

TeamWorks HCM User Group Meeting

**October 29, 2019
November 5, 2019**

Welcome & Introductions

SAO

Martha Varn, HCM Manager

Melody Richards, TeamWorks Program Director

Jeff Maile, Business Analyst

HRA

Bo McDaniel, Enterprise Talent Mgt Services Director

Latatia West, Policy Manager

Tonia Nelson, Lead Business Analyst

Sonja Willis, Business Analyst

Agenda

Report Manager (Replacement for GTA's
Mobius/View Direct System)

ERS GASB67 Compliance Reporting

Correcting Term/Incorrect Action Repeal
Transactions

Upcoming Activities

Agenda

Updates to FLSA Overtime Rule Regulations

ePerformance Approval Workflow
Enhancement

New Action Reason Code for Interim Staff

Agenda

Recurring Activities

- ❖ Personal Leave
- ❖ Education Leave
- ❖ Annual Enrollment Load
- ❖ Charitable Contributions Load

Subgroup Update

Report Manager

Replacement for Mobius/View Direct



Georgia Technology Authority

Technology enabling the business of government

Friday, October 18, 2019

Mobius

- Home
- Login
- Change Password
- FAQ
- User Guide
- Feedback Form
- Security Statement
- Training Videos

Welcome to the Georgia Technology Authority's Mobius/View Direct system.

Time sensitive matter-Attention required. Over the coming months, the View Direct solution including Mobius View, and all associated data and reports will be retired by GTA. The repository for INFOSSG-PROD will be retired on December 31, 2019, followed by the repository for INFOSSS-PROD on December 31, 2019. It is strongly recommended that you download any reports and data (if a policy is utilized) which you would like to keep. The reports and data will cease to be available beyond the dates listed above. Please contact your data owner or source provider regarding a replacement solution.

Downloads

- 7-Zip:
[32-bit](#) | [64-bit](#)
- Adobe Reader:
[Version 11 Full](#)

System	Days till retired	Date of retirement
INFOSSG-PROD	73	12/31/2019
INFOSSS-PROD	73	12/31/2019

What is Changing?

The Mobius/Luminist/ViewDirect System will be retired by the end of this year.

The TeamWorks Report Manager will become the Report Repository for all Budget, Payroll, and HR Reports in mid-November 2019.

<https://sao.georgia.gov/teamworks-report-manager>

Mobius vs Report Manager

	Mobius	Report Manager
Report Groups	Budget, HR, Payroll	Budget, HR, Payroll
User Accounts	One Account per Report Group; multiple users share one Recipient ID	Report Group access is assigned to each individual User's ID in TW
Batch Reports	Mobius Only	Report Manager Only
Report Name	PYXXX0018	XXX00-PY018
Ad-Hoc Reports	Run Type is optional – users can run and retrieve on-line in TW or send to Mobius	Run Type is restricted to on-line retrieval only – but will work the same as today.
Report Format	Reports Default to .PDF	Produced in .PDF (only option)
Text Files	Download as .TXT	Download as .CSV

ERS Compliance Reporting

Purpose:

Meet reporting requirements for Governmental Accounting Standards Board (GASB) Rule 67

What is GASB Rule 67?:

Requires governmental entities to report why an employee is not enrolled in a pension plan.

ERS Compliance Reporting

Reporting Frequency: Monthly

When:

Reason Code is reported to ERS on the 5th of the month via nightly batch processing

Who:

Employees active as of the last day of the month, not in a pension plan

What: Reason code from previous month code or default (99)

ERS Compliance Reporting

TeamWorks Open for Reporting:

Current month plus 1 month

Data Entry:

Enter once and then only if there is a change

Open period allows time to enter during the hire process or as changes occur.

ERS Compliance Reporting

Favorites ▾ Main Menu ▾ > Benefits ▾ > Enroll In Benefits ▾ > Pension Compliance Page

TeamWorks HCMTEST

Pension Compliance Report

Jane Doe Employee Empl ID Empl Record 0

Company: .

