South Carolina Enterprise Information System

# Human Resources & Payroll Project
# Department of Transportation
# Cutover Activities Checklist & Data Cleansing Guide

**July 25, 2011**

STATE INFORMATION TECHNOLOGY

SC BUDGET AND CONTROL BOARD

## Getting Ready for SCEIS HR/Payroll Cutover

As the SCEIS HR/Payroll Project Team prepares for the Department of Transportation to go live on September, 2011, we will once again need your assistance to ensure that the data that is going into the new system is accurate and up-to-date. Many of the activities in this guide should be familiar to you, as we have requested this information before as part of our data conversion efforts.

Your Agency Support Team is aware of these requests and understands that you may require additional resources and assistance to complete them. In addition, you may contact your Agency Advocate on the SCEIS Project Team if you have questions or require additional assistance. We appreciate your participation in these activities and we are excited, as we hope you are, to transition the Department of Transportation into the SCEIS HR/Payroll system in June.

## SCEIS HR/Payroll DOT Agency Cutover and Go-Live Activities

| August 2011 | | | | | | |
|---|---|---|---|---|---|---|
| **Monday** | **Tuesday** | **Wednesday** | **Thurs.** | **Friday** | **Sat.** | **Sun.** |
| 1 | 2<br>SCEIS Ready Room/Cutover Kickoff Meeting;<br>SCEIS Ready Room Opens | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12<br>SCEIS Ready Room closes until after go-live | 13 | 14 |
| 15 | 16<br>**HRIS Freeze begins 6 p.m. – DUAL ENTRY OF ALL CHANGES MADE TO EMPLOYEES' DATA AFTER THIS TIME WILL BE REQUIRED AT GO-LIVE**<br>**Activities to complete before 6:00 p.m.:**<br>• Complete validation of org structures in Nakisa<br>• Halt or monitor all direct deposit changes made just before or during the freeze period<br>• Assign all employees to a Work Schedule Rule and Work Weeks in HRIS<br>• Process outstanding pay actions w/effective date on or before 5/16<br>• Resolve positions awaiting salary actions "08 status"<br>• Complete EPMS reviews according to instructions<br>• Delete dormant employees from legacy systems | 17<br>Data Migration efforts begin | 18 | 19 | 20 | 21 |
| 22<br>**DUE:** Completed data collection spreadsheets or notifications for any templates that don't apply to your agency | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31<br>**DUE:** Completed IT2013 template for leave balances | 26 | 27 | 28 | 29 |

**SCEIS HR/Payroll DOT Ready Room Agency Cutover and Go-Live Activities – DRAFT**

| September 2011 | | | | | | |
|---|---|---|---|---|---|---|
| **Monday** | **Tuesday** | **Wednesday** | **Thursday** | **Friday** | **Saturday** | **Sunday** |
| | | | 1 | 2<br>**HR/Payroll System Go-Live**<br>Ready Room Activities resume; post-go-live Ready Room Action Plans distributed<br>**DUE:** Updated IT2013 template for leave balance information for September 1st | 3 | 4 |
| **5** | 6 | 7 | 8 | 9 | 10 | 11 |
| **12** | 13 | 14 | 15 | 16<br>**For September 16th Payroll (for CG Legacy Payroll):** Pay all outstanding amounts due to employees whose last day of work was September 1st or earlier | 17 | 18 |
| **19** | 20 | 21 | 22 | 23 | 24 | 25 |
| **26** | 27 | 28 | 29 | 30<br>First SCEIS-generated payroll run | | |

| October 2011 | | | | | | |
|---|---|---|---|---|---|---|
| **Monday** | **Tuesday** | **Wednesday** | **Thursday** | **Friday** | **Saturday** | **Sunday** |
| | | | | | 1 | 2 |
| 3<br>First SCEIS-generated off-cycle payroll | 4 | 5 | **6** | 7 | 8 | 9 |

## Agency Activity Checklist for HR/Payroll Department of Transportation Cutover

**Cutover Data Collection Activities**

- Review and validate your agency's Organizational Chart from the SCEIS Nakisa Org Chart tool. You will have an opportunity to access this information before Cutover at the SCEIS office. Any corrections that need to be made to your agency's organizational chart **should be made directly in HRIS** and must be completed by **Tuesday, August 16th**. You will be able to view the Nakisa Org Charts in the SCEIS Ready Room after go-live as well.
- Be sure you have submitted photographs for all employees whose images you wish to display in your agency's Nakisa Org Chart. Photos must be in .jpg format, should be no larger than 25kb in size, and should be individually titled using the employee's PERNR. For example, if John Doe's PERNR is 10000001, the file should be titled 10000001.jpg.
  - Please note that these images will be visible in Nakisa to anyone role-mapped to use it, as well as to anyone with ECC access to organizational transactions such as PA20 or PPOSE.
- All employees must be assigned a Work Schedule Rule and a Work Week/Work Period for FLSA purposes in the system. This should be entered into HRIS following the instructions in the attached document. A report will be generated from HRIS to indicate which employees in your agency have not been assigned to a Work Schedule and Work Week. This information must be entered into HRIS **before the August 16th freeze date**. Please see the Time Management section of the guide entitled Work Schedules for specific instructions.
  - Please note: if your agency requires new Work Schedule Rules to be built for timekeeping purposes, you must submit that information to us by July 31st. After that date, we will be unable to develop new Work Schedule Rules until after your agency goes live on September 2nd.
- The following spreadsheets must also be completed with data valid **through August 16th.** Please note that some of these spreadsheets may not apply to your agency. If that is the case, please send us an e-mail to that effect, noting which items are not applicable. Further, there are several spreadsheets that are agency-specific, so please disregard these activities unless they apply directly to your agency. These items are due to the SCEIS team by **Monday, August 22nd except for the IT2013 spreadsheet for leave balance quotas.** Please return these spreadsheets to the project team per the instructions provided in the accompanying cover letter. Instructions for completion are included within each spreadsheet.
  - Internal Titles Conversion Spreadsheet
  - Recurring Payments, Furlough and IT0185 Conversion

- IT0672 FMLA Balances
- IT1008/IT1013 for Temp Grant and Time Limited Leave Eligibility and Hourly Paid **(TBD)**
- IT1018 Cost Objects/Filled and Vacant Position Funding
- IT2012 Time Transfer Spec
- IT2013 Quota Balances **(due August 31st)**
- IT9005 Premium Rates Conversion
- Leave Pool Balances
- Non-Resident Alien Processing
- PA_OM Data for Non-State Employee Board Members Only for Travel Expenses
- SU01 CVR Charge Objects
- Tort Liability Codes
- IT0041 Agency Service Dates
- IT0022 Educational Disciplines
- IT0006 Company Housing Addresses
- District Code Data
- IT0185 Career Path, Decrease, and Retiree Data
- Agency Retiree Data
- Who's Who Search Restriction

- Access to HRIS will be shut down at **6:00 p.m. on August 16th.** Any actions with an effective date on or before August 16th must be entered before the system is closed.
  - **Do not** key actions with an effective date of August 17th – September 1st until you are notified that the HRIS system has been reopened after the freeze. You will continue to use legacy payroll systems to pay employees throughout the time of the HRIS freeze period (August 17th – September 1st for the September 16th pay check).
  - Please do not key actions with an effective date of September 2nd or later into HRIS. You will key those into SCEIS after go-live.
  - All outstanding pay actions with an effective date prior to August 17th should be processed in HRIS no later than COB August 16th. If this information is not keyed prior to the freeze period, agencies will be required to update this information in both HRIS and SCEIS.
  - Even though HRIS will be reopened before the SCEIS system goes live, you will be required to enter information for that period in HRIS, legacy payroll, and SCEIS upon go-live. **This means all HR, payroll, and benefits-related transactions for employees in your agency that are processed during the freeze period (August 17th – September 1st) will require dual entry in both systems in order to be accurate.**

