HUMAN RESOURCES

RELEASE NOTES – MARCH 2017

This document explains new product enhancements added to the ADMINS Unified Community for Windows **HUMAN RESOURCES** system.

1. MAINTENANCE ▶ EMPLOYEE MAINTENANCE ▶ [DATES/CLASS] TAB

When adding a new position to an existing employee, only the original hire date (EEO/Orig Hire Date) was brought into the new position **[Dates/Class]** tab.

Figure 1 Before – the new position only carried forward the EEO/Orig Hire Date

With the software update the option is now available to set the position hire date but retain some/most of the others.

Any field may be typed over and replaced with a date of your choosing on this screen when creating a new position. Overtyping dates may result in unintended consequences when reports or queries are run.

1.1. Carry Forward Position Dates [New Option]

Figure 2 Original Position Dates

Employee #310 is taking an additional position as the Fleet Maintenance Supervisor. Click on **[P Add Position].**

Enter the Salary Information. The next prompt was updated to allow **DATES** to be copied from a previous position.

If the **"Copy DATES from this position"** field is left blank, the **Position Hire, Anniversary, Longevity, Probation End, EEO/Orig Hire and FT Dates** will be set to the **Position Hire Date**. If a position is selected, the dates from the selected position are copied into the new position.

The dates that will be copied (if present in the selected "old" position) include:

Other
Leave of Absence Start
Leave of Absence end
Adjusted Seniority Date
Tenure Date

Position Dates
Anniversary Date
Longevity Date
Probation End Date
EEO/Orig Hire Date
Final Cobra Date
Layoff Date
Recall Date
CT PT Sick Leave Date

Evaluations
Date of Last Eval
Date of Next Eval

Eligible for…
Medicare
Retirement
Pension
Sick Bank
Civil Service (Seniority Date)
ERI
Perfect Attendance
Union Dues

Custom Dates
(Ten are available and will vary depending on options selected on each site)

[MBE-SUP-SAPLAUC-402]

2. PAYROLL PROCESSING

The file created for Automated Clearing House processing (ACH) as part of payroll processing is now separating the "**PPD**" records from the "**CCD**" records. A single file will be created but processed as distinct batches by the Automated Clearing House. Select **Human Resources ▶ Payroll Processing ▶ Process Paychecks ▶ Create Direct Deposit File**:
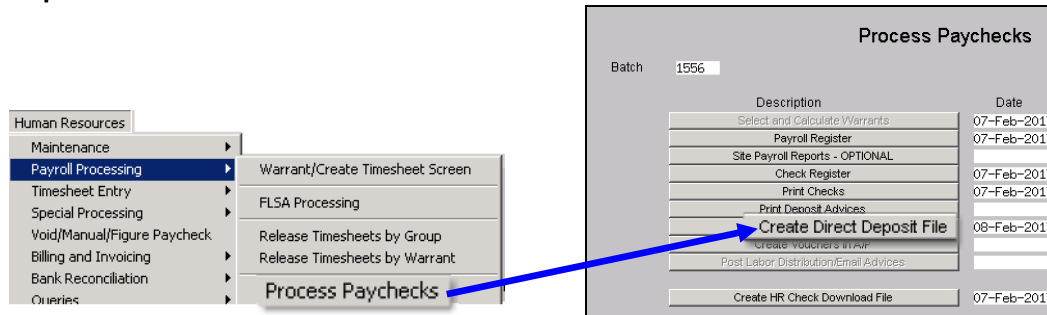
2.1. Create ACH File [Fix]

When using the SEC code **PPD** customers have 60 days to dispute or return the item as unauthorized. When using the SEC code **CCD** customers have 48 hours to dispute or return the item as unauthorized. In the image below, the payments to Vantage and the Bank of New York were not identified as "CCD" (commercial) records.

