HUMAN RESOURCES

RELEASE NOTES – MARCH 2020

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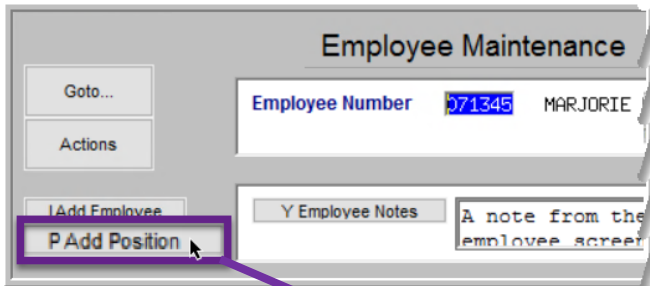
CONTENTS

1   EMPLOYEE MAINTENANCE

- improved the **[Add Position]** function to include copying notes, life insurance and family court fields
- added new fields on the **[2 Personal]** tab
- fixed the alignment on the age field on the **[8 Dates Class]** tab

1.1   [1 Contact] Screen ▶ [Add Position] ▶Copy Deductions [Fix]

When adding a position to an employee, there is an option to copy deductions from an existing position. Prior to the software update, the **notes** for the deductions were not copied with the deductions.
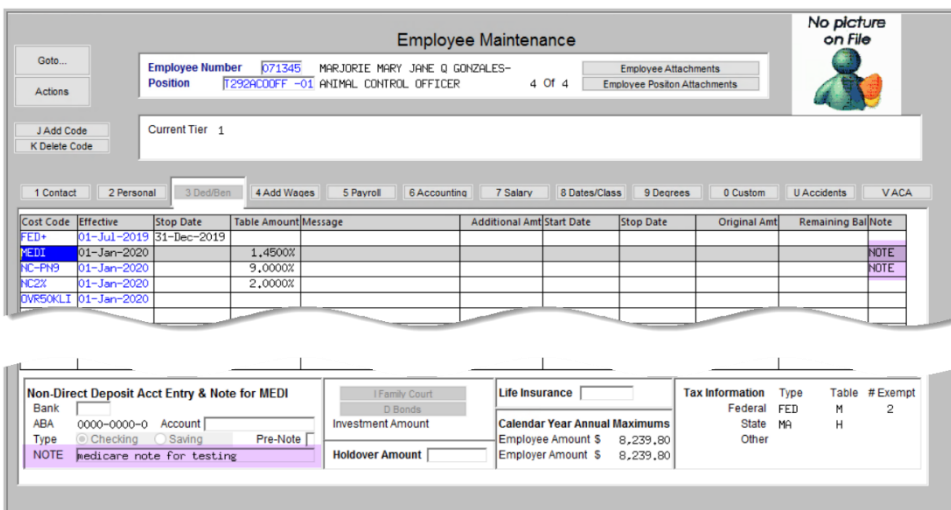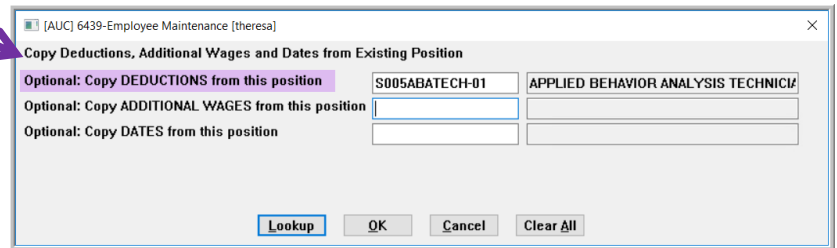
As shown in **Figure 1**, the **NOTE** on the **MEDI** deduction is now carried forward, as will any other notes fields for deductions.

Any existing **Life Insurance amount** and **Family Court Case Number** will also be copied.

