<table>
<thead>
<tr>
<th>Agenda</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome/Introductions</td>
<td>Seth Lewis, OSPS</td>
</tr>
<tr>
<td>PEBB</td>
<td>Miriam Sierra &amp; Sharon Sheehan, PEBB</td>
</tr>
<tr>
<td>Forced Insurance w/ PEBB Subsidy</td>
<td>Geri Greeno-Sanders, OSPS</td>
</tr>
<tr>
<td>Workday Update</td>
<td>Twyla Lawson, Gina Beaman, &amp; Cecil Owens, DAS CHRO</td>
</tr>
<tr>
<td>Corrected W-2 Process</td>
<td>Shawn Harken, DHS</td>
</tr>
<tr>
<td>PERS Corrections (Reminder)</td>
<td>Seth Lewis, OSPS</td>
</tr>
<tr>
<td>W-2 Inserts</td>
<td>Seth Lewis, OSPS</td>
</tr>
<tr>
<td>Inclement Weather &amp; Security Changes</td>
<td>Geri Greeno Sanders, OSPS</td>
</tr>
<tr>
<td>OSPS Reminders</td>
<td>Seth Lewis &amp; Geri Greeno Sanders, OSPS</td>
</tr>
<tr>
<td>Upcoming Training</td>
<td>Sharae Epperheimer, OSPS</td>
</tr>
</tbody>
</table>
Welcome/Introductions

Seth Lewis, OSPS
PEBB
Miriam Sierra & Sharon Sheehan, PEBB
PEBB

• Open Enrollment Corrections
• FSA Corrections
• Family Tier Subsidy Explanation
• HEM Appeal Deadline
• PEBB Form
2018 Force Insurance w/ PEBB Subsidy

Geri Greeno-Sanders, OSPS
Forcing Insurances

Reminders:
- 901 is automatically added when forcing medical insurances
  - Do not delete
  - Required to ensure subsidy information is reported
- Forcing family tier medical plans
  - Need to reduce the employee share by the subsidy amount
  - Need to enter in the subsidy amount on the P070
<table>
<thead>
<tr>
<th>Plan Code</th>
<th>Description</th>
<th>Car</th>
<th>OPE</th>
<th>Empie</th>
<th>PEBB</th>
<th>Emplr</th>
<th>PEBB</th>
<th>Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAA</td>
<td>EMP ONLY</td>
<td>A</td>
<td>W</td>
<td>6.47</td>
<td>.00</td>
<td>640.39</td>
<td>6.68</td>
<td>653.54</td>
</tr>
<tr>
<td>BBB</td>
<td>EMP&amp;SPouse</td>
<td>B</td>
<td>X</td>
<td>12.94</td>
<td>.00</td>
<td>1280.79</td>
<td>13.35</td>
<td>1307.08</td>
</tr>
<tr>
<td>CCC</td>
<td>EMP&amp;CHILDREN</td>
<td>C</td>
<td>Y</td>
<td>11.00</td>
<td>.00</td>
<td>1088.66</td>
<td>11.36</td>
<td>1111.02</td>
</tr>
<tr>
<td>DDD</td>
<td>EMP&amp;FAMILY</td>
<td>D</td>
<td>Z</td>
<td>17.47</td>
<td>18.11</td>
<td>1729.06</td>
<td>18.03</td>
<td>1764.56</td>
</tr>
<tr>
<td>ZZZ</td>
<td>PRIOR ADJ</td>
<td></td>
<td></td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>001</td>
<td>PRIOR ADJ</td>
<td></td>
<td></td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>101</td>
<td>EMP ONLY</td>
<td>A</td>
<td>W</td>
<td>6.47</td>
<td>.00</td>
<td>640.39</td>
<td>6.68</td>
<td>653.54</td>
</tr>
<tr>
<td>102</td>
<td>EMP&amp;SP/PTRN</td>
<td>B</td>
<td>X</td>
<td>12.94</td>
<td>.00</td>
<td>1280.79</td>
<td>13.35</td>
<td>1307.08</td>
</tr>
<tr>
<td>103</td>
<td>EMP&amp;CHILDREN</td>
<td>C</td>
<td>Y</td>
<td>11.00</td>
<td>.00</td>
<td>1088.66</td>
<td>11.36</td>
<td>1111.02</td>
</tr>
<tr>
<td>104</td>
<td>EMP&amp;FAMILY</td>
<td>D</td>
<td>Z</td>
<td>17.47</td>
<td>18.11</td>
<td>1729.06</td>
<td>18.03</td>
<td>1764.56</td>
</tr>
<tr>
<td>802</td>
<td>EMP&amp;PARTNER</td>
<td>B</td>
<td>X</td>
<td>12.94</td>
<td>.00</td>
<td>1280.79</td>
<td>13.35</td>
<td>1307.08</td>
</tr>
<tr>
<td>803</td>
<td>EE/DP’S CHL</td>
<td>C</td>
<td>Y</td>
<td>11.00</td>
<td>.00</td>
<td>1088.66</td>
<td>11.36</td>
<td>1111.02</td>
</tr>
<tr>
<td>804</td>
<td>EE/DP/EE CHL</td>
<td>D</td>
<td>Z</td>
<td>17.47</td>
<td>18.11</td>
<td>1729.06</td>
<td>18.03</td>
<td>1764.56</td>
</tr>
<tr>
<td>805</td>
<td>EMP&amp;OTH CHL</td>
<td>C</td>
<td>Y</td>
<td>11.00</td>
<td>.00</td>
<td>1088.66</td>
<td>11.36</td>
<td>1111.02</td>
</tr>
<tr>
<td>806</td>
<td>EE/DP/DP CHL</td>
<td>D</td>
<td>Z</td>
<td>17.47</td>
<td>18.11</td>
<td>1729.06</td>
<td>18.03</td>
<td>1764.56</td>
</tr>
<tr>
<td>807</td>
<td>EE/DP/BTH CH</td>
<td>D</td>
<td>Z</td>
<td>17.47</td>
<td>18.11</td>
<td>1729.06</td>
<td>18.03</td>
<td>1764.56</td>
</tr>
<tr>
<td>901</td>
<td>EE YTD/AGCYS</td>
<td></td>
<td></td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
</tr>
</tbody>
</table>
The P070 entry must cross foot. The employee share, PEBB subsidy, employer share must equal the PEBB admin and the vendor share. If you are looking at the PTD2 screen you must take the employee share amount and reduce it by the PEBB subsidy amount.