Figure 3 Before

Now, the Commercial records are correctly identified, as shown in the image below:

Figure 4 After

[ADM-AUC-HR-9875]

3. VOID/MANUAL FIGURE PAYCHECK SCREEN [FIX]

When adding a void or manual check, and using the optional **Employee Shift Code Override** field, the system allowed typing lower case letters into the find or search box. This resulted in no matching record found. Now the system forces any find or search term to all caps so that the matching code will be found.
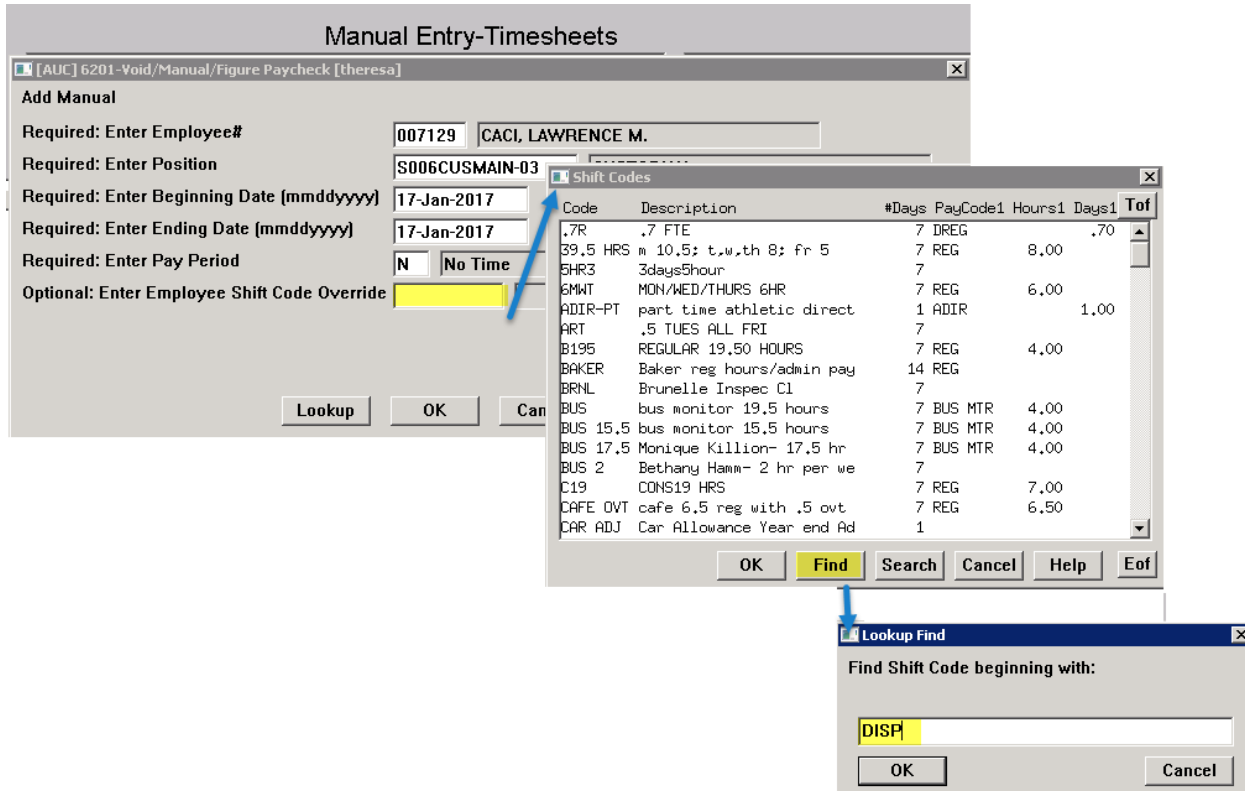
[ADM-AUC-HR-9857]

4. REPORTS

Access reports by selecting Human Resources ▶ Reports ▶ Report Library.