Figure 1 The new position with the copied notes

[ADM AUC-10188]

1.2 [2 Personal] Screen ▶ Tax Information [Enhancement]

The **[2 Personal]** tab **Tax Information** block was changed to incorporate the new fields on the **2020 W4**:

Figure 2 BEFORE: the [2 Personal] tab Tax Information section on the Employee Maintenance screen

Go to **Human Resources ▶ Employee Maintenance ▶ [2 Personal]** to update the Tax Information for each employee furnishing a **2020 W4.**

Figure 3 AFTER - The new Tax Information section on the [2 Personal] Tab with fields for the new W4

If the employee does not provide a new W4 for 2020 and beyond, there is nothing to update in the Tax Information for the employee. The ⊙ N/A radio button will be set and none of the Step 3 through 4c fields will be editable.

For each employee providing a new W4 for 2020, fill in the **Tax Information** section of the **[2 Personal]** tab of the **Employee Maintenance** screen. Fill in the fields based on the **W4** provided by the employee.

Check for any additional federal withholding for ongoing employees that provide a new W4 with extra withholding. **Set the stop date for additional withholding on the [3 Ded/Ben] tab of the employee maintenance screen and confirm that the extra withholding shows only on the [2 Personal] tab.**

The **HR–605 W4 Percentage Method Tables** document in the **HR Help Reference Library** has more detailed instructions.
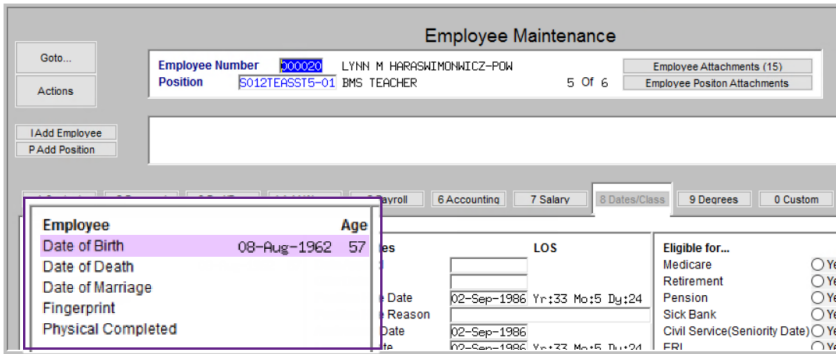
The **AUC** screen has error checking to ensure that the codes are used properly, as shown in the table below:

		Tax Type Selected / Box 2c Radio button		
		FED2020	FED	FED
Box 2C Checked on 2020 W4 form?		⊙ Yes	⊙ No	⊙ N/A
Exemptions Box	Based on the Tax Type & Box 2c radio button, is the field editable?	No	No	Yes
Dependents amount (Box 3 on the W4)		Yes	No	No
Other Income (Box 4(a) on the W4)		Yes	No	No
Deductions (Box 4(b) on the W4)		Yes	No	No
Extra Withholding (Box 4(c) on the W4)		Yes	Yes	No

[ADM-AUC-HR-10186]

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1.3 [8 Dates / Class] Tab [Fix]

ADMINS corrected the alignment of the age field on the **[8 Dates / Class]** tab. The current age is now listed on the Date of Birth line.

[ADM-AUC-HR-10188]

2 PAYROLL PROCESSING

- improved the handling of holidays on timesheets
- added an email notice if an email address is invalid when sending direct deposit advice

