B HUMAN RESOURCES RELEASE NOTES – DECEMBER 2017

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

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1. EMPLOYEE MAINTENANCE New Position Dates [Enhancement]

This enhancement was installed with the June 2017 software update but was not documented in the release notes. When an employee is moved to a new position, payroll staff will see a prompt allowing the dates to be copied over from an existing terminated position. As shown below, all fields are optional; now **DATES** may be copied in addition to **DEDUCTIONS** and **ADDITIONAL WAGES**.



The position hire date will be set; any other dates will be copied from the terminated position.

[ADM-AUC-HR-9793]

1.1. Adding Employees, Adding Positions and Changing Salaries [Fix]

X

Prior to the software update, the system did not take into consideration the module control #6017 Encumber Positon flag when adding an employee, adding a position, and changing a salary. This was corrected.

Salary Encumbrance for 1000-300-2330-124-03-00-51401 Required: Effective Date to Encumber (mmddyyyy) 10-Oct-2017 Optional: Enter Amount to Encumber [ex: 10000] 28,922,40 Lookup QK Cancel Clear All	The system would pop up a message asking for a date and amount to encumber, for positions flagged as shown in Figure 2 when module control #6017 was blank.
Image: AUC 7990-Human Resources Module Control (theress) File: Exit Ledgers: Purchase Orders: Accounts Payable: Frond Assets: Human Resources: Budget: Collections: Tax: Motor Excise Image: I	Misc Billing System Help
6017 Enter V if positions flagged in the position masterfile are ensumbered attains	1 Eat

Figure 1 Module Control 6017 - are flagged positions encumbered?



Goto			Position Mainter	nance		
Actions	Position Position Description	BOOJABATECH-01 APPLIED BEHAVIOR A	NALYSIS TECHNICIAN	Current Employees: 00 00	00003 BROOKS, M 00020 POWERS, L	EITH W YNN M
1 Add New 2 Flag for Delete 2 Copy Position 4 Edit List 5 Queries	Position Category Timesheet Corup Bargaring Unit Schedule Orade Budget Group Pay Group EEO Category EEO Category EEO Category EEO Type Worker Comp Code EEO Type Worker Comp Code EEO Type Unit Account Full Time Equivalent Supervisor Position Budget Fringe Amount Allow Employee in this	RD.UST SchoolREED RSL SCHOOLREED RFL F SCHOOLREED RSL SchoolREED SCHOOLREED RSL SchoolREED SLIB SchoolREED SchoolREED SII SchoolREED SchoolREED SII SchoolREED RSL SII 21 21 SG Par. SchoolREED SG Par. NOI SGO CLE SchoolREED SGO CLE SchoolScholSchoolSchoolScholSchoolSchoolSchoolSc	col Adjustment Counsel D CENTER D CENTER DOL Heekly 12 month em col Library Asst TRICT Page s-Professionals DOL TEACH & CLERI FLSA E-Time Duntary Termination RICH 22,5 MEEX NOF AWNHERE D0-00-51120 - 10 MONTH FY 0000 Posted on FY 0000 Posted on	or ployees Supervisors: Encumber Post	tion • Yes © No	
	Budgeted Position Budget for Vacant Posi	tion				

Now, if the value of module control 6017 is blank (indicating that the positions flagged on the position maintenance screen are *not* to be encumbered), the system will not force an encumbrance amount and date. This is effective when adding a:

- position to an employee,
- new employee, or
- salary change for a position,

and the **"Encumber Position" = Yes** in the **Position Maintenance Screen**.

Figure 2 Position Maintenance Screen Encumber Position Flag

See the document, HR-360 Encumbrances, for more information about this process.

[BLG-SUP-SAPLAUC-1025]

2. PAYROLL PROCESSING

2.1. Balancing FICA as the Year Comes to a Close [Info]



ADMINS support gets inquiries in the fourth quarter of the year when payroll staff balance FICA and the calculated estimates are higher than actuals. This may happen when highly paid employees reach the FICA annual maximum contribution as the end of the year approaches. The tax year FICA limit is entered in the base bucket table and some sites set the annual deduction/benefit in the cost code table. Be sure to review report **6162-HRFICALIMIT**, generated every warrant during the payroll calculation step, to identify situations when an employee has

exceeded the FICA limit.

[ADM-AUC-HR-9945]

2.2. Warrant/Create Timesheet Screen [New]

The Warrant/Create Timesheet screen did not list the batch number associated with the warrant. This number is used on the reports generated during warrant processing. This number allows both the user and the AUC support team to readily retrieve reports by using the cross reference of the warrant and batch number. View this change by selecting **Human Resources** > **Payroll Processing** > **Warrant/Create Timesheet Screen** > **[Details]** button. The batch # is used in the filename rather than the warrant number because multiple warrants may be processed in a single batch (see Figure 14).



Warrant Pay G	roups		Warrant Pay G	roups
Warrant 330014 Period Start 11-Aug-2017 End 17-Aug-2017	is 🔟 Check Date	Warrant 330014 Period Start 11-Aug-2017 E End 17-Aug-2017 E	Bank PAYR Period WE #Pays/Dec Batch 1577	is <u>1</u> Check Date
Sel Pay Group Frequency	Sel Pay Group	Sel Pay Group	Frequency	Sel Pay Group
✓ LUANN W TEST TC 16 EMPLOYEES - DIF BARG UNITS B ✓ TW Town Weekly W		 ✓ LUANN ✓ TEST TC 16 EMPLOYEES - ✓ TW Town Weekly 	W DIF BARG UNITS B W	

Figure 3 Before

Figure 4 After - Batch # is shown on the screen

In addition to the batch number showing on the detail screen, it is now displayed on the multi-record Warrant/Create Timesheet Screen as shown below:

All			Warrant/C	Warrant/Create Timesheet Screen									
	2 Warrant#	3 Check Date	4 Post Date	Pay Perio	d Bank	Batch#	Start	End	Status	# Unposted Void/Manual			
<u>1</u> Details	330031 930030 930029 930028 930027 930026 930025	02-Nov-2017 02-Nov-2017 02-Nov-2017 26-Oct-2017 19-Oct-2017 18-Oct-2017 19-Oct-2017	18-Oct-2017 18-Oct-2017 18-Oct-2017 18-Oct-2017 18-Oct-2017	W5 W5 WE N WE N	Payr Payr Payr Payr Payr Payr Payr	1592 1592 1593 1591 1586	26-0ct-2017 26-0ct-2017 26-0ct-2017 19-0ct-2017 12-0ct-2017 18-0ct-2017 12-0ct-2017	01-Nov-2017 01-Nov-2017 01-Nov-2017 25-Oct-2017 18-Oct-2017 18-Oct-2017 18-Oct-2017	Uncalculated Uncalculated Posted Calculated Posted Posted	1			

Figure 5 Batch # Added to Multi-Record Warrant/Create Timesheet Screen

[ADM-AUC-HR-9935

2.3. Last Paid Date on Employee Detail Records [Fix]

The last paid date was being written back to the employee detail record for any timesheet built, even if there were no hours or pay entered. Often timesheets are built in anticipation of time being entered, for example, in the case of Part Time Temporary Workers. The last paid date was being set when the payroll was posted even if the employee was not paid.