4.1.   Employee Reports

Select **Human Resources ▶ Reports ▶ Report Library ▶ [1 By Employee]** to select from the list of reports based on employee data. The **6770–Employee Salary Difference Report** now offers the option to enter a minimum employee salary amount:
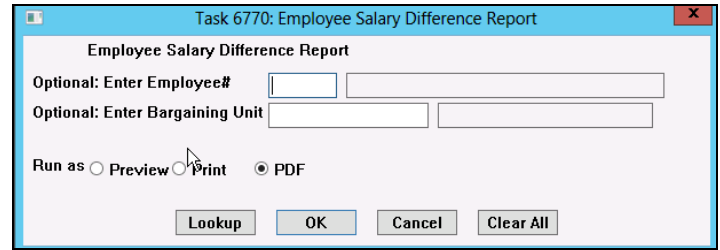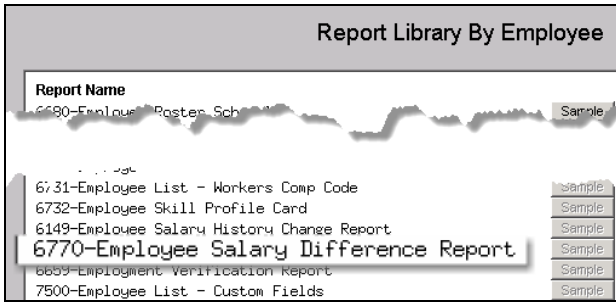
Figure 5 Before
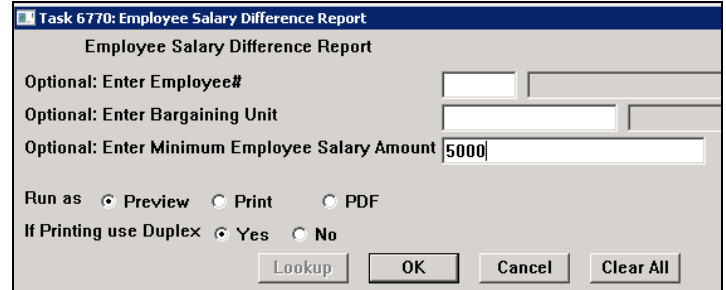
Figure 6 After

4.1.1. 6770 Employee Salary Difference Report [Enhancement]

Using the minimum employee salary amount suppresses reporting on part time employees with varying hourly rates and focuses on employees with variances that may impact budgeting.

These employees are excluded when the report is run with the optional minimum salary amount:

[ADM-AUC-HR-9873]

4.2. Timesheet Reports

Select **[3 By Timesheet]** to view the list of reports based on timesheet entry and history. An Excel version of the Timesheet Entry Detail by TS Group/Employee report was fixed to align the column headers with the data.

4.2.1.   6220–Timesheet Entry Detail by TS Group/Employee [Fix]

Figure 7 Before

Figure 8 After

[ADM-AUC-HR-9867]

5. TABLES

5.1.   Cost Code Table [New] "Subtract (from W2)" Field Added

Figure 9 Before

Figure 10 After

In most instances, cost code deductions or benefits are added together to be reported on the W2. In the case of over 50K life insurance, the employee's contribution *reduces* the taxable benefit.

To accommodate this reduction in the taxable benefit, the **Cost Code Table** has a new field at the bottom right in the **W2 box section**. To denote this, set the **[Subtract]** radio button to "**Yes**". The employee contributions will be deducted from the benefit amount shown on the W2.

[ADM-AUC-HR-9883]

6. YEAR END

This section addresses items found under Human Resources ▶ Year End Processing.
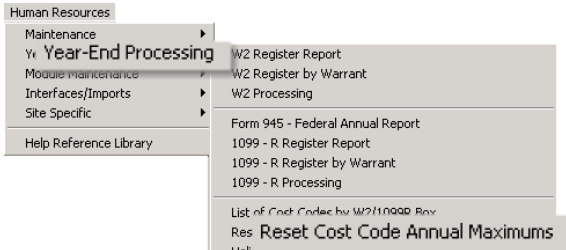
6.1. Reset Cost Code Annual Maximums [Fix] & [Update]

Use the **Reset Cost Code Annual Maximums** process to reset the remaining balance for employee deductions to the amount of the cost code table annual maximum or the employee's original amount.