Do not change the employer share, PEBB admin fee or vendor share amounts to get the system to cross foot.

The PEBB subsidy cannot be for more than the employee share is for.

Specifically for the PV1N/PV1C deduction codes where the employee share is less than the PEBB subsidy, the entries should look like →
Workday Update
Twyla Lawson, DAS CHRO
Corrected W-2’s

Shawn Harksen, DHS
Payroll has a fiduciary responsibility to process and report correct wage and tax information for employees.

OSPS:
- Submits the tax payments.
- Reconciles and reports quarterly and annual payroll taxes to DOR, IRS & SSA.

These reports and form(s) are tools to assist in maintaining correct payroll data for employees.
W-2c Process

- **Responsibility**
  - You have the legal and fiduciary responsibility to correct the information as soon as you discover the error and determine the correct information to report.

- **Reasons**
  - Incorrect SSN
  - Misspelled name
  - Overpayments crossing tax years
  - Early redemption of December paid January paycheck
  - Under reported wages
W-2c Process

- IRS Safe Harbor Rule for Corrected W-2s
- Defines De Minimis Errors as:
  - No single amount in error differs from the correct amount by more than $100.00
  - No single amount reported for tax withheld differs from the correct amount by more than $25.00
- If the safe harbor applies, you will not have to correct the Form W-2 and it will be treated as having been filed with all of the correct required information
- However, the safe harbor does not apply if the Payee elects to have you issue a corrected return.
W-2c Process

- If you receive an invoice from DAS:
  - Work with your agency’s accounting staff to pay the Joint Payroll Account
  - Work out a repayment plan with the employee for the employee’s share of the taxes
  - If the employee will repay through a payroll deduction, make the PANN entry on the P070 Deductions and Deduction Adjustments screen
  - If the employee will repay through a check or money order, complete Payment Notification Form. Send the form and the payment to PSS for processing.

- OSPS will process the Corrected W-2 Request form and produce the W-2c along with a cover memo.

- We will distribute the W-2c and memo to the Agencies via the Secure Mailbox or US Mail for Agencies outside of Salem.
Fill out and submit the Request for Corrected W-2 form. You can find it on our website.

The OSPA Reference Manual for Income Taxes has a great walkthrough for this form.

The OSPA Reference Manual for Income Taxes also has multiple examples; please use this resource

W-2c Process

- You do not need to request a W-2c if:
  - The employee was overpaid in a prior year and has not repaid the agency
  - The correction is for the current year
  - The employee has reported an address change
  - The employee has reported a name change because of a change in marital status
PERS Corrections (current and prior year)

- Current year, set correctives where you can
  - If you have to do Positive p050 entries for current year corrections
    - You must Send YTD Correction form or spreadsheet to cPers with details
- Do not make negative p050 entries
  - This impacts the employee’s current month’s PERS subject wages and contributions
PERS Corrections (current and prior year)

- If money is owed to an employee for a prior year
  - Determine if pick up should be employee or employer paid based on when the wages would have been earned
    - If employer paid, use non PERS subject p050 codes
      - Make p060 entries (RSP for pick up amount)
      - Send YTD Correction form or spreadsheet to cPers with details
    - If employee paid, use PERS subject p050 codes
      - Send YTD Correction form or spreadsheet to cPers with details
- P090 retirement data will be off for the current tax year
W-2 inserts

Seth Lewis, OSPS
Equal pay for equal work...why you need to take that survey!