2.1 Timesheet Holidays [Enhancement]

There are times when an hourly employee is paid a daily rate in the timesheet creation. One instance would be in the shift code table, the other in the holiday table. In the past, the employee would come in with zero dollars for that work date, requiring the payroll staff to find and key in the dollar amount.
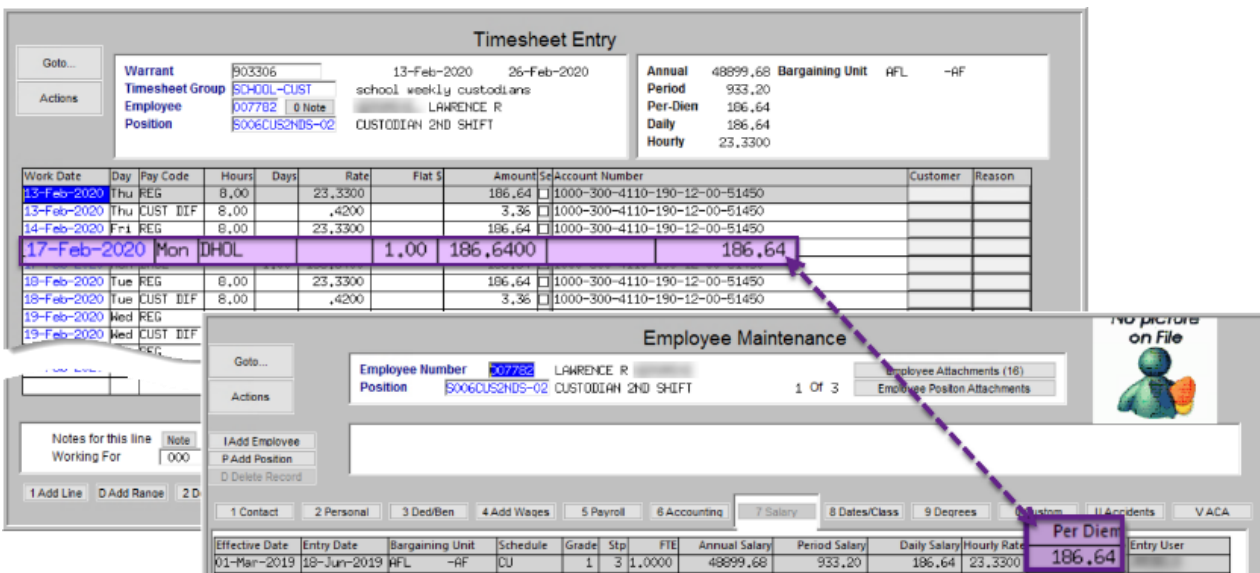
Figure 4 Timesheets bring in the holiday paid in days with the per-diem dollar amount instead of zero dollars

Now, the daily or per-diem rate (based on the pay code) will be used.

[BLG-SUP-SAPLAUC-1254]
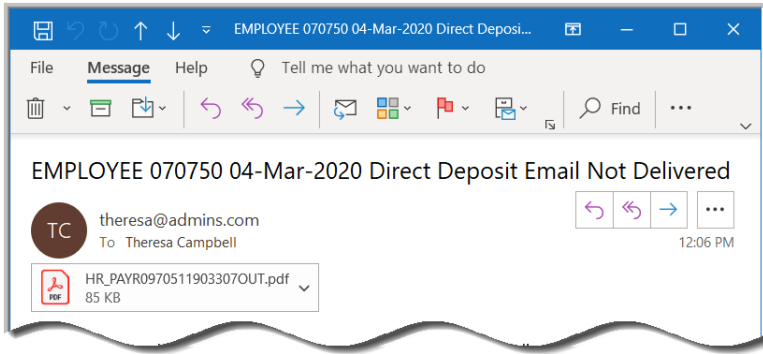
2.2 Email Direct Deposit Advice [Enhancement]

ADMINS continues to update the product to check email addresses during entry. There are times when an email address (that was working previously) is rejected and this has caused the process to not complete.

Now, an email will instead be sent to the user who posted the payroll indicating that the employee direct deposit was not delivered.

Figure 5 Sample of email sent to the user posting the payroll

This will allow the processor to contact the employee to get the corrected email and manually forward the email.

> **Note: the posting and emailing occurs on a schedule – based on site-specific times. If the posting and emailing takes place at 6:30PM and 8:30AM each day, any notification of non-delivery will arrive shortly after the posting is complete.**

[ADM-AUC-HR-10147]

2.3 W4 With a value in Box 3 [Fix]

If the employee had completed a new **W4** form and entered a value in box 3, the **Federal tax** was sometimes calculating a value *less than zero*. This has been corrected.

