Payroll User Group

6.15.16

Question

Answer

SSTA EXPENSE REIMBURSEMENT SYSTEM IMPLEMENTATION PILOT MAY 1 THROUGH JUNE 25

Michael Flanagan

Department of Labor Standards (DLS)

Purpose and Goals of Pilot

Purpose of Pilot:

Efficiently and accurately compensate Commonwealth employees using HR/CMS self-service timesheets for travel reimbursement. Within this pilot, employees will be responsible for entering specific reimbursement codes into timesheet, in compliance with their department's policy. After receiving all documentation related to the expense, the time approver will be responsible for approving the entry.

The goals of this pilot are:

- To more efficiently reimburse employees for job-related travel expenses by eliminating a paper-based submission and approval process
- To reduce the amount of manual processing of travel reimbursements by agency core users
- To reduce the amount of paper generated per transaction

Step 1

- OBJECT CLASS BB STATE EMPLOYEE RELATED EXPENSE codes (BB Codes) would be made available to DLS for a pilot program

- List of exact BB Codes to be piloted to be determined by Labor & Workforce Development Finance (LWD)

BB Codes – Definitions

Object Code	Object Code Name	TRC	TRC DESCRIPTION	TRC Use	EARN CODE	EARNINGS CODE DESCRIPTION
B01	Out of State Travel	B01	Travel And Oth Expe/OutOfState	Amount - Used for reimbursement to employees for the expense of approved **out of state** travel. Object Code B01.	B01	Travel And Oth Expe/OutOfState
		B1B	Travel Lodging Expense	Amount - Used for reimbursement to employees for approved lodging expenses in MA. Object Code B01.	B1B	Travel Lodging Expense
		BB1	Travel Airfare Expenses	Amount - Used for reimbursement to employees for approved airfare expenses only. Object Code B01.	BB1	Travel Airfare Expenses
B02	In State Travel	B02	Travel Expense/ In MA	Amount - Used for reimbursement to employees for approved **in state travel** expenses, such as lodging, excluding mileage, parking and tolls. Object Code B01.	B02	Travel Expense/ In MA
		BAE	Auto Expense Reimbursement	Amount - Used for reimbursement to employees for approved auto expenses not including mileage, tolls or parking. Object Code B02.	BAE	Auto Expense Reimbursement
		BMI	Car Mileage Reimbursement	Amount - Used to reimburse an employee for mileage while using a personal vehicle for approved business purposes. Object Code B02.	BMI	Car Mileage Reimbursement
		BPK	Parking Reimbursement	Amount - Used to reimburse an employee for parking to attend approved meetings, conferences, etc. Object Code B02.	BPK	Parking Reimbursement
		BTL	Toll Reimbursement	Amount - Used to reimburse an employee for tolls while traveling for approved business purposes. Object Code B02.	BTL	Toll Reimbursement
B03	Overtime Meals	B03	Overtime Meals Expense	Amount - Used for meal reimbursement when an employee works 3 or more hours of approved overtime exclusive of meal period. Meal reimbursements vary based on Collective Bargaining Agreements and Red Book. Employees on travel status are not eligible. Object Code B03.	B03	Overtime Meals Expense
B04	Tuition	B04	Tuition/Non-Graduate	Amount - Used for reimbursement to employees for approved tuition and/or tuition related expenses. All payments and reimbursements must be job related. Object Code B04.	B04	Tuition/Non-Graduate
		BB4	Tuition/Graduate	Amount - Used for Tuition reimbursement for approved Graduate level courses. Object Code B04.	BB4	Tuition/Graduate

Object Code	Object Code Name	TRC	TRC DESCRIPTION	TRC Use	EARN CODE	EARNINGS CODE DESCRIPTION
B05	Training & Membership	B05	Conference and Training	Amount - Used for reimbursement to employees approved for registration or reservation fees for conferences or training. Object Code B05.	B05	Conference and Training
		B06	Membership Dues and Licensing Fee	Amount - Used for reimbursement to employees for membership in professional associations or license fees. Object Code B05.	B06	Mbrship Dues and Licensing Fee
			Not Available in Timesheet	HRD Sponsored Training Reimbursement for NAGE	BNA	TRAINNAGE
			Not Available in Timesheet	HRD Sponsored Training Reimbursement for SEIU	BSE	TRAINSEIU
			Not Available in Timesheet	HRD Sponsored Membership/ Licensing Reimbursement	BX6	MBRSHPREIM
B07	Tangible Assets (Taxable)	BT7	Tangible Asset Allowances	Amount - Used for taxable reimbursement to employees for equipment or other assets. Object Code B07.	BT7	Tangible Asset Allowances
B08	Clothing Allowances	B08	Clothing Allowances	Amount - Used for reimbursement to employees for the approved purchase or cleaning of work-related clothing. Object Code B08.	B08	Clothing Allowances
B10	Exigent Job-Related Expenses	B10	Exigent Job-Related Expenses	Amount - Used for reimbursement to employees for approved incidental expenses, which require an immediate payment so that a department may perform its mission, or for job related expenses that cannot be paid for in an usual manner. Object Code B10.	B10	Exigent Job-Related Expenses
B92	Taxable Employee Reimbursement	B92	Taxable Employee Reimbursement	Amount - Used for any taxable (per IRS) employee reimbursements, excluding contractors. Object Code B92	B92	Taxable Employee Reimbursement
C98	Reimbursement of Contract Employee	C98	TravelExpense-Contract Service	Amount - Used for travel expenditure reimbursements incurred by a contract employee. Object Code C98.	C98	TravelExpense-Contract Service

BB Codes - SSTA

Look Up TRC

Search by: Time Reporting Code begins with B

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1-22 of 22 Last

Time Reporting Code	Description
B01	Travel And Oth Expe/OutOfState
B02	Travel Expense/ In MA
B03	Overtime Meals Expense
B04	Tuition/Non-Graduate
B05	Conference and Training
B06	Mbrship Dues and Licensing Fee
B08	Clothing Allowances
B10	Exigent Job-Related Expenses
B1B	Travel Lodging Expense
B92	Taxable Employee Reimbursement
BAE	Auto Expense Reimbursement
BB1	Travel Airfare Expenses
BB4	Tuition/Graduate
BC+	Bonus Comp Adjustment Increase
BC-	Bonus Comp Adjustment Decrease
BLD	Blood Donation
BMI	Car Mileage Reimbursement
BNS	One Time Bonus
BPK	Parking Reimbursement
BRL	Bereavement Leave
BT7	Tangible Asset Allowances
BTL	Toll Reimbursement

Step 2

- DLS employees trained to use BB Codes
  - Employees will use existing internal Excel form to calculate reimbursement amount
  - Employees will enter lump sum <u>dollar amount</u> under Saturday for the PREVIOUS week during pilot program
    - Employees will add a comment stating time period reimbursement covers

- Whenever an employee submits reimbursement under a BB Code he/she will email supporting documentation to time approver
  - Completed reimbursement form (for calculation purposes)
  - Scanned copies or screen shots of receipts and other support documentation

Step 3

- Manager will confirm reimbursement
  - Manager will compare documentation to reimbursement request in SSTA
  - If there is a discrepancy the manager will make adjustments and notify the employee
  - Once SSTA and documentation match the manager will approve reimbursement and time
  - Manager will save electronic documentation email for audit purposes

Advantages

- Employee
  - No additional paperwork
  - Quicker reimbursement
- Agency
  - Reduced paper, toner and postage costs
  - Expedited process
- Secretary
  - Reduced labor (cut data entry and review)
  - Simplified close of FY process

Challenges

- Still manual work
  - Redundant to fill out worksheet and SSTA
  - Problems printing maps to PDF (odometer)
  - Manager verification of mileage
  - Delegation of Approval of Reimbursement
- Employees with multiple cost centers

Future Possibilities

- Ideal would be:
  - Entering documentation directly into system for travel authorization
  - System that performs reimbursement calculations
  - System that allows for storage of support documentation

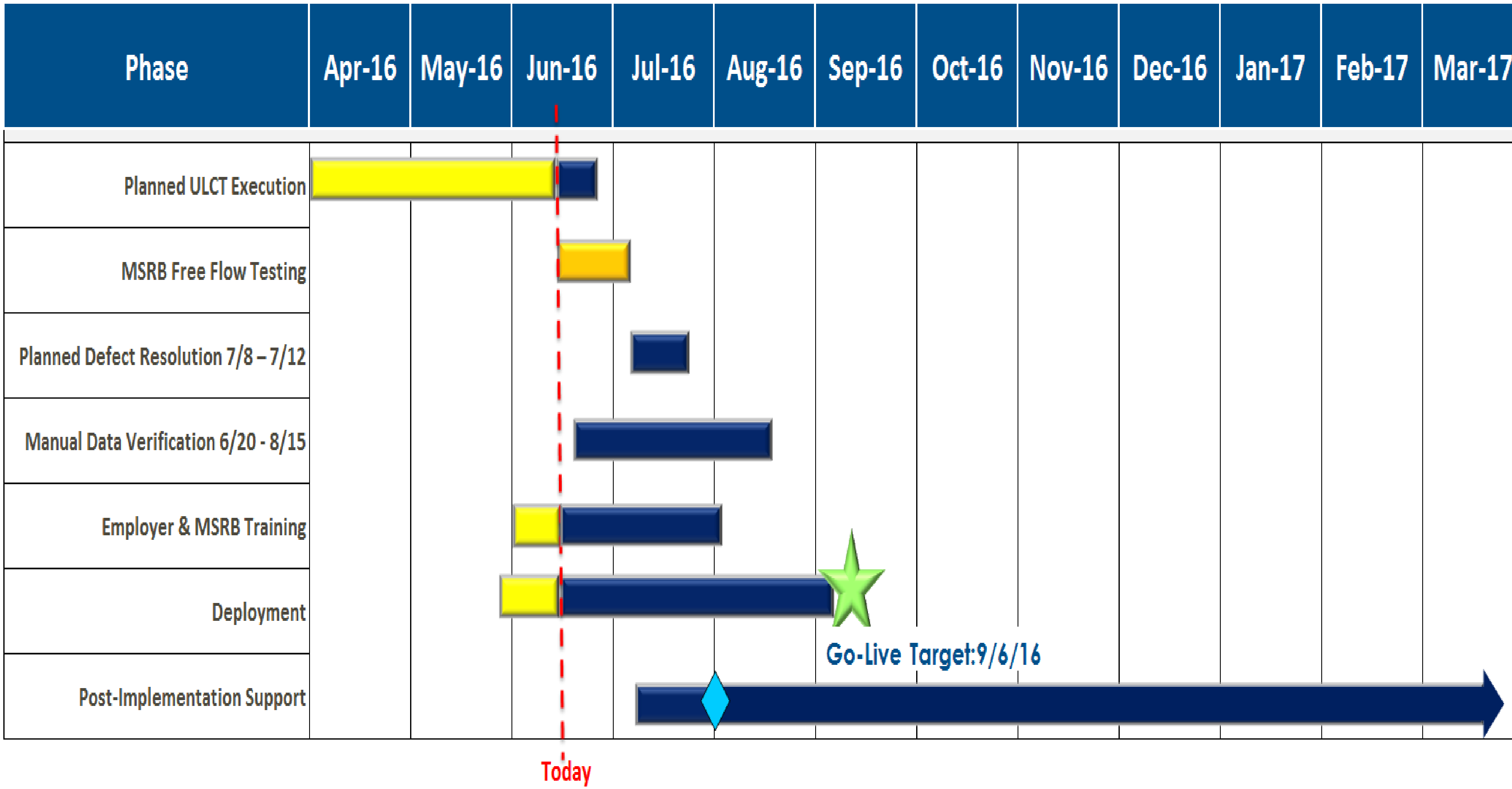
MASSACHUSETTS RETIREMENT BOARD
MARIS EXECUTIVE BRIEFING

June 10, 2016

MARIS

06/15/16

Days to Go-Live:	82	:



Planned Execution

Planning Activities

MSRB Free Flow Testing

Key Cut Over Activities and Dates

Deployment Activities	Project Plan Date	Comment
Line of Business Application Readiness	5/2/16 - 7/28/16	• Creation of Production Environment • Security Set Up • Configuration • Code migration and other readiness activities
HRCMS/UMass Send final legacy file	8/23/16	• August 20th PPE
Shut off Legacy User Access & Legacy Interfaces	8/25/2016	Last day of access (for both internal and external access)
Final Retirement Payroll Run (prior to "Go-Live")	8/26/2016	
Final Checks Printed and Mailed	8/29/2016	
Extract Legacy Conversion Data (Internal)	8/26/2016	Final extraction of data provided to MARIS, from legacy system(s)
Convert Final Data	9/3/2016	Load data Data conversion Reconciliation report results Manual data verification
HR/CMS / UMass to send first MARIS Interface File	9/6/16	September 3rd PPE
Production "Go-Live"	9/9/2016	MARIS Go-live for MSRB Users

METRO
CREDIT UNION

The credit union for Massachusetts State Employees

Credit Union for State Employees

- Over 10,500 State Employees are Members
- Over $89,000,000 on Deposit from State Employees
- Over $82,000,000 in Loan Balances
- Exclusive Offers for State Employees Only
- Exclusive State Employee Web Page
- Exclusive State HR/CMS Contacts Page

METRO CREDIT UNION

Specials

High Yield Savings

HIGH YIELD SAVINGS ACCOUNT

Maximum earnings combined with the flexibility of a savings account!

1.20% APY*

- Great rate with balances of $50,000 or more
- Easy accessibility
- Safe, secure, and fully insured

To open, visit a location near you. For details, call **877-MY-METRO** or visit **metrocu.org**.

METRO CREDIT UNION

Boston | Burlington | Chelsea | Framingham | Lawrence | Lynn | Melrose | Newton | Peabody | Salem | Tewksbury

NCUA MSIC

*Annual Percentage Yield (APY) based on daily balances for new accounts: 1.20% APY for balances of $50,000 or greater, 0.25% APY for balances of $25,000 to $49,999.99, 0.20% APY for balances of $10,000 to $24,999.99, and 0.15% APY for balances up to $10,000. APY is accurate as of 6/13/16, but may vary after account opening, is subject to change and is based on daily balances. Rates may change throughout the month and will affect the monthly interest payment. Fees may reduce earnings. Accounts cannot be accessed using ATM or Debit Card. $10,000 minimum opening deposit is required. Minimum withdrawal fee of $25 if withdrawal is less than $10,000. Low balance fee of $25, if at any time during the month the end of day balance falls below $10,000. **NEW MONEY ONLY. Funds on deposit at Metro are not eligible for this offer.**

METRO CREDIT UNION

Credit Card

TRANSFER YOUR BALANCES!

Start saving with a low 3.99% APR*

Move your high interest balances to your Metro credit card and save.

$0 It's easy, and there's no balance transfer fee!

31 All balance transfers made between **05/01/16** and **07/31/16** will receive the low 3.99% APR* for 6 months from the date of each balance transfer.**

METRO CREDIT UNION

0% Heat Loan

METRO
CREDIT UNION

0% FINANCING for HOME ENERGY EFFICIENCY IMPROVEMENTS

Metro participates in the Mass Save Residential HEAT Loan Program to offer members 0% interest loans for up to $25,000, with terms up to 7 years.

If you own a one-to-four family home and complete a no-cost Mass Save® Home Energy Assessment, you could be eligible for **0% interest financing** for the installation of approved energy efficient improvements!

0% APR* HEAT Loan

- Borrow $500 - $25,000
- Terms up to 7 years
- Easy online application

ELIGIBLE IMPROVEMENTS MAY INCLUDE:

- Attic, Wall, and Basement Insulation
- High-Efficiency Heating Systems
- Central Air Conditioning
- High-Efficiency Domestic Hot Water Systems
- Solar Hot Water Systems
- 7-Day Digital & WiFi Thermostats
- ENERGY STAR® Qualified Replacement Windows

mass save® PARTNER

Learn More

METRO
CREDIT UNION

My Reward Checking

BECAUSE YOU DESERVE IT...

MY REWARD CHECKING $0 ATM Fees | MY REWARD SAVINGS 2.00% APY

MY REWARD CHECKING

No ATM fees, PLUS cash back on your debit card purchases.

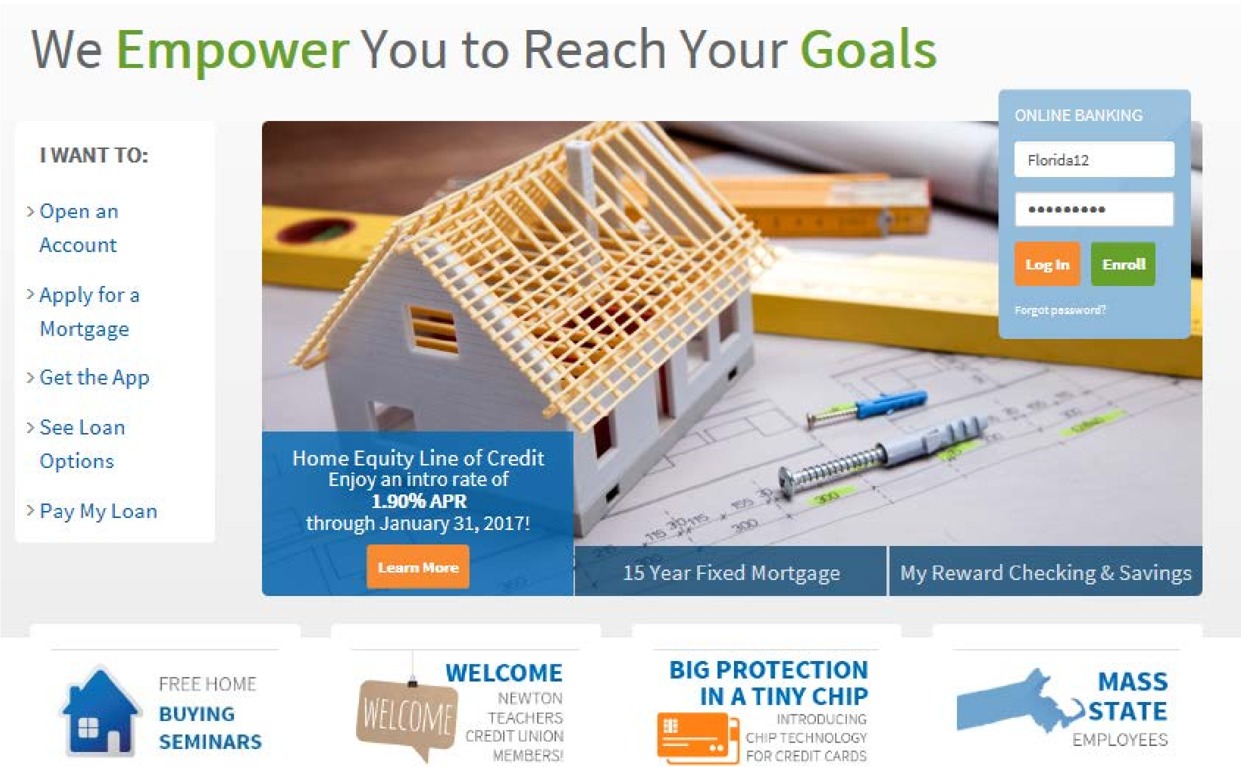
- **Free ATMs** and **unlimited refunds** of other banks' ATM fees
- Earn **3¢ reward** with every debit card purchase, up to $250 per year
- No monthly maintenance fee with direct deposit*
- eStatements required***

MY REWARD SAVINGS

My Reward Savings pays a higher rate of interest when it's linked to a My Reward Checking account.

