marriage declaration is required for spouse coverage
  - Student coverage forms are required in a timely manner
  - Responsibility for handling of appeals may be split between HR and payroll
- Q:** Employee paperwork cannot be filled out by the employee in some medical situations.
- A:** Contact HCA – they can take care of these cases.

## 6. Logged Changes in Infotypes

Patty Peterson, DOP, presented information on the Logged Changes in Infotype Data Report in HRMS.

**Handouts:** [Logged Changes in Infotype Data Report S\\_AHR\\_61016380](#)

User Procedure: [Logged Changes in Infotype Data](#)

Basics Job Aid (See Slide 4)

**Additional notes for Appeals Process** (Thank you, Taletha Walker, WDFW, and Mike Watte, L&I):

- Helpful link:  
<http://www.dop.wa.gov/payroll/HRMS/HRMSSupport/Pages/HRMSResources.aspx>
- Training materials are available on the OLQR at:  
<http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/default.aspx>; course manuals are also available, and Job Aids are grouped by course
- Can copy/paste “S\_AHR\_61016380” into HRMS command field on SAP Easy Access screen to go directly to report
- Reasons to use Logged Changes Report:
  - Review personal work
  - Summarize your work to give to others
  - See changes to an individual or group of employees
  - Reports are multi-purpose going from broad to a narrow search
  - Could help reduce user licenses in HRMS
  - Can find data edited and deleted
  - Helpful to find retro activity
  - Can match information from payroll journals
- Logged Changes detail legend:
  - D = Delete (a record was trashed or replaced due to a new record)
  - U = Update (penciled/edited an existing record)
  - I = Insert (create/maintain a record)

### **Slide 3 Logged Changes in Infotype Data screen shot**

- Section 1 – “Read documents from database: - you can choose both “Long-term” and “Short-term” document check boxes

### **Slide 5 “Selection” section of Logged Changes in Infotype Data screen**

- Section 2 – you can choose “All” radio button; “Master data” is the default
- Specifics available to narrow report:
  - Personnel number – employee whose information was changed

- Infotype – specify if desired; example: 0008 = Basic Pay (do not exclude any info types if wanting to see all changes)
- Changed on = date of change
- Changed by = person who made the change
  - \*NOTE\* changed by requires an 8-digit employee number = 00123456
  - By “TIDALSAP” = changes during HRMS upload and GAP automatic processes
  - \*NOTE\* if a ZCAT6 – Transfer Time Data is not performed after an entry is made in CAT2, the “changed by” will be “TIDALSAP” on your report
- Use arrows to right to exclude/include/choose ranges like other reports
- Try different options to see what you like – running reports does not affect the information
- Timing of HRMS interfaces and loads will be covered in a future meeting