During the reset process, items deselected were still posted, but not reported as posted. This has been resolved.

In addition, an option for cost code category was added to allow users to select up to nine cost code categories.

If there are many cost codes to be reset within a category use this option to select all the codes for a given category.
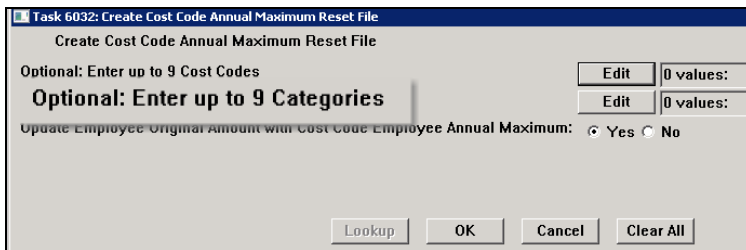
[ADM-AUC-HR-9852]

6.2. Tool to Help Research and Resolve ACA Filing Errors [New]

The most frequent ACA filing errors are the result of TIN Validation failure due to a bad social security number/name match. The link below allows employers to validate Social Security Numbers against names. This link may be used when adding a new hire or covered individuals in the **Human Resources ▶ Maintenance ▶ Employee Maintenance ▶ [V ACA Tab]** to verify and validate the data.

https://www.ssa.gov/employer/ssnv.htm

Employees must verify their data for you by producing their Social Security card or a letter of confirmation from the Social Security Administration.

[ADM-AUC-DOC-118]

6.3.   1095C Processing Entity Table Screen [Update]

6.3.1.   Payroll W2 1095C [Entity Table Changes]

The Payroll W2 1095-C screen was updated to incorporate new changes to the law for tax year 2016 reporting and installed on sites in January; this notice is included here to document the change.

1.   The Plan Start Month requires a two–digit number between "01" and "12"–if the plan starts in January, enter "01", if the plan starts in July, enter "07".
2.   The HSA Plan check box, when selected, allows the values in Line 15 to be blank.
3.   The description for Line 15 codes was updated to include Codes 1J and 1K.

Figure 11 Before   **Figure 12 After**

[ADM-AUC-HR-9851]

6.3.2.   Upload 1095C Data [Fix]

The upload process was not including all records in the spreadsheet. This was corrected.

[ADM-AUC-HR-9860]

6.3.3. 1095C Forms – Social Security Numbers [Update]

Figure 13 Before

Figure 14 After

In **Part 1 Employee** information, the social security number was printing in its entirety. With the software update, the social security number printed on the forms is masked and only the last four digits will print.

[ADM-AUC-HR-9880]

6.3.4. Bargaining Unit Table [Update]

A similar change was made to the [**Affordable Care Act**] tab of the Bargaining Unit Table:

6.3.5. Audit Reports [Fix]

The Employee Audit Report #3 was changed to properly describe social security number mismatches–the explanation was updated and installed on sites in January; this notice is included here to document the change.

Figure 15 Before

Figure 16 After

[ADM-AUC-HR-9854]

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6.3.6. Who Gets a 1095C Form [Clarification]

The ACA filing is based on calendar year and the examples below are for the calendar year January 1, 2016 – December 31, 2016.

Sites shall provide a 1095C form to:
- **new employees taking health insurance in 2016**
- **employees previously declining and now taking health insurance in 2016**
- **employees continuing health insurance in 2016**
- **employees declining insurance in 2016**
- **employees with changes to covered individuals in 2016**

If a continuing employee declined insurance prior to 1 January 2016, and has the ***offer*** to take insurance in 2016 but did not ***elect*** to take insurance with the municipality they are not reportable, as their ***declined status did not change in 2016***. They are reportable by the company providing their health insurance.

[ADM-AUC-HR-9887]

6.3.7. 1095C Forms [Update]

The 1095C form was updated per the IRS instructions and installed on sites in January; this notice is included here to document the change.