[ADM-AUC-HR-10219]

3 PRINTING MULTIPLE MANUAL CHECKS [Enhancement]
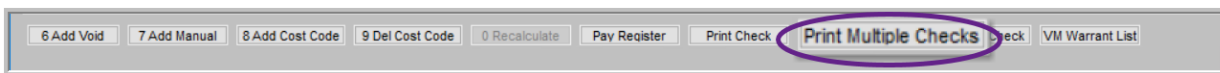
This is a process for printing multiple manual checks (for example, at the end of the year to account for the personal use of a municipal vehicle for multiple employees). The steps are as follows:
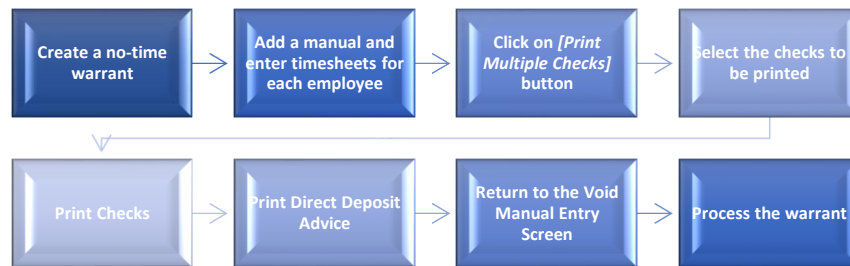
Section 8 was added to the **HR–430 Manual Checks** document that fully describes this new feature.

[MDT-SUP-SAPLAUC-1894]

4   SPECIAL PROCESSING ▶ Global Change to Employees Salary [Fix]

The global salary increase step was sometimes not setting the salary change records in the correct order if the employee had salary records on or after the salary change date.

This has been corrected.

[ADM-AUC-HR-10202]

5   REPORTS

- corrected the report selections criteria and name lookup on an existing report.
- added report **#6727** to help sites comply with **FOIA** requests for salary data
- added report **#6759 - Timesheet History Detail - Changed Timesheets**

5.1   Timesheet Reports ▶ #2662 Timesheet Entry Detail by Expense Account [Fix]

The optional filter on employee number has an embedded lookup on employee by name. Prior to the software update, the lookup was sorted and searched by employee number. This was changed to sort and search by employee name. **ADMINS** also corrected selection criteria and the name lookup.
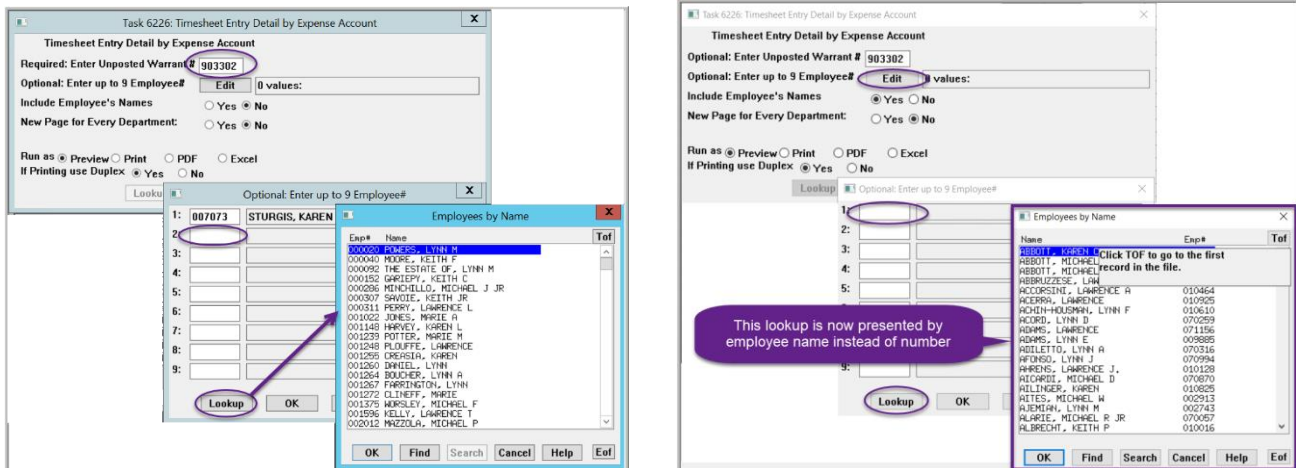
Figure 6 Before & After – embedded lookup is sorted and searched by employee name instead of employee number

[ADM-AUC-HR-10192]

5.2 #6727 – Paycheck Summary - By Employee / Pay Code Type [Enhancement]

ADMINS added a new report to the **Human Resources ▶ Reports ▶ Report Library ▶ [Paychecks Other] ▶ Paycheck History Reports**. This report may be used to satisfy **FOIA** requests for salary data.

