TeamWorks Agency Forum Q&A

Meeting Date: February 20th and 24th

After our initial distribution of answers to the questions that arose during the TeamWorks Agency Forum conducted on February 20th and 24th, SAO received feedback that further clarification was needed on the answers. We thank you for your feedback and hope these answers provide the clarification you need. However, if you do have further questions, please feel free to contact our TeamWorks Customer Service Center at the contact information listed within the answer chart below.

Since the TeamWorks Agency Forum's beginning in June 2013, SAO continues to learn from you our TeamWorks end-user community on improvements that are needed. We appreciate your feedback and patience as we continue to improve this meeting format and follow-up.

We hope you are looking forward to the next TeamWorks Agency Forum that will be conducted in June 2014--more information on this meeting will be coming in May 2014.

Question and Answers: TeamWorks Overall

Question	Answer
How do I contact the TeamWorks Customer Service Center	**SAO Customer Service Center (CSC) Contact Information:** *Available Monday-Friday 8AM - 5PM (unless State offices are closed due to holiday/ inclement weather—other exceptions will posted as they occur to ESS/TeamWorks)* **Call 404-657-3956 or 888-896-7771 and select an option.** Options and related email addresses can be found at sao.georgia.gov- then click on TeamWorks menu and then click the Customer Service Center sub-folder.
Can a copy of the slides or audio of this meeting be provided?	The presentation will be posted on the SAO website; however we are unable to provide a recording of the webinar due to the nature of the information shared. To find a copy of the presentation go to sao.georgia.gov and click on the TeamWorks folder and then click on the Customer Service Center sub-folder. There is a TeamWorks Agency Forum sub-folder on the left of the screen that you can click on to find the presentations.

What is the purpose of this meeting? What is the difference between clients and end-users that are referred to in the meeting?	The purpose of the TeamWorks Agency Forum is for SAO TeamWorks support team to have a touch point with the TeamWorks end-users. The information covered in this meeting varies from TeamWorks enhancements that are planned or in progress, to updates regarding TeamWorks Online Training, to reminders of deadlines coming up, etc... For management team members in agencies, this information may be a repeat-- if they have attended a separate SAO update meeting. The SAO TeamWorks support team clientele are the TeamWorks end-users, also called clients.
Where on the SAO website is the service level objective (SLO) chart located?	The SLO by Severity Level chart can be found on the SAO website by means of the following path…Go to sao.georgia.gov and click on the TeamWorks menu and then click on the Customer Service Center submenu. There you will see the Service Level Objective and Severity sub-menu selection on the left side of your screen.
How can we find out who our SAO Agency Partner is?	SAO Agency Partners are not designated for each individual TeamWorks end-user agency. Instead, each end-user is asked to contact the TeamWorks support team via the CSC. However to provide clarity, the SAO Statewide Reporting team (known as SWAR) also has accounting partners for each of the agencies. These assignments can be found by going to sao.georgia.gov under the "How do I?" menu to find the SAO Financial Reporting Partnership Contacts within SWAR. **TeamWork ticket escalations needed can be accomplished by two means:** 1. Click on the escalation link at the bottom of the auto-respond email a user receives if their ticket is escalated to our Tier 2 support staff. **2.** You can also find this escalation link by going to the sao.georgia.gov site and clicking on the TeamWorks menu and then click on the Customer Service Center sub-menu. On the left side of your screen you will see more sub-menus. Click on the sub-menu called Escalations- this will bring you to the SAO TeamWorks Escalation Form link.
Does SAO have plans for classroom training for TeamWorks Financials or HCM?	Due to budget restraints, there are no plans for SAO to provide TeamWorks classroom training at this time. However, please see the answer below for where best to find training.

Where can we find TeamWorks training or demos? Is it up to date enough to utilize?	The TeamWorks Online Training (often called UPKs) provides the ability to learn about implemented modules as they are used at the State of Georgia. There are 5 methods of utilizing the Online Training tool, all of which are explained in the "How to Take TeamWorks Financials/HCM Online Training" PowerPoint located on the SAO website. Go to sao.georgia.gov and click on the Training folder and then click on the TeamWorks Training sub-folder to see the training available and the PowerPoint presentation (for TeamWorks Financials and HCM). SAO TeamWorks team continues to make updates to this Online Training as changes occur in the system. Communications *(to those end-users who have signed up to receive TeamWorks Communications via the Financials and HCM News and Announcement page –click Home after logging into TeamWorks to find "Sign up for News" link)* will be sent out after any major update to the training. However, the current version that is available can and should continue to be used as a reference for how data is entered into TeamWorks.

Question and Answers: TeamWorks Security

Question	Answer
How long does it take to get a new employee's security profile set up?	For Employee Self Service (ESS) access is granted via a <u>nightly process</u> that runs and provides ESS access to all new employees; assuming the agency Human Resource personnel has updated the Job Data table. However, the TeamWorks SLO (Service Level Objective) for setting up new employee's security profile via a completed TeamWorks Online Security Form is 14 Business days or less. As noted above, the SLO by Severity Level chart can be found on the SAO website by means of the following path…Go to sao.georgia.gov and click on the TeamWorks menu and then click on the Customer Service Center submenu. There you will see the Service Level Objective and Severity sub-menu selection on the left side of your screen.