Pension Compliance Page Find | View All First ◀ 1 of 1 ▶ Last

*Month 09 - September ▾ *Calendar Year 2019 *ERS Reason Code 04 🔍 Other Pension Plan +

User ID Datetime

Save Return to Search

ERS Compliance Reporting

Reason Codes

- 00 Full-time Student
- 01 Work Study Student
- 02 Rehired Retiree Part-time
- 03 Non-employee
- 04 Other Pension Plan
- 05 Discontinue ERS after age 65
- 06 Other
- 07 Terminated
- 08 Enrolled in ERSGA Plan
- 99 Default
- DD Ignore

ERS Compliance Reporting

Default reason code reported to ERS:

ERS will contact agency to obtain correct code

How can I get additional information on this new process?

Webinar on Wednesday, October 30, 2019

2:30 – 3:30

ERS Compliance Reporting

When does the reporting begin?

November 1 for employees that were active as of 10/31/2019

Enter codes before November 5, 2019

ERS will work with agencies!

Health Benefit Interface Transactions

Recap:

- SHBP can only process 1 change per day (Adverse impact in transfer actions and empl rcd changes)
- Personal Data must be complete - Addresses must be of 'Home' Type. (Must select a gender for Ga Breeze)
- Review SHBP error reports on a **daily** basis
- For full presentation go to <https://sao.georgia.gov/hcm-news>

Health Benefit Interface Transactions

Special Situations:

- Terminations that should have been Transfers
 - ❖ Cannot use repeal transaction in this situation
 - ❖ A delete and re-enter can be entered in this case
- Historical Actions
 - ❖ If an old transaction needs to be re-sent, make sure that no later name/address changes have occurred.
 - ❖ Sometimes multiple rows have to be deleted and re-entered.

SAO

Upcoming Activities

Infrastructure Refresh

- Change in hardware
- No application changes are anticipated
- January – early May