- If you have positions that have undergone a State Title Change and are awaiting salary actions in "08 status," you will need to resolve this status no later than August 16th. If this information is not keyed prior to the freeze period, agencies will be required to update this information in both HRIS and SCEIS.
- By EPMS policy, employees receive a "Successful by Default" rating on their review date if no other rating has been given. It has been standard practice to allow agencies up to 30 days after an employee's review date to process a rating before a "Successful by Default" rating is applied to the employee's record. If this information is not keyed prior to the freeze period, agencies will be required to update this information in both HRIS and SCEIS post-go-live.
- You should begin identifying employees in multiple assignments. A SCEIS Team member will be on hand in the Ready Room to help you process these scenarios appropriately.
- If you have employees whose information should not be included in the Who's Who Search functionality in MySCEmployee for security purposes, you need to identify them and provide all the required information on the Who's Who Search Restriction data template mentioned above.
- **All employees in all position types (including temporaries) must be entered into HRIS** so they can be converted into SCEIS. If these employees are not entered into the HRIS system, they cannot be converted into SCEIS and will require manual entry after go-live.
- Make sure you have identified all individuals that will require access to Charge Objects on timesheets.
- Old/dormant employee records should be deleted from the CG payroll system and all other legacy systems prior to your go-live date.
- All costing data on employees based on the current funding in the legacy payroll system will be converted. The "Multipurpose Code" field on all records in the legacy system will be used prior to go-live to facilitate the translation of STARS data into SCEIS data and ensure the correct level of SCEIS financial postings. Any issues with this field must be addressed prior to conversion.
- Validate that all retirement deductions on the payroll match the enrollment data submitted to the Retirement System. In addition, make certain that anyone in the unelected status whose 30-day election period ends on September 1st has made an election. If ORP is the election, a vendor must be specified.
- Validate and correct any discrepancies in employee birth dates between SCEIS and EIP. A report containing any discrepant information will be provided to you in the Ready Room before go-live.

- If you have not already done so, you will need to validate, as indicated in the data cleansing toolkit, that the following fields are accurate on all types of positions: FLSA, Insurance indicator, Part-Time/Full-Time indicator, and Leave indicator – these fields drive employee group and subgroup which drive rules for time management and payroll.
- For any employee whose last day of work is September 1st, be prepared to pay all outstanding amounts due on the September 16th payroll check from the legacy system. Special attention should be given to the timeliness of the collection of time sheets and leave records for these employees.
- Following the freeze of the HRIS system on August 16th, changes to an employee's direct deposit information should either be held until after go-live to be keyed into SCEIS directly, or else you will have to key it in both systems **and** the employee will have to be pre-noted in both systems. If any direct deposit changes are made in the legacy system during the cutover period, you will need to maintain a copy of the records so it can be keyed into SCEIS, otherwise, the employee may experience a rejected or delayed direct deposit.
- All deductions related to EIP and FBMC will be loaded from files received from them. You will need to validate these items in the Ready Room.
- All Deferred Compensation deductions (457, 401K, 401 Roth) will be converted from the deduction amounts on the CG payroll dated September 16th. Any changes that may be needed for these amounts for the September 30th and all subsequent payrolls must be first sent to the vendor because all input will be received directly from them.
- You will be asked to validate your employees' withholdings in the system. You are encouraged to ask your employees to check their own withholding information before conversion to improve accuracy.
- Agencies should identify all positions on work schedules that will have FLSA work periods/work weeks that cross over the September 2nd go-live date. Overtime earnings for those positions will have to be reviewed by the agency post go-live to ensure employees are properly compensated for any overtime earned in the cross over period. For employees that are paid overtime, a onetime adjustment should be processed in the Payroll module to complete this task. For employees who are awarded compensatory time off in lieu of paid overtime, adjustments should be made to an employee's quota balance in SCEIS to complete this task.
- You will need to keep records of leave requests effective September 1st so that balance adjustments may be entered into the SCEIS system post-go-live. We will be loading balances effective August 31st from the Quota Balances (IT2013) spreadsheet.
    - Leave Accruals for the month of May should be included on the Quota Balances (IT2013) spreadsheet due on August 31st.

**Technical Readiness Activities**

- Review the SCEIS Organization Technical Infrastructure Readiness Guide on the SCEIS website at http://sceis.sc.gov/files/Organization_Technical_Infrastructure_Readiness.pdf.
    - This document contains the necessary information for making sure SCEIS core system users have the necessary technical settings to ensure proper access to the system at go-live.

**General Agency Readiness Activities**

- Ensure data cleansing activities have been completed as prescribed in the instructions below.
- Validate assignment of roles in the system and alert SCEIS team of any changes as necessary.
- Complete HR/Payroll training courses as prescribed by your Individual Transition Plan (ITP).
- Familiarize employees with self-service functionality by ensuring they take the SCEIS Employee Self-Service and Manager Self-Service (if applicable) courses.
- Communicate to employees where to go to get help with MySCEmployee and answers to questions related to viewing and updating personal information.

# Instructions for Required Activities

Please note: These instructions correspond directly to the instructions you received for data cleansing in February, 2009, and again early in 2011. As always, please don't hesitate to contact the SCEIS team if you have questions.

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## Organizational Management

### Data Cleansing

**Organizational Unit**

Activity 1 - Identification of Divisions/Departments/Regions and Codes

In SAP, each true manager/supervisor should have an organizational unit. Each agency should identify the divisions, departments, sections, regions, etc. that makes up the agency structure. For each of these organizational units, create an abbreviation or other identifier that uniquely identifies that particular organizational unit.

ACTION: Identify a seven character abbreviation or identifier for each organizational unit. Each true manager/supervisory position within your agency should have an organizational unit in SCEIS.

NOTES:

- A true manager/supervisory position has at least one other position that reports into it. The holder of this position typically would be responsible for the approval of hours worked and leave requests, completion of performance appraisals, etc.
- **The department code should not be greater than seven characters.** This can be an abbreviation of the name of the organizational unit or another meaningful identifier that is unique to the org. unit. See p. 12 of this guide for an example of the department code, in this case HR Dept., which aligns with the long org. unit description Human Resources Dept.
- Agencies already live on SCEIS with the Finance and Procurement functionality need to check to make sure the correct department field is assigned to each of your positions.
- In addition, you need to ensure that each manager/supervisor has an organizational unit assigned to his/her position.

Activity 2 – Update the agency contact information and address information on all positions. This information will be taken from the fields stored on the table side of HRIS (Menu Path = Table, Table Maintenance, TAMC).

