



# OSPS USERS' FORUM

## JANUARY 13<sup>TH</sup> 2020

PAYROLL SYSTEM SUPPORT  
OREGON STATEWIDE PAYROLL SERVICES  
FINANCIAL BUSINESS SYSTEMS  
ENTERPRISE GOODS AND SERVICES

# Agenda

Welcome/Introductions

ePayroll Updates

OSPS Reminders

Federal & State W-4 Changes

New P010

Senate Bill 1049 Changes

Upcoming Training

## OSPS Staff Changes

- Seth & Geri leaving to Workday
- ? is the new Seth
- Matthew Riley is the new Geri
- Vangie Barizo is the new Matt
- Tim Wheeler is the new Vangie
- Sharae, Daphne, and Michelle are still Sharae, Daphne, and Michelle



# ePayroll Updates



# ePayroll Updates as of 1/10/2020

- Space before or after OR number at login will no longer produce an error when logging in
- Names will appear as legal name in ePayroll
- All names will be last name, first name format
- Function to identify suspended ePayroll accounts
  - Accessible under ePayroll admin site
  - Go to time groups
  - Select view suspended employees next to the agency
  - Report will show suspended employee ePayroll accounts
    - Account is usually suspended due to separation or job changes
  - Agencies can use report to maintain groups
  - Can remove employee from the group from the report

# ePayroll Updates

[Apps](#) > [ePayroll Admin](#) > [Groups](#)

## Time Groups

- [Agency 10000 - View Suspended Employees](#)
- [Agency 10700 - View Suspended Employees](#)
- [Agency 10800 - View Suspended Employees](#)
- [Agency 11400 - View Suspended Employees](#)
- [Agency 11500 - View Suspended Employees](#)
- [Agency 11900 - View Suspended Employees](#)
- [Agency 12000 - View Suspended Employees](#)
- [Agency 12100 - View Suspended Employees](#)
- [Agency 12300 - View Suspended Employees](#)
- [Agency 12400 - View Suspended Employees](#)
- [Agency 13100 - View Suspended Employees](#)
- [Agency 13700 - View Suspended Employees](#)
- [Agency 14100 - View Suspended Employees](#)
- [Agency 14200 - View Suspended Employees](#)
- [Agency 14400 - View Suspended Employees](#)

# ePayroll Updates

[Apps](#) > [ePayroll Admin](#) > [Groups](#) > [Suspended Employees](#)

## Suspended Employees for Agency 10700

Show  entries

Search:

Group Name ▲	Name ⇅	ORNumber ⇅	Position ⇅	Remove ⇅
ePayroll.10700.200B	Lisa S Upshaw	OR0188690	0026056	<input type="checkbox"/>
ePayroll.10700.211	Amy E Zellner	OR0224094	0040902	<input type="checkbox"/>
ePayroll.10700.211	Lieb K Lee	OR0124593	0015297	<input type="checkbox"/>
ePayroll.10700.301	Kyle J Weraky	OR0193080	0070225	<input type="checkbox"/>
ePayroll.10700.301	Brandi Gross	OR0250766	0062021	<input type="checkbox"/>
ePayroll.10700.410	Mona L Lowery	OR0173615	0021990	<input type="checkbox"/>
ePayroll.10700.410	Carol R Goodwin	OR0184111	0024922	<input type="checkbox"/>

# OSPS Reminders



# Reminders

- Work Schedules
  - Work schedules for part time employees round to the nearest tenth except if it is .25, .50 or .75
- Separation Date
  - OSPS staff cannot change an end date in OSPA for separated employees. If the separation date is incorrect in OSPA, the date needs to be changed in WD and fed to OSPA.
- Update from LRU
  - DAS-LRU has reached agreement with both SEIU and AEE to remove the requirement to work 32 hours in the month in order to be eligible for vacation accruals, holiday pay and sick leave. Please contact [LRU@oregon.gov](mailto:LRU@oregon.gov) if you have any questions.
- Corrected W-2s
  - If you have questions about processing corrected W-2s please contact Vangie Barizo

# Reminders

- P010 Retirement start date
  - Payroll offices are required to enter the retirement start date on the P010 screen
  - Entered upon hire after status check is done
  - This is what triggers the employee to be on the E357-020 report
    - Employees eligible for Participation in Retirement report
  - Workday uses this report monthly to update the range option from 'A' to 'P'
  - Payroll offices work this report monthly to update P010 to start contributions



```
? FINAL CHECK ISSUED:      000000
? FINAL CHECK PERIOD ENDING: 000000
? TAX DATA FOLLOW-UP FLAG: N
? RETIREMENT START DATE:   000000
```

