

# TeamWorks Agency Forum

October, 2016

# Welcome!

**Facilitator: Amber Hall**

# Purpose

- Enhance communication with TeamWorks end-users
- Provide transparency and information on current and/or upcoming SAO strategies
- Discuss changes and enhancements
- Allow Agencies an opportunity to provide feedback on topics important to them

# Frequency

- Twice a year
- Tentatively in May and October
- Two identical meetings each month to better accommodate schedules
- Users will receive future invitations for upcoming Agency Forum meetings
- SAO will send the invitations about a month prior to the meetings

# Question Tips

- Please type any questions that you have in the Webinar question section.
  - Questions will not be answered during the presentation. They will be compiled, posted, and a link sent after the two presentations are complete.
  - Presentation slides and Q&As will be posted after both presentations (approximately 2 weeks)
- ❖ If you have questions, please be sure you have provided your first name, last name, agency name and email address. This is to ensure SAO can provide you with the answer you are seeking in a timely manner.

# Today's Topics

- **TeamWorks HCM**

# TeamWorks HCM

## Topics Include:

- Annual Base Benefits Rate Refresh for 2017 Plan Year
- Military Leave
- Personal Leave
- Education Support Leave
- W-2 Processing
- Affordable Care Act (ACA) Federal Reporting
- Support for FLSA Changes
- HCM 9.2 Upgrade

*Presented By:*  
HCM Functional Team

# TeamWorks HCM

## Annual Base Benefits Rate Refresh for 2017 Plan Year

- 10/1/2016 Job row was inserted for employees who are active or on leave
  - Effective Date is 10/1/2016
  - Action = Data Change
  - Action Reason = Refresh Annual Benefits Base Rt
- Calculates the ABBR for GaBreeze 2017 Plan Year

*Presented By:*

**Jason Dunn**

**HCM Functional Lead**

# TeamWorks HCM

## Annual Base Benefits Rate Refresh for 2017 Plan Year (continued)

- ABBR Corrections
  - Correct in TeamWorks
    - Action/Action Reason = Data Change/Correct Annual Base Benefits Rate
  - Correct in GaBreeze using the ABBR Smart Form

*Presented By:*

**Jason Dunn**

**HCM Functional Lead**

# TeamWorks HCM

## Annual Base Benefits Rate Refresh for 2017 (continued)

### ➤ Special Processing

- If there was an existing Job Data row with effective date of 10/1/2016, the new ABBR row was inserted using the next sequence number
- If there were existing Job Data row with effective date greater than 10/1/2016, the new ABBR row was inserted in the proper place and subsequent rows were updated accordingly.

*Presented By:*

**Jason Dunn**

**HCM Functional Lead**

# TeamWorks HCM

## Annual Base Benefits Rate Refresh for 2017 Plan Year (continued)

### ➤ Special Processing

- Employees that were in process of transferring (top Job Data row = Transfer/Out)
  - DID NOT have a new row inserted
  - Existing top row was not updated with the new ABBR rate
- Employees hired/rehired after 10/1/2016
  - ABBR from the top Job Data row will be used.

*Presented By:*

**Jason Dunn**

**HCM Functional Lead**

# Questions?

Please type them in the Webinar questions section

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# TeamWorks HCM

## Military Leave Reminder

- Balances were reset to 0 the night of October 7
- BNxxx0504 (Military Leave Reset Report) was available October 8
- Federal Fiscal Year 2017 balances can now be entered

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## Personal Leave Reminder

- Elections can be entered from December 8 through December 31
- HR Users can enter elections after 12/31 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 1/8/2017
- Look for a communication in mid-November

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## Education Support Leave Reminder

- 2016 balances will be cleared on 12/31/2016
- 2017 balances will be added on 12/31/2016

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## W-2 Processing

- SAO will be requesting approval from agencies for SAO to send W-2s to the IRS
- SAO will be requesting each agency to identify 2 contacts
- Updated Balance Adjustment Requests
  - Multiple adjustments can be submitted on one ticket to the CSC
  - Must use the spreadsheet provided by SAO. It's not posted yet but will be located at:  
<http://sao.georgia.gov/w-2-processing>
- Look for a communication from SAO in early November

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## Affordable Care Act (ACA) Federal Reporting

- SAO will be requesting each agency to identify a primary and secondary individual as the ACA contact for their agency
- Reporting schedule
  - Employee statements will be distributed to employees in January
  - Employer returns are filed in March
- EY (Ernst & Young) will continue as the state's outsourced partner to manage the reporting and filing in a centralized manner.