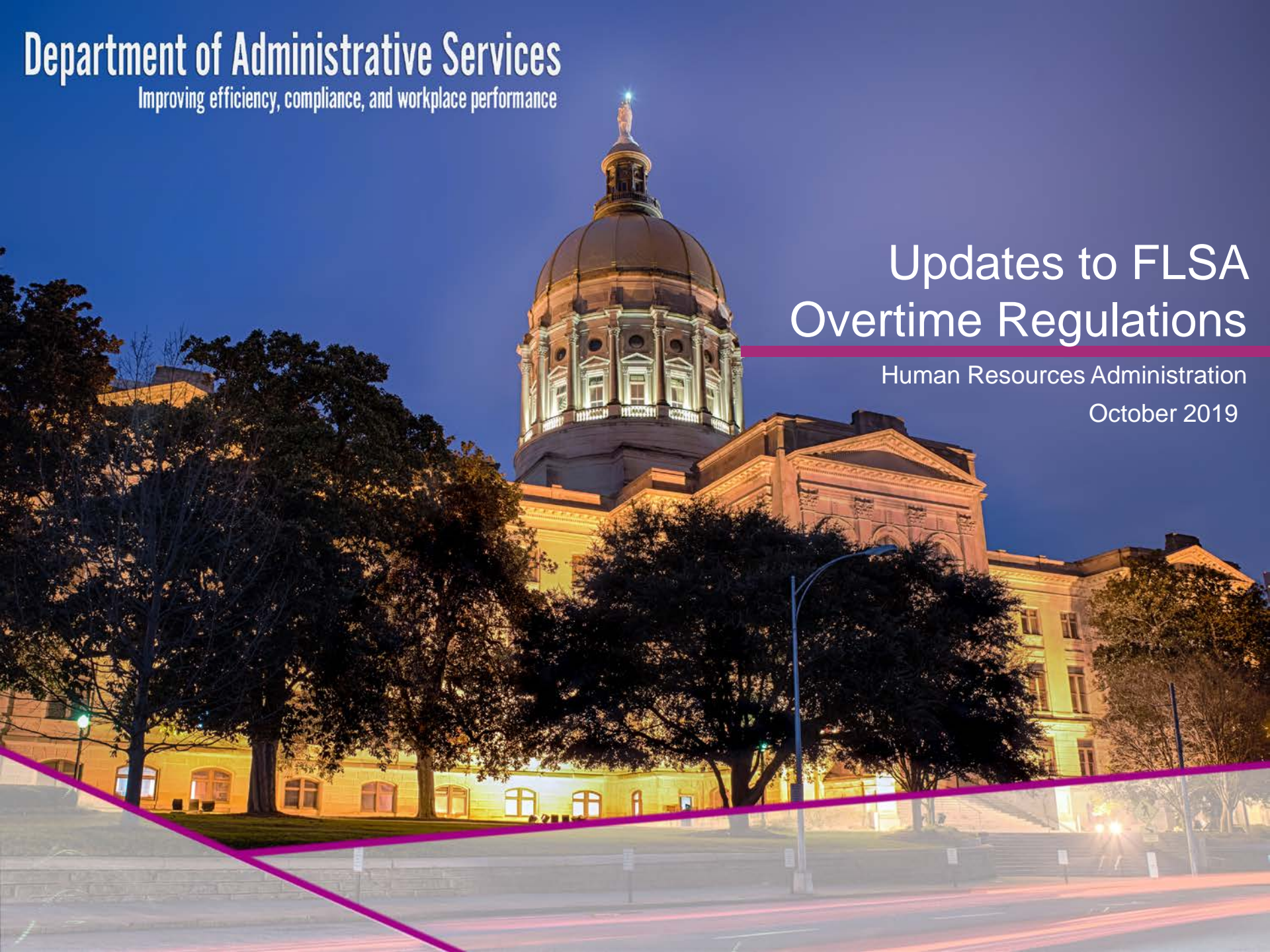
Department of Administrative Services

Improving efficiency, compliance, and workplace performance

Updates to FLSA Overtime Regulations

Human Resources Administration

October 2019



FLSA Topics

A recording of this presentation on FLSA Overtime Rule Changes is also available at:

- <https://www.youtube.com/watch?v=g24tSteM8SE&feature=youtu.be&rel=0>

FLSA Topics

- FLSA Overtime Updates
Manager
- Updating FLSA Status
Business Analyst

Latatia West, HRA Policy

Tonia Nelson, HRA

FLSA Overtime Updates

To be exempt from overtime:

- ✓ Paid on salary basis
- ✓ Satisfy “duties test”
- ✓ Meet salary threshold

All three prongs must be met to be exempt from overtime.

FLSA Overtime Updates

NOTE:

Certain professional employees are not subject to the salary basis or salary threshold.

The USDOL receives authority through the FLSA to update the regulations on overtime exemptions.

FLSA Overtime Updates

New Regulations Effective January 1, 2020

- ✓ Salary threshold will be set at the 20th percentile of all full-time employees
- ✓ Salary threshold increases from \$455/week (\$23,600/year) to \$684/week (\$35,568/year)

FLSA Overtime Updates

New Regulations Effective January 1, 2020

- ✓ Highly compensated employee exemptions salary threshold increases from \$100,000/year to \$107,432/year
- ✓ DOL to review salary thresholds on a regular basis; no automatic adjustments

FLSA Overtime Updates

New Regulations Effective January 1, 2020

- ✓ Non-discretionary bonuses, incentive payments, and commissions (paid at least annually) can be used to calculate up to 10% of the standard threshold
- ✓ Catch-up payment permitted at the end of the 52-week period

FLSA Overtime Updates

New regulations do not:

- ✓ Make changes to the salary basis prong
- ✓ Make changes to the duties prong

Interesting Facts:

Over *116,000* comments were received by USDOL, which also conducted “listening sessions” in several cities prior to issuing the proposed rule.

FLSA Overtime Updates

What should we do to prepare?

(1) Identify all employees who will be affected

✓ Currently classified as exempt

AND

✓ Earning less than \$35,568 per year

FLSA Overtime Updates

What should we do to prepare?

(2) Track hours for all employees identified to be reclassified as nonexempt

- ✓ Identify the number of hours that will be considered overtime
- ✓ Determine if the overtime hours can be managed to a minimum

FLSA Overtime Updates

What should we do to prepare?

(3) Review current standards or policies that may need to be changed

- ✓ Use of agency-issued communication devices (laptops, cellphones, tablets, etc.)
- ✓ Telework policies or practices
- ✓ Policies on requirements for working overtime (over 40 hours per week)

FLSA Overtime Updates

What should we do to prepare?

(4) Create a time line for change management activities to ensure compliance with **January 1, 2020** effective date

- ✓ Develop a list of the changes and draft a plan for how your agency will respond
- ✓ Prepare early to ensure timely compliance

FLSA Overtime Updates

What should we do to prepare?