- Earn **2.00% APY** on daily balances up to $3,000**
- Must be linked to My Reward Checking
- Limit one savings account per person

How to find State specials: metrocu.org



metrocu.org/state

METRO CREDIT UNION

https://www.metrocu.org/mastatehrcmscontacts

Locations | Careers | Events | About | Contact

METRO CREDIT UNION 1926 - 2016 90

PERSONAL BUSINESS RESOURCES BENEFITS

Online Banking

MA STATE HR/CMS RESOURCE CENTER

Metro is proud to be the credit union for Massachusetts State Employees.

Our goal: Provide your employees with exceptional service and expert guidance to help them achieve their financial goals!

Janine Brady

Your Metro Representative
877-MY-METRO x3020
jbrady@metrocu.org

METRO The credit union for Massachusetts State Employees

2016 State Payroll Calendar

Preview the Calendar >>

Schedule an Onsite Visit

Janine Brady is available for onsite visits, including Open Enrollment, Benefits Fairs, and Lunch and Learn sessions.
Request an Onsite Visit >>

Request Supplies

If you would like New Employee Membership Packets, Posters, or Enrollment Cards, we are happy to supply them for you.
Request Supplies from Metro >>

Frequently Asked Questions

I'm a new payroll or HR contact. How do I submit my information in order to be included on alerts and updates?
Please submit your information directly to Janine Brady and she will follow up with you. Janine can be reached by phone at 877-MY-METRO x3020 or email at jbrady@metrocu.org.

I am a payroll coordinator and need to speak to someone at Metro regarding an employee's payroll. Who should I contact?
If you are a payroll coordinator, you may contact Janet Donald, AVP Deposit Operations, at 617-889-7688. Employees who have questions about their payroll deduction with Metro should contact the Member Service Center at 877-MY-METRO.

Where do I find the membership application and direct deposit forms for Metro?
You can find these forms on the MA State Employees page.

Where do I find updates on new products, specials, or promotions geared to State Employees?
The most up-to-date information on products, specials, and news can be found on the MA State Employees page.

METRO CREDIT UNION The credit union for Massachusetts State Employees

https://www.metrocu.org/mastatecontacts

Request Supplies

If you would like New Employee Membership Packets, Posters, or Enrollment Cards, we are happy to supply them for you.

Request Supplies from Metro >>

Online Bankin

REQUEST SUPPLIES

First Name	
Last Name	
Department/Agency	
Phone	( ) -
Email	
Street Address	
City	
State	MA
U.S. ZIP code	
Please provide me with	☐ New Employee Membership Packets ☐ Updated Posters ☐ Enrollment Cards ☐ Other (Please describe below)
# of Membership & Enrollment Packets	
# of Posters	
Please describe other supplies you are interested in	

METRO CREDIT UNION

Email Communications

METRO CREDIT UNION
The credit union for Massachusetts State Employees

Email Communications

Primary contact to share Metro emails with employees

Name: ______________________________
Agency: ______________________________
Department: ___________________________
Email: ______________________________

Secondary Contact to share Metro email with employees

Name: ______________________________
Agency: ______________________________
Department: ___________________________
Email: ______________________________

Please email form to Janine Brady at jbrady@metrocu.org

METRO CREDIT UNION

Sunshine Fund

Free Financial Education Lunch and Learns

METRO CREDIT UNION

The credit union for Massachusetts State Employees

Free

Lunch & Learn

Seminars

Another Valuable Metro Resource Available To All State Employees

Metro offers complimentary on-site Lunch & Learn Seminars. This is a great opportunity for your employees to hear valuable information on a wide range of financial topics.

Seminars can be tailored to fit your agency's needs, time schedule, and employee interest. If there is a particular topic that you would like us to address, just let us know.

Topics Include:

- Metro Has It All
- OnTrack: How to Manage Your Checking Account
- Money Management
- Budgeting
- Understanding Your Credit Score and Report
- Dealing with Debt for Adults
- Hints for Managing Your Credit Card Debt
- Hints for Managing your Holiday Season Debt
- Fall Financial Cleaning
- Home Buying/Remortgaging
- Identity Theft
- Retirement 101

For Additional information or to schedule, contact Janine Brady, jbrady@metrocu.org
We look forward to speaking with you soon!

- Dedicated Account Representatives
  - Lunch and Learn Sessions
  - Open Enrollments
  - Benefit Fairs
  - Employee Financial Education Seminars
- Promotional Materials Available
  - Payroll Inserts
  - Bulletin Board Posters
  - Intranet Links
  - Flyers and Brochures

Thank you

Contacts

- Janine Brady
  - jbrady@metrocu.org
  - 877-MY-METRO x 3020

- Charlene Bauer
  - cbauer@metrocu.org
  - 617-889-7795

Commonwealth of Massachusetts
Group Insurance Commission

Flexible Spending Accounts

2016 Plan Years

	Half Year Plan	GIC Fiscal Plan Year 2017
Number of Months	6 months	12 months
Plan Year Dates	1/1/2016 – 6/30/2016	7/1/2016 – 6/30/2017
HCSA Maximum	$1,275	$2,550
HCSA Minimum	$250	$250
DCAP Maximum	$2,500	$5,000 per cal. year
Grace Period 2.5 months	9/15/2016	9/15/2017
Deadline to File Claims	10/15/2016	10/15/2017
Bi-weekly Deductions Start	12/27/2015	6/26/2016
Bi-weekly Deductions End	06/25/2016	6/24/2017
Number of Pay Periods BI-WEEKLY	FSA 13	FSA 26 13 in CY16 and 13 in CY17

Confirmation Packet

- Confirmation packets are being mailed via USPS to all participants
- Confirmation Letter
  - 2017 Plan Election Amounts
  - Set of two Wallet Cards
- New HCSA participants will receive their set of two Health Care FSA debit cards in a separate mailing, plain white envelope

Confirmation Packet Wallet Card

GIC HEALTH CARE FLEXIBLE SPENDING ACCOUNT (FSA)

ASK FOR IT! SHOW THIS CARD TO YOUR PROVIDER!

Each time you use the card, ask the provider for an itemized statement that includes:

1) Provider name and address
2) Patient name
3) Date the service/supply was provided (regardless when paid or billed)
4) Description of the service/supply
5) Dollar amount you owe

IRS regulations require you to provide an itemized statement for FSA expenses upon request. Submit online, via the mobile app, by fax, or mail. Also retain a copy with your personal tax records.

Note: Do not send the card terminal receipt, balance-forward or paid-on-account statements; these are not sufficient for IRS documentation.

CONTACT INFORMATION

www.asiflex.com/GIC

asi@asiflex.com

Phone: 1.800.659.3035

Customer Service Hours:

8 am - 8 pm Mon-Fri and 10 am - 2 pm Sat

Fax: 1.877.879.9038

PO Box 6044 | Columbia, MO 65205-6044

Get the ASIFlex Mobile App!

Submit claims and check your balance on–the-go!

The app is free and available on Google Play or the App Store, or asiflex.com/GIC!

Important Dates for Employees

2016 Half-Year Plan: January 1 to June 30, 2016

2 ½ Month Grace Period: July 1 –September 15, 2016

Claim Filing Deadline: October 15, 2016

2017 Plan Year: July 1, 2016 to June 30, 2017

2 ½ Month Grace Period: July 1 –September 15, 2017

Claim Filing Deadline: October 15, 2017

Next Open Enrollment spring 2017

Deactivated HCSA Cards

- Employees need to log into their account or contact the FSA Administrator– ASIFlex
  - **www.asiflex.com/gic**
  - Call ASIFlex's toll-free number 800.659.3035
- Supporting documentations, EOBs are a good resource
- Do not call the GIC, we do not have access to the Employee's FSA Accounts

Updated Job Aid

MassCareers

Karin S Eddy | Home | Resources ▾ |

Recruiting   Oracle Business Intelligence

Centers

Recruiting
Oracle Business Intelligence

Quick Access

Onboarding (Transitions)
Requisitions
Candidates

Welcome Center

News and Alerts
June 8, 2016

1. For Human Resources

- Un-Post a Requisition in CEO

  Per the Un-Post a Requisition job aid, "Once the candidate has accepted the offer, Human Resources will need to remove (unpost) the requisition from MassCareers and CEO".

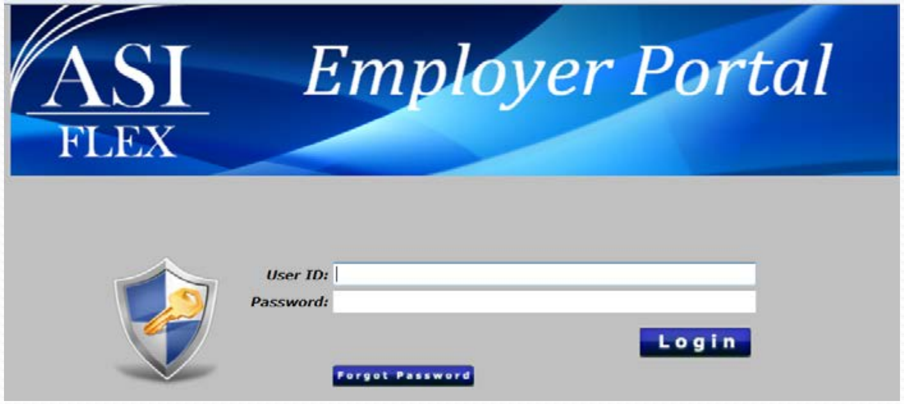
  "The job is no longer available" will display in CEO when applicants view a job opening that should have been unposted. Repeatedly seeing this message may give applicants the impression that the Commonwealth has limited job openings.

- 14 Day Report runs daily at 7:30 am.

2. For Benefits Coordinators – Onboarding FSA Form

Effective immediately candidates can complete their Flexible Spending Account (FSA) enrollment form in Onboarding. Benefits Coordinators will execute the PDF and enter the bi-weekly deduction on the form.

Employer Portal



- Secure portal with unique credentials for each coordinator
- ASIFlex posts enrollment reports and payroll discrepancy reports
- Coordinator can upload enrollment forms, status change forms and etc.

Changes to Elections

- Can change election during plan year only with qualified status change
  - A deactivated HCSA card is NOT a qualifying status change
- New: 60 days to make changes, same as other GIC Benefits
- Additional qualifying events for DCAP
- Leave of Absence – Use the Status Change form
- Complete Status Change forms and send to ASIFlex through portal or by fax, not to the GIC

Coordinator Action Items

- May/June 2016
  - Review 2017 enrollment lists posted to Employer Portal
    - 2017 Enrollments and 2016 Not re-enrolled
  - Make changes to enroll or terminate as needed

- On-Going Monthly Discrepancy Reports
  - Will be sent through your Employer Portal
    - At end of the month an email is sent when report is posted
  - Resolve discrepancies within two business days
  - Coordinators fax or upload new hire and change forms to ASIFlex, not the GIC

Payroll Error Refunds

- Refunds are made with post tax funds and create tax problems for the member and the Commonwealth
- Refunds may only be made within 60 days of the mistaken deduction effective 7/1/16
- After 60 days, it is up to the employer/agency to repay the employee – no refunds will be made from the FSA account
- Timely reconciliations will avoid problems

Payroll Error Refunds

- ***Avoid refund requests:*** enter the correct deduction code(s), deduction amount(s) and end date deduction(s) when entering terminations/leaves of absence.
- To request a payroll refund :
  - Send the request via email to Karin.Eddy2@state.ma.us within 60 days
  - Include the following information:
    - Employee Name
    - Employee ID
    - Deduction code(s) and amount(s) of refund; e.g. DCAP $50, HCSAF $2.50
    - Reason for refund; e.g. terminated state service, deduction taken in error
    - **Offline Agencies**: Name and address for refund check – refund checks will be made payable to the Commonwealth of Massachusetts. The agency must refund the employee.
    - **UMass and HRCMS payroll systems**: Refunds by payroll reversals in the same calendar year. GIC will review and authorize the processing of the payroll reversal with OSC for HRCMS agencies.
  - The GIC must approve the refund request and will work with ASIFlex to research

Contacting ASIFlex

Coordinators

Account Manager	**Kaleena Kollmeier**
Email	flexgic@asiflex.com
Coordinators Only	(888) 602-4132
Direct Phone	(573) 777-5616
Direct Fax	(573) 442-4435
NOTE: Please refer participants to customer service and not to the account manager.	

Participants

Mailing Address	**ASIFlex Customer Service** **P.O. Box 6044** **Columbia, MO 65205-6044**
Website	www.asiflex.com/gic
Email	asi@asiflex.com
Customer Service Hours	8 AM to 8 PM Mon. – Fri. 10 AM to 2 PM Saturday
Toll-Free Phone	1.800.659.3035
Toll-Free Fax	1.877.879.9038

benefit strategies LLC

1989 - 2014

Celebrating 25 Years of Third Party Administrator Innovation and Customer Service Excellence

Commuter Choice – Transit and Parking

Presented by Jasmine Shamer

06/15/2016

Reports Available

- *If your division is not getting all the email notifications from Benefit Strategies for changes or enrollments, or if your employees are not submitting copies of their completed election forms, a report can be generated by Benefit Strategies with all changes done within a date range. Please call or email Jasmine Shamer @ Benefit Strategies and request this report as often as needed – please make sure to provide your agency code when calling or emailing.*

MBTA Increase Effective July 2016

- *If your employees completed the Online Election Change Form with Benefit Strategies to increase their PR contributions towards the July 2016 passes/tickets, they should have done so no later than Wed 6/08/16*
- *If you have employees in your agency that have not completed the Online Election Change Form, they can still submit their change but it will be effective for Aug 2016, which will mean they will not have enough funds to buy their July pass – will need to pay out of pocket online or at kiosk locations, and then submit a claim to Benefit Strategies to be reimbursed for their deduction, example:*
  - *6/17/16 check date deduction $75 instead of $84.50 towards July pass – flex card is only loaded with $75*
  - *Employee will have to load Charlie Card with own funds $84.50 and then submit claim to be reimbursed for the $75 that's on the flex card*

Monthly Balance Reminders

- *Benefit Strategies sends email reminders to all members every month, between the 3rd and 5th of the month, asking them to login to their account and check their balance*
- *Very important that members do check their balance on a regular basis to make sure they have enough month to month for their commuter TRN or PRK expenses, and that they're not in excess of too much money*
- *If members have a balance they've rolled over from 2015 year to 2016, by doing the request to increase their PR deduction for July 2016 passes, they are not spending down their already accrued balance*

Transit Election Change Process Calendar for 2016

- *The deadline for members to have submitted their commuter Transit changes for July 2016 benefit month (by completing the Election Change Form) was Wed 06/08/2016*
- *The PR deduction would have been entered into the HRCMS system no later than Mon 6/13/2016 with an effective date of 6/11/2016*
- *The deduction will be taken on Fri 6/17/2016 check*
- *The deduction will be funded on the Benefit Strategies Flex cards on Mon 6/20/2016*

Contact Information

Your dedicated Account Manager:

Jasmine Shamer

Email: ClientServices@benstrat.com

Phone#: 877-353-9442

Fax#: 603-647-4668

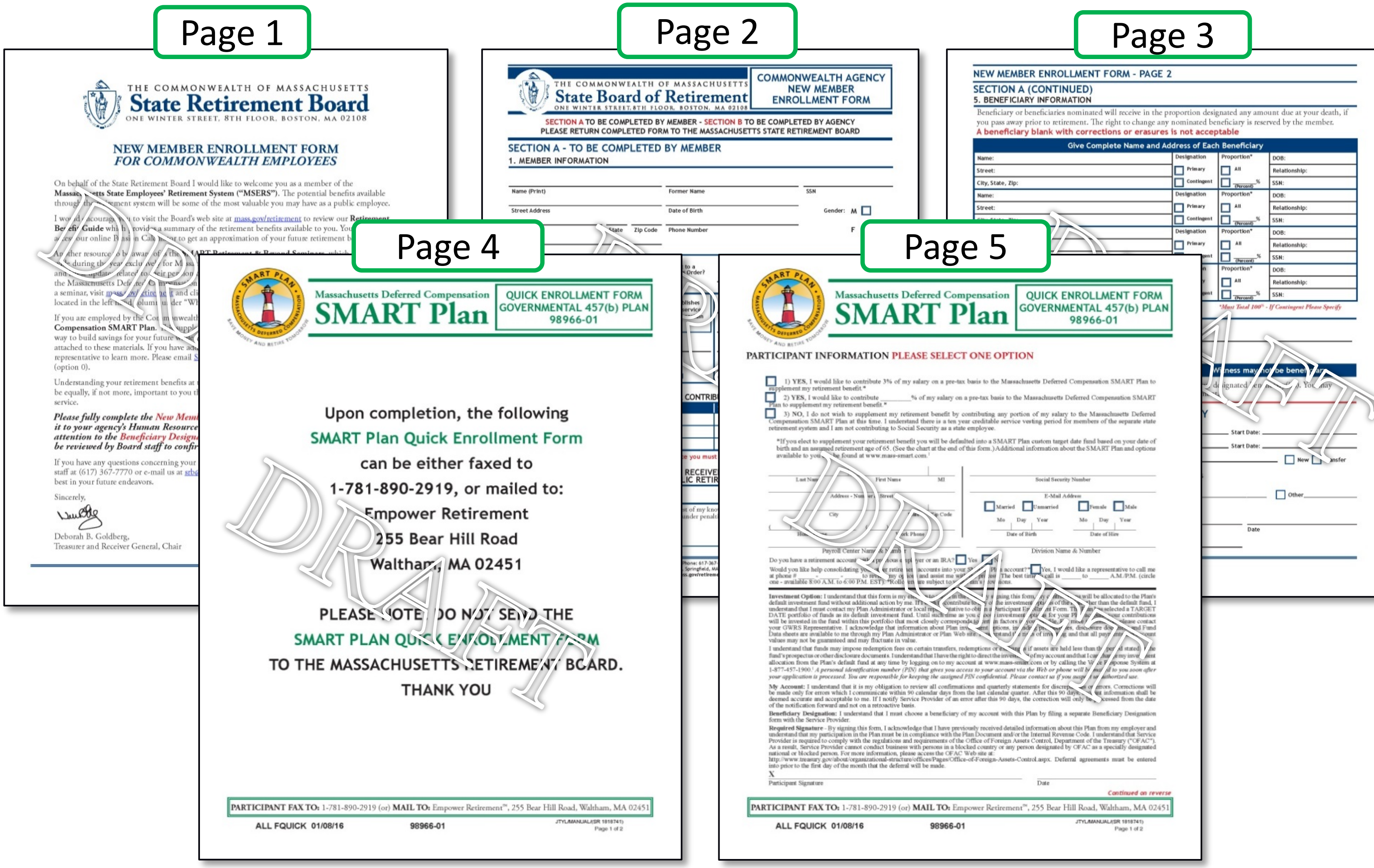
Website: www.benstrat.com

SMART Plan Agenda

Presented by Rob Young, Manager Retirement Counseling

- Enrollment Enhancements
- Plan Service Center security
- Educational opportunities
- Online Scheduler

SMART Plan Enrollment Enhancement



Plan Service Center Access

- Security issue – don’t share passwords
- Efficient contribution changes
- One simple step....

New Payroll User?

- Contact CTR; Felicia.Hopkins@state.ma.us to receive monthly payroll file

- Please contact SMART Plan for any ???s – including terminations

SMART@gwrs.com

Plan Service Center Access

Department	Descr	Deptid	Location Code	First Name	Last Name	Phone#	Email Address
OSC	OFFICE OF THE STATE COMPTROLLER	OSC1000	002	FELICIA	HOPKINS	617-973 2625	felicia.hopkins@massmail.state.ma.us

Educational Opportunities

- SMART Retirement & Beyond
- Managing Your Retirement Income Workshops
- Lunch + Learn
- New Hire Orientation meetings

Online Scheduler – *coming soon!*

- SMART Plan participants locate meeting on website through zip code
- Reserve a place at Group meeting or specific time for Individual consultation
- Meeting Confirmation or potential changes are sent through Email
- Assistance available in Waltham office through new, dedicated line

Questions?

Thank you

Two muffins were in an oven.

https://youtu.be/p6_dJDPgac0

ACA UPDATE

ACA Update

- Insurance Status will be automated
  - The GIC Status Page is removed from HR/CMS
  - No need for departments to update employee's election status
  - Form 1 must be maintained for offer of coverage and employee's election

- Beginning in the Fall, all wages tied to ACA to be exclusively in Timesheet or in Job for salaried employees
  - Details to come
  - Use of Additional Pay to be curtailed

ACA Statistics

- ACA Statistics including UMass for CY 2015
  - Total 93,159 forms for 1095-C generated
  - Monthly Health Care Offer Rate average at 98%

PAYROLL REMINDERS

KEVIN MCHUGH

Validating SSNs

- ►It is illegal to hire undocumented workers (IRCA) – if the I9 Form is incomplete, then DO NOT setup in HR/CMS
- ►If you get a warning that an SSN is already used, then the employee already has an Employee ID –
    - Search by National ID to find the Emplid, then Add Employment Instance to Recd 0

****** never create a 2nd EMPLID*****

Invalid SSN Scenarios

- When an employee is paid under an incorrect SSN, please notify Commonhelp immediately. Provide the following:
  - Identify whether a W2 was issued for employee under any other EMPLID or SSN
  - For the current W2 year indicate whether the employee was paid under any other Emplids
- IMPORTANT: CTR has to determine the correct EMPLID to use going forward and correct balances for current year W2 reporting
- Report issues immediately and avoid W2Cs

Payroll Close / Open Timeline

- Departments should be familiar with the *NEW* CTR Annual Compliance Calendar
- You can filter on Business Functions like ‘Payroll Management’ and whether this is an “Action” item.

Compliance Calendar

COA Changes

By Today You Should Have:

- Identified any FY17 COA changes, e.g., program codes or appropriation changes
- Planned for any Position transfers and LCM distributions for FY17
- Started to enter PH documents for AP

Key Dates in June

- **Finalize your PH activity for AP by June 30**
- **For PPE June 25 – Last full payroll of FY 2016:**
  - June 26 - Last day for HR and Garnishment transactions in HR/CMS
  - June 27 - Last day for posting Time and Attendance
  - June 28 - Last day for making Labor Distribution changes in LCM

HR/CMS Account Code Roll

- Now Available
- HMMARS3 Report identifies:
  - All positions assigned to invalid accounts
  - If incumbent exists, then EMPLID and Recd# are shown
- Agencies must take corrective action before 7/1
- Resource Document on Knowledge Center provides recommended steps and info on Mass Position Transfer
  - KC $\Rightarrow$ Payroll $\Rightarrow$ Financial Data Management

HR/CMS Account Code Roll

- July 14 - Failure to act will result in these positions being automatically updated
- The invalid account codes will be updated with the FIRST valid account code within your department

Mass Termination of Contract Jobs

- ***NEW Schedule*** – NON HED Agencies will occur July 15 while HED Agencies will occur in the Fall

- Who? Active contractors hired before and unpaid since October 1, 2015
- Departments will be notified
- Report Name is HMPCS004 – Termination of Contract Jobs

Payroll Receipt Vouchers

- Continue to send Paper Voucher to the State Retirement Board (RET)
- All Vouchers for any Pay Periods through April 2 were due at RET before Friday May 24
- Vouchers for Pay Periods after April 2 should be submitted ASAP
- Cash Cutoff is June 30^{th} for PRRVs

LCM Rules Roll – POAA Rules

- All current rules will expire on 6/30
- Draft rules for FY 2017 are available now
- Departments should review draft rules and delete any rules that will not apply to FY 2017
- Departments must include full justification for rule as a Comment and submit for approval
  - Departments do not need to email paperwork to CTR Payroll Bureau - Rules Request Form is no longer used
  - Departments should retain signed copy of rules on file
- New rules must have a From Date of 7/1/2016 for FY 2017
  - Any new FY 2016 rules must have To Date of 6/30/2016

LCM Rules Roll – POAA Rules

- **Document IDs for draft rules are defined as follows:**
  - Department ID
  - Assigned Appropriation or ALL if the rule applies to all Appropriations
  - A if the rule applies to all Units or U if the rule is Unit-specific
  - A if the rule applies to all Positions or P if the rule is Position-specific
  - C16 (to indicate that it is a Create rule generated in 2016)
  - Unique number
- **Departments can enter *C16* as the Document ID search criteria to find all draft POAA rules**

LCM Rules Roll – Other Rules

- PALT Rules – Rules are specific to FY
  - Departments must reapply for all PALT rules
- DEACC Rules – CTR Payroll Bureau has contacted Departments to confirm that rules still apply for FY 2017
- PCREQ / DEPTEs / Profiles – Will continue in effect for FY 2017
  - Departments should review and make any changes needed for FY 2017

Split Year is 40% FY16 & 60% FY17

Split Year Payroll Proration

- ► Pay Period begins on 6/26 and ends on 7/9.
- ► Payroll is prorated by business days of the pay period (Mon- Fri) – 4 Business Days in FY 2016 and 6 Days in FY 2017.
- ► **Most Payroll charges will post 60% to FY 2017.**

FY 2016

FY 2017

Split Year – Earnings That Will Post to FY 2017

- **ERIP** – **All** Sick, Vacation and COM Buyouts entered as **Amounts** will post to 7/1

Earnings Code	Description	MMARS Object Code
CBA	Comp Time Buy Back – Amounts	A08
SBA	Sick Leave Buy Back – Amounts	A12
VLA	Vacation In Lieu – Amounts	A13

- Sick, Vacation and COM Buyouts entered as **Hours** will post to 6/30 and therefore, FY 2016

Earnings Code	Description	MMARS Object Code
CBB	Comp Time Buy Back – Hours	A08
SBB	Sick Leave Buy Back – Hours	A12
VIL	Vacation In Lieu – Hours	A13

Split Year – Earnings That Will Post to FY 2016

- **Prior Period Adjustments** – Entered in Timesheet on a date before 6/30
- **Current Pay Period Charges Entered in Timesheet On or Before 6/30**
  - If Combo Code is used to specify labor distribution for **any** day processed during Split Year Payroll or if Combo Code is used for Additional Pay
  - Note that time entered on or before 6/30 will split between FY 2016 and FY 2017 if no Combo Codes are used for any of the employee’s payroll charges

Split Year – Earnings That Will Post to FY 2016

- **Certain categories of Earnings Codes**
  - Furlough Processing
  - Reimbursements
  - Retro Earnings Codes
  - Settlements and Judgments
  - See CTR Memo for list of Earnings Codes

- **Be aware of the Posting Dates and establish EPPA/DEPTE for the pay period if needed**.
  - For example, BMI posts to 6/30 $\Rightarrow$ Need EPPA for PPE 7/9 to redirect charges in LCM

Split Year Funding

- During Split Year, funding for FY 2016 charges are **not** from Payroll Holds

- PHs are **only** used for the Accounts Payable periods

Accounts Payable Payroll

- **Pay Periods ending 7/23, 8/6, and 8/20**
- **2 ways to charge FY 2016:**
  - Enter Prior Period Adjustment in Timesheet for a date before 6/30
  - Use an Accounts Payable earnings code in Timesheet or Additional Pay
    - See CTR Memo for list of AP Earnings Codes
- **Be aware of the Posting Dates (AP codes = 6/30)**
  - Establish EPPA/DEPTE for the corresponding time slice
    - PPE 07/09/2016 for AP codes

Payroll Holds

- Payroll Holds are required for all charges – even negative and net $0 – during Accounts Payable
- Executive departments need ANF approval for any increases to PHs for Type 1 accounts where the total $$$ encumbered is > $25K
- **After June 30th, NO NEW PH for BUDGETED FUNDS**
- If Insufficient Budgeted Funds (including not having PH created prior to June 30) FY16 charges will not paid. Instead, department will need to request a Prior Year Deficiency funding
- Make sure you have enough $$$ to cover FY 2016 charges through Split Year payroll before you encumber the $$$ in a PH

Payroll Holds

- Payroll Holds must:
  - Specify 2016 as the BFY and FY in the Header and on each Accounting line
    - After July 1st, if you leave the fields blank, value will default to 2017 on submission – CTR will reject PH
  - Specify a program for federal grants (4CN)
  - Specify a unit if departmental budgets are used
  - Be unique for the combination of Department / Appropriation / Object Code

Payroll Holds and Funds Availability

Type of Charge	PH Exists – Enough $$	PH Exists – Not Enough $$	PH Does Not Exist
Positive	PREXP references the PH and reduces the PH $$$ by amount of charge	PRLIF references the PH – FA reports show Budget Tracking as Encumbrance	PRLIF does not reference a PH (but must do so to be submitted) – FA reports show Budget Tracking as N/A
$0	PREXP references the PH	N/A	PRLIF is generated but can be submitted – FA reports show Budget Tracking as N/A
Negative	PREXP does not reference a PH	N/A	PRLIF is generated but can be submitted - FA reports show Budget Tracking as N/A

Ensure that PHs are in place for all AP charges – or account will be unfunded! PH can be for $0 if charges are net $0 or negative charges.

Reminder: PRLDE & PRLIF Clean- Up

- State Finance Law requires that accounts are funded before expenditures are made
- All State Accounts must be balanced before end of AP Period

SSTA Reminder: Payable Time Approvals

- At the end of AP Period, CTR will Close any Payable Time in “ NA” Needs Approval status for periods in FY 2016.
- Departments should not have unapproved time past 3 pay periods.

Deficiency Payroll

- Request approval from CTR APB
- Transfer $$ to CTR account
- Department uses the Deficiency Earnings Codes (D01 – D06) as directed by CTR Payroll to process charges in HR/CMS Payroll
  - Judy Cole - judy.cole@state.ma.us
- CTR Payroll will handle the distribution to CTR account in LCM

Deficiency Payroll Codes

D01 Deficiency Regular

D02 Deficiency Travel Reimbursement

D03 Deficiency Other Pay - Subject to Retirement)

D04 Deficiency Vacation in Lieu

D05 Deficiency Sick Buy Back

D06 Deficiency Overtime

Coordinate with CTR Payroll which code is used for payment

CTHRU

THOMAS SMITH-VAUGHAN - CTR

CTHRU

CTR

CTHRU

- CTR's new Open Records Platform SaaS solution subscription based OTS
- Costs @$175K annually
- Goal: If the record could be requested of our office – we will make it available online
- Will have a geometric ROI for agencies whose records are contained in MMARS and HR/CMS
- Ideation to Live demo in less than 90 days

•Live Demo…

Initiative of the Comptroller

CTHRU Open Payroll

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This site provides a guided view through our Commonwealth Payroll and provides a transparent look at how we allocate payroll funds. The charts, graphs, and tables below are all highly interactive and we invite you to explore.

Read More...

Select Calendar Year 2015

Total Spent

$5.61 Billion

Calendar Year 2015

The total spent on payroll in 2015.

Show Chart

Highest Paid Employees

$466,349

Mohler-Faria, Dana - President, Special Proje...

Top 5

1. Mohler-Faria, Dana - President, Special Projects Administrator
2. Barrett, Dawn - Professor
3. Gurnon, Richard - President
4. Linnehan, James - Vice President
5. McCarthy, Edward - Civil Engineer V

Show Chart

Top Departments

$493.52 Million

Trial Court (TRC) Total Payroll

Top 5

1. Trial Court (TRC)
2. Department of Correction (DOC)
3. Massachusetts Department of Transportation (DOT)
4. Department of State Police (POL)
5. Department of Developmental Services (DMR)

Show Chart

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Search

Commonwealth of Massachusetts

CTHRU Open Expenditures

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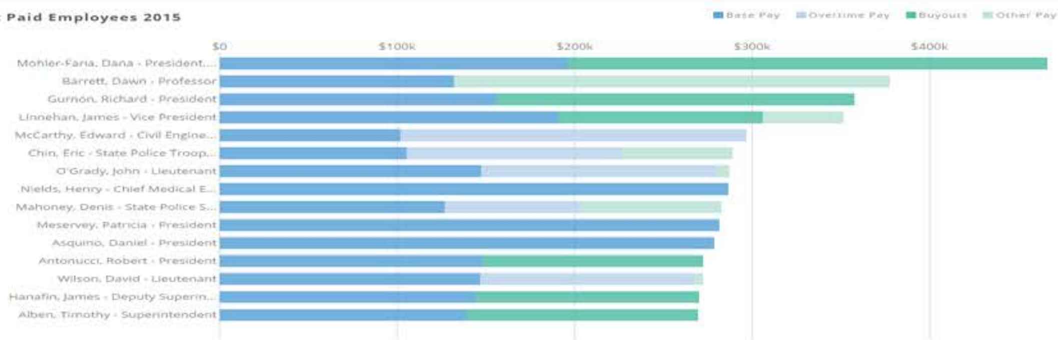

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Comptroller Web Site View Data in Worksheet

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Show Chart

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comptroller

Office of the Comptroller (CTR)	**Department**
Comptroller	Job Title
Deputy Comptroller	Job Title
Assistant Comptroller	Job Title
Asst. Comptroller	Job Title
Deputy Comptroller (overlap)	Job Title

Office of the Comptroller (CTR)

Total Payroll

$11.19 Million

Calendar Year 2015

The total spent on payroll for Office of the Comptroller (CTR) Department in calendar year 2015.

Show Chart

Employees

152

Calendar Year 2015

The total number of employees in Office of the Comptroller (CTR) Department.

Show Chart

Median Employee Pay

$81,706

Calendar Year 2015

The median pay among full-time employees of Office of the Comptroller (CTR) Department for calendar year 2015.