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## Affordable Care Act (ACA) continued

- Core Services for in-scope agencies include:
  - Collection of information needed for reporting, such as work hours, offers of insurance, and insurance enrollment
  - Central management of annual IRS reporting and issuance of employee statements
  - Central management of notifications from federal exchanges for appeal if an employee claims eligibility for a tax subsidy
  - Call center to manage 1095-related employee inquiries
  - As tax preparer, EY will sign the forms

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## Affordable Care Act (ACA) continued

- Services do not include
  - Healthcare eligibility determination
  - 1094-B Reporting (Medicaid, PeachCare)
  - Consent forms for electronic issuance of employee statements
- Refer to <http://sao.georgia.gov/affordable-care-act> for additional information

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## Support for FLSA Changes

- HRA and SAO are jointly working on a TeamWorks solution to:
  - Identify employees who are exempt but do not meet the compensation test
  - Perform one-time conversion of FLSA Status from exempt to non-exempt

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## Support for FLSA Changes (continued)

- How will the conversion work?
  - Only employees in applicable job codes will be converted
  - A 12/1/2016 row will be inserted into Position Data and Job Data
  - The FLSA Status on the 12/1/2016 rows will be updated to non-exempt
  - Future-dated rows in Position Data and Job Data will also be updated
  - No other changes, including Employee Type, Pay group, Standard Hours, etc., will be made
  - Employees who pass the salary test but also require a job code change will need to be updated manually

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## Support for FLSA Changes (continued)

### ➤ Planned for TeamWorks

- Queries to assist in identifying exempt employees that do not meet the salary test
- On-line page to view job codes that are exempted
- On-line system message to warn when an exempt employee does not pass the compensation test

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## Support for FLSA Changes (continued)

- Available Now in TeamWorks
  - OHR094\_FLSA\_SALARY\_TEST Query
    - Employees currently with FLSA Status not equal to Non-exempt or Safety/Non-Exempt
    - Do not meet salary test (less than \$47,476)
    - Not in one of the exempted job codes
    - Use to review FLSA status for employees that do not meet the salary test

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## Support for FLSA Changes (continued)

- Available Now in TeamWorks
  - OHR095\_FLSA\_EXCL\_JOBCODES Query – Excluded Job Codes
    - Lists all job codes that are excluded from FLSA such as teachers, legislators, etc.

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## Support for FLSA Changes (continued)

### ➤ Conversion

- If your agency has a small number of conversions you may prefer to handle them manually
- If your agency has a large number of job code changes you may also prefer to make your changes manually
- Agencies may choose to opt out of the conversion

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## Support for FLSA Changes (continued)

### ➤ Conversion

- Conversion is planned for a few days before 12/1/2016 to allow agencies to make changes after the conversion
- List of FLSA Status codes to be excluded from the conversion has not been finalized
- Query to identify employees that will be included in the conversion
- Look for future communication on the conversion

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## HCM 9.2 Upgrade

### ➤ Status

- Upgrade will start at **6:00 PM** on Thursday, October 27, 2016
- Upgrade will finish by **8:00 AM** on Monday, October 31, 2016

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## HCM 9.2 Upgrade (continued)

### ➤ What is changing?

- New look and feel
- Employee Self Service dashboard
- Manager Self Service dashboard
- Termination checklist
- Absence Management and Time & Labor enhancements
- ePerformance AutoSave

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

## HCM 9.2 Upgrade (continued)

### ➤ How do I learn more about the upgrade?

- Go to <http://sao.georgia.gov/hcm-92-upgrade> for the latest information on the update: News, FAQs and Recorded Webinars
- Attend the HCM User Group Meeting on Tuesday, October 25, 2016 or November 7, 2016. Floyd Veterans Memorial Building, 1816 A-B (West Tower) beginning at 2:00 p.m. Presentation includes information and a demo of the new features

*Presented By:*

**Martha Varn**

**HCM Functional Manager**

# TeamWorks HCM

<http://sao.georgia.gov/hcm-92-upgrade>

Fiscal Leadership for Georgia

TeamWorks | Statewide Reporting | Shared Services | Policies and Procedures | Travel | Training & Calendars | State Board of Accountancy

**TeamWorks**

- Communications
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- ▶ Financials
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  - ▼ **HCM 9.2 Upgrade**
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## HCM 9.2 Upgrade

**Great news!** The TeamWorks HCM 9.2 Upgrade is coming in 2016. This is a migration to the latest release of PeopleSoft to support strategic goals, business objectives, and regulatory requirements. This upgrade will focus on **"Lift and Shift"** meaning the same user functions that you currently use in 9.1 will be available in 9.2.

### Key Dates

What's Happening?	When?
User Acceptance Testing	Late August 2016 thru September 2016
Training	September 2016
Go Live	Late October 2016

*\*Please note, dates are PRELIMINARY and updates will be communicated as soon as possible.*

Please be sure to submit your questions via our [Frequently Asked Questions](#) form available on the

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# Presentation Info

- Presentation slides and Q&As will be posted on the SAO website (takes approximately 2 weeks after both presentations).
- Once posted, all of those who registered will receive an email with the link where the documents are located.

# Conclusion

## ➤ Future Topics?

- What would you like for us to cover?
- Any other suggestions or feedback?
- Send To: [amber.hall@sao.ga.gov](mailto:amber.hall@sao.ga.gov)

## ➤ Links to refer to:

- <http://sao.georgia.gov/w-2-processing>
- <http://sao.georgia.gov/affordable-care-act>
- <http://sao.georgia.gov/hcm-92-upgrade>