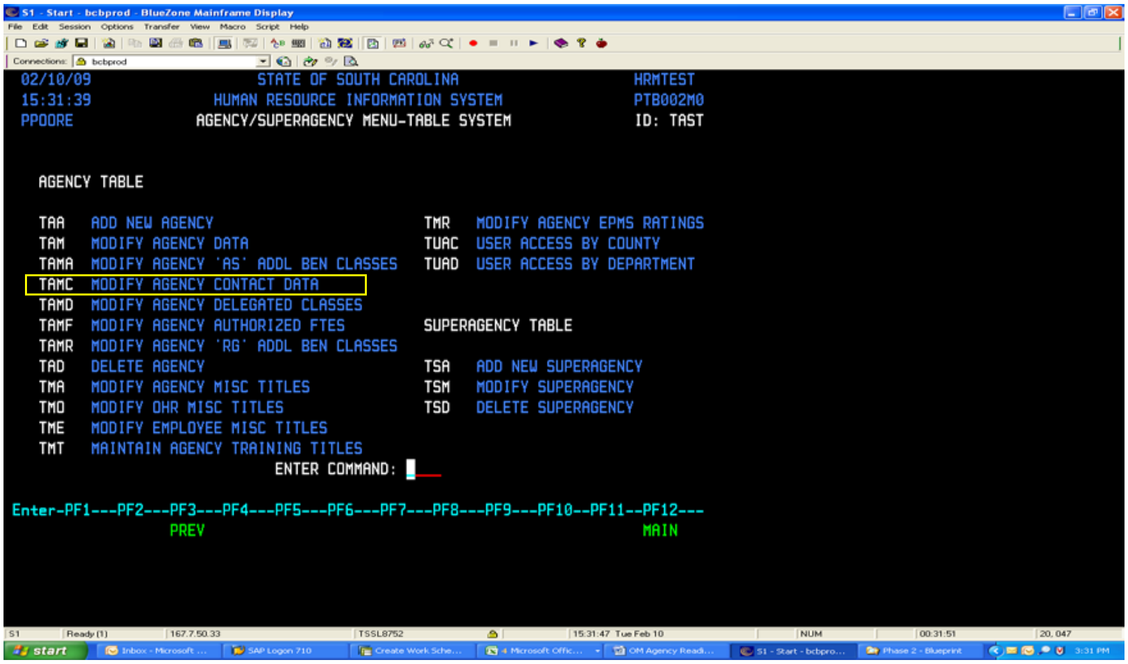
NOTES:

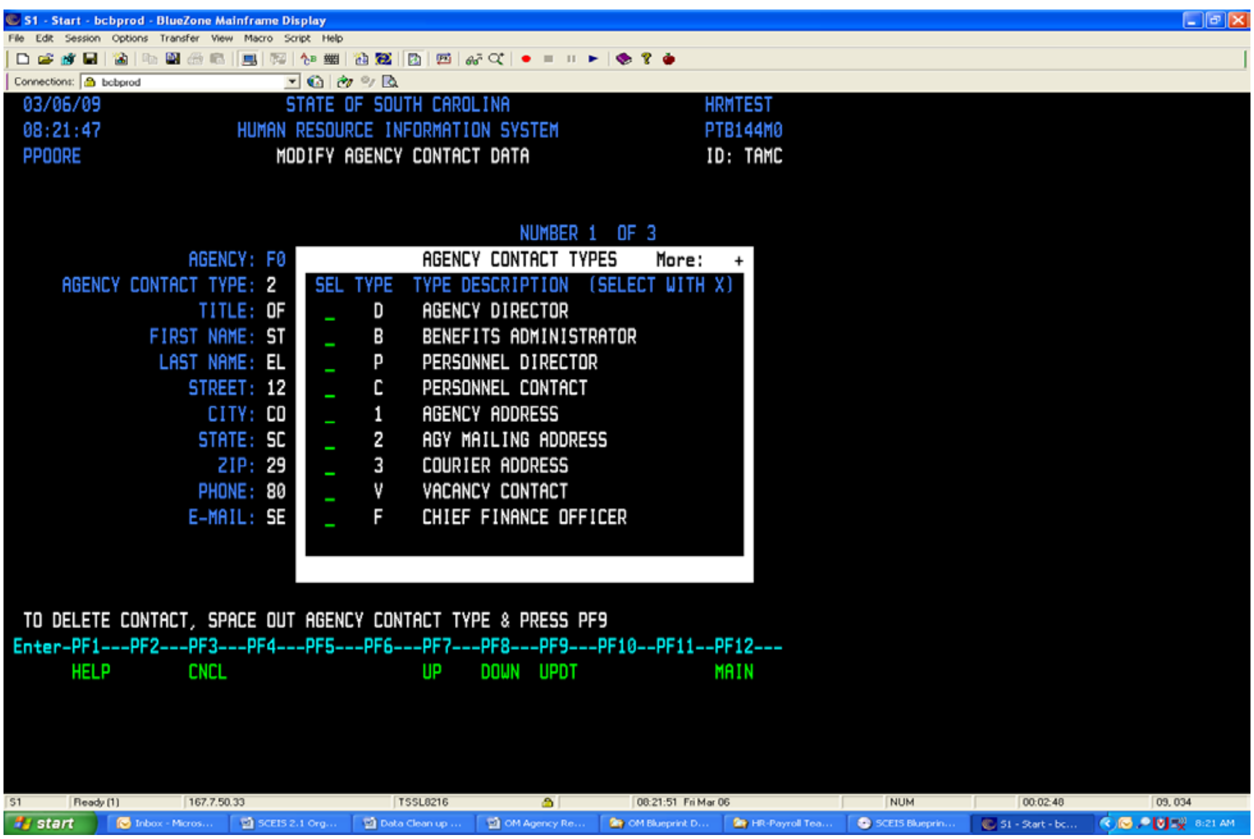
- In the "position no. field," please enter the type of position as the first character (P = permanent, T= temporary, G= temp-grant, L=time-limited). Then enter the full ninedigit position number.  The position no. field on the TAMC screen should have a total of ten characters.

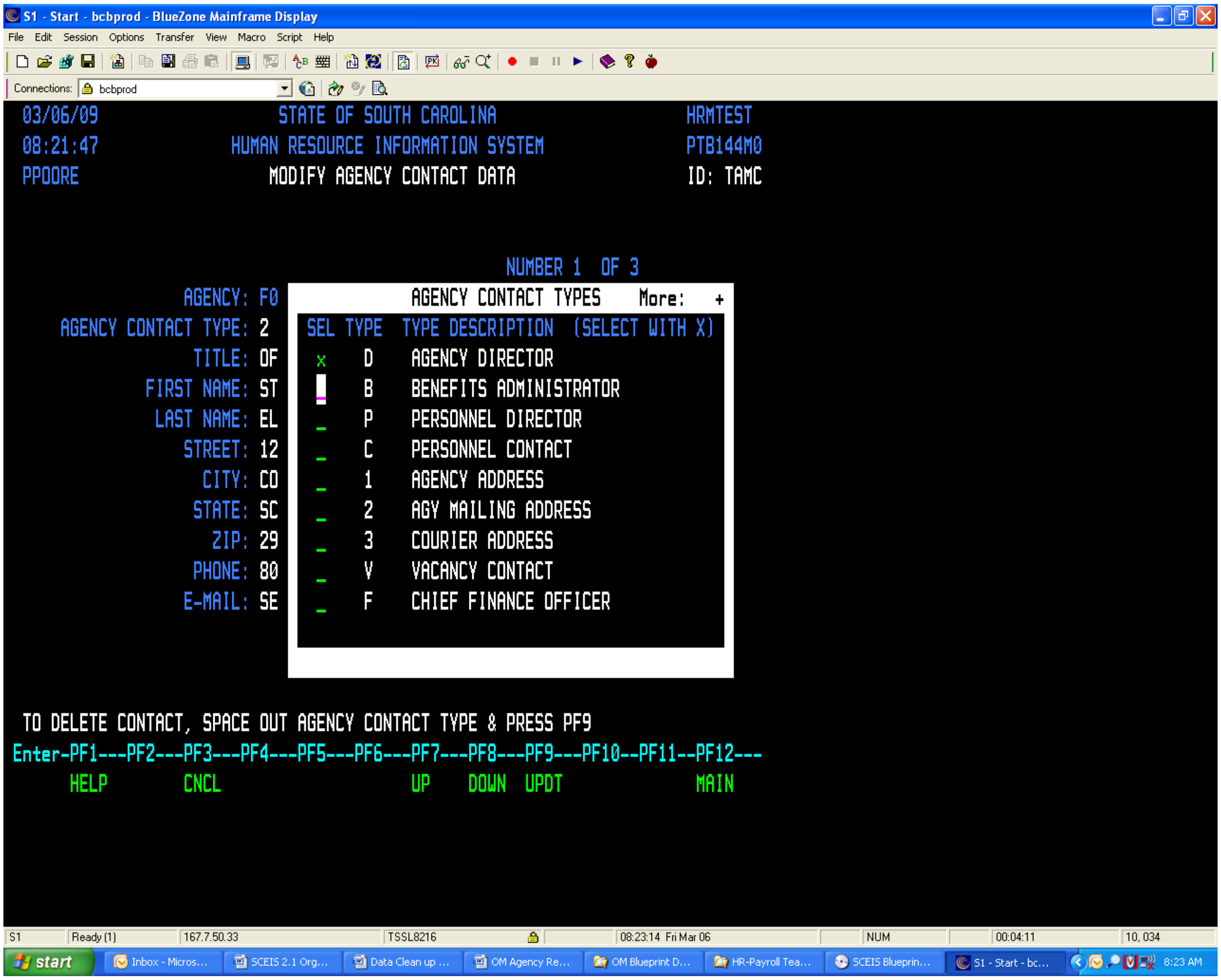
ACTION:

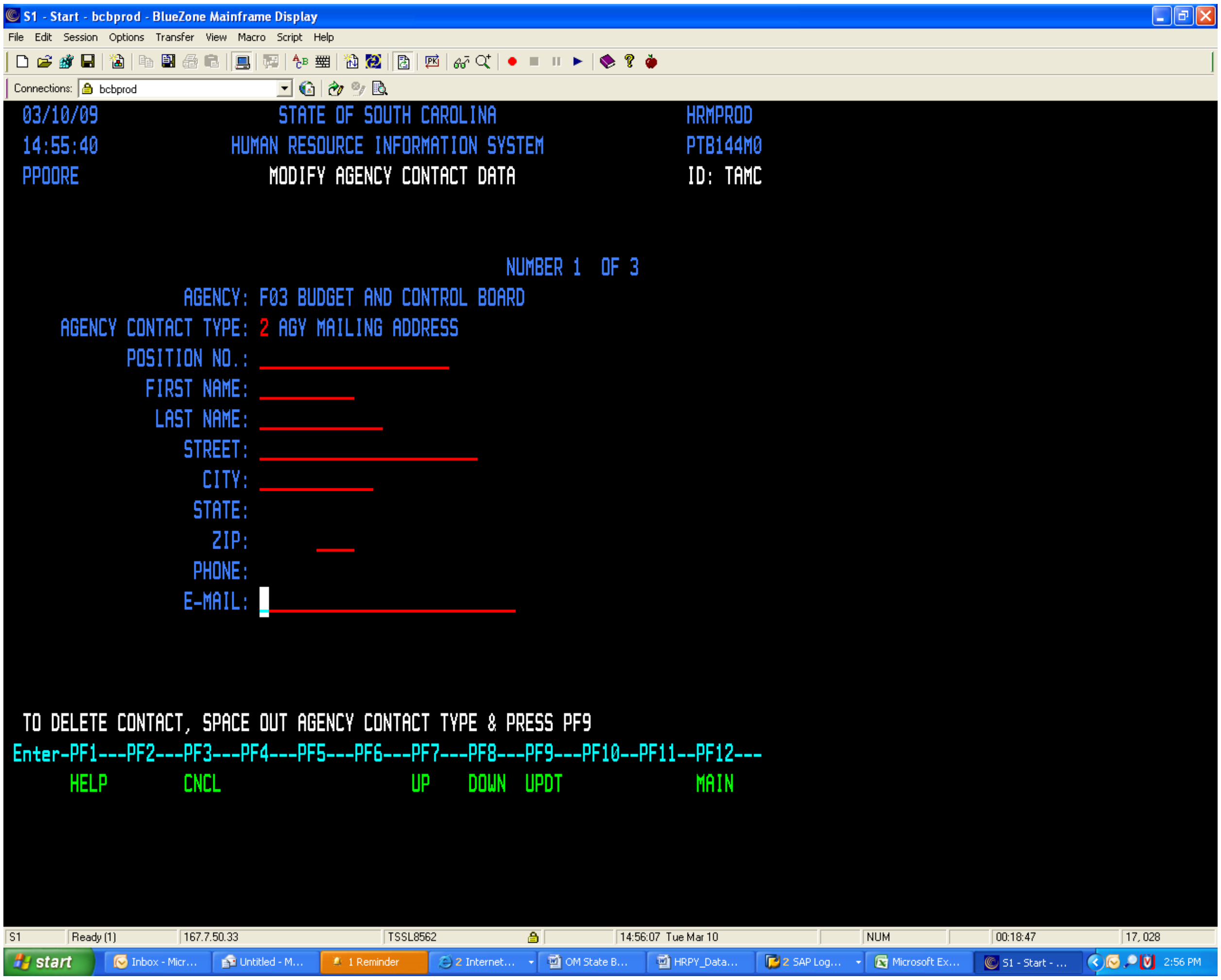
i. Agency Director = Enter the name of employee in this position and enter the type of position and the position number of that employee in the "Position No" field (total of ten characters).  Example: P0001234567 or T0000012345
ii. Benefits Administrator = Enter the name of employee in this position and enter the type of position and the position number of that employee in the "Position No" field (total of ten characters).
iii. Personnel Director = Enter the name of employee in this position and enter the type of position and the position number of that employee in the "Position No" field (total of ten characters).
iv. Affirmative Action Officer = Enter the name of employee in this position and enter the type of position and the position number of that employee in the "Position No" field (total of ten characters).
v. Agency address = Enter main agency address
vi. Agy mailing address = Enter agency's main mailing address
vii. Courier Address = Enter agency's main courier address
viii. CG/Payroll contact = Enter the name of employee in this position and enter the type of position and the position number of that employee in the "Position No" field (total of ten characters).
ix. Chief Financial Officer = Enter the name of employee in this position and enter the type of position and the position number of that employee in the "Position No" field (total of ten characters).

See the series of screenshots below for step-by-step images to arrive at these fields.


S1 - Start - bcbprod - BlueZone Mainframe Display
02/10/09 STATE OF SOUTH CAROLINA HRMTEST
15:31:39 HUMAN RESOURCE INFORMATION SYSTEM PTB002M0
PPOORE AGENCY/SUPERAGENCY MENU-TABLE SYSTEM ID: TAST
AGENCY TABLE
TAA ADD NEW AGENCY
TAM MODIFY AGENCY DATA
TAMA MODIFY AGENCY 'AS' ADDL BEN CLASSES
TAMC MODIFY AGENCY CONTACT DATA
TAMD MODIFY AGENCY DELEGATED CLASSES
TAMF MODIFY AGENCY AUTHORIZED FTES
TAMR MODIFY AGENCY 'RG' ADDL BEN CLASSES
TAD DELETE AGENCY
TMA MODIFY AGENCY MISC TITLES
TMO MODIFY OHR MISC TITLES
TME MODIFY EMPLOYEE MISC TITLES
TMT MAINTAIN AGENCY TRAINING TITLES
TMR MODIFY AGENCY EPMS RATINGS
TUAC USER ACCESS BY COUNTY
TUAD USER ACCESS BY DEPARTMENT
SUPERAGENCY TABLE
TSA ADD NEW SUPERAGENCY
TSM MODIFY SUPERAGENCY
TSD DELETE SUPERAGENCY
ENTER COMMAND:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
PREV MAIN