Employer-Provided Health Insurance Offer and Coverage
Information about Form 1095-C and its separate instructions is at *ww.irs.gov/form1095c*

Figure 17 Before

Employer-Provided Health Insurance Offer and Coverage
Do not attach to your tax return. Keep for your records.
Information about Form 1095-C and its separate instructions is at *www.irs.gov/form1095c*

Figure 18 After

Part II Employee Offer and Coverage	All 12 Months	Jan
14 Offer of coverage (enter required code)	1E	
15 Employee Share of Lowest Cost Monthly Premium, for Self-Only Minimum Value Coverage		0.00
16 Applicable Section 4980 Safe Harbor (enter code, if applicable)		

Figure 19 Before

Part II Employee Offer and Coverage	All 12 Months	Jan
14 Offer of coverage (enter required code)	1E	
15 Employee Required Contribution (see instructions)	0.00	
16 Section 4980 Safe Harbor and Other Relief (enter code, if applicable)	2C	

Figure 20 After

[ADM-AUC-HR-9851]

7. SCREEN MINIMIZED ON TIMEOUT [FIX]
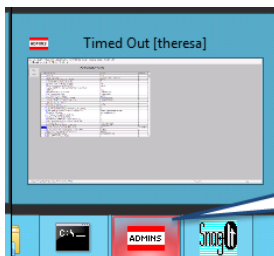
Users on selected sites were unable to restore an AUC session if the screen was minimized and the time out limit was reached. With the software update, restore an AUC session by double clicking on the ADMINS icon in the taskbar

[ADM-AUC-SY-8001]

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8. RECORD LOCKS [NEW]
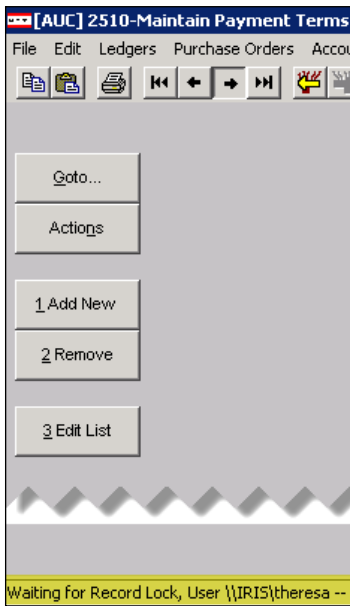
Users sometimes encounter a lock that prevents them from accessing a record. There is a message displayed at the bottom of the screen in the lower left corner that will say "Waiting for Record Lock, User \\IRIS\theresa", for example. This tells the user who else is on the record. Some users may be unable to see or interpret this message and will ask an expert user at their location for help.

A new feature is available that an expert user on the site may use to identify record locks. Select **Help ▶ Check Blocking Locks**.

This will check for blocking locks and open a report window on the screen with the lock information.

```
MLOCK -b
User "theresa" PID "00000e18" on node "IRIS" running "TRAN", has record 35
in file "d:\AUC_DE~1\admhome\auc\FMMOD\Dat\Tab\apportrm.tab" open for "Writ"
which is blocking "anthea" PID "00000f28" on node "IRIS" trying to run "TRAN"
```
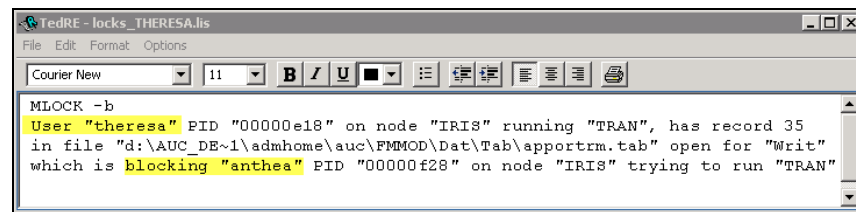
In the example, the user "Theresa" is blocking "Anthea" and the expert user may contact Theresa to ask her to exit the screen to release the lock and allow Anthea to access the record. The expert user now **must** click **File|Exit** to close this report window before they can do anything else in AUC.