In response to a revision of state law, the Pay Equity Project is conducting a mandatory survey of all state employees to help identify and address pay inequities within our workforce.

To complete your survey, go to [http://payequity.oregon.gov](http://payequity.oregon.gov)

While taking the survey, be sure to include all of your relevant experience, education, training and certifications. If it is determined your current compensation is too low, it may be adjusted upward, however no one’s pay will be reduced. The survey closes on Wednesday, February 28, so don’t miss it!

Thank you for doing your part in making Oregon’s compensation equitable for you and your co-workers.

NOTE: If you are not currently employed by the state of Oregon, please disregard this notice.
W-2 inserts: Earned Income Tax Credit

**EARNED INCOME TAX CREDIT**

Employees may be eligible for the Earned Income Tax Credit (EITC or EIC), a benefit for working people with low to moderate income, particularly those with children. EITC reduces the amount of tax owed and may provide a refund.

Visit these websites for additional information about how to qualify:
Federal: https://www.irs.gov/credits-deductions/individuals/earned-income-tax-credit
Oregon: https://www.oregon.gov/DOR/programs/individuals/Pages/credits.aspx
Inclement Weather

Geri Greeno-Sanders, OSPS
Inclement Weather/Hazardous Conditions

- When DAS or the agency close an office or facility before the start of an employee’s work day
- For FLSA Non-Exempt only
- 40 hours per biennium (does not roll over)
- Employees can use IW leave for half the day and paid leave or LWOP for the other half
- Code is being added to benefit packages
- Will let agencies via eNews when it is fully implemented
Security Changes to OSPA

- On January 10th OSPS enabled agency groupings for OSPA access.
- Criteria
  - Must have same RACFID and user type for all agencies
- Allows user to log in with group name and access all agencies
- List of current groups on pg. 2 of Intro to Security handout
- Due to future security changes, agency security officers will need to start requesting access to the group instead of each agency number
Updates and reminders
Seth Lewis & Geri Greeno-Sanders, OSPS
Updates and reminders

- Temporary sick leave (TS) has a usage cap of 40 hours per calendar year
  - The balance can carry forward, no annual accrual limit
  - Only the usage limit resets as of January 1

- Submitting OSPS forms
  - Please do not include paperwork that is not required by a form
  - Please do not staple together, paper clip if necessary
  - Make sure form is completed in full
    - Some forms are missing a signature and in a large agency we don’t know who to contact
Updates and reminders

- Anyone who is claiming exempt must submit a new W4 to you by February 15
  - If you do not receive a new one you must reset their withholding to either single and zero or to what their last W4 was that was not exempt
- Tax Rates/Tables for 2018
  - We will update the OSPS tax rate tables once the Oregon Department of Revenue releases the State withholding formulas
Updates and reminders

- For agencies who use P&D to mail out system generated checks
  - The list for who can pick up at P&D is different than the list of authorized signers provided to OSPS by agencies who can sign for checks that are delivered
  - Email address to update who can pick up from P&D
    - pdsecure.GApdsecure@oregon.gov
- ePayroll
  - When asking about errors, need examples (screenshots) and OR Number
- Remember to use post tax codes when employee is in LWOP and forcing insurances
- Prior Year Corrections
  - Make only if money is owed or SEIU employee paid related
Updates and reminders

- Staffing changes
  - Please be sure to use the help desk email and phone number for questions
  - Do not email individuals as they may be out of the office
  - Using OSPS helpdesk email and phone number will ensure someone will answer your questions
Upcoming trainings

- OSPA For Beginners (Two 4 hour Sessions)
  - Day 1 - Interfaces and Screens
    - Understanding OSPA and basic system screens
    - January 23, 2018 12:45pm - 4:45pm
    - DAS East Computer Lab
  - Day 2 - Frequently used processes
    - In depth look at frequently used processes
    - January 24, 2018 12:45pm - 4:45pm
    - DAS East Computer Lab
Upcoming trainings

- OSPA For Beginners (Two 4 hour Sessions)
  - Day 1 - Interfaces and Screens
    - Understanding OSPA and basic system screens
    - April 11, 2018 12:45pm - 4:45pm
    - DAS East Computer Lab
  - Day 2 - Frequently used processes
    - In depth look at frequently used processes
    - April 12, 2018 12:45pm - 4:45pm
    - DAS East Computer lab
Upcoming trainings

- OSPA Payroll Reports Training (3 hour session)
  - Critical Reports
    - Understanding payroll record retention
    - Focus on critical reports
    - How to work exception reports
  - July 26, 2018 1:30pm - 4:30pm
  - DAS West SFMS Conference Room - First Floor
Next forum

- **DATE:** April 19, 2018
- **TIME:** 2:00 p.m.
- **PLACE:** Employment Auditorium
- **AGENDA:** TBD

- Email Sharae with your ideas about agenda items at sharae.epperheimer@oregon.gov