Show Chart

All Matching Records

Records/page 10

Name / Record Number	Job Title	Base Pay	Overtime Pay	Buyouts	Other Pay	Total Pay
Shack, Thomas	Comptroller	$161,691	$0	$0	$0	$161,691
Benison, Martin	Comptroller	$74,726	$4,076	$76,528	$0	$155,330
Merkowitz, Howard	Deputy Comptroller	$143,416	$0	$0	$0	$143,416
Fisher, Kathy	Deputy Comptroller	$137,532	$0	$0	$0	$137,532
Guido, Christopher	Deputy Comptroller	$134,154	$0	$0	$0	$134,154
Hedderman, Jeannette	General Counsel	$129,764	$0	$0	$0	$129,764
Hamilton, Steven	Director Enterprise Sys Serv	$120,905	$0	$0	$0	$120,905
Lieu, Pauline	Edp Systems Analyst IV	$93,559	$25,344	$0	$0	$118,904
Chan, Wing	TPL: Appl Sys Analyst/Prog Sr	$107,526	$1,058	$0	$6,633	$115,217
Lambert, Kathleen	TPL: Appl Sys Analyst/Prog Sr	$103,064	$3,469	$0	$1,173	$107,706

Office of the Comptroller (CTR)

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$11.19 Million

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≥ From

≤ To

Sort Ascending

Sort Descending

Clear Ok

« ‹ 1 2 3 4 5 6 7 ... › »

Summary 2015

Name
Smith-Vaughan, Thomas

Job Title	Bargaining Group	Other Pay
Accounts Payable Mgr	Managers (EXE)	$0
Department	**Employment Type**	**Total Pay**
Office of the Comptroller (CTR)	Full Time Employee	$80,907

Payroll Details

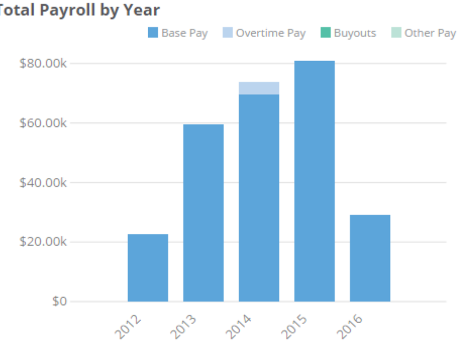
Total Pay
$80,907

Compare to: Entire Payroll

Legend: Low – Median – High

Payroll History

Total Payroll by Year



Year	Base Pay	Overtime Pay	Buyouts	Other Pay	Total Pay
2015	$80,907	$0	$0	$0	$80,907
2014	$69,509	$4,373	$0	$0	$73,882
2013	$59,597	$80	$0	$0	$59,677
2016	$29,198	$0	$0	$0	$29,198
2012	$22,646	$0	$0	$0	$22,646

View Raw Data for this Record

CTHRU Open Expenditures

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Read More...

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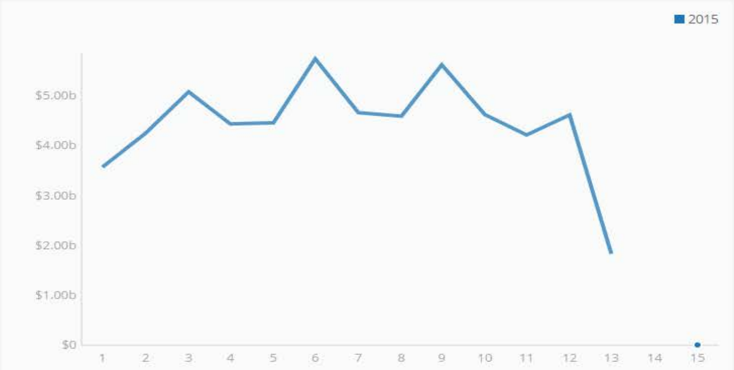
Spending Summary 2015

Total Spending
$57.70 Billion

Total Transactions
2.93 million

Total transactions is every transaction that the State as an entity has made since the start of the fiscal year

Explore All Spending



Top Department
$11.07 Billion
EXECUTIVE OFFICE OF HEALTH AND HUMAN...

Top 5
1. EXECUTIVE OFFICE OF HEALTH AND HUMAN SERVICES (EHS)
2. OFFICE OF THE STATE TREASURER (TRE)
3. DEPARTMENT OF REVENUE (DOR)
4. DEPARTMENT OF ELDER AFFAIRS (ELD)
5. UNIVERSITY OF MASSACHUSETTS SYSTEM (UMS)

Show Chart

Top Vendor
$2.94 Billion
EOL - SUMMARY TRUST PAYMENT

Top 5
1. EOL - SUMMARY TRUST PAYMENT
2. BOND REDEMPTION (PRINCIPAL)
3. RETIREMENT ALLOWANCE-TEACHERS
4. UMS - SUMMARY TRUST PAYMENT
5. RETIREMENT ALLOWANCE-STATE EMPLOYEES

Show Chart

Top Object Class
$17.88 Billion
BENEFIT PROGRAMS (RR)

Top 5
1. BENEFIT PROGRAMS (RR)
2. STATE AID/POL SUB (PP)
3. PENSION & INSURANCE RELATED EX (DD)
4. REGULAR EMPLOYEE COMPENSATION (AA)
5. DEBT PAYMENT (SS)

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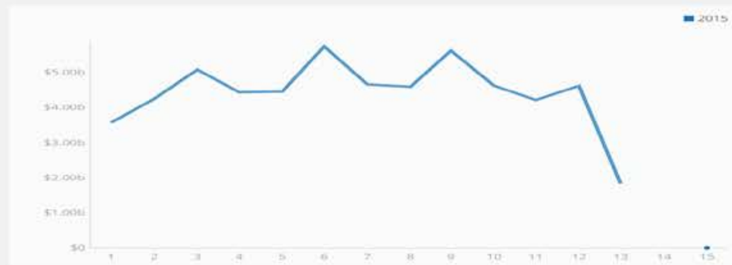

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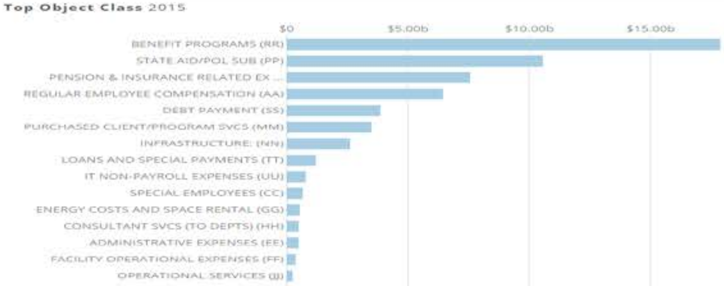
Hide Chart

Top Object Class 2015



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Explore Object Class

Open Expenditures

Entire Ledger
$57.7 billion - 100.0% of all

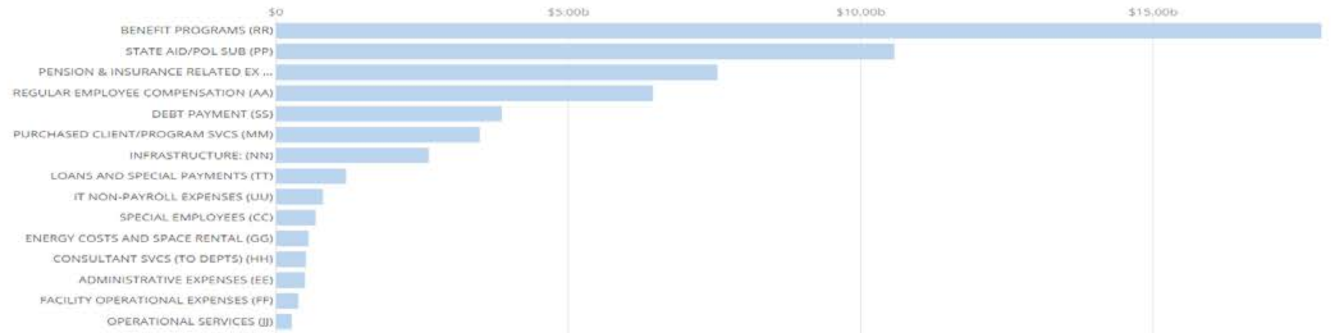
$57.7 Billion Entire Ledger 2015

Spending Summary Checkbook

Entire Ledger broken down by Object Class

Share

Back



Snapshot
Pie Chart
Over Time
Hide Table

Show As
$ %

Sort
Total (Descending)

Showing 1 - 15 of 20

Previous Next

Hide Table

Object Class	Amount
BENEFIT PROGRAMS (RR)	$17,879,479,145.19
STATE AID/POL SUB (PP)	$10,577,741,593.24
PENSION & INSURANCE RELATED EX (DD)	$7,550,516,948.76
REGULAR EMPLOYEE COMPENSATION (AA)	$6,448,494,843.71
DEBT PAYMENT (SS)	$3,862,828,222.67
PURCHASED CLIENT/PROGRAM SVCS (MM)	$3,487,730,929.84
INFRASTRUCTURE: (NN)	$2,614,360,978.07
LOANS AND SPECIAL PAYMENTS (TT)	$1,199,008,465.09
IT NON-PAYROLL EXPENSES (UU)	$801,995,012.58
SPECIAL EMPLOYEES (CC)	$680,729,623.86
ENERGY COSTS AND SPACE RENTAL (GG)	$555,124,251.35
CONSULTANT SVCS (TO DEPTS) (HH)	$512,266,054.14
ADMINISTRATIVE EXPENSES (EE)	$497,401,409.11
FACILITY OPERATIONAL EXPENSES (FF)	$383,067,583.55
OPERATIONAL SERVICES (JJ)	$269,426,643.84
EQUIPMENT PURCHASE (KK)	$168,183,394.05
EQUIPMENT LEASE-MAINTAIN/REPAR (LL)	$80,566,923.04
REGULAR EMPLOYEE RELATED EXPEN (BB)	$70,020,886.68
PAYROLL REJECTS (99)	$59,401,568.13
UNASSIGNED (UNAS)	$1,604,412.09

Open Expenditures

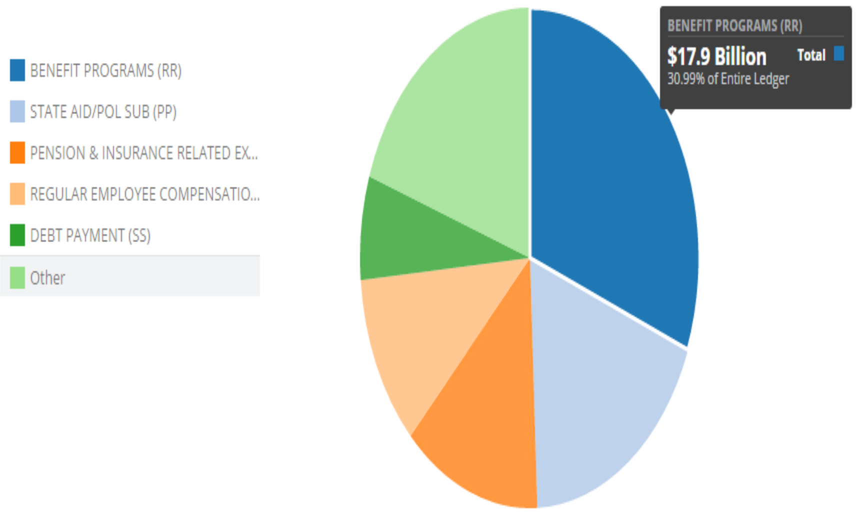
Entire Ledger
$57.7 billion - 100.0% of all

$57.7 Billion Entire Ledger 2015

Spending Summary Checkbook

Entire Ledger broken down by Object Class

Back



Snapshot
Pie Chart
Over Time
Show Table

View Table

Commonwealth of Massachusetts

CTHRU Open Payroll

Search

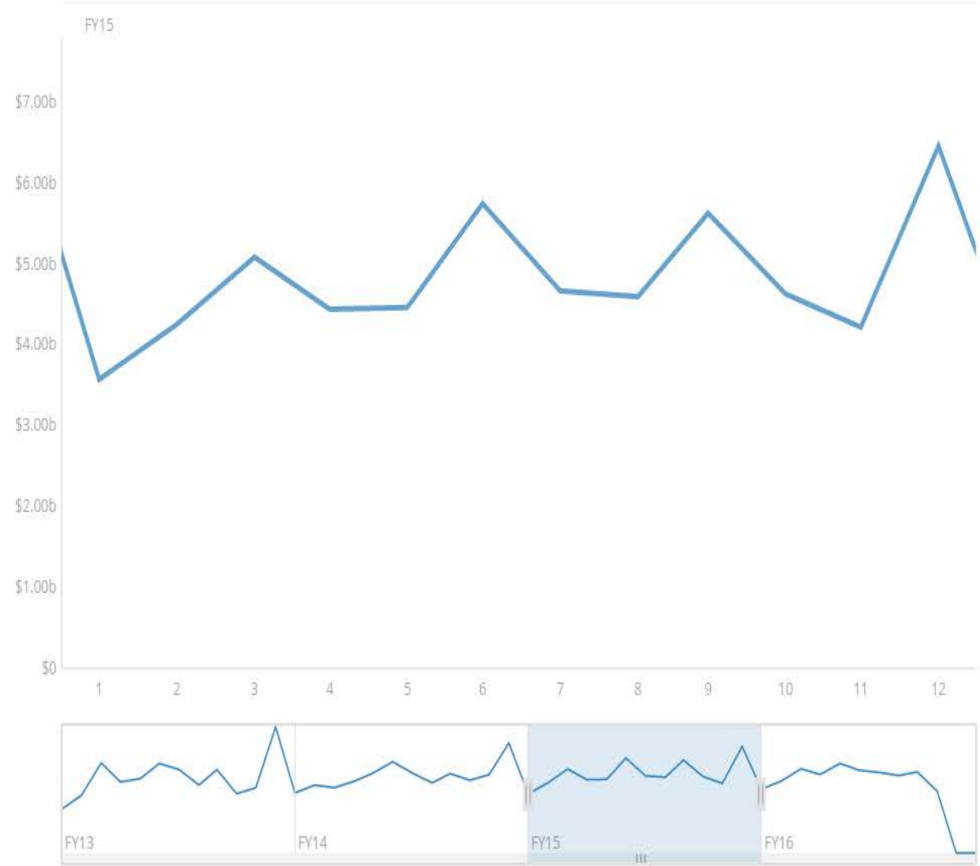
Open Expenditures

Entire Ledger
$57.7 billion - 100.0% of all

$57.7 Billion Entire Ledger 2015

Spending Summary Checkbook

Zoom 1m 6m YTD 1y All



Total Show All

- BENEFIT PROGRAMS (RR)
- STATE AID/POL SUB (PP)
- PENSION & INSURANCE RELATED EX (DD)
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- DEBT PAYMENT (SS)
- PURCHASED CLIENT/PROGRAM SVCS (MM)
- INFRASTRUCTURE: (NN)
- LOANS AND SPECIAL PAYMENTS (TT)
- IT NON-PAYROLL EXPENSES (UU)
- SPECIAL EMPLOYEES (CC)
- ENERGY COSTS AND SPACE RENTAL (GG)
- ADMINISTRATIVE EXPENSES (EE)
- CONSULTANT SVCS (TO DEPTS) (HH)
- FACILITY OPERATIONAL EXPENSES (FF)
- OPERATIONAL SERVICES (JJ)

Snapshot

Pie Chart

Over Time

Display

Fiscal Period

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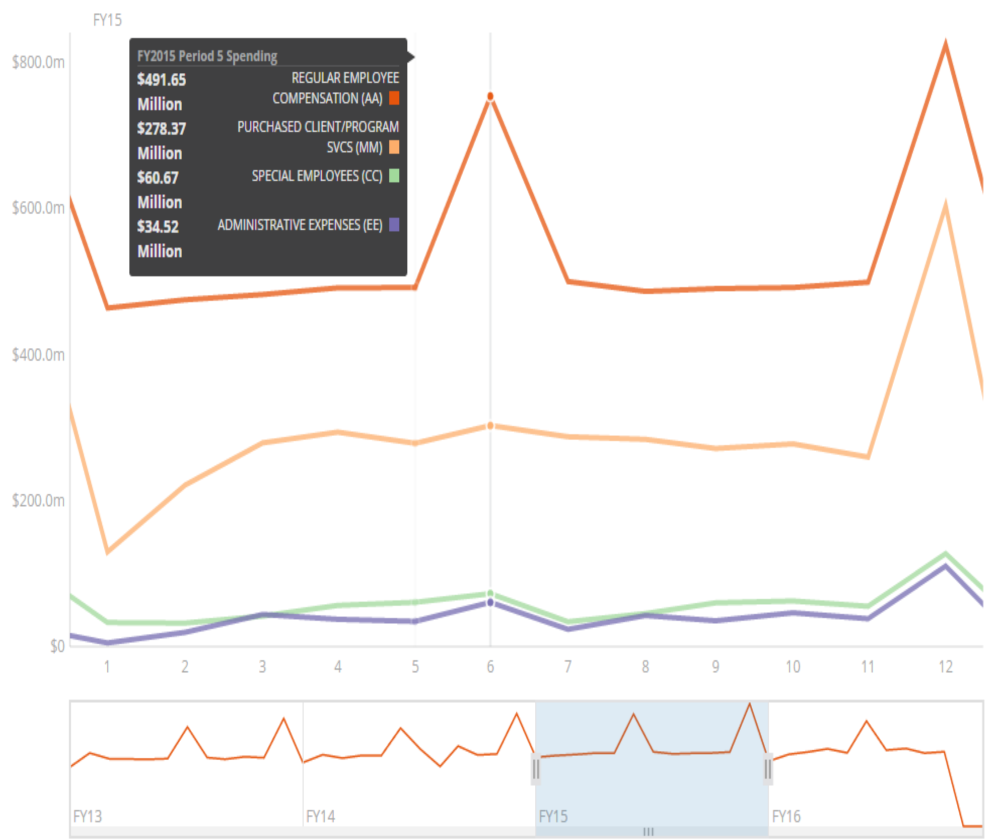
Open Expenditures

Entire Ledger
$57.7 billion - 100.0% of all

$57.7 Billion Entire Ledger 2015

Spending Summary Checkbook

Zoom 1m 6m YTD 1y All



Total Show All

- BENEFIT PROGRAMS (RR)
- STATE AID/POL SUB (PP)
- PENSION & INSURANCE RELATED EX (DD)
- REGULAR EMPLOYEE COMPENSATION (AA)
- DEBT PAYMENT (SS)
- PURCHASED CLIENT/PROGRAM SVCS (MM)
- INFRASTRUCTURE: (NN)
- LOANS AND SPECIAL PAYMENTS (TT)
- IT NON-PAYROLL EXPENSES (UU)
- SPECIAL EMPLOYEES (CC)
- ENERGY COSTS AND SPACE RENTAL (GG)
- ADMINISTRATIVE EXPENSES (EE)
- CONSULTANT SVCS (TO DEPTS) (HH)
- FACILITY OPERATIONAL EXPENSES (FF)
- OPERATIONAL SERVICES (JJ)

Snapshot
Pie Chart
Over Time

Display
Fiscal Period

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CTHRU Open Expenditures

The Commonwealth of Massachusetts presents CTHRU Open Expenditures as part of our commitment to improving transparency and open record access by providing a guided view through complex financial information.