This has been resolved.

[PCS-SUP-SAPLAUC-577]

2.4. Warning Message – "Point of No Return" [New]

A message was added to the Disbursement Processing Steps menu to warn the user that the warrant could not be selected for recalculation once the Check Register step was complete.



Figure 6 New warning message on [Check Register] step



If **[No]** is selected, the success flag will not be set on the step and the warrant may be selected for recalculation.

Figure 7 The steps menu when selecting [No]

	Process Paychecks													
Batch	1595													
	Description	Date	Start	End	Success									
	Select and Calculate Warrants	21-Nov-2017	10:20:08.00	10:22:10.97	7 🔽									
	Payroll Register	27-Nov-2017	14:53:30.08	14:53:45.09) 🔽									
	Site Payroll Reports - OPTIONAL				Г									
	Check Register	27-Nov-2017	15:00:48.21	15:00:55.11										
	Print Checks	27-Nov-2017	16:11:57.47	16:12:15.42	2 🔽									
	Print Deposit Advices				Γ									
	Create Direct Deposit File				Г									
	Create Vouchers in A/P				Г									
	Post Labor Distribution/Email Advices													
	Create HR Check Download File		_		Г									

If **[Yes]** is selected, the success flag will be set on the **[Check Register]** step and the **[Select and Calculate Warrants]** step will be grayed out and cannot be selected for recalculation.

Figure 8 Process Paychecks may not be restarted – past the "Point of No Return"

[ADM-AUC-HR-9957]

2.5. Labor Distribution Posting [Fix]

The labor distribution posting was posting Cash to the period ending date when balancing the fund. This has been corrected to instead post to Accounts Payable.

[ADM-AUC-HR-9941]

2.6. Posting Labor Distribution is a "Hands On" Process [Info]

	Process P	aychecks
Batch	1593	
	Description	Date
	Select and Calculate Warrants	18-0ct-2017
	Payroll Register	18-Oct-2017
	Site Payroll Reports - OPTIONAL	
	Check Register	21-Nov-2017
	Print Checks	21-Nov-2017
	Print Deposit Advices	21-Nov-2017
	Create Direct Deposit File	21-Nov-2017
	Create Vouchers in A/P	21-Nov-2017
	Post Labor Distribution/Email Advi	ces
		_
	Create HR Check Download File	

Please do not click on the **[Post Labor Distribution/Email Advices]** step unless you have time to see the posting through to the

end. You need to watch the process to be able to click **[Yes]** or **[No]** to post once the fifteen posting reports are **generated and reviewed**.

 unless you

 ugh to the

 Labor Distribution Report

 Image: Comparison of the post of the post

Yes

If you run this step unattended

you to contact support in order to resolve. This could take some time and cause delays in the completion of your payroll posting.

[ADM-AUC-HR-9954]

No

3. SPECIAL PROCESSING ▶ Salary Change [Fix]

A programming change was made to correct the display on the **Employee Maintenance** Salary Tab. Prior to the software update, if an employee had a step increase entered via **Human Resources** Special Processing Global **Change To Employees Salary**, and also had other activity, such as a **Cost Of Living Adjustment (COLA)**, the **COLA** was not reflected in the screen.

						Emp	loyee Maint	enance				on File
Goto Actions	Emp Posi	ioyee Number lion 4520-1	000291 1210-001					1 Of 2	Employee Attac Employee Positor	hments (6) Attachments		2
I Add Employee P Add Position	-			_	_							
		-										
1 Contact	2 Personal	3 Ded/Ben 4	Add Wages	5 Pa	yroll	6 Acc	and the first of t		and the second sec	AA 0.0	the second s	
							ouning I	8 Dates/Cl	ass 9 Degre		ustom	U Accidents V A
Effective Date	Entry Date	Bargaining Unit	Schedule	Grade	Stp	FTE	Annual Salary	Period Salary	Daily Salary	Hourly Rate	Per Diem	U Accidents V A
Effective Date 13-Sep-2017	Entry Date 14-Sep-2017	Bargaining Unit A -1	Schedule	Grade 13	Stp 2 1	FTE	Annual Salary 72927.92	Period Salary 1402.46	Daily Salary 280,49	Hourly Rate	Per Diem 280,49	UAccidents VA Tier# Entry User 1 GlobalChange
Effective Date 13-Sep-2017 13-Sep-2017	Entry Date 14-Sep-2017 13-Sep-2017	Bargaining Unit A -1 A -1	Schedule AWS AWS	Grade 13 13	Stp 2 1 2 1	FTE	Annual Salary 72927.92 71497.92	Period Salary 1402,46 1374,96	Daily Salary 280,49 274,99	Hourly Rate 35.0615 34.3740	Per Diem 280,49 274,99	Tier Entry User Global Change
ffective Date 3-Sep-2017 3-Sep-2017 3-Mar-2017	Entry Date 14-Sep-2017 13-Sep-2017 20-Mar-2017	Bargaining Unit A -1 A -1 A -1	Schedule AWS AWS AWS	Grade 13 13 13	Stp 2 1 2 1 1 1	FTE 1,0000 1,0000	Annual Salary 72927.92 71497.92 69800.64	Period Salary 1402,46 1374,96 1342,32	Daily Salary 280.49 274.99 268.46	Hourly Rate 35.0615 34.3740 33.5580	Per Diem 280,49 274,99 268,46	U Accidents VA Tier# Entry User 1 GlobalChange 1

Figure 9 Before–No entry is shown on July 2, 2017

	Employee Maintenance												
Goto Actions	Employee Number Position 4520-:	<mark>200291</mark> 210-001			i) ents								
P Add Employee													
1 Contact 2 Pers	1 Contact 2 Personal 3 Ded/Ben 4 Add Wages 5 Payroll 6 Accounting 7 Salary 8 Dates/Class 9 Degrees 0 Custom U Accidents VACA												
Effective Date Entry Da	te Bargaining Unit	Schedule	Grade	Stp FTE	Annual Salary	Period Salary	Daily Salary Hourly R	ate Per Diem	Tier# Entry User				
13-Sep-2017 14-Sep	-2017 A -1	AWS	13	2 1,0000	72927,92	1402,46	280,49 35,061	5 280,49	1 GlobalChangeS				
13-Sep-2017 13-Sep	-2017 A -1	AWS	13	2 1,0000	71497.92	1374,96	274,99 34,374	0 274.99	1				
02-Jul-2017 27-Sep	-2017 A -1	AWS	13	1 1,0000	71196.74	1369,17	273,83 34,229	273.83	1				
13-Mar-2017 20-Mar	-2017 A -1	AWS	13	1 1,0000	69800.64	1342,32	268,46 33,558	0 268,46	1				

Figure 10 After-the COLA is reflected on July 2, 2017

[ADM-AUC-HR-9813]

4. QUERIES

4.1. Timesheet History Screen [Fix]

The lookup on the timesheet history screen was not retaining the selection made by the user, and instead showing the first position for the employee, requiring that the user select the position again once the screen displayed the first position. This was corrected.