# Reminders

- If you do not enter the retirement start date
  - Workday will not know to update the employee's range option
  - Payroll will not know to update the P010
  - Payroll offices will have to make retroactive corrections once the error is discovered.
- P010 final check and pay period dates
  - P010 dates only override the system check date, they do not override the ACH deposit date
  - The dates do not feed to any other system and are not what determines separation dates, Workday is the system of record for employment dates
  - P010 dates only apply to the pay period currently being processed
    - If there are P010 dates set and you set a corrective for that month they will apply

# Reminders

- Employee transfers
  - Losing agency pays benefits if transfer is any day other than first working day of the month
  - Losing agency needs to wait to update P010 until after gaining agency clones
  - Losing agency needs to wait to delete P070 entries until after gaining agency clones
  - Gaining agency should notify losing agency when cloning is complete
- When transferring from an agency that uses ePayroll for timekeeping to an agency that does not:
  - ePayroll will inactive the losing agency position number and add the gaining agency's position number to the time group
  - The losing agency needs to remove the employee from the time group
- If you do not use ePayroll for timekeeping and receive the error P005 SSN FLAGGED FOR DAILY TM CAPT USE P005
  - Contact the losing agency to ask them to remove the employee from their former time group
  - If no response, contact OSPS Helpdesk to remove from ePayroll
  - Delete employee from PSEC screen
    - Tab to agency number
    - Type DEL with 2 spaces
    - Enter

# Reminders

- When contacting the OSPS Helpdesk for assistance we ask that you,
  - Please provide the OR number of the employee you have a question on
  - Please provide the agency number if you work with more than one agency
  - Send all emails to the group email address and not to individuals (I know we have this with the staffing changes, maybe add a slide before that one with this info and move the send emails to that, then I can reiterate when we get to the staffing changes)
- Remember to email the OSPS Helpdesk's group email with questions, not members individually.

# Federal and State W4 Changes



# Federal & State W4 Changes

- Oregon W-4 Form
  - DOR has stated that if you submit a new Federal W4 form you must also submit new Oregon W-4 if a state one is not on file
  - Our recommendation is that if you receive a new Federal W-4, you also request a new Oregon W-4
    - This applies even if they are only making changes to their Federal W-4, they must still submit a new Oregon W-4
  - To download and view an electronic version of the new Form OR-W4, you may visit [www.oregon.gov/dor/forms](http://www.oregon.gov/dor/forms), or [www.oregon.gov/dor](http://www.oregon.gov/dor) for more information.
  - DAS OSPS' guidance has not changed regarding tax advice, employees should contact the IRS, Department of Revenue or consult with a tax advisor.
    - Job Aid for employees completing W4 in Workday
    - Includes address for IRS calculator
  - OSPS will continue to make P060 tax adjustments for agency administrative error and adjustments under \$10 for separated employees

# Federal & State W4 Changes

W withholding

← PAY W-4 Withholding Changes Actions

Business Processes Complete Federal Withholding Elections Completed Date On or After 01/01/2020 12:00:00.000 AM  
Complete State and Local Withholding Elections

396 items

	Business Process Type	Effective Date	Date and Time Completed	Line 1 (Federal Withholding - Marital Status)	Line 2 (Federal Withholding - Multiple Jobs or Spouse Works)	Line 3 (Federal Withholding - Dependent Amount)	Line 4a (Federal Withholding - Other Income)	Line 4b (Federal Withholding - Deductions)	Line 4c (Federal Withholding - Additional Amount)	Federal Withholding: W-4 - Number Of Allowances	Federal Withholding: W-4 - Exempt	Federal Withholding W-4 - Last Updated Date	State Withholding (Work) - Marital Status	State Withholding (Work) - # of Allowances	State Withholding (Work) - Additional Amount	State Withholding (Work) - Exempt Indicator	State Withhold (Work) - Updated
5	Complete State and Local Withholding Elections	08/26/2019	01/06/2020 10:44:10.616 AM	Married but withhold at higher Single rate		0.00	0.00	0.00	0.00	1		12/20/2019 09:06:43.432 PM	Married but withhold at higher Single rate	0	0.00		01/06/2020 10:44:10 AM



# New P010 Screen



# New P010 Screen

- P010 screen has a 1/31/20 date hook
  - Tax module will look to this date to know how to calculate taxes
  - Exemption field for federal taxes is not valid on P010 entries with a 01/31/20 or later date
- Any P010 updates starting 01/31/20 or later need a 2020 federal and state W4 (even if all that is changing is their PERS status)
  - Retirees per SB 1049
  - PERS changes such as non-contributing member to contributing member
  - Transfers who may change PERS status (General Service to P&F)
- If you have a 2020 federal and state W4 on file you do not need a new one to make PERS related changes on the P010 screen