This site provides a guided view through our budget and provides a transparent look at how we allocate public funds. The charts, graphs, and tables below are all highly interactive and we invite you to explore.

Read More...

Search

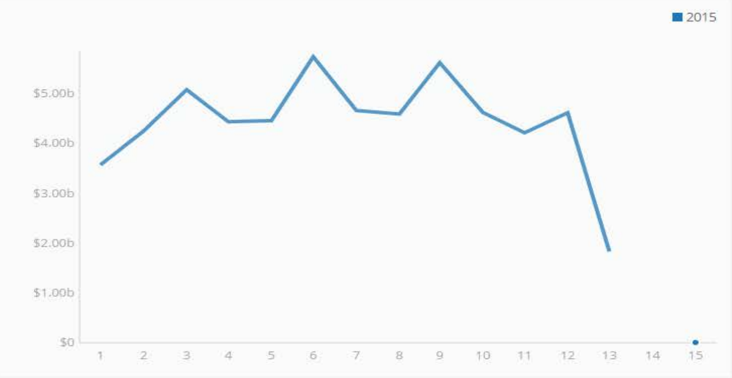
Spending Summary 2015

Total Spending
$57.70 Billion

Total Transactions
2.93 million

Total transactions is every transaction that the State as an entity has made since the start of the fiscal year

Explore All Spending



Top Department
$11.07 Billion

EXECUTIVE OFFICE OF HEALTH AND HUMAN...

Top 5
1. EXECUTIVE OFFICE OF HEALTH AND HUMAN SERVICES (EHS)
2. OFFICE OF THE STATE TREASURER (TRE)
3. DEPARTMENT OF REVENUE (DOR)
4. DEPARTMENT OF ELDER AFFAIRS (ELD)
5. UNIVERSITY OF MASSACHUSETTS SYSTEM (UMS)

Show Chart

Top Vendor
$2.94 Billion

EOL - SUMMARY TRUST PAYMENT

Top 5
1. EOL - SUMMARY TRUST PAYMENT
2. BOND REDEMPTION (PRINCIPAL)
3. RETIREMENT ALLOWANCE-TEACHERS
4. UMS - SUMMARY TRUST PAYMENT
5. RETIREMENT ALLOWANCE-STATE EMPLOYEES

Show Chart

Top Object Class
$17.88 Billion

BENEFIT PROGRAMS (RR)

Top 5
1. BENEFIT PROGRAMS (RR)
2. STATE AID/POL SUB (PP)
3. PENSION & INSURANCE RELATED EX (DD)
4. REGULAR EMPLOYEE COMPENSATION (AA)
5. DEBT PAYMENT (SS)

Show Chart

Open Expenditures

Entire Ledger
$57.7 billion - 100.0% of all

$57.7 Billion Entire Ledger 2015

Spending Summary Checkbook

Entire Ledger broken down by Cabinet/Secretariat

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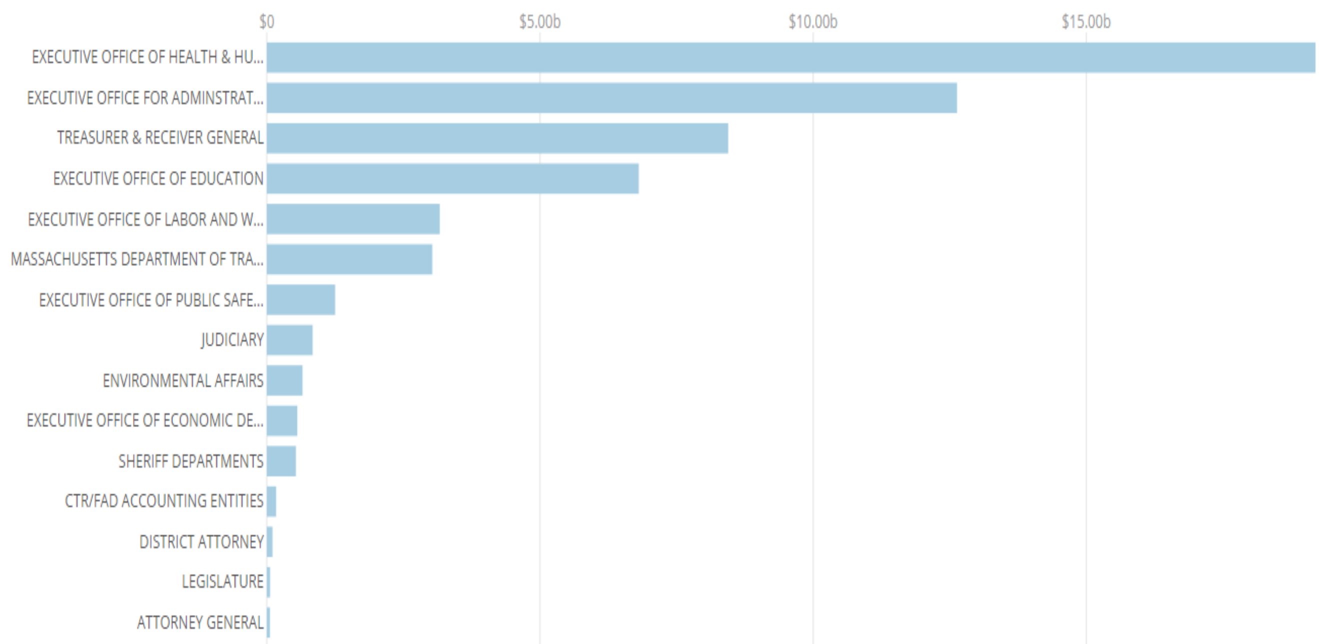
Select a segment on the chart to explore details

Back



Snapshot
Table
Over Time

Show As
$ %

Sort
Total (Descending)

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Open Expenditures

Entire Ledger
$57.7 billion - 100.0% of all

$57.7 Billion Entire Ledger 2015

Spending Summary Checkbook

Entire Ledger broken down by Cabinet/Secretariat

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Department	155
Appropriation Type	15
Appropriation Name	2368
Object Class	20
Object Code	358
Vendor	36167
Zip Code	3446

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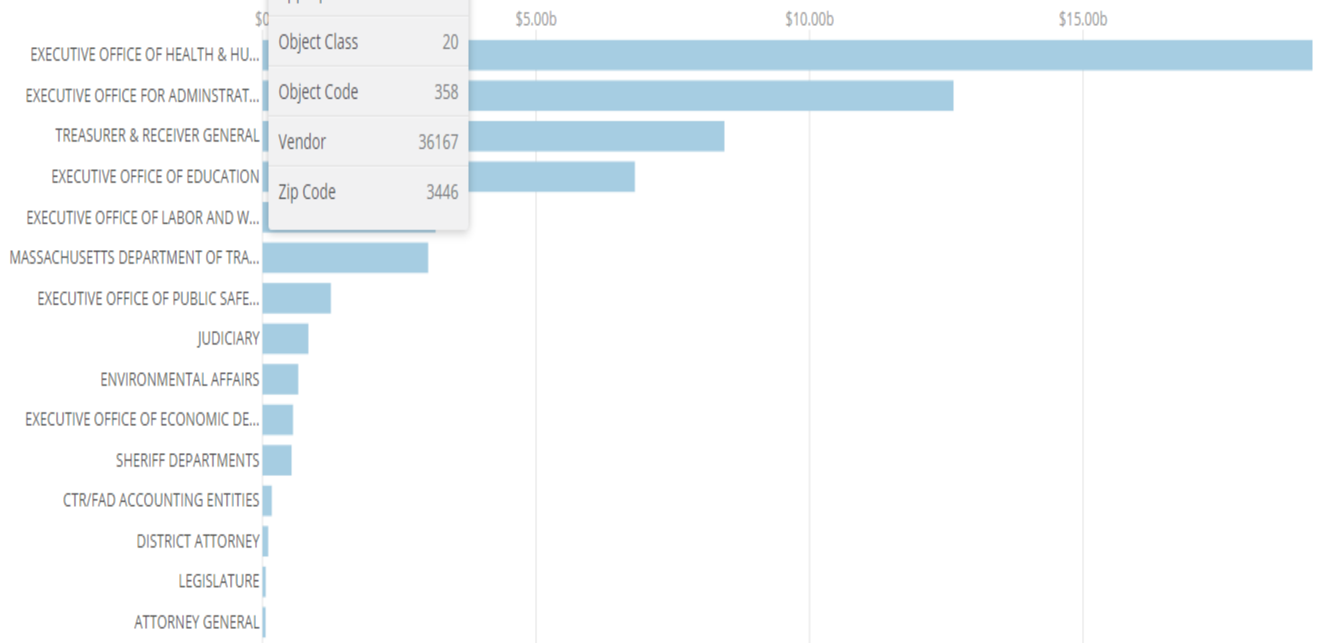

Snapshot

Pie Chart

Over Time

Show As

$ %

Sort

Total (Descending)

Showing 1 - 15 of 30

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Open Expenditures

Entire Ledger
$57.7 billion - 100.0% of all

Cabinet/Secretariat
EXECUTIVE OFFICE OF HEALTH & H...
$19.2 billion - 33.3% of all

$19.2 Billion EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES 2015

Spending Summary Checkbook

EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES broken down by Department

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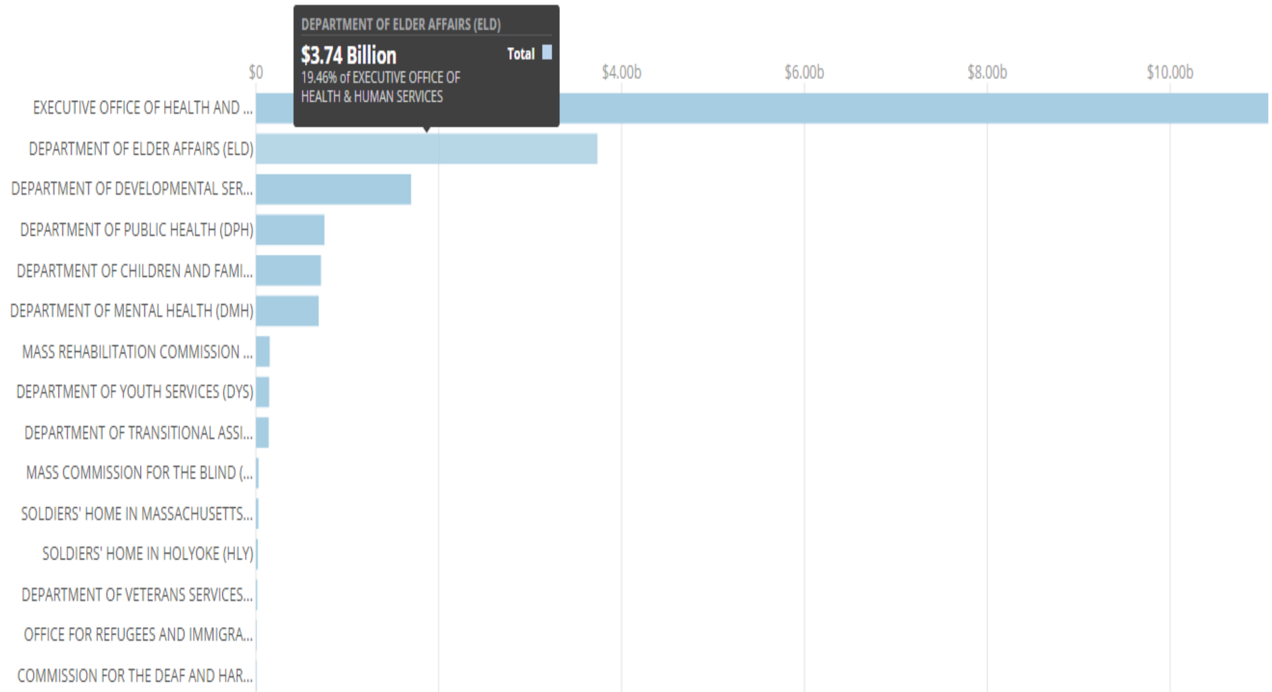

Snapshot
Pie Chart
Over Time

Show As
$ %

Sort
Total (Descending)

Open Expenditures

Entire Ledger
$57.7 billion - 100.0% of all

Cabinet/Secretariat
EXECUTIVE OFFICE OF HEALTH & H...
$19.2 billion - 33.3% of all

Department
DEPARTMENT OF ELDER AFFAIRS (ELD)
$3.74 billion - 6.5% of all

$3.74 Billion DEPARTMENT OF ELDER AFFAIRS (ELD) 2015

Spending Summary Checkbook

DEPARTMENT OF ELDER AFFAIRS (ELD) broken down by Appropriation Type

Within EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES

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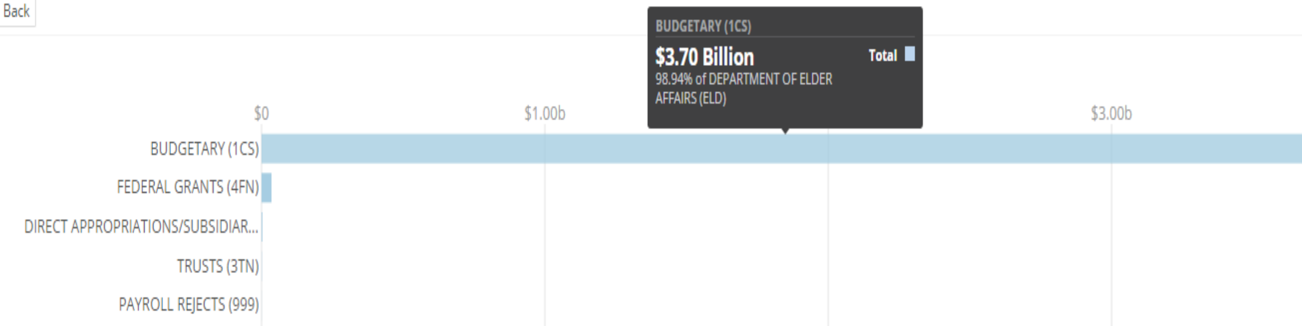

Snapshot

Pie Chart

Over Time

Show As

$ %

Sort

Total (Descending)

Commonwealth of Massachusetts

CTHRU Open Payroll

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Open Expenditures

Entire Ledger
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$19.2 billion - 33.3% of all

Department
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Appropriation Type
BUDGETARY (1CS)
$3.70 billion - 6.4% of all

$3.70 Billion BUDGETARY (1CS) 2015

Spending Summary Checkbook

BUDGETARY (1CS) broken down by Appropriation Name

Within EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES and DEPARTMENT OF ELDER AFFAIRS (ELD)

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Snapshot

Pie Chart

Over Time

Show As

$ %

Sort

Total (Descending)

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Open Expenditures

Entire Ledger
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EXECUTIVE OFFICE OF HEALTH & H...
$19.2 billion - 33.3% of all

Department
DEPARTMENT OF ELDER AFFAIRS (ELD)
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Appropriation Type
BUDGETARY (1CS)
$3.70 billion - 6.4% of all

Appropriation Name
PROTECTIVE SERVICES (91101636)
$22.4 million - 0.0% of all

$22.4 Million PROTECTIVE SERVICES (91101636) 2015

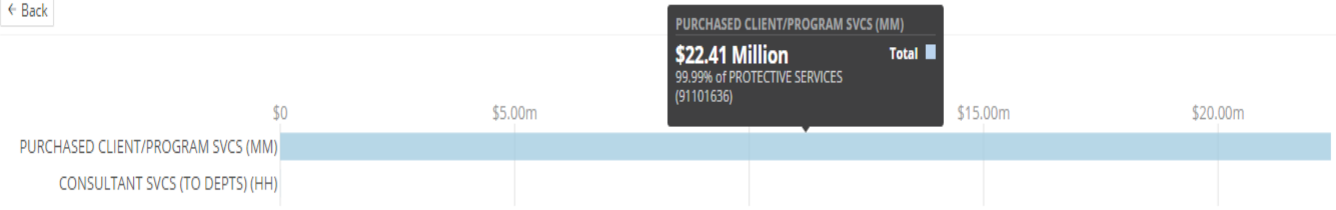
Spending Summary Checkbook

PROTECTIVE SERVICES (91101636) broken down by Object Class

Within EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES, DEPARTMENT OF ELDER AFFAIRS (ELD) and BUDGETARY (1CS)

Share

Back



Snapshot

Pie Chart

Over Time

Show As

$ %

Sort

Total (Descending)

Open Expenditures

Entire Ledger
$57.7 billion - 100.0% of all

Cabinet/Secretariat
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Appropriation Name
PROTECTIVE SERVICES (91101636)
$22.4 million - 0.0% of all