(5) Prepare managers and supervisors

- ✓ Communicate with employees about the changes
- ✓ Answer employee questions
- ✓ Possibly reclassify some managers/supervisors

FLSA Overtime Updates

What should we do to prepare?

(6) Communicate upcoming changes

- ✓ Determine communication techniques suitable for workforce, hours of business, and locations
- ✓ Consider how affected employees may perceive the changes
- ✓ Convey that changes are federal law mandates applying to all employers

Effects of FLSA Overtime Updates

Require reclassification of previously exempt employees to nonexempt status

Potential to cause previously unexpected overtime

New monitoring responsibilities

Both exempt and nonexempt in same job

FLSA Overtime Updates


Consequences of misclassifying an employee as exempt:

- ✓ Back wages and overtime compensation owed
- ✓ Attorney's fees
- ✓ Potential for class action
- ✓ Additional penalties for willful violations

Updating FLSA Status

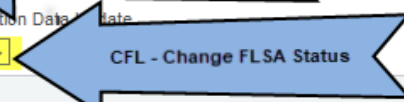
Position Information Find | View All Position Number: First 1 of 1 Last

Headcount Status: Filled Head Count: 1 out of 1

*Effective Date: 07/01/2019  Effective Date = 11/15/2019

*Status: Active

Reason: UPD Position Data: Action Date: 06/28/2019

*Position Status: Approved  CFL - Change FLSA Status

Key Position

Job Information

*Business Unit: Job Code: *SCOA Type: Regular *Full/Part Time: Full-Time

*Regular Shift: Not Applicable Union Code: Title: Short Title: [Detailed Position Description](#)

Work Location

*Reg Region: USA United States Company: *Pay Group: SS1 Semi-Monthly Salaried

Department: *Employee Type: S Salaried

*Location: County Code: Dot-Line: UI Code: Security Clearance: Reports To: Supervisor Lvl:

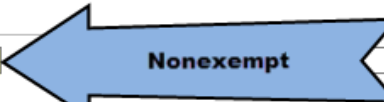
Salary Plan Information

Salary Admin Plan: SUP Grade: 03

Standard Hours: 40.00 Work Period: W Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

USA

FLSA Status: Nonexempt  Nonexempt



Human Resources Administration

404-656-2705

www.doas.ga.gov

HRA Policy

policy@doas.ga.gov

ePerformance Approval Workflow Enhancement

New functionality to view the approval status

Available mid-November

ePerformance Approval Workflow Enhancement

To see the approval status of an ePerformance document, click the red indicator flag

The screenshot displays the TeamWorks HCMTEST interface. The top navigation bar includes links for Home, Worklist, Performance Trace, and Add to Favorites. The main content area is titled "Annual Performance Review" and "Manager Evaluation - View". A left sidebar lists performance processes, with "Review Manager Evaluation" selected and marked with a red flag icon. The main view shows details for a Manager Evaluation, including Job Title, Document Type, Template, Status (Approval - Submitted), Manager, Period (07/01/2018 - 06/30/2019), Document ID (1219649), and Due Date (07/31/2019). A red arrow points to a small red flag icon next to the Document ID. The interface also includes options to Expand All, Collapse All, and Change Due Date, and a section for "Section 1 - Core/Individual Competencies".

ePerformance Approval Workflow Enhancement

Click on Approval Status

TeamWorks HCMTEST Home Worklist Performance Trace

Performance Process Annual Performance Review Return

Steps and Tasks Manager Evaluation - View

Annual Performance Review
07/01/2018 - 06/30/2019 Overview

- Define Criteria
Due Date 01/01/2019
- Review Self Evaluation
Due Date 07/31/2019
- Review Manager Evaluation
Due Date 07/31/2019

Job Title [Redacted] Manager [Redacted]
Document Type Annual Performance Review Period 07/01/2018 - 06/30/2019
Template Annual Performance Review Document ID 1219649
Status Approval - Submitted Due Date 07/31/2019

Expand All | Collapse All | Change Due Date

Related Information
Approval Status

ePerformance Approval Workflow Enhancement

Approval Status will display at the bottom of the document in Related Content

Related Content Approval Status

EVALUATION_APPROVAL_CHAIN- Evaluation Approval Chain

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (1 kb)