# New P010 Screen

- Migration of P010 screen will be on Friday night January 17<sup>th</sup> after 6pm
- Agencies can make P010 updates starting Monday January 20 (yes this is a holiday but if you are approved to work you can make entries)
- Request federal and state W4 forms from employees this week to enter next week
- OSPS has sent agencies a list of employees with a 1/31/20 or later W4 entry on the P010
  - Agencies must delete these before Friday 1/17/20 at 5pm
  - If the entry is not removed, the tax logic will not take into account the federal exemption field and will not properly withhold for the employee
  - OSPS will **NOT** make P060 entries to correct tax withholdings for these employees



# P010 Current

P010 OR0128529 10700  
GREENO, GERI L

WITHHOLDING/RETIREMNT INFO 09/24/19 PROD  
WH02 ENTER UPDATES

RDC/CREW/CST CTR 431 -----MANDATORY WITHHOLDING-----  
? TAX DATA FOLLOW-UP FLAG: N BEG DATE STAT EXEM ADDL END DATE  
? FINAL CHECK ISSUED: 000000 ? FED 000000 00 0000 000000  
? FINAL CHECK PERIOD ENDING: 000000 ? STATE 000000 00 0000 000000  
? RETIREMENT START DATE: 000000

EFF DATE	EXP DATE	----FEDERAL---			-----STATE----			RTMT SYST	RTMT STAT	RTMT ACCT	FICA SUBJ	SAIF SUBJ	UNEM SUBJ
? 022819	999999	S	00	0000	S	00	0000	G	E	481382	Y	Y	Y
? 033118	013119	S	00	0000	S	00	0000	G	D	481382	Y	Y	Y
? 123116	022818	J	02	0000	J	02	0000	G	D	481382	Y	Y	Y
?													
?													
?													

----WAIVERS----

| CLASS DATE |
|------------|------------|------------|------------|------------|------------|
| ?          | ?          | ?          | ?          | ?          | ?          |

# P010 Starting January 20, 2020

```

P010    OR0128529 10700          WITHHOLDING/RETIREMNT INFO 09/24/19 ACPT
      GREENO, GERI L              RDC/CREW/CST CTR 431
WH02 ENTER UPDATES                E          F S S S U S
                                     X **RETIRE**  I U A U N U
EFF   EXP   LINE   4C/   E   SY ST   C B I B E B
DATE  DATE  2  3   4A   4B   ADDL M  ST AT ACCT  A J F J M J
? 022819 999999 S   N 00000 0000000 0000000 00000 00 G  E 481382 Y  Y  Y
STATE S          00000 00
? 033118 013119 S   N 00000 0000000 0000000 00000 00 G  D 481382 Y  Y  Y
STATE S          00000 00
? 123116 022818 J   N 00000 0000000 0000000 00000 02 G  D 481382 Y  Y  Y
STATE J          00000 02
?
STATE
?
STATE
?
STATE
FED MANDATORY
? 000000 000000          00000 0000000 0000000 00000 00
STATE MANDATORY
? 000000 000000          00000 00
? FINAL CHECK ISSUED:          000000          ? TAX DATA FOLLOW-UP FLAG: N
? FINAL CHECK PERIOD ENDING: 000000          ? RETIREMENT START DATE: 000000
  
```

Senate Bill 1049 - Changes



# Senate Bill 1049 - Changes

- Starting with the 1/1/2020 pay period retirees will need to have match contributions sent
- Retiree will need to have an 'A' range option code, 6% pick up is not deducted or paid
- Request a 2020 federal and state W4 form from your retirees
- Make entries to the SYST field on the P010 screen
- Entries must be made by 1/27/20 (final run 1)
- If entries are not made by final run 1 and the retiree receives wages on run 1 agencies will
  - Have to make P060 entries or
  - Agencies will be invoiced
- Contact Shauna Tobiasson if you have questions



# Upcoming Training



# Upcoming Training

- OSPA For Beginners (Two 4 hour Sessions)
  - Day 1 – Interfaces and Screens
    - Understanding OSPA and basic system screens
    - January 22<sup>nd</sup> 1pm-5pm
    - DAS East Computer Lab
  - Day 2 – Frequently used processes
    - In depth look at frequently used processes
    - January 23<sup>rd</sup> 1pm-5pm
    - DAS East Computer lab

\* With iLearn being down, please email Sharae Epperheimer, if you would like to attend this training. You will receive credit for taking the class once iLearn resumes

# Next forum

- DATE: April 15, 2019
- TIME: 2:00 p.m.
- PLACE: Employment Auditorium
- AGENDA: TBD
  
- Email Sharae with your ideas about agenda items at [sharae.epperheimer@Oregon.gov](mailto:sharae.epperheimer@Oregon.gov)