Object Class
PURCHASED CLIENT/PROGRAM SVCS ...
$22.4 million - 0.0% of all

$22.4 Million PURCHASED CLIENT/PROGRAM SVCS (MM) 2015

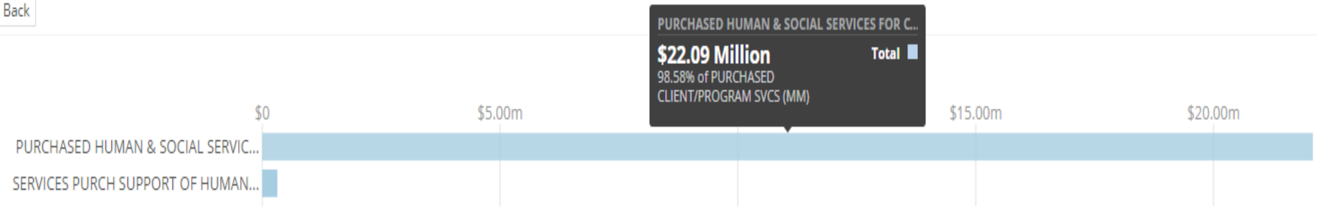
Spending Summary Checkbook

PURCHASED CLIENT/PROGRAM SVCS (MM) broken down by Object Code

Share

Within EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES, DEPARTMENT OF ELDER AFFAIRS (ELD), BUDGETARY (1CS) and PROTECTIVE SERVICES (91101636)

Back



Snapshot
Pie Chart
Over Time

Show As
$ %

Sort
Total (Descending)

Open Expenditures

Entire Ledger
$57.7 billion - 100.0% of all

Cabinet/Secretariat
EXECUTIVE OFFICE OF HEALTH & H...
$19.2 billion - 33.3% of all

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DEPARTMENT OF ELDER AFFAIRS (ELD)
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BUDGETARY (1CS)
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Appropriation Name
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$22.4 million - 0.0% of all

Object Class
PURCHASED CLIENT/PROGRAM SVCS ...
$22.4 million - 0.0% of all

Object Code
PURCHASED HUMAN & SOCIAL SERVI...
$22.1 million - 0.0% of all

$22.1 Million PURCHASED HUMAN & SOCIAL SERVICES FOR CLIENTS/NON MEDICAL (M03) 2015

Spending Summary Checkbook

PURCHASED HUMAN & SOCIAL SERVICES FOR CLIENTS/NON MEDICAL (M03) broken down by Vendor

Share

Within EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES, DEPARTMENT OF ELDER AFFAIRS (ELD), BUDGETARY (1CS), PROTECTIVE SERVICES (91101636) and PURCHASED CLIENT/PROGRAM SVCS (MM)

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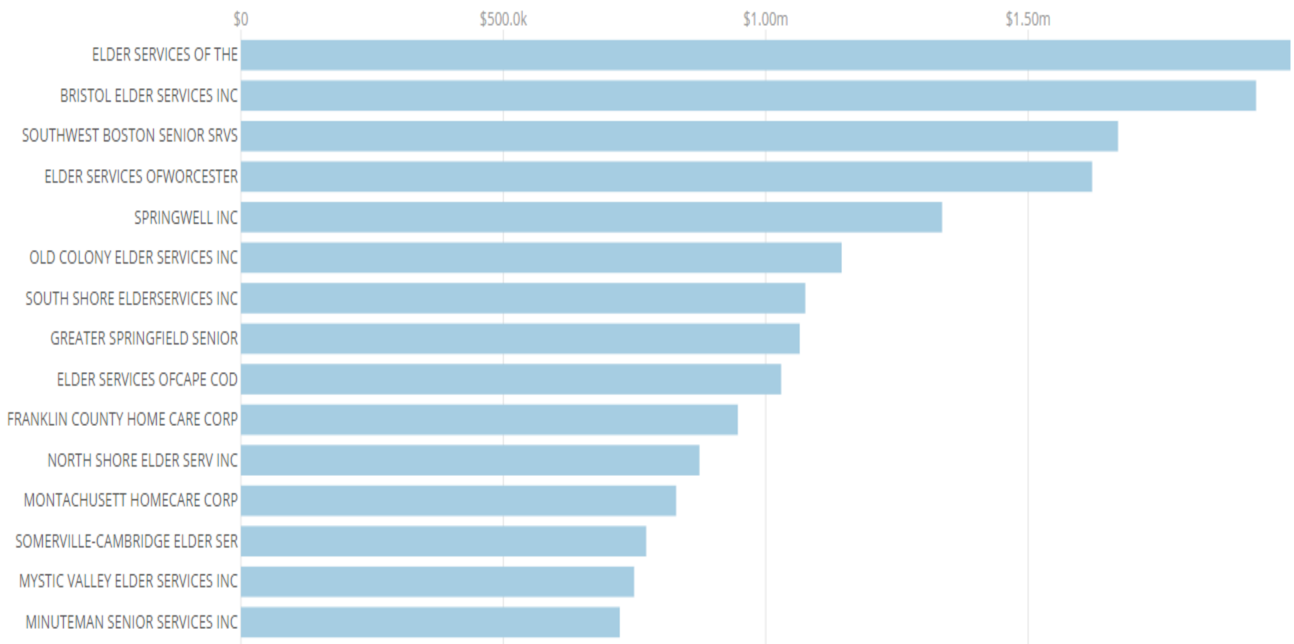

Snapshot
Pie Chart
Over Time

Show As
$ %

Sort
Total (Descending)

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Open Expenditures

Entire Ledger
$57.7 billion - 100.0% of all

Cabinet/Secretariat
EXECUTIVE OFFICE OF HEALTH & H...
$19.2 billion - 33.3% of all

Department
DEPARTMENT OF ELDER AFFAIRS (ELD)
$3.74 billion - 6.5% of all

Appropriation Type
BUDGETARY (1CS)
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Appropriation Name
PROTECTIVE SERVICES (91101636)
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Object Class
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$22.1 Million PURCHASED HUMAN & SOCIAL SERVICES FOR CLIENTS/NON MEDICAL (M03) 2015

Spending Summary Checkbook

PURCHASED HUMAN & SOCIAL SERVICES FOR CLIENTS/NON MEDICAL (M03) broken down by Vendor

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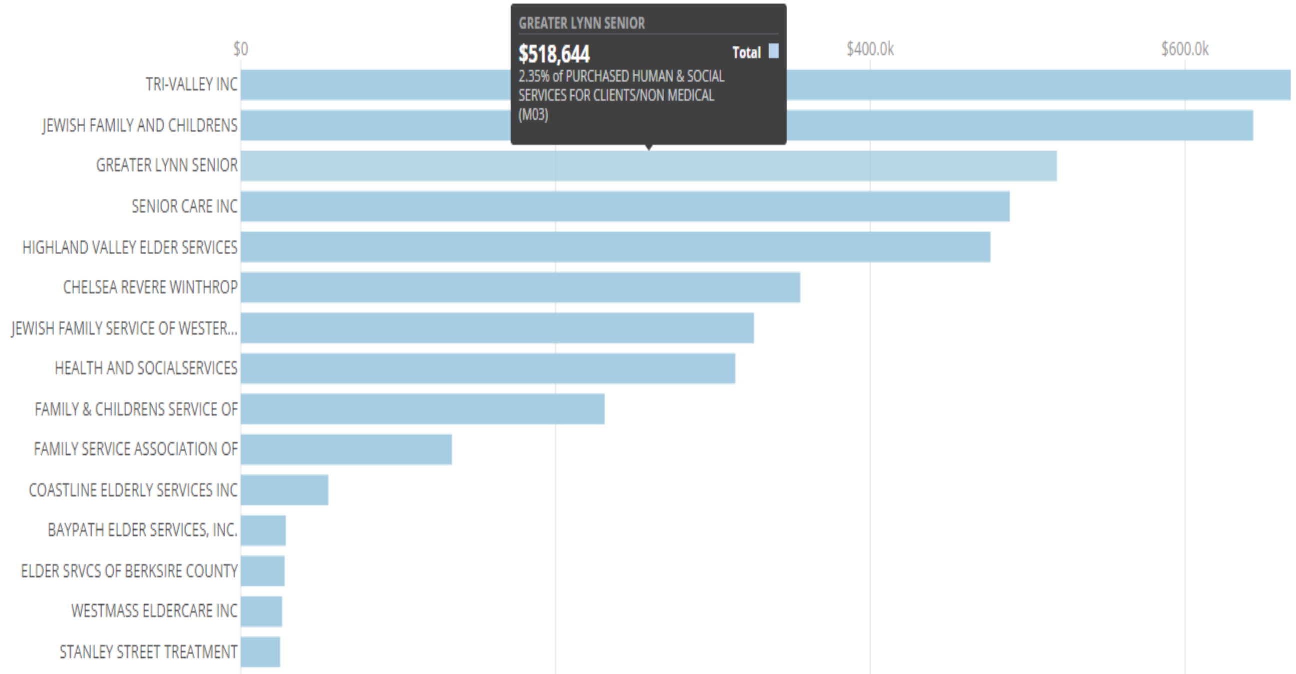
Within EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES, DEPARTMENT OF ELDER AFFAIRS (ELD), BUDGETARY (1CS), PROTECTIVE SERVICES (91101636) and PURCHASED CLIENT/PROGRAM SVCS (MM)

Back



Snapshot
Pie Chart
Over Time

Show As
$ %

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Total (Descending)

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Open Expenditures

Entire Ledger
$57.7 billion - 100.0% of all

Cabinet/Secretariat
EXECUTIVE OFFICE OF HEALTH & H...
$19.2 billion - 33.3% of all

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$22.1 million - 0.0% of all

$518,644 GREATER LYNN SENIOR 2015

Spending Summary Checkbook

GREATER LYNN SENIOR

Within EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES, DEPARTMENT OF ELDER AFFAIRS (ELD), BUDGETARY (1CS), PROTECTIVE SERVICES (91101636), PURCHASED CLIENT/PROGRAM SVCS (MM) and PURCHASED HUMAN & SOCIAL SERVICES FOR CLIENTS/NON MEDICAL (M03)

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Payments Over Time

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Fiscal Period

Payment BreakDown 2015

By Zip Code

Other Agencies Using GREATER LYNN SENIOR

Vendor	Agency	Top Expense Category	Amount
GREATER LYNN SENIOR SERVICES	Federal Contracts Explorer	Q999: MEDICAL- OTHER	$263,915.00

Open Expenditures

Entire Ledger
$57.7 billion - 100.0% of all

Cabinet/Secretariat
EXECUTIVE OFFICE OF HEALTH & H...
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Vendor
GREATER LYNN SENIOR

$518,644 GREATER LYNN SENIOR 2015

Spending Summary | Checkbook

GREATER LYNN SENIOR

Checkbook

Filtered by EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES, DEPARTMENT OF ELDER AFFAIRS (ELD), BUDGETARY (1CS), PROTECTIVE SERVICES (91101636), PURCHASED CLIENT/PROGRAM SVCS (MM) and PURCHASED HUMAN & SOCIAL SERVICES FOR CLIENTS/NON MEDICAL (M03)

Total $518,644.20 | Transactions 20 | Download

Back

	Vendor	Department	Appropriation	Payment Date	Amount	Payment ID
	GREATER LYNN SENIOR	DEPARTMENT OF ELDER AFFAIRS (ELD)	PROTECTIVE SERVICES (91101636)	Jul 3, 2015	$40,785.84	07011500000000000346
	GREATER LYNN SENIOR	DEPARTMENT OF ELDER AFFAIRS (ELD)	PROTECTIVE SERVICES (91101636)	Jul 2, 2015	$3,174.60	06301500000000122343
	GREATER LYNN SENIOR	DEPARTMENT OF ELDER AFFAIRS (ELD)	PROTECTIVE SERVICES (91101636)	Jun 9, 2015	$39,683.52	06051500000000112615
	GREATER LYNN SENIOR	DEPARTMENT OF ELDER AFFAIRS (ELD)	PROTECTIVE SERVICES (91101636)	Jun 9, 2015	$38,245.01	06051500000000112822
	GREATER LYNN SENIOR	DEPARTMENT OF ELDER AFFAIRS (ELD)	PROTECTIVE SERVICES (91101636)	May 7, 2015	$7,317.55	05051500000000101622
	GREATER LYNN SENIOR	DEPARTMENT OF ELDER AFFAIRS (ELD)	PROTECTIVE SERVICES (91101636)	Apr 17, 2015	$1,111.55	04151500000000095368
	GREATER LYNN SENIOR	DEPARTMENT OF ELDER AFFAIRS (ELD)	PROTECTIVE SERVICES (91101636)	Apr 1, 2015	$52,911.36	03301500000000089564
	GREATER LYNN SENIOR	DEPARTMENT OF ELDER AFFAIRS (ELD)	PROTECTIVE SERVICES (91101636)	Mar 16, 2015	$3,726.91	03121500000000083806
	GREATER LYNN SENIOR	DEPARTMENT OF ELDER AFFAIRS (ELD)	PROTECTIVE SERVICES (91101636)	Mar 6, 2015	$52,543.92	03041500000000080551

Open Expenditures

EXECUTIVE OF OFFICE OF HEALTH & H...
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Vendor
GREATER LYNN SENIOR
$518,644 - 0.0% of all

$518,644 GREATER LYNN SENIOR 2015

Spending Summary Checkbook

GREATER LYNN SENIOR

Payment Detail

Back to Checkbook

GREATER LYNN SENIOR

EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES

$39,683.52

Zip Code
01901

Fund
GENERAL FUND

Date: 6/9/2015
ID: GREATER LYNN SENIOR

Additional Details

Fiscal Year
2015

Date
6/9/2015

Vendor
GREATER LYNN SENIOR

Date
6/9/2015

Amount
$39,683.52

Payment Reference
060515000000000112615

Commonwealth of Massachusetts

CTHRU Open Payroll

Search

CTHRU Open Expenditures

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greater lynn

GREATER LYNN SENIOR Vendor

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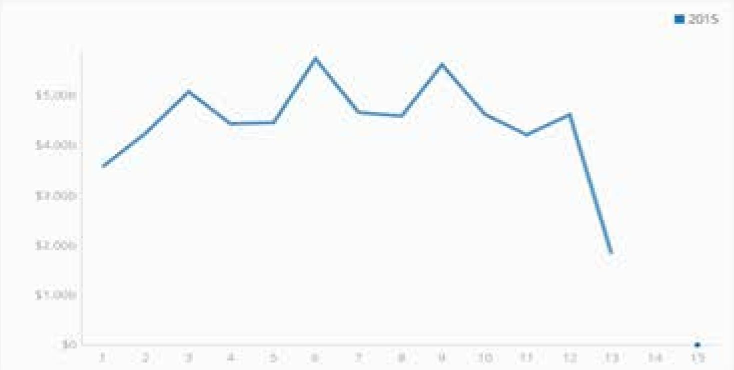
Explore All Spending



Top Department
$11.07 Billion
EXECUTIVE OFFICE OF HEALTH AND HUMAN...

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Show Chart

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EOL - SUMMARY TRUST PAYMENT

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3. RETIREMENT ALLOWANCE-TEACHERS
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Show Chart

Top Object Class
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BENEFIT PROGRAMS (RR)

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4. REGULAR EMPLOYEE COMPENSATION (AA)
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Show Chart

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Comptroller Web Site   View Data in Worksheet

Open Expenditures

Entire Ledger
$57.7 billion - 100.0% of all

Vendor
GREATER LYNN SENIOR

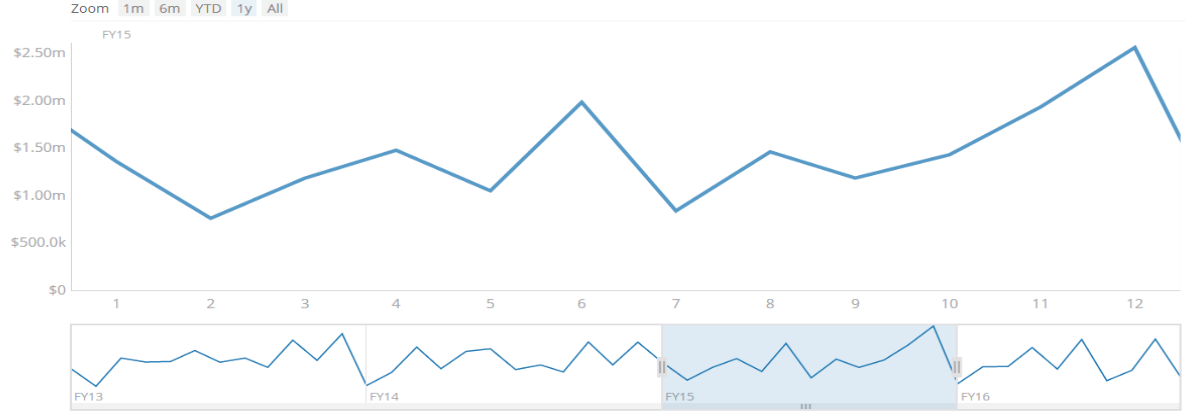
$17.2 Million GREATER LYNN SENIOR 2015

Spending Summary Checkbook

GREATER LYNN SENIOR

Back

Payments Over Time



Totals
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Table
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Fiscal Period

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By Cabinet/Secretariat

By Zip Code

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Vendor	Agency	Top Expense Category	Amount
GREATER LYNN SENIOR SERVICES	Federal Contracts Explorer	Q999: MEDICAL- OTHER	$263,915.00

CTHRU

Questions?