If a position for which there is no timesheet history is selected from the lookup, the first position for which there is timesheet history will appear in the screen.

[ADM-AUC-HR-9944]

4.2. Vendor Check History [Enhancement]

An **[Image]** button was added to the screen to allow for the rapid retrieval of vendor check images. Access the screen by selecting **Human Resources** > **Queries** > **Vendor Check History**.



View Vendors											
Vendor 200166 BOSTON MUTUAL LIFE INS. COG											
1 Name/Address 2 Addresses 2 Classification 4 Attachments 2 tems 2 User Defined	9 Emails										
Seg# Description Filename											
26 HR Ded Check #0080874 Date 10-Aug-2017 hr_PAYR0080874930013.pdf											
27 HR Ded Check #0080884 Date 17-Aug-2017 hr_PAYR0080884930014.pdf											
28 HR Ded Check #0080894 Date 24-Aug-2017 hr_PAYR0080894930015.pdf											
29 HR Ded Check #0080904 Date 31-Aug-2017 hr_PAYR0080904930016.pdf											
30 HR Ded Check #0080914 Date 07-Sep-2017 hr_PAYR0080914930017.pdf											
31 HR Ded Check #0080924 Date 14-Sep-2017 hr_PAYR0080924930018.pdf											
32 HR Ded Check #0080934 Date 21-Sep-2017 hr_PAYR0080934930019.pdf											
33 HR Ded Check #0080944 Date 28-Sep-2017 hr_PAYR0080944930020.pdf											
34 HR Ded Check #0080954 Date 05-Dct-2017 hr_PAYR0080954930021.pdf											
35 HR Ded Check #0080983 Date 12-Dct-2017 hr_PAYR0080983930023.pdf											
36 HR Vendor Wire #0954984 Date 07-Jul-2017 hr_PAYR0954984930022.pdf											
37 HR Ded Check #0080994 Date 12-Oct-2017 hr_PAYR0080994930024.pdf	W View										
38 HR Ded Check #0081004 Date 19-Oct-2017 hr_PAYR0081004930025.pdf											
39 HR Ded Check #0081016 Date 26-Dct-2017 hr_PAYR0081016930028.pdf											
40 HR Ded Check #0081036 Date 19-Oct-2017 hr PAYR0081036930027.pdf											

The **[Image]** button displays the **[Attachments]** screen for the selected vendor- attachments are in ascending order; to find the check, page up/down or use the $\boxed{H4} + \boxed{+}$ buttons to find the check in the list. In this example, check #0080994 is used. Click on the check #, then click on the **[W View]** button to display a copy of the check in your screen.



[ADM-AUC-HR-9890]

4.3. Warrant History Screen [New]

This new screen collects all the reports generated during the processing of a batch of warrants. Access the screen by selecting **Human Resources** ▶ **Queries** ▶ **Warrant History** Screen.

		1					Wa	arrant History					
<u>Q</u> o Ac	tio <u>n</u> s	-	Warrant# Bank	PAYR	PAYROLL	Batch# - CITIZENS	1592 BANK	Check Date Posted Date	02-Nov-2017 18-Oct-2017	Period Start Period End	26-Oct-2017 01-Nov-2017		
		1											
Seq#	Descrip	ption				Filename					1		
1	Nannan	nt Employ	yee Lount k	eport		Hr_Warrant	Lmpcnt_60	022_THERESH_1592.	PDF	<u>∠</u> view	g Email		
	Timesheet Entry Detail by TS Group/Leave					TSDetByLev	CACO_TURD	RESH_1592.PUF					
	Fica L	INIT RE	port			FicaLimit_	6162_THERE	15H_1592.PDF					
 	Marrar	nt Sunnai	ry Keport	at the De		HRWarrant_	6199_I HERE	10H_1002.FUF					
	Labor	Distrib	ution GL PC	isting Ke	port	R_Posted_	to_GL_622.	L_THEREOH,FUP					
	Fagles	unnarg	Table / Dee	Lunkian F	anan Dan	CaleCalt	. 2004 TUE	THERESH_1392.FDF					
<u> </u>	Paurol	1 Pegint	table 7 Dec	accion e	From Kep	Pauroll Re	c/204_INEr	2209 THERESA 18	92 PNF				
	Paurol	1 Regist	ter	HEBI IGGC	aroop	Rayroll Re	gister_73	10 THERESA 1592 B					
10	Paurol	1 Regist	ter - Excer	tion Per	ort	Calculatio	alculation Excention 7215 IHERESA 1592 PDE						
11	Deduct	ion Reg	ister	020111100	0.0	HRPayDed 2	HRPaulled 7220 THERESA 1592.PDF						
12	Separa	te Check	k Listing			CheckClc s	CheckClc, septhk 7223 THERESA 1592, PDF						
13	Benefi	t Catego	ories			BenDedCat	BenDedCat 7227 THERESA 1592.PDF						
14	Payrol	1 Check	Register			HRPaycheck Register 7231 THERESA 1592.PDF							
15	Payrol	1 Vouche	er - Prelim	inary		Vouchers_7	271_THERES	6A_1592.PDF					
16	Vouche	er Batche	es Created	in Accou	nts Paya	Voucher_Ba	tches_7272	2_THERESA_1592,PI	F				
17	Labor	Distrib	ution Detai	1		Labor_Dist	ribution_l	Detail_7282_THERE	SA_1592.PDF				
18	Labor	Distrib	ution Detai	1-By Enp	loyee	Labor_Dist	irbution_1	By_Employee_7283_	THERESA_1592.F	, ,			
19	Labor	Distrib	ution Summa	iry		Labor_Dist	ribution_9	Summary_7285_THER	ESA_1592.PDF				
				1								_	
6 Add Attachment													

Figure 12 Warrant History Screen

If there are additional files to be attached to the warrant (not generated from the warrant process), the user may include them by clicking on the [6 Add Attachment] button.

I		Warrant History											
ŀ	Goto Actions	Warrant# Bank	PAYR	PAYROLL	Batch# − CITIZENS	1592 BANK	Check Da Posted D	e 02-Nov-20: te 18-Oct-20:	17 Period Start 17 Period End	26-Oct-2017 01-Nov-2017			
	Seg# Description	yee Count Re ry Intail by	sport y IS Geo	up∆eav≏	Filename Hr_Warrant TSPetBul ev	_Enpon _F148	it_6022_THERESA_159 THERESA_1592,PDF	2.PDF	~~~	~~~	~~~		
	18 Labor Distrib 19 Labor Distrib 20 Sample User s	ution Detail ution Summar upplied atta	l-øy Exp. ry achment	loyee	Labor_bist Labor_Dist 1095ctest5	inbutı ributi .pdf	on_By_Employee_72a on_Summary_7285_TH	3_TheRESH_15% ERESA_1592.PD	Z.P Z.View	<u>8</u> Email	<u>9</u> Remove	1	

Figure 13 User supplied attachments & viewing or emailing attachments



Only user supplied attachments may be removed using the **[9 Remove]** button. Any attachment may be **[7 View]**ed or **[8 Email]**ed, using the buttons to the right of the filename for each attachment.