S1 - Start - bcbprod - BlueZone Mainframe Display
03/06/09 STATE OF SOUTH CAROLINA HRMTEST
08:21:47 HUMAN RESOURCE INFORMATION SYSTEM PTB144M0
PPOORE MODIFY AGENCY CONTACT DATA ID: TAMC
NUMBER 1 OF 3
AGENCY: F0
AGENCY CONTACT TYPE: 2
TITLE: OF
FIRST NAME: ST
LAST NAME: EL
STREET: 12
CITY: CO
STATE: SC
ZIP: 29
PHONE: 80
E-MAIL: SE
AGENCY CONTACT TYPES More: +
SEL TYPE TYPE DESCRIPTION (SELECT WITH X)
D AGENCY DIRECTOR
B BENEFITS ADMINISTRATOR
P PERSONNEL DIRECTOR
C PERSONNEL CONTACT
1 AGENCY ADDRESS
2 AGY MAILING ADDRESS
3 COURIER ADDRESS
V VACANCY CONTACT
F CHIEF FINANCE OFFICER
TO DELETE CONTACT, SPACE OUT AGENCY CONTACT TYPE & PRESS PF9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
HELP CNCL UP DOWN UPDT MAIN


S1 - Start - bcbprod - BlueZone Mainframe Display
File Edit Session Options Transfer View Macro Script Help
Connections: bcbprod
03/06/09 STATE OF SOUTH CAROLINA HRMTEST
08:21:47 HUMAN RESOURCE INFORMATION SYSTEM PTB144M0
PPOORE MODIFY AGENCY CONTACT DATA ID: TAMC
NUMBER 1 OF 3
AGENCY: F0
AGENCY CONTACT TYPE: 2
TITLE: OF
FIRST NAME: ST
LAST NAME: EL
STREET: 12
CITY: CO
STATE: SC
ZIP: 29
PHONE: 80
E-MAIL: SE
AGENCY CONTACT TYPES More: +
SEL TYPE TYPE DESCRIPTION (SELECT WITH X)
x D AGENCY DIRECTOR
B BENEFITS ADMINISTRATOR
P PERSONNEL DIRECTOR
C PERSONNEL CONTACT
1 AGENCY ADDRESS
2 AGY MAILING ADDRESS
3 COURIER ADDRESS
V VACANCY CONTACT
F CHIEF FINANCE OFFICER
TO DELETE CONTACT, SPACE OUT AGENCY CONTACT TYPE & PRESS PF9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
HELP CNCL UP DOWN UPDT MAIN
S1 Ready (1) 167.7.50.33 TSSL8216 08:23:14 Fri Mar 06 NUM 00:04:11 10, 034
start Inbox - Micros... SCEIS 2.1 Org... Data Clean up ... OM Agency Re... OM Blueprint D... HR-Payroll Tea... SCEIS Blueprin... S1 - Start - bc... 8:23 AM


S1 - Start - bcbprod - BlueZone Mainframe Display
File Edit Session Options Transfer View Macro Script Help
Connections: bcbprod
03/10/09 STATE OF SOUTH CAROLINA HRMPROD
14:55:40 HUMAN RESOURCE INFORMATION SYSTEM PTB144M0
PPOORE MODIFY AGENCY CONTACT DATA ID: TAMC
NUMBER 1 OF 3
AGENCY: F03 BUDGET AND CONTROL BOARD
AGENCY CONTACT TYPE: 2 AGY MAILING ADDRESS
POSITION NO.:
FIRST NAME:
LAST NAME:
STREET:
CITY:
STATE:
ZIP:
PHONE:
E-MAIL:
TO DELETE CONTACT, SPACE OUT AGENCY CONTACT TYPE & PRESS PF9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
HELP CNCL UP DOWN UPDT MAIN
S1 Ready (1) 167.7.50.33 TSSL8562 14:56:07 Tue Mar 10 NUM 00:18:47 17, 028
start Inbox - Micr... Untitled - M... 1 Reminder 2 Internet... OM State B... HRPY_Data... 2 SAP Log... Microsoft Ex... S1 - Start - ... 2:56 PM

**POSITIONS**

Activity 1 – Complete required entries for Department Field, Supervisor Indicator, Supervisor Position Number, and DEPT DESCR. in HRIS.

In the Manager Self-Service (MSS) functionality in the MySCEmployee portal, supervisors and managers will have responsibility for initiating and approving various actions such as approving working time, leave, etc. for their employees. In addition, managers will have the ability in MSS to view information regarding employees for whom they supervise. In order to route these approvals properly, positions that have supervisory responsibility for other positions have to be identified in SCEIS. For the workflow to function properly each true manager/supervisor must be assigned an organizational unit, be identified as a supervisor, be assigned a valid position number, and have the corresponding long name for the organizational unit filled in.

Each position (FTE, temporary, temporary-grant, and time-limited) must have a department field assigned to it in HRIS. The department field represents the department/division/region in which the position resides. The Department Field can be up to seven (7) characters in HRIS. Below is a screen shot of where to add or change the department field in HRIS. The data entered into the department field is referred to as the Short Description of the Org Unit, (e.g., HR Dept).

In order for the SCEIS system to recognize that an employee holds a manager/supervisor position, that position must be flagged as supervisory. This information will be converted into SCEIS from HRIS, so in order to ensure your agency's supervisory positions are identified, you need to put a "Y" in the supervisor indicator field on the position in HRIS.

Once the system identifies a supervisor, it will look for the employees that report into that position. If the supervisory position is marked as noted above, the system will recognize that the position denotes a supervisor, but you will still also need to denote which other positions report to that supervisory position. You will need to assign the supervising position number to each of its direct reports on the Supervisor Position No. field in HRIS.

Finally, Long Description of the Organizational Unit must be entered on each manager/supervisor position in the DEPT DESCR field in HRIS. In the screen shot below and the example referenced above for Short Description of the Org Unit (HR Dept), the corresponding Long Description might be Human Resources Dept. The Long Description field may be up to 20 characters long.

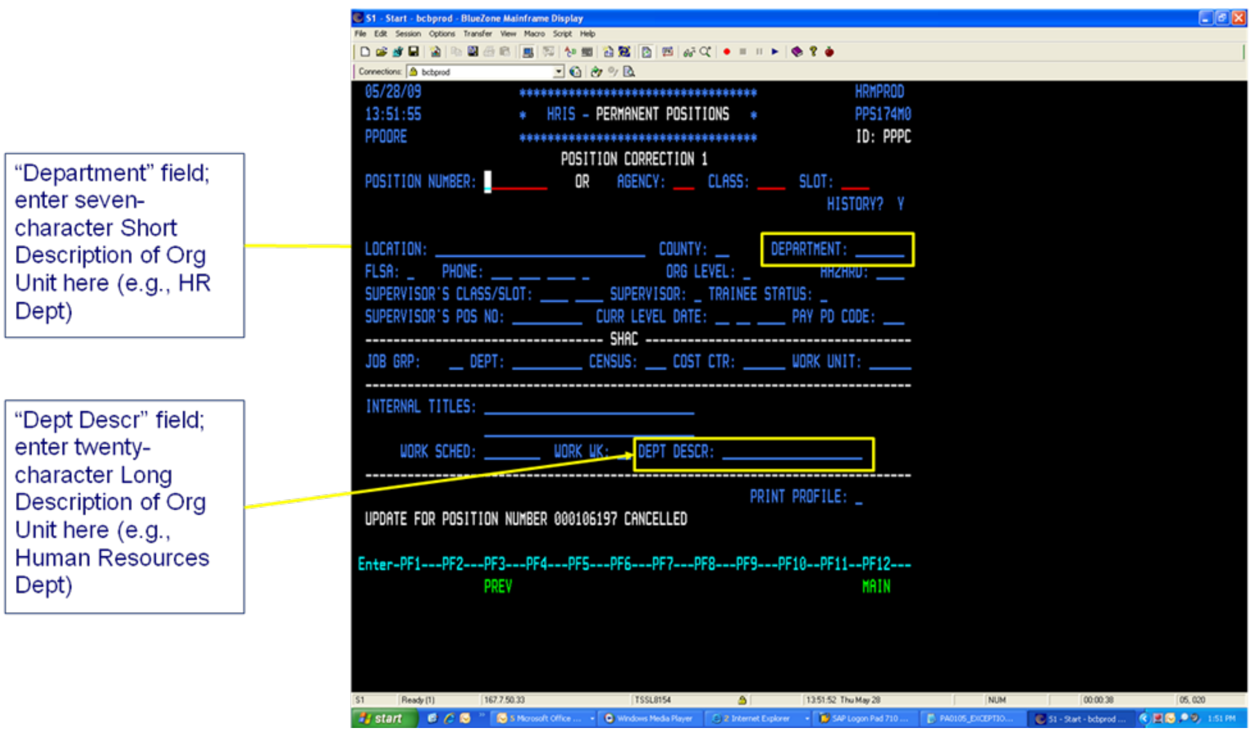
ACTION:

- On the PPPC screen in HRIS, enter the corresponding department field (short description for org unit) for each position within your agency.
- For all true managers/supervisors, place a "Y" in the supervisor indicator field.

- For each position, enter supervisor's position number
- For each manager/supervisor position, enter the name of the organizational unit in the "DEPT DESCR" field.

<u>NOTES</u>:

- This must be done for **all** applicable positions, including FTE, temporary, temporary-grant, time-limited, **and vacant** positions.
- If you're already live on SCEIS Finance, you need to check to make sure the correct department field is assigned to each of your positions. In addition, you need to ensure that each manager/supervisor has an organizational unit assigned to his/her position.




<u>Activity 2</u> – Verify accuracy of data on positions

<u>ACTION:</u> Verify accuracy of the following fields on all positions in your agency. **This information is the data the SCEIS Team will convert directly into the SCEIS system to populate your agency's data in SCEIS.**

- Position Type (Perm, Temp, Temp Grant and Time Limited)
- Position Number

- Class Title
- FLSA Code
- Full-time/Part-time Indicator
- Central Office Indicator
- County Code for position
- Drive State Vehicle – does position require an employee to drive a state vehicle?
- Worker's Comp Code (hazard code)
- Exempt from Grievance Act
- Shift differential
- Power to arrest
- Leave indicator
- Benefits indicator

<u>Activity 3</u> – SHAC Information

<u>ACTION:</u> Verify that the following information is accurate for each position in HRIS (PF8 menu). This applies to all position types, including temporary, temporary-grant, and time-limited, as well as FTE.

- FedCat
- Census code
- Work unit
- Cost center
- Jobgrp
- Department

<u>Activity 4</u> – Managing Positions

Because data on positions in the SCEIS system will be converted from HRIS, it is important that *all* position information is maintained in HRIS. This includes temporary, temporary-grant, and time-limited positions, even if these positions are vacant. Similarly, vacant positions (temporary, temporary-grant, and time-limited) that will not be used or are dormant should be deleted from HRIS to prevent them from being converted into SCEIS unnecessarily.

<u>ACTION:</u>

- Make sure all temporary, temporary-grant, and time-limited positions are entered and maintained in HRIS.
- Make sure all vacant temporary, temporary-grant and time-limited positions that will no longer be used are deleted from HRIS.

NOTE: Position Descriptions – Position descriptions will be maintained electronically in SCEIS. Existing position descriptions will not be converted into SCEIS.

Activity 5 – Maintaining FTE balances

ACTION: To the extent possible, keep FTEs balanced in HRIS and be certain that funding is set up correctly in the CG's Payroll system. Data on funding of positions will be converted from the CG's Payroll system.

HRIS DATA CONVERSION: The following HRIS fields have been identified for conversion into SCEIS to cover information needed for Organizational Management in the system. Data in these fields will be transferred into the SCEIS system on all positions, so please verify the accuracy of the information stored in each.

| HRIS FIELD |
|---|
| Dept. Description (Dept. Descr.) |
| Department field |
| Supervisor Indicator |
| Supervisor Position Number |
| Position Type |
| Position Number |
| Class Code |
| Class Title |
| FLSA Code |
| Full-time/Part-time Indicator |
| Central Office Indicator |
| County Code for position |
| Drive State Vehicle |
| Worker's Comp Code (Hazard Code) |
| Exempt from Grievance Act |
| Shift differential Indicator |
| Power to arrest |
| FedCat |
| Census code |
| Work unit |
| Cost center |
| Jobgrp |
| Department |
| Agency contact information and addresses |
| Benefits Indicator |
| Leave Indicator |
| Total FTE |

AGENCY DATA ENTRY: The following data will not be converted from HRIS, and may (since not all fields are mandatory) require manual entry by the agency or spreadsheet loads if available to ensure all relevant information reaches the system for Organizational Management functions. If a category of data is marked with “at agency discretion,” it means you may elect to use this field, but your agency will be responsible for populating that field in SCEIS after go-live.

| AGENCY DATA ENTRY |
| --- |
| Blood Borne Pathogen – at agency discretion |
| Staff Indicator – Listing of positions that may not follow the normal reporting structure within your agency. |
| Position subject to drug testing – at agency discretion |
| Essential positions – those positions that are expected to report to work during emergencies or hazardous weather – at agency discretion |
| Budgeted Dollar Amount for a position – at agency discretion |
| Which positions receive On-Call Pay and the rate (this will be captured on a data collection spreadsheet) |
| The shift differential rate/amount for a position (this will be captured on a data collection spreadsheet) |
| Which positions receive geographic differential and the rate (this will be captured on a data collection spreadsheet) |

# Personnel Administration

## Data Cleansing

Activity 1 – HRIS Data Conversion: The following HRIS fields have been identified for conversion to SCEIS for the Personnel Administration functionality. Data in these fields will be transferred into the SCEIS system on all employees, so please verify the accuracy of the information stored in each.

| HRIS FIELD | HRIS FIELD |
|---|---|
| ADDITIONAL BENEFITS | EXEM GRIEV (Employee's Grievance Status) |
| AGENCY HIRE DATE | HOME COUNTY |
| CLASS DATE | HOME_PHONE (If used by agency) |
| CONTINUOUS STATE SERVICE DATE | HOURLY PAY |
| DATE OF BIRTH | LAST EPMS RATING |
| DEGREE TYPE (If used by agency) | LEAVE DATE |
| DEGREE_INSTITUTION (If used by agency) | LEVEL DATE (If used by agency) |
| DEGREE YEAR (If used by agency) | LONGEVITY PAY |
| EDUCATION LEVEL (If used by agency) | MARITAL STATUS |
| EMAIL ADDRESS (If used by agency) | NEXT_REVIEW DATE |
| EMERGENCY CITY (If used by agency) | PAYRATE |
| EMERGENCY NAME (If used by agency) | PHONE (Work Phone #) (If used by agency) |
| EMERGENCY PHONE (If used by agency) | RACE |
| EMERGENCY RELATIONSHIP (If used by agency) | SEX |
| EMERGENCY STATE (If used by agency) | STATE HIRE DATE |
| EMERGENCY STREET (If used by agency) | SUPPLEMENTAL PAY |
| EMERGENCY ZIP CODE (If used by agency) | VETERAN STATUS (If used by agency) |
| EMPLOYEE_NO (If used by agency) | |

Activity 2 – HRIS Miscellaneous Fields

Each agency should review usage of HRIS miscellaneous fields and any internal HR systems, since not all data fields may have been accommodated in the system. See below as a reference guide to HRIS miscellaneous items identified based on agency questionnaire responses.