The **Check Date Range** field is required; all other fields are optional and allow filtering by **Posted Warrant #, Timesheet Group, Employee #,** and **Bargaining Unit**.

Figure 7 Running the paycheck summary report for the 2019 calendar year

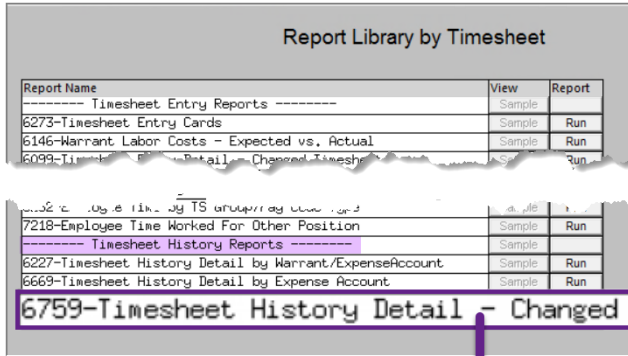**Figure 8 New report #6727 – Paycheck Summary - By Employee / Pay Code Type run as Excel®**

Note: Categorizing the pay codes is site-specific. Check the pay code *type* on the pay code table for information about the pay code types.

[BLG-SUP-SAPLAUC-1261]

5.3 #6759 Timesheet History Detail - Changed Timesheets [Enhancement]

Run the report to know who made a change to a timesheet after a warrant has been posted:

HR ▶ Reports ▶ Report Library ▶ By Timesheet ▶ #6759 Timesheet History Detail - Changed Timesheets

The only **required field** is a **Posted Warrant #,** which may be entered directly or selected from a lookup.

The report may be **sorted** by **Employee Name within Timesheet Groups**, or by **Employee Name**.

The report may be run to Preview/Print/**PDF®** or to **Excel®**.

This is only available on timesheets posted after this software update.

Figure 9 The Timesheet History Detail – Changed Timesheets Run as ⊙ PDF®

Figure 10 The Timesheet History Detail – Changed Timesheets Run as ⊙ Excel®

[ADM-AUC-HR-10172]

5.4 Paycheck Cost Code Summary Reports [Enhancement]

ADMINS added two more optional filters to several of the **Paycheck Reports**:

- #6831 Paycheck Listing
- #6801 Paycheck Cost Code Summary – By Category / Cost Code
- #6802 Paycheck Cost Code Summary – By Employee / Cost Code
- #6800 Paycheck Cost Code Summary – By Timesheet Group
- #6803 Paycheck Cost Code Summary – By Category / Pay Code
- #6804 Paycheck Cost Code Summary – By Employee / Pay Code
- #6727 Paycheck Cost Code Summary – By Employee / Pay Code Type

Access the reports by selecting **Human Resources ▶ Reports ▶ Report Library ▶ [4 By Paychecks/Other]**.

Figure 11 Before - six optional filters

- Up to nine Bargaining Units may be selected for the reports.
- Up to nine Timesheet Groups may be specified

Figure 12 After – added two additional filters on Bargaining Unit and Timesheet Group

All selection criteria must be met for the data to be shown on the report. A sample is shown using the **#6801 Paycheck Cost Code Summary – By Category / Cost Code** report. A legend is provided at the bottom of each report to show what selection criteria was used to generate the data on the report.

Figure 13 the #6801 Paycheck Cost Code Summary – By Category / Cost Code report.

[ADM-AUC-HR-10203]

6   QUERIES ▶ EMPLOYEE ENCUMBRANCE HISTORY [Enhancement]

ADMINS added filtering by date to the **Excel®** Account and Employee transaction reports on the encumbrance history screen to make it easier to focus on a set of data. Access the screen via **Human Resources ▶ Queries ▶**

Employee Encumbrance History Screen. Select

Figure 14 The Employee Encumbrance History Screen

Prior to the software update, the only field available was the required year.

Figure 15 Before – the Excel® **Account Transactions and Employee Transactions prompts**

Figure 16 After - the Effective Date Range Filter

The **Excel®** output is the same and was described in detail in the December 2019 Release Notes.