Clicking on [8 Email] will display the following prompt; the only required field is the email address field.

🔣 [AUC] 6815-Warrant History [the	resa]	×
Sending Attachment via Email		
Optional: Enter Contact Name	Anthea Dimond	
Optional: Enter Note	Here is the report you requested.	1
Optional: Enter Note		
Required: Enter Email Address	anthea@admins.com	
	Lookup OK Cancel Clear All	

The resulting email will resemble the one below; the file will be attached as a PDF[®] file.

				Marrant	Liston	•		-													_
			Elo Edt	arrant_Emp	cnt_6022_	THERESO	_1592.	PD lob	e Acrobat	Reader	DC										_
From:	theresa@admins.com	ļ	Home	e Tool	s Do	cumen	t 🖹	P	0		Q	\bigcirc	⊕	1 / 1	k	150	% *		?) s	igr
10:	Anthea Dimond																				
Cc:	Theresa Campbell																				
Subject:	Warrant 930029 Report Attachnment				MDCOU	NT BIL	DED			Decima	h = 4 10	Oak	2017	ab 10.	20.22	here TT	IPPERCI	7		Demo	1
🖂 Message	T Hr_Warrant_Empont_6022_THERESA_1592.PDF (5 KB)	ļ		5022-nK	ENPCOU	NI_AOC	, NDP	L	N	larrar	Tow nt Emp	n of i loyee	ADMIN: Count	at 12: S t Repo	rt	by Ir	167.607	A.		raye .	L
Dear Anth	ea Dimond,		p	Chec Period Period	arrant k Date Start Ending	: 93(: 26-0 : 19-0 : 25-0	028 Rt-201 Rt-201 Rt-201	7 7 7 7													
Here is th	e report you requested.		E	Employm	ent Ty	pe					M	ale	F	emale	т	otal	-				
Batch 159	2 Warrant 930029 Report		F	9 9 9 9	Full Full Part	-Time -Time -Time	Facult	у				1	7	2	8 5 1	4	6 1				
Attachme	nt Hr_Warrant_Empont_6022_THERESA_1592.PDF		И	arrant	Total							1	8	3	4	c	0		1		
Thank you	I Contraction of the second		▶ ₽	Check Period Period I	arrant K Date Start Ending	: 930 : 02-N : 26-0 : 01-N	029 0v-201 0t-201 0v-201	777			N proc	/lultip esse	le wa d with	hin a s	s may single	/ be batc	h.				
Theresa																			<u>.</u>		
TOWN			E	Employm	ent Ty	pe					M	lale		emale	T	otal					
			F	7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7	Full Full Part	-Time -Time -Time	Facult	y				1	6 1	2	7 5 1	4	6				
																	-				
** Do pot	roply to this ampil massage as it was system generated		P	varrant	Total							1	,	3	5	5	0				
via the A	DMINS Unified Community (AUC) System **		т	lot al								3	5	6	7	10	02				
	, , , , , , ,																				

Figure 14 Email and attached PDF[®] file sent from the Warrant History Screen

[ADM-AUC-HR-9930]

5. REPORTS-WORKERS COMPENSATION SALARY REPORT [Info]

🔟 Task 6039: Workers Compensation Salary Report	×
Workers Compensation Salary Report This report prints timesheet history pay by v compensation code and category.	workers
Required: Work Date Range (mmddyyyy)	From: 01012013 To: 12012013
Optional: Enter up to 9 Worker Comp Codes	Edit 0 values:
Print Employee Names?:	• Yes O No
Optional: Entity Code	
Run as © Excel	
Lookup	OK Cancel Clear All

There is a standard workers compensation report to be used by sites for their audit. Run the report by selecting Human Resources ▶ Reports ▶ Report Library ▶ By Timesheets [Page Down] 6039 Workers Compensation Salary Report. The report is available in Excel[®]. The wages are reported by paycheck category code and broken down in the columns. Employee and workers compensation totals are provided.