The user with a record lock will not be able to use the Help ▶ Check Blocking Locks feature since they are already captive in the locked AUC process. They will need to ask another user, the site "super user" or ADMINS to check for them.

[ADM-AUC-SY-7995]

9. PREVENTING "FROZEN" SESSIONS [NEW]

Occasionally, users report that their session has **"Frozen"**. To minimize the chance of this happening, always exit the system using **File ▶ Exit** from the menu.
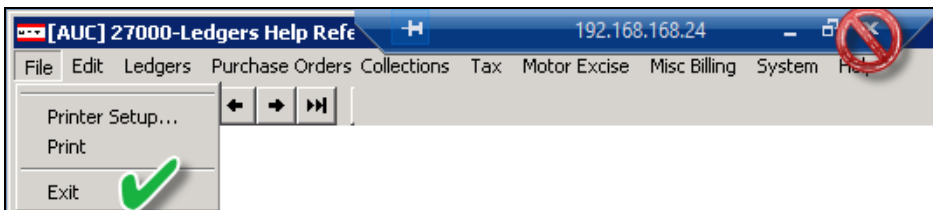
 "Frozen" sessions may result if the **X** on the blue connection bar at the top of the screen is used to close the AUC session, or if the session is abandoned at the end of the workday.

Users who will be away from their desks for longer than 30 minutes should exit from the AUC application using **File ▶ Exit** from the menu prior to departing. Do the same at the end of the workday, as open sessions on the server may result in unintended consequences.

[ADM-AUC-DOC-120]

10.   MULTI-RECORD SCREENS [FIX]

Sites using version 9.2 of the ADMINS software were updated to use proportional fonts in the headings of multi-record screens. This allows fixed fonts to be used for the data within the grids, which users report are easier to read, while using variable fonts for the headings, fixing alignment issues.

Figure 21 Before

Figure 22 After

[ADM-AUC-SY-8002]

11.   SYSTEM ADMINISTRATION KIT [UPDATE] PCL 5

Some printers advertised to be PCL 6 compliant do not include PCL 5 backward compatibility. When deploying printers without PCL 5 backward compatibility, ADMINS recommends that the default for reports is set to **PDF** printing.

11.1. Printers [PDF Option]

ADMINS recommends that sites select a default of **"PDF"** for reports. The only impact to the users will be the report displayed in the PDF Viewer instead of the ADMINS Report Viewer (TedRE). If you want your site to default to PDF output please contact support@admins.com to arrange for the change.

This is a site-wide change that will affect all modules and all users of AUC.

11.1.1.   What Will the Users See?

Figure 23 Preview as the Default

Figure 24 PDF as the Default

Figure 25 ADM Ted Viewer

Figure 26 PDF Viewer

This default will not prevent users from selecting **Preview**. If a user tries to print the **"*.lis"** report output using the **TedRE Preview** to a printer that is not PCL 5 compliant the report will not print. Selecting **PDF** will preview the report in a **PDF Viewer** window and will print to any printer.

[ADM-AUC-SY-8008]

12. ADOBE ACROBAT PDF VIEWER SETTINGS [Update]

PDF is the default for ADMINS reports on some sites. When the report comes into view, you may customize the appearance of the viewing window by pressing **[CTRL|K]** or selecting **Edit▶Preferences**. From there, you may set your default layout and zoom with the drop down menus.

[ADM-AUC-DOC-118]

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13. HELP REFERENCE LIBRARY

13.1. New or Updated Documentation

The following new or updated documentation was added to the Help Reference Library.

- EMPLOYEE POSITIONS   HR–200 Reset Annual Maximums   [Updated]
     HR–210 Leave Accruals   [Updated]
     HR–275 Pay Codes   [New]
- SPECIAL PROCESSING   HR–580 Year End Taxable Benefit Adjustments   [New]
- YEAR END PROCESSING   HR–630 W2 Processing Slides   [Updated]
     HR–670 1099R Training Slides   [Updated]
     HR–750 ACA January 2017 Webinar   [New]
- SYSTEM   HR–1110 System Administration Kit   [Updated]