[ADM-AUC-HR-10177]

7   TABLES ▶ Tax Rate Tables ▶ New Fields [Enhancement]

To comply with IRS regulations, the Tax Rate tables were updated with new fields. Select **Human Resources ▶ Tables ▶ Tax Rate** tables to see the change.

Figure 17 Before - the "FED" Federal Tax Rate Table

The **2020 W4** annual exemption amount for **H & S is $8,600** and for **M** is **$12,900** and appears on the **FED** table.

Figure 18 After – the "FED" table with a new field for 2020 W4 Annual Exemption amount – changes highlighted

The **FED2020** exemption amount is part of the employee's **W4** and is on the personal tab.

The **Base Bucket for Period Tax Reduction** field shown at **#1** in **Figure 18** was moved to the left to make room for the **2020 W4 Annual Exemption Amount** field.

The **2020 W4 Annual Exemption** amount of **$12,900**, shown in **#2** in **Figure 18**, is taken from Publication 15-T.

The example shown is the dollar value for **M**; **H** and **S** each use $8600 for Calendar year ending 31 December 2020. These exemption amounts are used with the **FED** tax type.

See also **Human Resources ▶ Help Reference Library ▶ Tables ▶ HR–605 W4 Percentage Method Tables** for more detailed information.

Figure 19 Excerpt of Page 5 from Publication 15t

Due to changes in law, currently neither personal nor dependency exemptions are valid. Therefore, on the **FED2020** Tax Rate table, no exemption amounts should be entered.

Figure 20 Sample for the new FED2020 Tax Rate Table

See the IRS Publication 15T for definitive information on the tax withholding methods. See **HR–605 in the Help Reference Library** for detailed instructions for updating the Tax Rate table.

[ADM-AUC-HR-10186]

7.1 IRS Tools for the New W4 [Enhancement]

The IRS offers
- a withholding estimator for employ*EE*s to use when furnishing a new form W4, and
- a withholding assistant for employ*ER*s verifying the federal tax withheld from paychecks

7.1.1 Online Withholding Estimator for Employ*EE*s Furnishing a New W4

If employees choose to furnish a new **W4** the best method for filling out the **W4** is to use the withholding estimator found here:

https://www.irs.gov/individuals/tax-withholding-estimator

Existing employees are ***not required*** to furnish a new **W4** if they are not asking for additional withholding. New employees and any employees asking for a change, such as additional withholding, must furnish a new **W4**.

Use the online estimator because it yields more accurate results than manual calculations using the tables on the **2020 W4**.

A copy of the completed **W4** may be saved for each employee and attached to their employee maintenance record.

[ADM-AUC-HR-10208]

7.1.2 Employ*ER*s Tax Calculation Spreadsheet

When submitting a new form W4, employees may find that the federal tax withheld from their next paycheck yields unexpected or unintended results. To give employees an accurate estimate of the impact of the new **W4**, please use the Excel® spreadsheet downloaded from the IRS website:

https://www.irs.gov/pub/irs-utl/IncomeTaxWithholdingAssistantForEmployers2020.xlsx

The spreadsheet looks like this and may be used for either the *existing W4* provided prior to January 2020 or the *new W4;* follow the instructions in blue in the lower right corner of the spreadsheet:

Figure 21 Image of the Income Tax Withholding Assistant Spreadsheet for Federal Tax Calculation

For each employee submitting a **W4**, a copy of the completed spreadsheet may be saved and attached to their employee maintenance record.

[ADM-AUC-HR-10208]

8 VENDOR CHECK HISTORY ▶ Void Date Column [Enhancement]

Vendor checks issued during the payroll process sometimes need to be voided. There is a document, **HR–420 Voiding A Vendor Check from a Payroll**, describing how to handle vendor check voids.

ADMINS added a **Void Date** column to the **Human Resources ▶ Queries ▶ Vendor Check History** screen. Use this column to enter a void date; entering a date in this column does not affect any of the payroll reports or files, it is only a *note* to help immediately identify the check as void.