Rite Home Insert Page Layout Formula: Data Review View B1 -		K							Work	ers_Compe	nsa	. 050	ft Excel				
B1 F O H I 2 Work Dayley, 0 Witzbers to 00002007 M I Immediate It Story M N O P 2 Work Dayley, 0 Witzbers to 00000000000000000000000000000000000		File Home	Insert	Page Lavout	Formulas	Data Review View											
B1 C D E P O H I 1 Timesheet Pistory -																	2
B1 F C D E F O H I 1 Timesheet Hstory	6		k∐ Ŧ														
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1 Timesheet history Nork bayes; writes to observe? N		A A	В	С	D	E	F	G	Н	1			M	N	0	P	1
2 Work Buyes: Protein: Position Position <th< th=""><th>1</th><th>1 Timesheet H</th><th>istory</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>4</th></th<>	1	1 Timesheet H	istory														4
Implaye Implaye Implaye Implaye Position Position WC Code WC Code Description Ret Tel Pay FE VOIDSMED Construction 5 02032 xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx		2 Mork Bade): 0	7012016 to 06	202047													
Image Employee M Soc Sets Number Position Description WC Code WC Code WC Code Value Value <td></td> <td>2 WORDay(s). 0</td> <td>0120101000</td> <td>502011</td> <td></td> <td>◄</td>		2 WORDay(s). 0	0120101000	502011													◄
S Conservation Conservation Search Out Application Out O	2	4 Emp No	Employee Na	Soc Sec Number	Position	Position Description	WC Code	WC Code Description	Rate	Total Pay	RF	Æ	WORKMENS CO	COMP TIME U	COV	DIFFERENTIA FU	J۲
6 002023 xxxxxx229 100-01180-88 HR HTERN 5868 0.00 65076 70 00.00 0.00	4	5 020322		xxx-xx-4344	054-01300-99	SUBSTITUTE - LONG TERM	8868		0.00	4,924.87		2.00	0.00	0.00	0.00	0.00	٣
7 002030 0 0000000000000000000000000000000	6	6 020323		xxx-xx-2029	100-01180-98	HR INTERN	8868		0.00	650.76		10	0.00	0.00	0.00	0.00	7
8 00031 xxxxxx3986 100-01155-99 SECRETARY SLBSTITUTE 5888 0.00 5.751.13 00 0.00		7 020330		xxx-xx-8133	062-00980-30	PARAPROFESSIONAL	8868		0.00	4,097.97		.00	0.00	0.00	0.00	0.00	₹
9 020332 000-0080-09 PAARPROFESSIONAL 6888 0.00 2.783.48 0.00 <th< td=""><td>8</td><td>8 020331</td><td></td><td>xxx-xx-9966</td><td>100-01155-99</td><td>SECRETARY SUBSTITUTE</td><td>8868</td><td></td><td>0.00</td><td>5,751.13</td><td></td><td>- 00</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td><td>Z</td></th<>	8	8 020331		xxx-xx-9966	100-01155-99	SECRETARY SUBSTITUTE	8868		0.00	5,751.13		- 00	0.00	0.00	0.00	0.00	Z
10 020332 0000-r4302 100-01290-99 SUBSTITUTE - DALY 5868 0.00 6800.00 00 0.00	9	9 020332		xxx-xx-4320	002-00980-09	PARAPROFESSIONAL	8868		0.00	2,763.48		.00	0.00	0.00	0.00	0.00	1
11 1202033 000000000000000000000000000000000000	1	0 020332		xxx-xx-4320	100-01290-99	SUBSTITUTE - DAILY	8868		0.00	600.00		00	0.00	0.00	0.00	0.00	7
12 CO2034 COCK-01-06 100-01730-99 SUBSTITUTE - DALY 5868 0.00 2,940.00 00 0.00	1	1 020333		xxx-xx-0091	100-01290-99	SUBSTITUTE - DAILY	8868		0.00	820.00		.00	0.00	0.00	0.00	0.00	₹
13 D020335 D000-077682 100-01155-99 SECRETARY SUBSTITUTE 5888 0.00 2,812.44 .00 0.00 <td>1</td> <td>2 020334</td> <td></td> <td>xxx-xx-1046</td> <td>100-01290-99</td> <td>SUBSTITUTE - DAILY</td> <td>8868</td> <td></td> <td>0.00</td> <td>2,040.00</td> <td></td> <td>00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>7</td>	1	2 020334		xxx-xx-1046	100-01290-99	SUBSTITUTE - DAILY	8868		0.00	2,040.00		00	0.00	0.00	0.00	0.00	7
14 020236 000000000000000000000000000000000000	1	3 020335		xxx-xx-7862	100-01155-99	SECRETARY SUBSTITUTE	8868		0.00	2,812.04		.JO	0.00	0.00	0.00	0.00	2
15 020337 000000000000000000000000000000000000	1	4 020336	t i	xxx-xx-0364	110-00210-99	ASSISTANT TRACK COACH - GIRLS	8868		0.00	3,510.00		` 00	0.00	0.00	0.00	0.00	
16 002038 0000-224162 '00 0.00	1	5 020337		xxx-xx-3043	015-01300-99	SUBSTITUTE - LONG TERM	8868		0.00	2,760.00		OU.	0.00	0.00	0.00	0.00	₹
17 020239 000-0730-99 SUBSTITUTE - DALY 5868 0.00 80.00 00 0.00 <th< td=""><td>1</td><td>6 020338</td><td></td><td>xxx-xx-2146</td><td>062-00980-25</td><td>PARAPROFESSIONAL</td><td>8868</td><td></td><td>0.00</td><td>2,241.62</td><td></td><td>` 00</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td><td>7</td></th<>	1	6 020338		xxx-xx-2146	062-00980-25	PARAPROFESSIONAL	8868		0.00	2,241.62		` 00	0.00	0.00	0.00	0.00	7
18 002040 000000000000000000000000000000000000	1	7 020339		xxx-xx-8896	100-01290-99	SUBSTITUTE - DAILY	8868		0.00	80.00		.JO	0.00	0.00	0.00	0.00	Ξ.
19 020341 000000000000000000000000000000000000	1	8 020340		xxx-xx-3725	054-00980-19	PARAPROFESSIONAL	8868		0.00	1,863.33		° 00	0.00	0.00	0.00	0.00	1
20 0200342 000-0101099 PARAPROFESSIONAL SUBSTITUTE 5686 0.00 1,55183 ^00 0.00	1	9 020341		xxx-xx-8863	100-01010-99	PARAPROFESSIONAL SUBSTITUTE	8868		0.00	1,143.45		.JO	0.00	0.00	0.00	0.00	•
1 020243 000000000000000000000000000000000000	2	0 020342		xxx-xx-0163	100-01010-99	PARAPROFESSIONAL SUBSTITUTE	8868		0.00	1,551.83		00 °	0.00	0.00	0.00	0.00	
22 020344 000-0160-99 FRITERN 5868 0.00 648.33 ^00 0.00	2	020343		xxx-xx-5430	110-00140-01	ASSISTANT CREW COACH	8868		0.00	1,071.00		.JO	0.00	0.00	0.00	0.00	٩
23 020245 000000000000000000000000000000000000	2	2 020344		xxx-xx-0214	100-01180-99	HR INTERN	8868		0.00	648.93		00 °	0.00	0.00	0.00	0.00	
121 020346 000 1,000,00 1,000,00 1,000,00 0,00	2	3 020345		xxx-xx-1376	960-01590-99	TEEN THEATER	8868		0.00	500.00		JŪ	0.00	0.00	0.00	0.00	•
25 020347 000-0x-2386 980-01590-99 TEBN THEATER 10868 0.00 1,000.00 .00 0.00	2	4 020346		xxx-xx-6904	960-01590-99	TEEN THEATER	8868		0.00	1,000.00		00.ר	0.00	0.00	0.00	0.00	2
28 020349 000 000 0.00 0	2	5 020347		xxx-xx-2386	960-01590-99	TEEN THEATER	8868		0.00	1,000.00		JŪ	0.00	0.00	0.00	0.00	•
27 020300 000 0.00	2	6 020349		xxx-xx-8066	960-01590-99	TEEN THEATER	8868		0.00	500.00		00.ר	0.00	0.00	0.00	0.00	
28 0202351 000-0x-9219 980-01590-99 TEEN THEATER 5888 0.00 500.00 7.00 0.00	2	7 020350		xxx-xx-9173	960-01590-99	TEEN THEATER	8868		0.00	625.00		J0	0.00	0.00	0.00	0.00	•
28 000 100000 .0 0.00 0	2	8 020351		xxx-xx-9219	960-01590-99	TEEN THEATER	8868		0.00	500.00		٦.00	0.00	0.00	0.00	0.00	2
30 868 0 40,359,486.94 562 106,572.88 2,750.42 58,571.75 5556.83 64,375 31 002906 xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	2	9 020352		xxx-xx-9234	960-01590-99	TEEN THEATER	8868		0.00	1,000.00		-0	0.00	0.00	0.00	0.00	•
31 002906 σακοα-2792 011-01120-03 SCHOOL CUSTODIANI '9079 0.00 38,513.75 J0 0.00 0.00 637.04 '32 32 004046 σακοα-7215 054-00400-03 CAFETERIA WIORKER I '9079 0.00 11,598.52 '.00 143.20 0.00 <t< td=""><td>3</td><td>0</td><td></td><td></td><td></td><td></td><td>8868</td><td></td><td>0</td><td>40,359,486.94</td><td></td><td>5.62</td><td>10,587.28</td><td>2,750.42</td><td>58,571.75</td><td>556.63 64</td><td>4,7</td></t<>	3	0					8868		0	40,359,486.94		5.62	10,587.28	2,750.42	58,571.75	556.63 64	4,7
32 004048 0.00 11,598.52 0.00 143.20 0.00 0.00 0.00 0.00 0.00 0.00 0.00	3	002906		xxx-xx-2792	011-01120-03	SCHOOL CUSTODIAN I	9079		0.00	38,513.75		JO	0.00	0.00	0.00	637.04	۲
	3	2 004048		xxx-xx-7215	054-00400-03	CAFETERIA WORKER I	9079		0.00	11,598.52		00.1	143.20	0.00	0.00	0.00	2

Figure 15 Standard Workers Compensation Report

5.1.1. Bargaining Unit Column Added to the Report [Enhancement]

Effective with this software update, a column for Bargaining Unit was added to the report.