| HRIS Miscellaneous Field Data Based on Agency Questionnaire Responses | Available in SAP |
|---|---|
| Agency Location Codes | Yes |
| Additional Pay | Yes |
| Badge Numbers | Yes |
| Band and Level Code | Yes |
| Budget Code | Possibly |
| Call Numbers | Yes |
| CATT System (Primary system/HRIS secondary system and key into both) double entry | No double entry of basic employee data such as Name, SSN, address, etc. |
| Central Office Location | Yes |
| Drivers Vehicle Access | Yes |
| Dual Employment | Yes |
| EEO Data | Yes |
| EEOC Code Levels (ex:E2A) | Yes |
| Earned Income Credit | Yes |
| Federal Exemptions | Yes |
| Fire Academy Temporary Employees | Yes |
| Gas Card | Yes |
| Internal Career Path Levels | Yes |
| Internal Position Number | Yes |
| Internal Position Titles | Yes |
| Internal Titles | Yes |
| Level | Yes |
| Location Codes | No |
| Military Leave | Yes |
| Money Plus | Yes, plan type and deduction information. However, EIP will be the system of record with this information. |
| New Band/Level | Possibly |
| Old Grade | Yes. An infotype is available for agency usage to store as desired. |
| Old Title (capture merit system title) | Yes. Internal Titles may be stored by the agency. |
| Outside Employment | Yes |
| Pay/Transfer Leave | Yes |
| PD Dates | Yes |
| Program areas listed: “county director”, particular programs, i.e. CPS, Foster Care, FI | Possibly part of cost center information. |
| Retirement (type) | Yes |
| State Exemptions | Yes |
| Temporary Pay Status | Yes |
| Training - (Vendor/Provider, Title of training, Staff Member receiving training, Date of Training, Times of Training, # of hours/days trained, and which budget the | No. The training module is not being implemented. |

| HRIS Miscellaneous Field Data Based on Agency Questionnaire Responses | Available in SAP |
|---|---|
| training came out of or if it was free of charge). | |
| United States Citizen | Yes |
| WC SIC (Workers' Comp Standard Industrial Class) | Yes (Current Workers' Comp Codes as stored in HRIS.) |
| TERI Begin and End Dates | Yes |

Activity 3 – Temporary Employees
Agencies should ensure that temporary hourly employees are being separated in a timely fashion as required by State statutes.

Activity 4 – Discontinued HRIS Data Fields
Each agency should review the "trainee" and "merit system" fields in HRIS to determine if data in these fields is used for any agency HR administration functions and consider the impact since this data will not be converted to the new system.

Activity 5 – Retirement Data in HRIS
Retirement information will be maintained in Payroll on the employee going forward. There will be a field on positions to record the retirement plan that pertains to the position.

# Time Management
## Data Cleansing

**Time Management**

Activity 1 - Identification of Work Schedules/Planned Working Times

Each agency will need to identify and provide Work Schedules/Planned Working Times for all of its employees. The Work Schedule is assigned to the position, not directly to the employee, so please be aware that if an employee changes positions, his or her Work Schedule Rule information may not remain the same if the position has different characteristics. This activity will enable the system to provide a drop down listing of applicable work schedules for each agency. Also, this information will be used to establish an employee's basic work schedule, FMLA eligibility, leave accruals, compensatory/overtime determination, etc. This information is essential in proper payroll processing. This information will be stored in and converted from HRIS.

For a complete list of the available Work Schedule Rules, visit the SCEIS website at www.sceis.sc.gov and navigate to the HR & Payroll section using the left navigation menu. Select the Publications and Tools link, and then click on the Naming Conventions for Work Schedules spreadsheet. If your agency has a Work Schedule that is not accounted for in the list, please contact the SCEIS Team. It is important to note that if there is a Work Schedule Rule your agency needs that is not on the list, the SCEIS Team will have to create it for you and test it before making it available for production. This is a time-intensive process, so if you are aware of Work Schedules not on this list, we request that you contact us about it as soon as possible to ensure your agency's Work Schedule Rule needs are met in plenty of time for go-live.

ACTION:

- Assign a Work Schedule Rule to each position in HRIS (this is for all position types, including FTE, temporary, temporary-grant, and time-limited). See the screen shot included on the next page to see where this information should be stored.

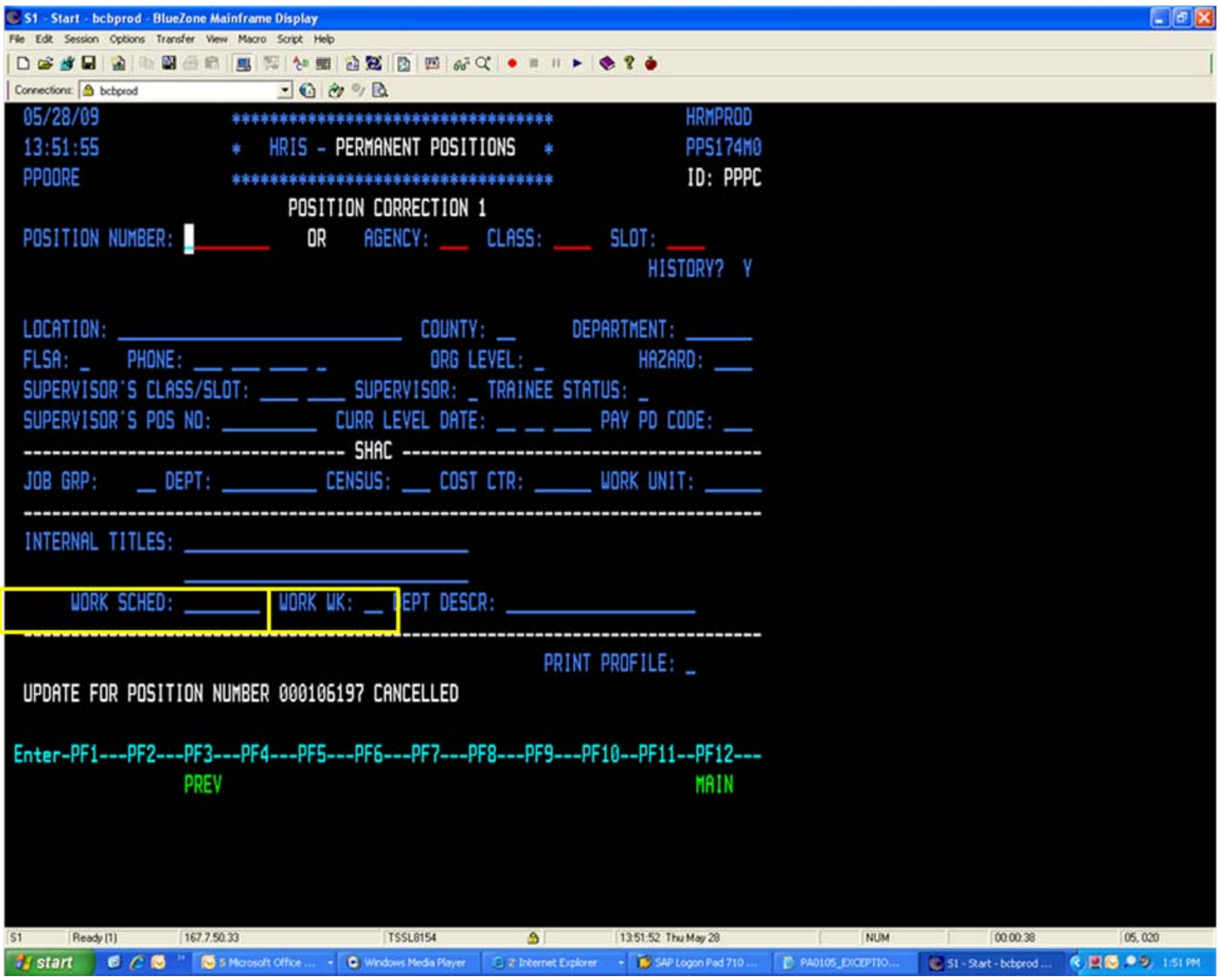
Activity 2 – Employee Work Period/Workweek

Each agency will need to provide the FLSA work period/workweek for each of its employees. This activity will enable the system to calculate compensatory time/overtime properly, if applicable. This information is essential in proper payroll processing. This information will be stored in and converted from HRIS.