Vendor Check History

New Void Date column allows entering a void date for a vendor check

[ADM-AUC-HR-10055]

9 YEAR END PROCESSING

- enhanced year end (**W2, 1099R, & 1095C**) processes to notify payroll staff of undeliverable email forms
- fixed the display of the self-insured checkbox on the **1095C** work file screen

9.1 W2 & 1099R Processing [Enhancement]

ADMINS continues to update the product to check email addresses during entry. There are times when an email address (that was working previously) is rejected and this has caused the process to not complete. Now, an email will instead be sent to the user who ran the process indicating that the **W2 or 1099R** was not delivered.

This will allow the processor to contact the employee to get the email corrected then manually forward the **W2 or 1099R** email.

Figure 22 Sample of email sent to the user running the W2 or 1099R process – shows the employee # and the form name

[ADM-AUC-HR-10147]

9.2 1095C ▶ [Edit 1095 Work File] Screen [Fix]

Sites that are self-insured indicate so by selecting the ⊙ **Yes** radio button on the **Human Resources ▶ Tables ▶ W2 Entity Table ▶ [2 Payroll W2 ACA]** tab as shown in **Figure 23**:

Figure 23 The Payroll 1095C Entity Table shows if coverage was provided through a self-insured plan

The **Edit 1095 Work File** screen was showing the checkbox as grayed out even if the ⊙ **Yes** radio button was selected. This was a screen display issue that affected neither the printed 1095C forms nor the electronic file submitted to the IRS. **ADMINS** corrected this and the checkbox will show the correct coverage status on the screen.

Figure 24 The self-insured checkbox on the Edit 1095 Work File screen – before and after

[ACM-AUC-HR-10194]

9.3   HSA (Health Savings Account) Plans [Clarification]

Figure 25 Payroll W2 / 1095C Filing Table

If the site uses an **HSA plan, at no cost to the employees**, check the **HSA Plan ☑**, select the correct code from the lookup for line 14 (most sites use **"1E"**) and enter **.01** in line 15.

This will display zero dollars on the forms, the screen, and in the file sent to the IRS.

If the plan is in effect for only a portion of the year, check the **HSA Plan ☑** and enter the .01 in each month the plan is in effect.

[ADM-AUC-HR-10214]

9.4 Emailing 1095C Forms to Employees [Enhancement]

ADMINS continues to update the product to check email addresses during entry. There are times when an email address (that was working previously) is rejected and this has caused the process to not complete. Now, an email will instead be sent to the user who ran the **1095** process indicating that the **1095C** was not delivered.
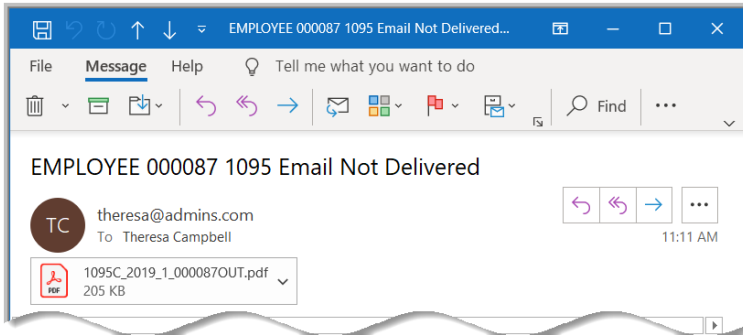
This will allow the processor to contact the employee to get the email corrected then manually forward the email.

[ADM-AUC-HR-10147]

10 SITE SPECIFIC ▶ ATTENDANCE REPORT [Enhancement]
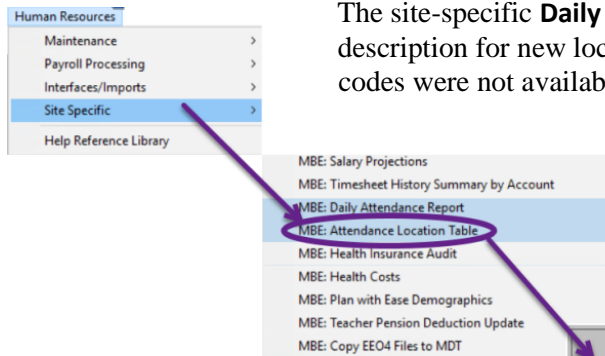
The site-specific **Daily Attendance Summary Report** was not printing the description for new location codes (added following the original installation). These codes were not available to be maintained by the end user. **ADMINS** added an **Attendance Location** table to be maintained by the end user for display on the report.