HR/CMS Upgrade: Preview of Coming Attractions or Potential New Features*

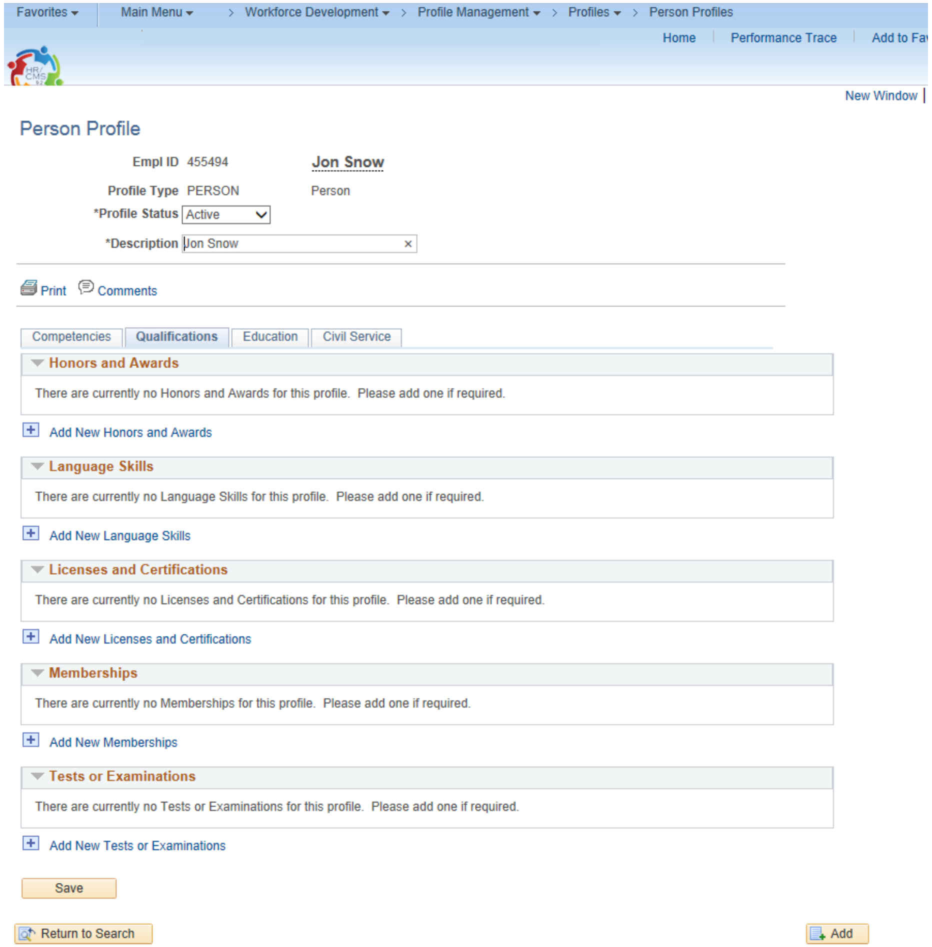
- Option to have new look and feel
- New State Withholding Self-Service (M4)
- Mobile Compatibility
- New Alerts and Approval notifications for managers

 * Actual enhancements subject to approval

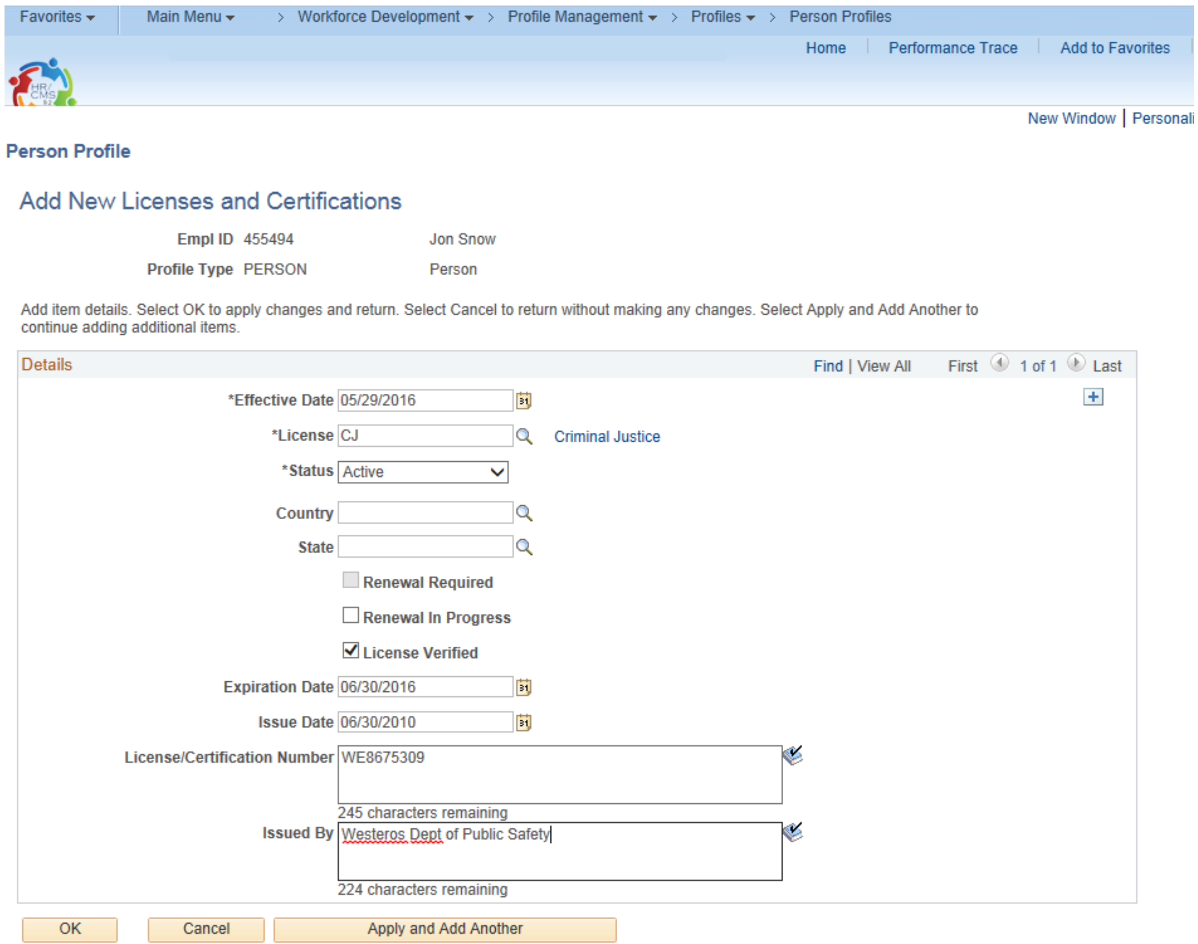
HR/CMS Person Profiles

- HR/CMS v9.2 includes Person Profiles
- Allows departments to enter pertinent employee information in the following categories:
  - Licenses
  - Memberships
  - Education
- Licenses/Memberships entered with expiration dates will alert employees and managers 60 days prior to expiration

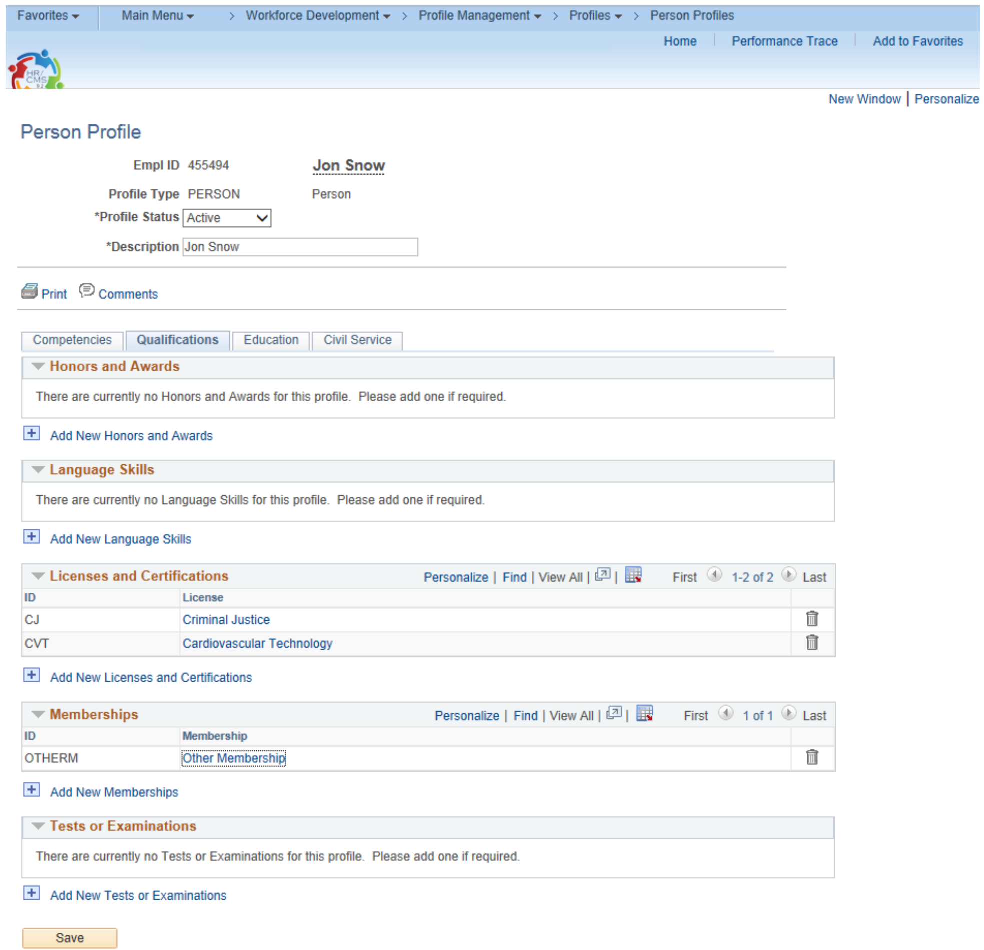
Core User Data Entry



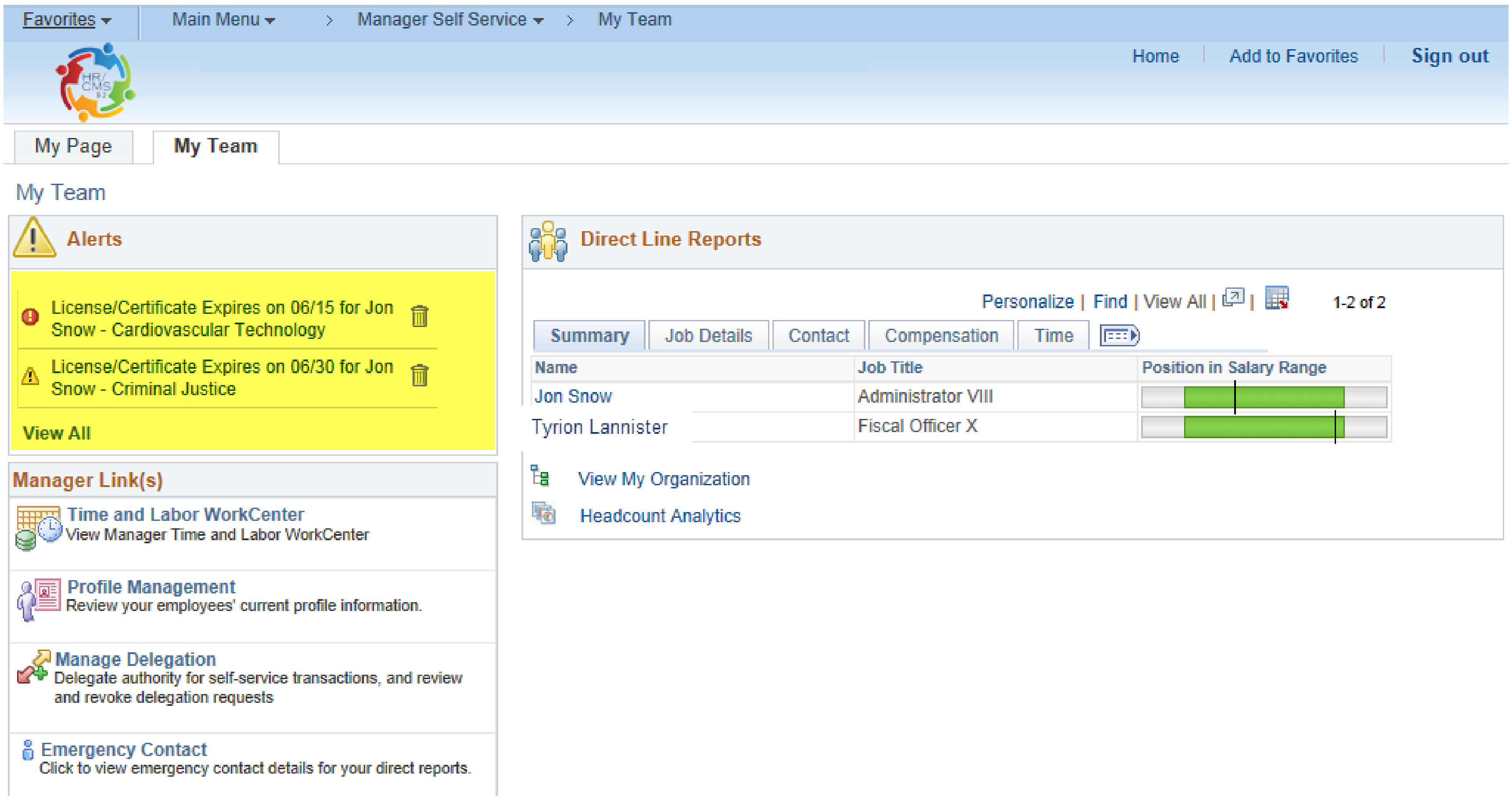
Click Add New Licenses and Certifications



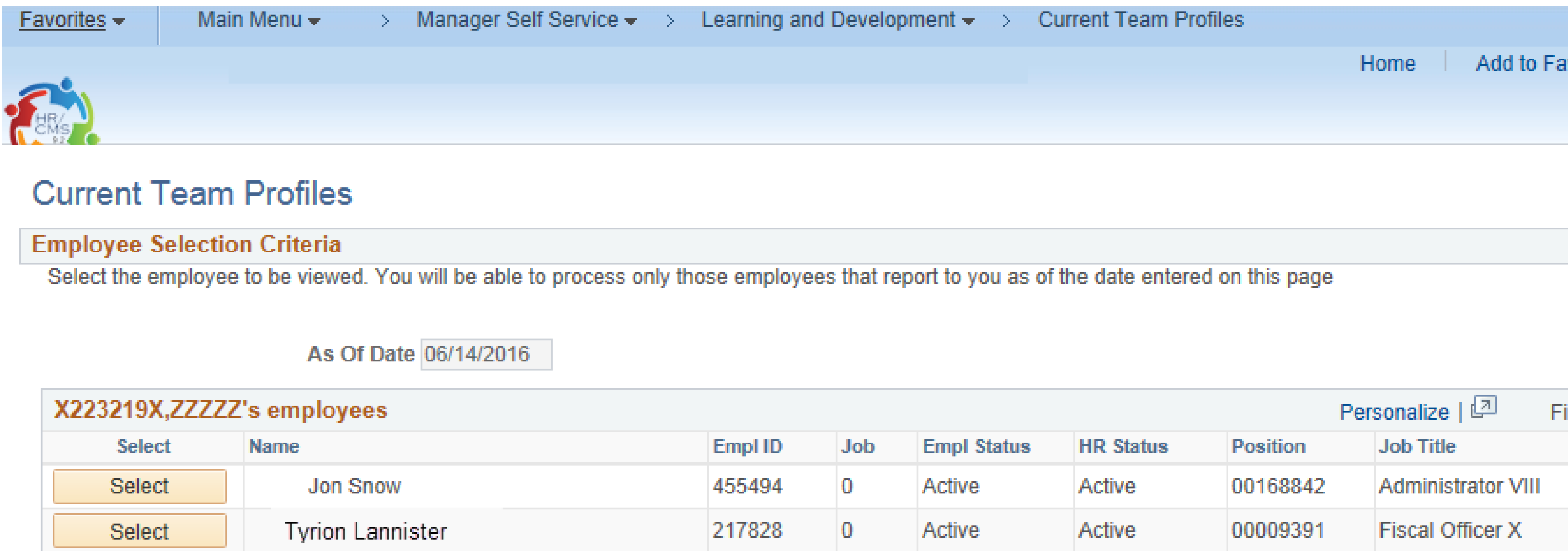
Employees and Managers do not have access to view Competencies