-		Sec									
- 4	A	B	С	D	E	F	G	Н	1	J	K
1	Timeshe	et History									•
2	Work Day((s): 01012013 to 12012013									
3											
4	Emp No	Employee Name	Soc Sec Number	Position	Position Description	WC Code	WC Code Description	Barg Unit	Rate	<u>Total Pay</u>	111F PAY
1027	001017			T292ACOPT -01	Animal Control OFFICER PT	PS	Public Safety	NON -NO	0.00	830.00	9.0
1028	001022			T292ACOOFF -01	ANIMAL CONTROL OFFICER	PS	Public Safety	PROF -01	0.00	43,827.91	0.00
1029	002123			T123LEMLEMA-01	L.E.M.A. COORDINATOR	PS	Public Safety	NON -NO	0.00	1,500.00	9.0°
1030	002874			T292ACOASST-01	ASST ANIMAL CONTROL	PS	Public Safety	PROF -01	0.00	35,333.63	0.00
1031	002950			T292ACOPT -02	Animal Control Officer PT	PS	Public Safety	NON -NO	0.00	3,090.00	0.00
1032	003023			T292ACOPT -03	Animal Control Officer PT	PS	Public Safety	NON -NO	0.00	4,460.00	0.0
1033	070441			T292ACOPT -02	Animal Control Officer PT	PS	Public Safety	NON -NO	0.00	4,150.00	0.0
1034						PS	Public Safety	r	0.00	93,191.54	0.6
1035							Total	1		26,451,421.26	38,377.4

[ADM-AUC-HR-9952]



		Position Maintenance
Position Position Description	BOOJABATECH-01 APPLIED BEHAVIO	Current Empl
Position Category Timesheet Group Bargaining Unit Schedule Grade Step	ADJUST SCHOOL-REED AFL -AF SLIB 1 2	School Adjustment Counselor REED CENTER School Weekly 12 month employees School Library Asst
Budget Group Pay Group EEO Category EEO Type	DISTRICT 21 05 00	DISTRICT 21 Pays Para-Professionals
Workers Comp Code FLSA Code Employment Type Employment Status Accrual Group Entity Default Account#	8868 NONE F IT CL09 1 0100-430-0000-	SCHOOL TEACH & CLERI NO FLSA Part-Time Involuntary Termination CLERICAL 32.5 MEEK TOWN OF ANYWHERE DOWN OF ANYWHERE
Full Time Equivalent Supervisor Position Budget Salary Budget Fringe Amount	.8000 S003ILAREME-01	ILA - 10 MONTH Su For FY 0000 Posted on For FY 0000 Posted on

The workers compensation code is initially set on the Human Resources Maintenance Position Maintenance.

When an employee is assigned the position, the value is carried into the **Employee Maintenance** ► [8 Dates/Class] tab.

The value may be changed for an individual employee on the Human Resources ▶ Maintenance ▶ Employee Maintenance ▶ [8 Dates/Class] tab.

The code descriptions highlighted in yellow correspond to code descriptions in the column highlighted in yellow in Figure 15 Standard Workers Compensation ReportFigure 15

Figure 16 Workers Compensation Code on the Position Maintenance Screen

Qoto Employee Number 2000 Position S003ABATEC	Employee Maintenance	Engloyee Attachments (1)
[Add Employee <u>P</u> Add Position		
1 Contact 2 Personal 3 DediBen 4 Add V	Veges <u>\$ Payroll</u> <u>8 Accounting</u> <u>7 Selery</u> <u>8 Distestion</u>	S QOustom UAccidents VACA
Classifications Employee Status Employee Type EEO Employment Category	Jak JNL & EV.	, che, _ate ,7
EEO Employment Type Workers Compensation Code Accrual Group	00 9969 SCHOOL TEACH & CLERI 51.09 CLERICAL 32.5 MEEK	Termination Date Reason

To make the best use of this report, add any missing Workers Compensation Codes to the employee records. In addition, add codes to all positions in the position maintenance screen to ensure that future employees are coded. Once the missing workers compensation codes are added to the employees, the report may be used now and in future years.

Figure 17 Workers Compensation Code on the Employee Maintenance ▶ [8 Dates/Class] tab

[ADM-AUC-HR-9945]

6. TABLES > BARGAINING UNITS [HOLIDAYS]

			E	Bargai	ning I	Unit - H	Holida	/s						
Goto	Bargaining Un	it new -ne ne	W AESCME											
		n prin pri pr	A TH SUIL											
Actions														
Z Summary							_							
R Bald Marca	1 Cost Codes	∠noroays	3 Longevity H	<u>'ay</u>	4 Ketroa	ictive Pay	2.500	ary Sched	<u></u>	Uther Into		nent State	menes Ar	tordable CareAct
9 Delete	Restrict Holida	ws to Year 2017 Dolu	2017 holid	ere sil	1 he d	di en la un	ч							
200000		Jete tear point dining .			1 00 0	1100-1000								
Z Edit List									Only	if				
	Date	Description	Pay Code	Hours	Days	Add, S	ubstitute	or Ignore	Worl	ked Re	urrence	Month	Week	Day of Week
	04-Jan-2017	Nev Years Day	HOL			C Add	 Sub 	C Ignor	e 💽 Yes	O No	M	1	First	Wednesday
	20-Feb-2017	President's Day	HOL			C Add	Sub	C Ignor	e 🔍 Yes	C No	ы	2	Third	Monday
	17-Apr-2017	Patriot's Day	HOL			C Add	Sub	C Ignor	e 🖲 Yes	O No	N.	4	Third	Monday
	21-Apr-2017	Good Friday	HOL			C Add	 Sub 	C Ignor	e 🔍 Yes	C No	μ	4	Third	Friday
	22-Mag-2017	Menorial Day	HOL			C Add	Sub	C Ignor	e 🖲 Yes	C No	М	5	Fourth	Monday
	07-Jul-2017	Independence Day	HOL			C Add	 Sub 	C Ignor	e 🖲 Yes	C No	μ	7	First	Friday
	04-Sep-2017	Labor Day	HOL.	8.00		C Add	Sub	C Ignor	e 🖲 Yes	C No	N	9	First	Monday
	09-0ct-2017	Columbus Day	HOL			C Add	• Sub	C Ignor	e 🖲 Yes	C No	М	10	Second	Monday
	14-Nov-2017	Veteran's Day	HOL			C Add	 Sub 	C Ignor	e 🖲 Yes	C No	Ν			
	22-Nov-2017	1/2 Day before Thank	HOL			C Add	Sub	C Ignor	e 💽 Yes	C No	M	11	Fourth	Wednesday
	23-Nov-2017	Thanksgiving Day	HOL			C Add	 Sub 	C Ignor	e 🔍 Yes	C No	М	11	Fourth	Thursday
	24-Nov-2017	Day after Thanksgivi	HOL			C Add	· Sub	C Ignor	e 💽 Yes	C No	M	11	Fourth	Friday
	24-Dec-2017	1/2 Day before Chris	HOL			C Add	 Sub 	C Ignor	e 🖲 Yes	C No	<u>A</u>			
	25-Dec-2017	Christmas Day	HOL			C Add	· Sub	C Ignor	e 💽 Yes	C No	A			
	31-Dec-2017	1/2 Day before New Y	HOL			C Add	Sub	C Ignor	e 🖲 Yes	C No)A			
			1		1.0				1					
	Ec	opy From/to Bargaining Unit			M	<u>v</u> create	New Yea	r						

The Holidays tab of the Bargaining Unit table allows the entry of holidays throughout the year, with options for how to use the holidays (substitute, add or ignore) in the timesheets. There is also a button to create a new year based on an existing year.