Please verify who can reset passwords at the agency level? Also, where is the online security form and how do you request a deletion?	Each TeamWorks Agency Security Officer has access to reset passwords at the agency level. However this task can be delegated to others with the approval of your TeamWorks Agency Security Officer. The following query can be run to determine who has access to reset passwords: **LIST_USERS_ACCESS_BY_AGENCY.** • **In HCM, the role "Agency Security Reset" allows Agency Security Officers and delegates to reset passwords.** • **In FSCM, the role "Agency Security" allows Agency Security Officers and delegates to reset passwords.** Each agency has an assigned TeamWorks Agency Security Officer. To see a listing of who your agency's TeamWorks Agency Security Officer is use the following queries: **TeamWork Financials: YOUR_BU_SECURITY_OFFICER_LIST (FSCMPROD)** **TeamWork HCM: YOUR_CO_SECURITY_OFFICER_LIST (HCMPROD)** All managers have access to initiate a request to grant their direct reports access to reset passwords by submitting an Online Security Request form within TeamWorks at the following path: Agency Security > Manager Security Request A deletion request can be submitted through the Online Security form as well. Instructions on how to complete a deletion request can be found here http://sao.georgia.gov/security-resources
If an employee is terminated in HCM and they have a security profile, will it be automatically deleted based on their termination?	Once an employee is terminated within the Job Data table in HCM, there are two automated nightly processes that delete and/or lock security profiles. Once the user is deleted/ terminated within HCM, the TeamWorks Financials system then reads the HCM termination information and auto locks security profiles of users within TeamWorks Financials. However this automated process does not update the Online Security Request Form for the

	terminated individuals. Therefore the agency still must submit a deletion request through the TeamWorks Online Security Form. The deletion request is maintained for audit reporting. SAO is researching enhancement opportunities to automate this Form update process in the future—but, is unable to state when this may occur at this time.

Question and Answers: TeamWorks HCM

Question	Answer
Can system changes to ACA be explained a little as to what they are? Are SAO and HRA working together on this?	ACA stands for Federal Affordable Healthcare Act. HRA and SAO are working together to create reports within TeamWorks to assist individual agency HR employees in monitoring the work hours of ACA eligible employees to determine if they meet or exceed the threshold during the look back period. Once reports are created, a communication will be distributed to the HR community across TeamWorks supported agencies. If an employee is determined to be eligible for medical-only benefits, you will be able to enroll the employee in the same manner as the current process for employees that are eligible for SHBP today. ACA eligible employees entered into the new Med-only Benefit Program within TeamWorks will be sent daily by the system to DCH. Once enrolled in medical thru SHBP, the election information (deduction) will be sent via a daily automated batch process to TeamWorks and processed through payroll.
For agencies/ authorities that do not use DCH for benefits, what reports will be sent to them to notify them if part-time employees have signed up for benefits?	This data is not in TeamWorks and thus cannot be provided by SAO. However, agencies that do not use DCH for benefits should contact their benefit provider to understand the process to follow. Once the deduction for medical is entered in TeamWorks Payroll, the Query Manager can be used to identify employees on non-zero records with a medical deduction. If further explanation is needed on Query Manager, please contact the TeamWorks Customer Service Center.

Will employers have to pay the health portion on only those employees that qualify?	Specified AST Work Group assignments with contact information for each work group member were recently emailed to each agency by DCH. Please contact your assigned AST Work Group for assistance with this question.
Could you please offer an update on when the connectivity between the ADP SHBP system and the HCM system will be improved?	Please contact your assigned AST Work Group (as defined by recent DCH email to agencies) for assistance regarding questions related to SHBP/ADP connectivity.
I know you didn't mention direct deposits, but are we still researching allowing the employee to make a change in the system (PeopleSoft/ TeamWorks) and it take effect the same pay period, unlike now, requiring the pre-note process?	Although the pre-note process is best practice, SAO plans to research increasing the frequency for the pre-note process sometime in the future. No decisions have been made at this point.
Can Martha expand on the off cycle checks via ACH? Did I understand you to say off cycle checks may be sent by ACH in the future rather by paper?	Yes, SAO TeamWorks support team plans to research a possible change in the system to include off-cycle checks in ACH transmissions sometime in the future. No decisions have been made at this point.
Are there any plans to put W-2's online, instead of generating paper copies?	SAO TeamWorks support team plans to research a possible change in the system to enable online W-2s. No decisions have been made at this point.
Can 29 or 30 hour "part time employees" have access?	In all cases, access to TeamWorks should be requested based on the job responsibilities of the FT or PT employee, regardless of the number of hours they work.

Question and Answers: TeamWorks Financials

Question	Answer
What is the process with the IRS regarding 1099s?	SAO sends the 1099 file on behalf of TeamWorks agencies to the IRS every year by mid-March.
Where can we find the payables report?	Go to sao.georgia.gov and click on the TeamWorks menu and then click on the Financials submenu. Then, click on the Accounts Payable selection and Reports will be an option under Accounts Payable. There you will find the payables reports.
Does SAO have a template that can be shared with agencies if they want to use the AP Voucher upload process?	Agencies can contact State Accounting Office (SAO) to express interest in establishing AP Offline voucher process. The request should be sent to the SAO via the fscm@sao.ga.gov mailbox with the subject "New Offline User Request" stating your interest in using the Accounts Payable Offline Voucher process. An SAO TeamWorks Financial support team member will forward a copy of the Offline Flat File Layout to you. Unfortunately, there is not a template like the GL upload template available today.
Can users run the monthly BCR reports; or rather should we have the capability to do so?	Yes, TeamWorks Financial end-users can run the BCR report by logging into TeamWorks Financials and following this path, →Commitment Control → Custom Budget Report → Budget Comparison Reporting (GL4006X)
The 0PO13FP shows Outstanding PO's for 2009 for our unit. Can these be cleared up? The other query does not show these.	Please contact SAO TeamWorks Customer Service Center with details of this PO concern/ issue. Then, the SAO TeamWorks Financials support team will work with you to understand your concern/ issue and analyze the issue.