For a complete list of the available FLSA Work Periods, visit the SCEIS website at www.sceis.sc.gov and navigate to the HR & Payroll section using the left navigation menu. Select the Publications and Tools link, then click on the Naming Conventions for Work Schedules spreadsheet. Work weeks are listed on the second tab of the workbook.

ACTION:

- Assign a Work Period/Work Week to each position in HRIS (this is for all position types, including permanent, temporary, temporary-grant, and time-limited). See the screen shot included below to see where this information should be stored.




Activity 3 – Employee Assignment to Work Schedule Validation
Each agency will need to validate the Planned Working Times for all employees prior to go live. This activity may require multiple validations as we move forward toward go live.

Activity 4 – Identify Positions Eligible to Receive Premium Rates
A spreadsheet has been created to identify all positions in the agency that may be eligible to receive premium rates. These rates may include shift differential, on-call pay, or market geographic differential. When time is evaluated in the system, the system will check each position for these indicators before applying premium rates to an employee's pay. Please

identify all positions in your agency eligible for any of these premiums on the IT9005 – Premium Rates spreadsheet, as well as the rate that applies to that eligibility.

NOTE: If you have questions about how to align the appropriate Work Schedule Rule to a position that is also eligible for premium rates, please contact the SCEIS Team.

ACTION:

- Complete the IT9005 Premium Rates spreadsheet and return to the SCEIS Team.

**Leave Management**

Activity 1 – Leave Accruals and Usage

Each agency will need to provide the leave records for each employee (including balances and usage) for the calendar year in which the agency will go live. Also, each agency will need to provide information on any employees who are exceptions under the State HR Regulations as it relates to maximum quota carryover. Data required for this activity includes Annual and Sick Leave balances, as well as Comp Time and Holiday Comp balances.

You will also need to gather information on employees who are on an extended leave of absence; whether paid or unpaid for the purpose of identifying leave usage for those leave types with specific limits in an effort to comply with State regulations. Agencies will be responsible for ensuring the data is accurate and up to date at time of conversion.

ACTION:

- Agencies have received a spreadsheet to complete for IT2013 – Quota Balances. Please complete this spreadsheet for all employees in your agency.

Activity 2 – FMLA (Family Medical Leave Act) Balance Data

Each agency will need to provide FMLA information on all employees that are currently on FMLA leave or who have taken leave under FMLA in the calendar year of the agency's go-live date. This activity will ensure that the records regarding an employee who is either on FMLA or who has had an FMLA qualifying event for the calendar year of go-live are maintained accurately. This activity will enable usage of the FMLA Workbench in SCEIS after go-live.

FMLA Balance information will be converted using the IT0672 - FMLA Balances spreadsheet. Specifically, each agency will be asked to provide the following information for any employee with a qualifying FMLA event in the calendar year in which your agency goes live on SCEIS HR/Payroll:

1. SSN

2. FMLA Qualifying Event Reason
3. Begin Date of Event
4. End Date of Event
5. Available balance remaining in weeks
6. Is the FMLA Leave continuous or intermittent
7. YTD hours on FMLA leave

Activity 3 – FMLA (Family Medical Leave Act) Eligibility and Leave Taken
Each agency will need to provide the total number of hours worked by **all employees in the agency** in the preceding 12 months (from date of go live) for each employee, including academic staff if applicable. This information will be used to track eligibility to take leave under FMLA, which is partially determined by the total number of hours an employee has worked in a 12-month period.

The agency will also need to provide the number of hours of Annual Leave taken and the number of hours of Family Sick Leave taken **by each employee in the agency.**

This information will be tracked on the IT2012 – Time Transfer Specifications spreadsheet which you will need to complete and return to the SCEIS Team. Additional time-related information will be captured on this spreadsheet including Gap Hours Comp'd or Paid, Comp Time Eligibility, Employees on Military Leave, Overtime Paid, Charge Nurse Eligibility, Call Back Eligibility,

Activity 4 – Leave Transfer Pool
Each agency will need to provide information for the calendar year in which you go live leave sick leave and annual leave pool balances as follows:

1. Balance of Sick Leave pool hours as of date to be provided
2. Balance of Annual Leave pool hours as of date to be provided
3. Sick Leave pool dollar value as of date to be provided
4. Annual Leave pool dollar value as of date to be provided

**Time Entry**
Activity 1 – Charge Objects
If your agency has employees who are required to record time against specific funding objects, make sure you have identified those employees as needing access to Charge Objects on the electronic timesheet in the MySCEmployee portal's Employee and Manager Self-Service functionalities.

## Payroll

**Data Cleansing**

Activity 1 – Ensure that all employees in your agency are loaded in both HRIS and the CG's Payroll system. In addition, make certain the Social Security numbers are the same in both systems. The SCEIS Team will continually run reports to check for employees in one system and not the other, as well as to check for discrepancies between the Social Security numbers stored for an employee in each system. As you receive these reports, it is critical that you follow up to ensure the errors are accounted for and fixed so the employee is correctly loaded into SCEIS.

Activity 2 - For any employee whose last day of work is September 1, 2011, be prepared to pay all outstanding amounts due on the September 16 payroll check from the legacy system. Special attention will be necessary to the timeliness of time sheets and leave records at this time. These employees' data will not be converted into the SCEIS system if they have been terminated in HRIS before the date that the SCEIS Team transports the data. Because SCEIS is an integrated system, if no HR data is converted from HRIS, the system will not generate any further pay to that employee. As such, it is imperative the employee receives any outstanding payments due in the payroll run before your agency transitions to SCEIS.

Activity 3 – Recurring Payments: Complete IT0014/IT0185 – Recurring Additional Payments/Furlough spreadsheet. This spreadsheet captures additional recurring payments, including: Temporary Pay Adjustment, Longevity, Special Assignment Pay, Clothing Allowance, Administrative Salary Adjustment, Research Grant, Market/Geographic Pay, National Board Certification (for teachers), Housing and Riot Squad. It also tracks Furlough Deduction Spread.

Activity 4 - Delete all old/dormant employee records in your legacy payroll systems prior to conversion. This may include temporary employees that have never been terminated on payroll, dual employment records that are no longer used, records for employee recognition that were used one time but are still active, etc.

Activity 5 - All of the costing data on employees based on the current funding in the legacy payroll system will be converted using the IT1018 template provided to you by the SCEIS Team.

Activity 6 - Validate that all retirement deductions on the payroll match the enrollment data submitted to the Retirement System. In addition, make certain that anyone in the unelected status whose 30-day election period ends on May 1 has made an election. If ORP is the election, a vendor must be specified.

Activity 7 - All deductions related to EIP from the EIP system will be converted.

Activity 8 – All deductions related to FBMC from the FBMC system will be converted.

Activity 9 – Validate employee data from the legacy payroll system to ensure accuracy. The data on the legacy payroll system that will be converted include the following:

- SSN
- Name
- Address
- Marital Status (for tax purposes) and Withholding Exemptions
- EIC and FICA exempt status
- All Retirement System information
- All deductions
- Department Location (check sort code)
- Multipurpose Code Field – Assigns cost distribution on the position on IT1018