6.1.1. Edit List [Fix]

The Edit list of holidays generated for the upcoming year was showing incorrect information. The information on the right of the report is related to the recurrence. The report has been corrected and is now available in Excel[®] as well as the Print/Preview/PDF[®] format.

N
N
<u>ith Day of Week</u>
3 Monday
3 Monday
3 Monday
4 Monday
1 Monday
2 Monday
4 Thursday
4 Friday
4 Wednesday

Figure 18 Edit List shows correct data and is now available in Excel[®] format

[ADM-AUC-HR-9939]

7. YEAR END PROCESSING

7.1. W2 Processing ▶ Review Forms [Box 9 Updated]

Box 9, Verification Code, was added to the online form used to preview the W2 data for each employee. To see this change, select Human Resources ▶ Year End Processing ▶ W2 Processing ▶ [Review W2 Forms].



[ADM-AUC-HR-9942]



7.1.1. W2 Forms [Box 9 Updated]

In addition to wording changes on the backer detailed below, the front of the form now includes **Box 9**, used for a verification code. This code is used by some software vendors participating in the W-2 Verification Code initiative. As **ADMINS** is not participating in the initiative, this box will be blank for all employees. For other changes, see the text excerpted from the IRS instructions.

This Information is being furnis	E mploy hed to th	e Internal Revenue Service	Form W-2	OMB No. 1545-0008						
	1	Wages, tips, other compensation 7334.21	2 Federalinco 10	me taxwithheld 006.21						
Employeds social security numb 001-10-1146	ber 3	Social security wages 0.00	4 Social security tax with held 0.00							
b Employeridentification no. (EIN 11-3456789	5	Medicare wages and tips 0.00	6 Medicareta×	withheld 0.00						
TOWN OF ANYWHERE 1 MAIN STREET CAMBRIDGE, MA 02138 a Control number		Safe, accurate,	Vi	it the IRS Website at						
TOWN TOWN 001256		FAST ! Use	ilig w	wv.irs.gov/enie.						
 Employeds first name and initi 	-1	the second se								
	ai	Last name		Suff.						
MARIE F BAILEY	aı	Last name		Suff.						
MARIE F BAILEY 9 MARION ROAD	# \\\120	Last hame		Suff.						
MARIE F BAILEY 9 MARION ROAD CAMBRIDGE MA(")2138	Läst näme		Suff.						
MARIE F BAILEY 9 MARION ROAD CAMBRIDGE MA (1 Employee's address and ZIP oo]2138 de	Last name		Suff.						
MARIE F BAILEY 9 MARION ROAD CAMBRIDGE MA (1 Employee's address and ZIP co 7 Socialsecutify tips 0.00)2138 de	Last name Allocated tips 0.00	9 Verificatio	Suff. n Code						
MARLE F BAILEY 9 MARION ROAD CAMBRIDGE MA (1 Employee's address and 2/P co 7 Socialsecurity tips 0.00 10 Dependentcare benefits)2138 de 11	Last name Allocated tps 0.00 Nonqualified plans	9 Verificatio	Suff.						
MARLE F BAILEY 9 MARION ROAD CAMBRIDGE MA (1 Employee's address and ZIP co 7 Social security tips 0.00 10 Dependentcare benefit 0.00)2138 de 11	Last name Allocated tips 0.00 Nonqualified plans 0.00	9 Verificatio 12a See instru : G	suff. n Code ctions for Box 12 900.00						
MARIE F BAILEY 9 MARION ROAD CAMBRIDGE MA (1 Employed's address and ZIP co 7 Social security tips 0.00 10 Dependent care benefits 0.00 13 Statutory Employee 14 ()2138 de 11 Other	Allocated tips 0.00 Nonqualified plans 0.00 842 22 DENSN	9 Verificatio 12a Seeinstru : G 12b : DD	Surf. n Code ctions for Box 12 900.00 1449.25						
MARIE F BAILEY 9 MARION ROAD CAMBRIDGE MA (1 Employed's address and ZIP co 7 Social security tips 0.00 10 Dependent care benefit 0.00 13 Statutor Fundove Referement Plan)2138 de 8 11)ther	AllocatedSps 0.00 Nonqualifiedplans 0.00 842.22 PENSN 2.88 PEN30+	9 Verificatio 12a See instru G 12b DD 12r :	Suff. n Code ctions for 8 ox 12 900.00 1449.25 0.00						

Box 9—Verification code (not applicable to Forms W-2AS, W-2CM, W-2GU, or W-2VI). If you are participating in the W-2 Verification Code Initiative, enter the appropriate verification code in box 9. Otherwise, leave box 9 blank. For more information, see *IRS.gov/ individuals/w-2-verification-code*.

New box 12 Code FF. A new box 12 Code FF has been added to report the total amount of permitted benefits under a Qualified Small Employer Health Reimbursement Arrangement (QSEHRA). These new QSEHRAs allow eligible employers to pay or reimburse medical care expenses of eligible employees after the employees provide proof of coverage. The maximum reimbursement for an eligible employee under a QSEHRA is \$4,950 (\$10,000 if it also provides reimbursements for family members), before indexing for inflation. For more information, see the 21st Century Cures Act, Public Law 114–255, Division C, Section 18001.

Credit for excess taxes. If you had more than one employer in 2017 and more than \$7,886.40 in social security and/or Tier 1 railroad retirement (RRTA) taxes were withheld, you may be able to claim a credit for the excess against your federal income tax. If you had more than one railroad employer and more than \$4630.50 in Tier 2 RRTA tax was withheld, you also may be able to claim a credit. See your Form 1040 or Form 1040A instructions and Pub. 505, Tax Withholding and Estimated Tax.

7.2. Masking / Truncating Social Security Numbers Not Allowed on W2 [Info]

Per the 2017 IRS Instructions for Forms W2:

Social security numbers. Do not truncate social security numbers shown on Forms W-2, W-2AS, W-2GU, and W-2VI. Social security numbers are required on Forms W-2. See *Taxpayer identification numbers*, later. See also Regulations section 301.6109-4(b)(2).