When a new location is used in the district, add it to the **Attendance Location Table**. The code and associated description will be shown on the report.

[MBE-SUP-SAPL-1069]

11 COPY LIVE TO TRAINING [ENHANCEMENT]
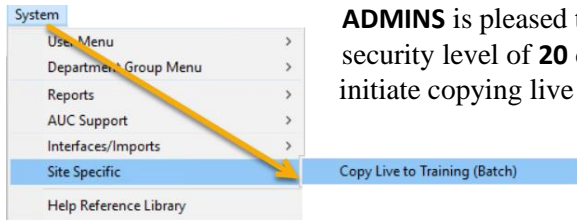
ADMINS is pleased to offer this new feature. Now, users with a security level of **20** can initiate a copy of live data to training. To initiate copying live to training, select:

System ▶ Site Specific ▶ Copy Live to Training (Batch)

This process will refresh the training module, so verify with other department heads that they are not in the middle of doing any important testing.

Read the detailed instructions in the **SY–175 Copy Live to Training (Batch)** document in the **Help Reference Library**.

[ADM-AUC-SY-8114]

12 WANT FASTER RESPONSE ON SUPPORT REQUESTS?

*1. Subject* line should not be blank → 2. Include a phone number and name → 3. When is this needed?

4. Include screen captures → 5. Provide the report or screen number → 6. New issue, new email
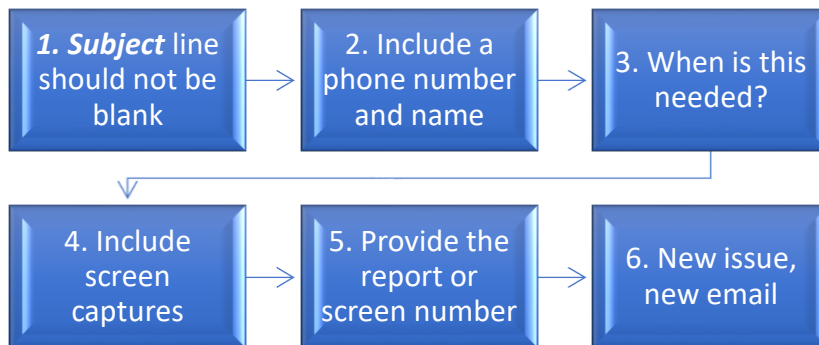
To improve the user experience when emailing support@admins.com for assistance, please include the following information on the email:

1. A *Subject:* line should briefly describe the request – for example, *Subject:* **Timesheet Entry Screen help needed**, or *Subject:* **Posting Disbursements – need assistance**.

2. Include your **full name** and **contact information**, including the **best phone number** to use when support staff call you.

3. How critical is the request? Is it *urgent*, as in trying to make a **4PM deadline for a bank ACH file**? If it is for the next time, let us know the next time the process will be run.

4. We love **pictures** – they are worth a thousand words–include screenshots when relevant.

5. We love words, too, so describe the problem, and include a **report number** or **screen number** if known.

6. Start a **new email for a new issue**. Use **Reply All** to include the entire support team and allow seamless escalation for complex requests.

13 HELP REFERENCE LIBRARY

The following new or updated documents were added to the Help Reference Library.

13.1 New or Updated Documents

- PAYROLL PROCESSING   HR–350 How to Recalculate a Warrant   [New]
- SPECIAL PROCESSING   HR–430 Manual Checks – New Chapter 8   [Updated]
                            HR–525 Medicare Wages over $200,000   [New]
- TABLES   HR–605 W4 Percentage Method Tables   [Updated]
- YEAR END PROCESSING   HR–648 IRS Pub 15t   [New]
                            HR–670 Calendar Year End ACA Slides   [Updated]
                            HR–680 IRS Instructions for Forms 1094 & 1095C   [Updated]
- SYSTEM   HR–1110 System Administration Kit   [Updated]