View All First 1-1 of 1 Last

	Approval Chain	Approver ID	Name	Approval Status	Modified Datetime
1	ePerformance Approving Mgr			Pending	07/05/2019 3:08:33PM

STATUS	FEATURE AVAILABLE Y/N?
Define Criteria	Not Available
Track Progress (Checkpoint Documents)	Available however Related Content section will be blank
Evaluation in Progress	Available however Related Content section will be blank
Approval Submitted	Available, pending approvals will be displayed in Related Content
Ready to Acknowledge	Available, approvals will be displayed in Related Content
Acknowledged	Available, approvals will be displayed in Related Content
Completed	Available, approvals will be displayed in Related Content

New Action Reason Code For Interim Staff

Purpose: Identify employees who work short periods of time but are not terminated and rehired between work periods

- ❖ Tenured staff
- ❖ Seasonal staff
- ❖ Other short work periods

New Action Reason Code For Interim Staff

Usage: Allows for easy activation/de-activation of employees who routinely have breaks in work periods.

Benefit: Provides a way to identify these types of employees for reporting and compliance purposes.

New Action Reason Code For Interim Staff

Action Code: LOA (Leave of Absence)

Action Reason Code: INS (Interim Staff)

Availability: December 2019

Action Reason Reference Guide is located at
<https://sao.georgia.gov/action-reason-code>.

Personal Leave Reminder

- Elections can be entered from December 8 through December 31
- HR Users can enter elections for employees who cannot access ESS
- Employees are eligible to elect Personal Leave if they have a sick leave balance over 120 hours as of November 30
- Personal Leave will be available for use on 1/8/2020.

Education Support Leave Reminder

- 2019 balances will be cleared on 12/31/2019
- 2020 balances will be added on 12/31/2019

Annual Enrollment Load For Payroll

Deductions for December 2019 will be loaded by the end of November

New Deduction Codes (*Update: there are no new deduction codes*)

There are a few rate changes

Charitable Contributions Load

Transactions will be loaded for the payroll in January 2020

Subgroup Updates

Subgroups

- ❖ General/HCM Transactions
- ❖ ePerformance
- ❖ Training
- ❖ Payroll

Subgroup Updates

Feedback – Topics of Interest

- ❖ Reports and payroll queries
- ❖ Onboarding – training
- ❖ Is there a navigation guide?
- ❖ Sequencing of HCM transactions (related to SHBP and only 1 transaction per day)

Subgroup Updates

Feedback – Pain Points

- ❖ Training/Best Practices/Knowledge
- ❖ Additional UPKs for payroll to cover all payroll processes

Subgroup Updates

Feedback – Specific Issues

- ❖ Additional UPKs for payroll to cover all payroll processes
- ❖ Health Benefit Transactions
- ❖ Effective Dates: When to correct/update/override on various scenarios
- ❖ Using Combo Codes
- ❖ ERS invoice & reconciliation issues
- ❖ Position Management

Subgroup Updates

Next Steps

- ❖ Organizational Meeting
- ❖ Assign feedback topics to appropriate group
- ❖ Identify solutions
- ❖ Prioritize

Other Feedback

Next Steps

- ❖ Updates on current and future activities
- ❖ HCM Security Roles
- ❖ Combo Codes
- ❖ Queries
- ❖ Labor Reports
- ❖ Documentation

Did You Know.....

Queries with `_U` at the end of the name indicate the query provides access to unmasked birthdate, social security number and direct deposit account number.

Additional security is needed to be able to view and run the unmasked queries.

Follow your agency's normal security process to request access. TeamWorks Agency Security Officers are aware of how to request additional access.

SAO Communications

HCM security access is used to prepare distribution lists for communications using the Primary Email addresses in TeamWorks HCM.

Please remember to keep your email addresses updated, especially if you have transferred to a new agency.

Please use your state email address and not a personal email address as your primary email address.

Please share communications within your agency as appropriate.

Providing Feedback

Martha Varn: Martha.Varn@sao.ga.gov

Melody Richards: Melody.Richards@sao.ga.gov

Customer Support Center: HCM@sao.ga.gov

Agency Participation

We want your feedback!

- Suggested topics for future meetings
- Suggested topics for subgroups
- General comments

Thank you for your participation!

Questions?

Materials from this presentation will be available on the SAO website at:

<https://sao.georgia.gov/human-capital-management/hcm-news>