ADM-AUC-HR-9864



7.3. 1099R Forms [Updated]

Minor wording changes were made to the backers. ADMINS made minor format changes to the front of the forms to align more closely with sample forms from the IRS.



Figure 19 Before



[ADM-AUC-HR-9948]

7.4. 1095C ACA Processing

Additional error checking was added when building the 1095 File. The following errors will be identified:

Date 1-Nov-2017
1-Nov-2017
1-Nov-2017
1-Nov-2017
1-Nov-2017

- 1. Employee has an invalid Mailing State Code
- 2. Employee record is missing first or last name
- 3. Employee record is missing Social Security #
- 4. Covered individual record is missing first or last name
- 5. Covered individual record is missing both Date of Birth and Social Security number# (one or the other is required)
- 6. Line 14 either all 12 Months must have a value or at least 1 value in the individual months
- 7. Line 15 if code 1E, 1B etc., then line 15 must have a value in either all 12 or individual months



In addition to the report being produced when building the 1095 file, the same report may be run from the Edit 1095 Work File screen. A new button was added to the screen for running the error check. Manual changes are allowed in the Edit 1095 Work File Screen, when making a change this **[Check for Errors]** should be performed.

	EAUC] 7574-Edit 1095	Work File [theresa]]											_ = ×
	File Edit Ledgers Purcha	ase Orders Accounts	Payable Fix	ed Assets	Human Reso	irces Budge	et Collectio	ns Tax Mol	or Excise M	lisc Billing S	ystem Help			
	► E B H ►	+ м 🦉 👻	ا 🔳 🖌	2 🔒										
		2017			j.	Edit 109	95 Worl	k File						
	Actions	Employee#	1 Name of BENEDICT	Employee M CUMBER	BATCH					2 SS#	0(-1030		Reporting	Entity
	1 1095 Menu	3 Street Addr 274 EAST ST	ess Reet										ACA 15 ACA Offe	P r Start
	2 Check for Errors	10 Task 7568:	195 Form E 195 Error C	hecking a	ing in Form				×				29-Dec-19 29-Dec-19	orting Start/End 93 Firmo Start/End
	2 1095 Register 4 Employee Edit	Run as 🙃	Preview se Duplex	 ○ Print ● Yes 	⊂ PI ⊂ No	DF			rye 67	er ID (EIN) 189			29-Dec-19 ACA Deci	93 ined
<u>1</u> 1095 Menu	§ Remove Employee	ļ	Lookup	0	к <u> </u>	Cancel	Clear	AII	32	:t Phone :1-9876 ×	123			
	§ Add Employee	11 City or Toy CAMBRIDGE	vn		12 Sta MA	ite (13 Zipcode 02138-000	0						
2 1095 Register	EMPLOYEE OFFER AN	ID COVERAGE		Plan St	art Month	05								
<u>3</u> Employee Edit	14 Offer of Coverage	12 Mths 1E	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	15 Employee Share		.01	121,15	.01	132,10	.01	132,10	.01	.02	.03	.04	.05	.06
4 Remove Employee	16 Applicable Section	n 20												
5 Add Employee	COVERED INDIVIDUAL	LS					lf Employer	provided sel	f-insured co	iverage, che (e)	eck the box Months Cor	vered		
2.100 200/00	(a) Name of Cove 17 BENEDICT CUME 18 MARY ENE J.ILL C	red Erbatch Cumperbatch		(b) SS# XXX-XX- XXX-XX-	(c) D 1030 7451	ов ((e) 12 Mth X	Jan F	eb Mar	Apr May	Jun Jul	Aug S	ep Oct I	Nov Dec
Figure 21 Before	e Figure 22	After -	- nev	v Ch	eck f	or E	rror	s but	tton					

Performing the error checks after making changes will help to ensure that the data appearing on the forms for your employees and the data submitted to the IRS is error–free.

7568-HR1095CHKERR.REP Printe	d 21-Nov-2017 at 11:55:00 by THERESA Town of ADMINS 1095 Form Error Checking	Page 1
Employee: 000012 HOLMES, MARIE R		
Employee has invalid Mailing State Code	Update Employee Maintenance then Build 10995 again or Remove/Ad	d on Form screen
Employee: 010765 D'ANGELO, KEITH M		
Line 14 contains 1B,1C,1D,1E,1J or 1K	Line 15 must have a value in All 12 Months or each individual m	onth
Employee: 070604 , LAWRENCE		
Employee Last Name missing	Update Employee Maintenance then Build 10995 again or Remove/Ad	d on Form screen
Employee: 070661 PERFECT, PATRICIA		
Employee SS# missing	Update Employee Maintenance then Build 10995 again or Remove/Ad	d on Form screen
*** Total # Employees with Errors 4		

Figure 23 Sample report when building 1095 file or running error check from the maintenance screen

[ADM-AUC-HR-9921]



7.4.1. Forms [Updated]

Updates were made to the 1095C form to comply with new IRS specifications. The text on the center front of the form was updated and the form page control numbers were added.

Form 1095-C Department of the Treasury Internal Revenue Service	Employer-Provided Health Insurance Offer and Coverage Do not attach to your tax return. Keep for your records Information about Form1095-C and its separate instructions is abwww.irs.gov/form1095c	
Figure 24 Before	·	

		600117
Form 1095-C	Employer-Provided Health Insurance Offer and Coverage	OMB No. 1545-2251
Department of the Treasury Internal Revenue Service	Go to www.irs.gov/Form1095C for instructions and the latest information .	2017

Figure 25 After

Additional information. For additional information about the tax provisions of the Affordable Care Act (ACA), including the individual shared responsibility provisions, the premium tax credit, and the employer shared responsibility provisions, see www.irs.gov/Affordable-Care-Act/Individuals-andFamilies or call the IRS Healthcare Hotline for ACA questions (1-800-919-0452). An "Additional Information" paragraph was added to the Instructions for Recipient on the backer. Added or changed text is shown in yellow highlight in the examples.

In addition, text was added to Part II, Employer Offer of Coverage, Line 14 parts 1.A and 1.G.

1A. Minimum essential coverage providing minimum value offered to you with an employee contribution for self-only coverage equal to or less than 9.5% (as adjusted) Figure 27 Helpful text on 1A.

1G. You were NOT a full-time employee for any month of the calendar year but were enrolled in self-insured employer-sponsored coverage for one or more months of the calendar year. This code will be entered in the *All 12 Months* box or in the separate monthly boxes for all 12 calendar months on line 14.

[ADM-AUC-HR-9942]

8. HELP REFERENCE LIBRARY

Figure 26 Additional Information on backer

8.1. New or Updated Documentation

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

٠	YEAR END PROCESSING	HR–630 W2 Year End Training Slides	[Updated]
		HR–640 IRS Instructions for Forms W2	[Updated]
		HR-660 IRS Instructions for Forms 1099-R	[Updated]
		HR-670 1099-R Slides	[Updated]
		HR-680 IRS Instructions for Forms 1094C & 1095C	[Updated]
		HR–705 TCC Registration with the IRS	[Updated]
•	OTHER	HR–900 Menu and Toolbar Tips	[Updated]

Figure 28 Helpful text on 1G.