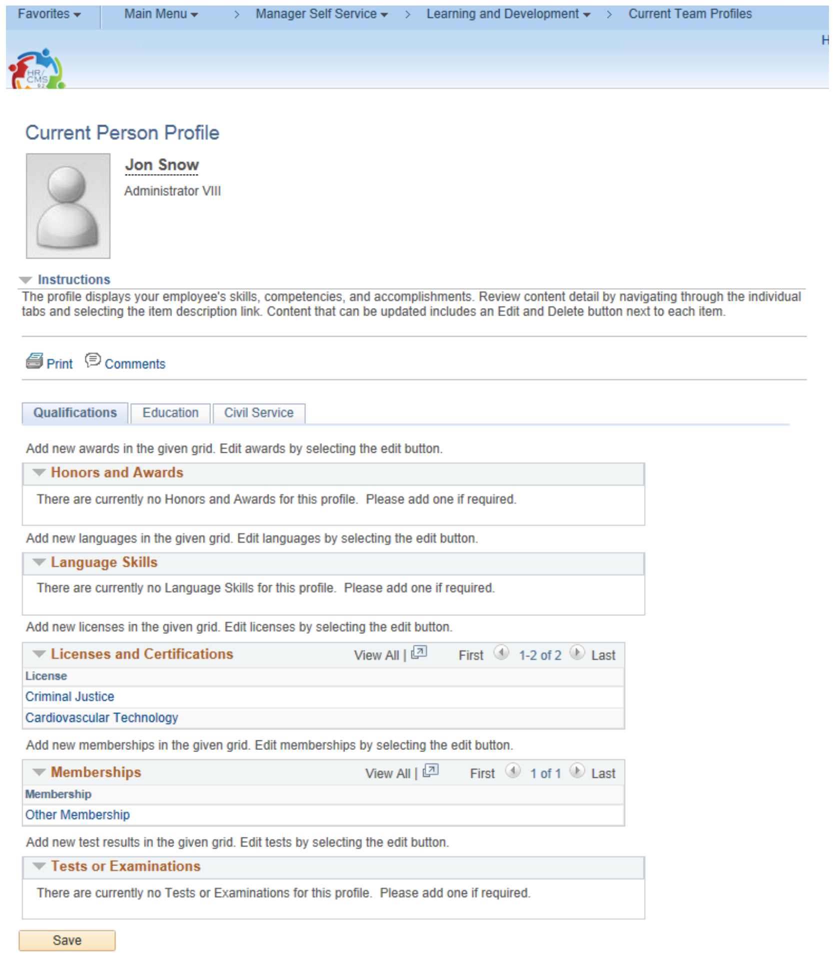
Manager View of Alerts



MGR Click on Profile Management

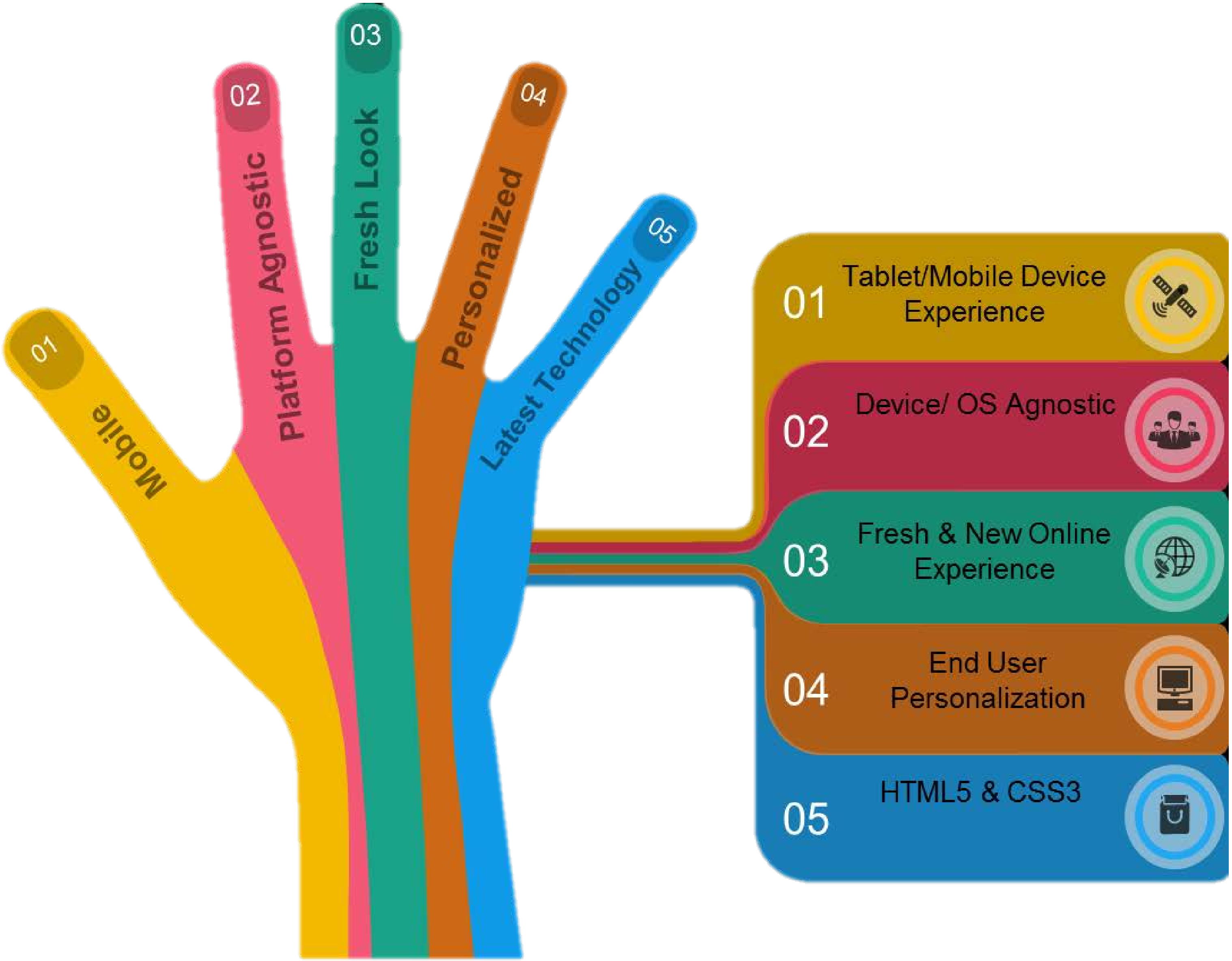


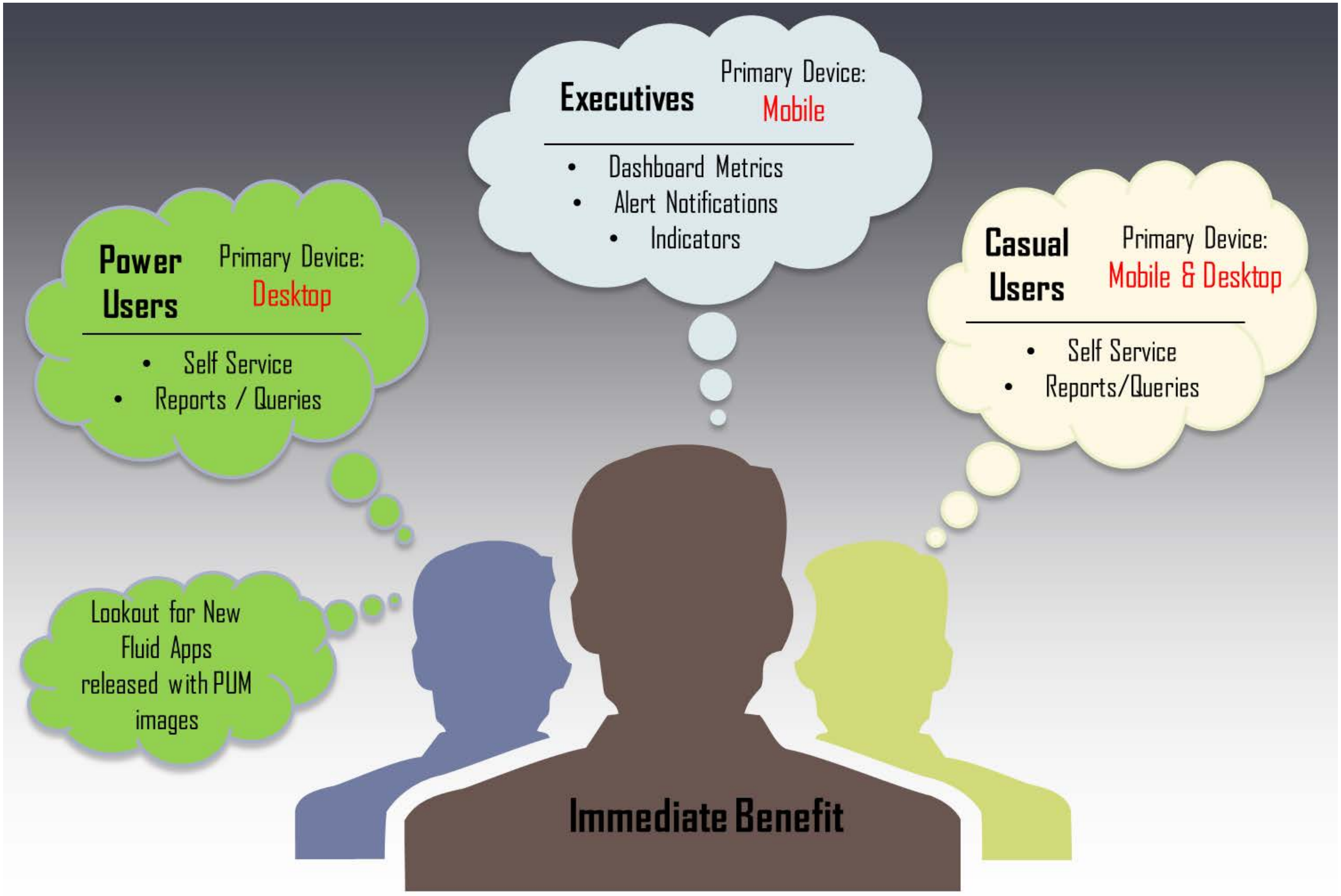
Click on Select next to employee



Functionality	Benefits
Company Directory	This feature is already demonstrated and can be very useful in getting hierarchical information and also some level of HR information (department, location etc). There is now also a mobile version of this which can provide a lot of gain for users accessing the system on internet to get directory information for others within commonwealth.
Overtime Request	This functionality can replace the current paper based overtime request process. This will provide better audit and workflow functionality
Automated Forms (ECF)	This was demonstrated during fit/gap and can be used to automate some of the functionality of the paper based ECF. Appropriate workflow and attachment functionality can be created based on different departments using it. This can boost productivity, auditability and reduce paper
Life events (eBen)	This can be useful to provide a guide to employees on what all steps they need to go through when going through a life event. This was demoed during the FIT/GAP. We can configure this to route to GIC for enrollment but other steps can be within peoplesoft like changing payroll related, emergency contact info. This can be a great usability feature
Open up profile so employees and manager can record information directly with agency core user approval	There is inbuilt workflow in profile for approval. Instead of agency users doing all the data entry for education/qualification, they can just be the approval step to validate documents. This is how other companies use it and the data remains fluid and useful for workforce planning.
FMLA administration	Use the delivered FMLA request and tracking functionality. This can replace the current manual process.
Using smart HR functionality for job part users to create transaction based templates	This is also something that is catching on these days where templates of HR transaction can be created without providing access to job data panel. Users are provided limited data field entries based on the transaction being processed. Also some of the fields can be auto-populated based on the template and transaction used. This is big boost to productivity.

What is Fluid?




Executives
Primary Device:
Mobile
Dashboard Metrics
Alert Notifications
Indicators
Power Users
Primary Device:
Desktop
Self Service
Reports / Queries
Casual Users
Primary Device:
Mobile & Desktop
Self Service
Reports/Queries
Lookout for New Fluid Apps released with PUM images
Immediate Benefit

Intuitive Navigation

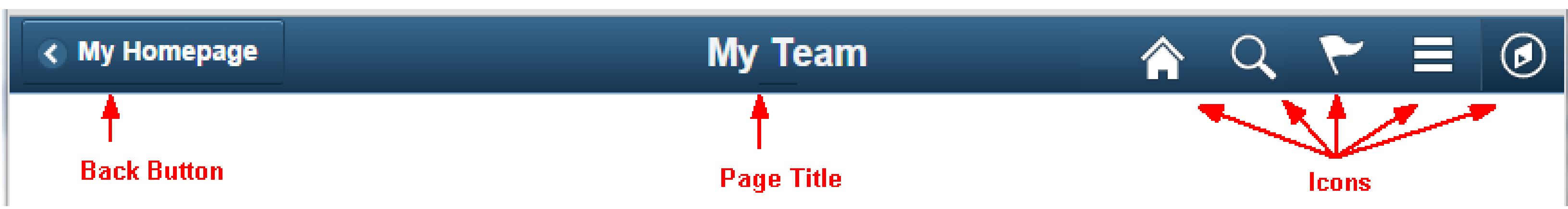
Banners

All fluid components should use the following standards to maintain a common look and feel.

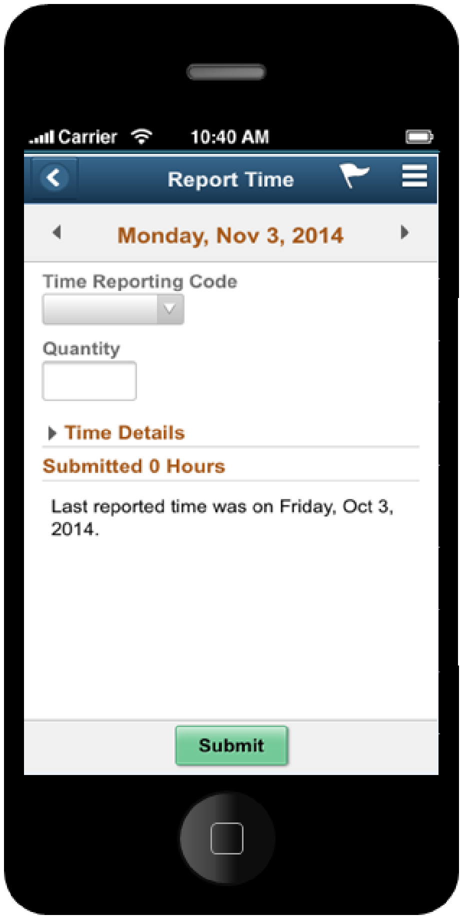
The banner of a fluid component can be divided into the following three areas:

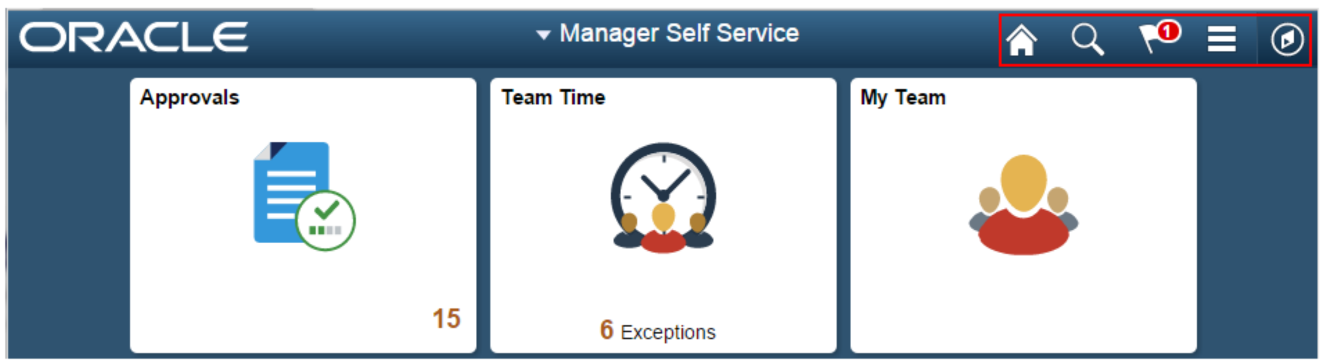
This section describes the use of icons in the following parts of a fluid application:

- Back Button
- Page Title (also referred to as the Banner Title)
- Icons

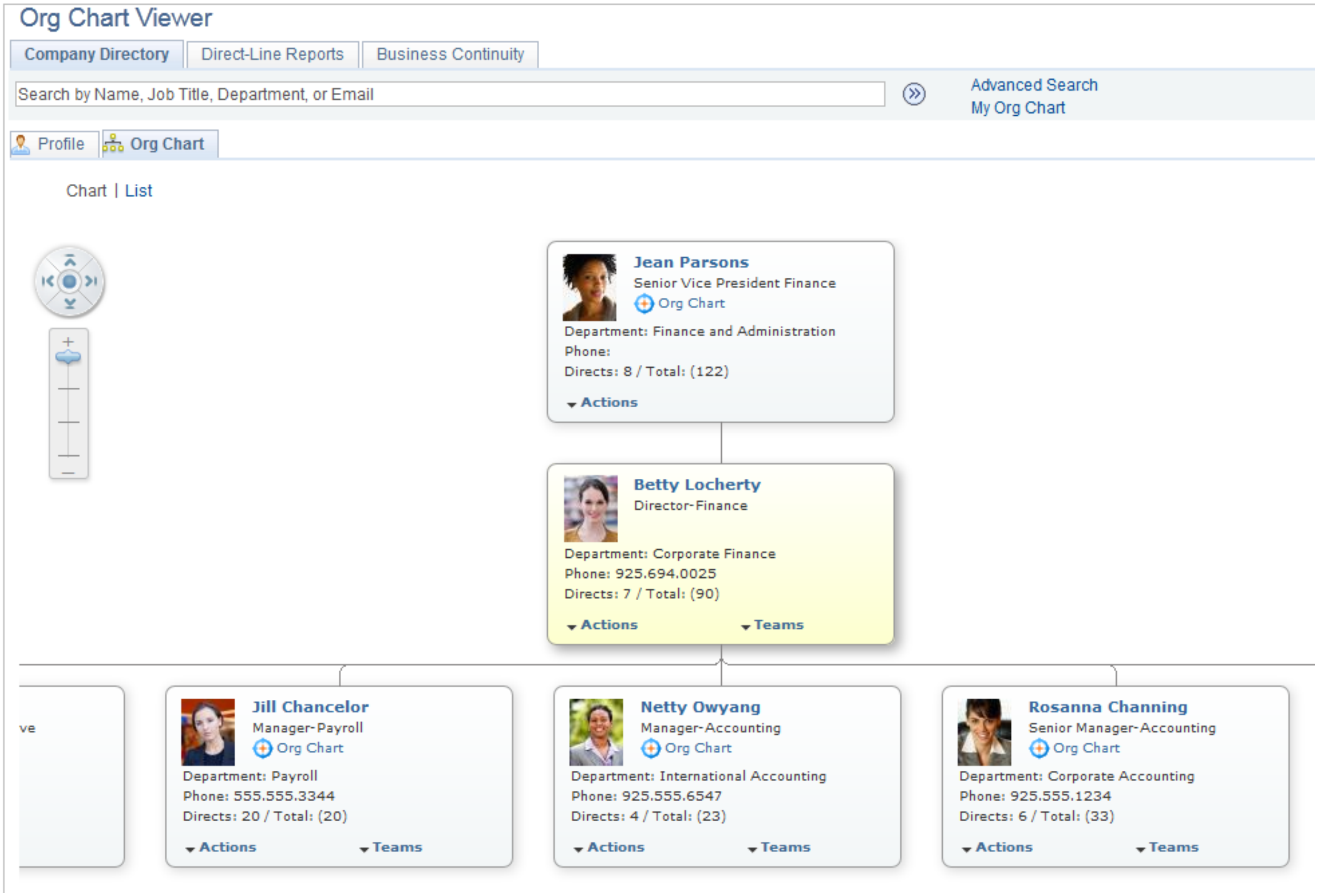


Fluid – Look and Feel



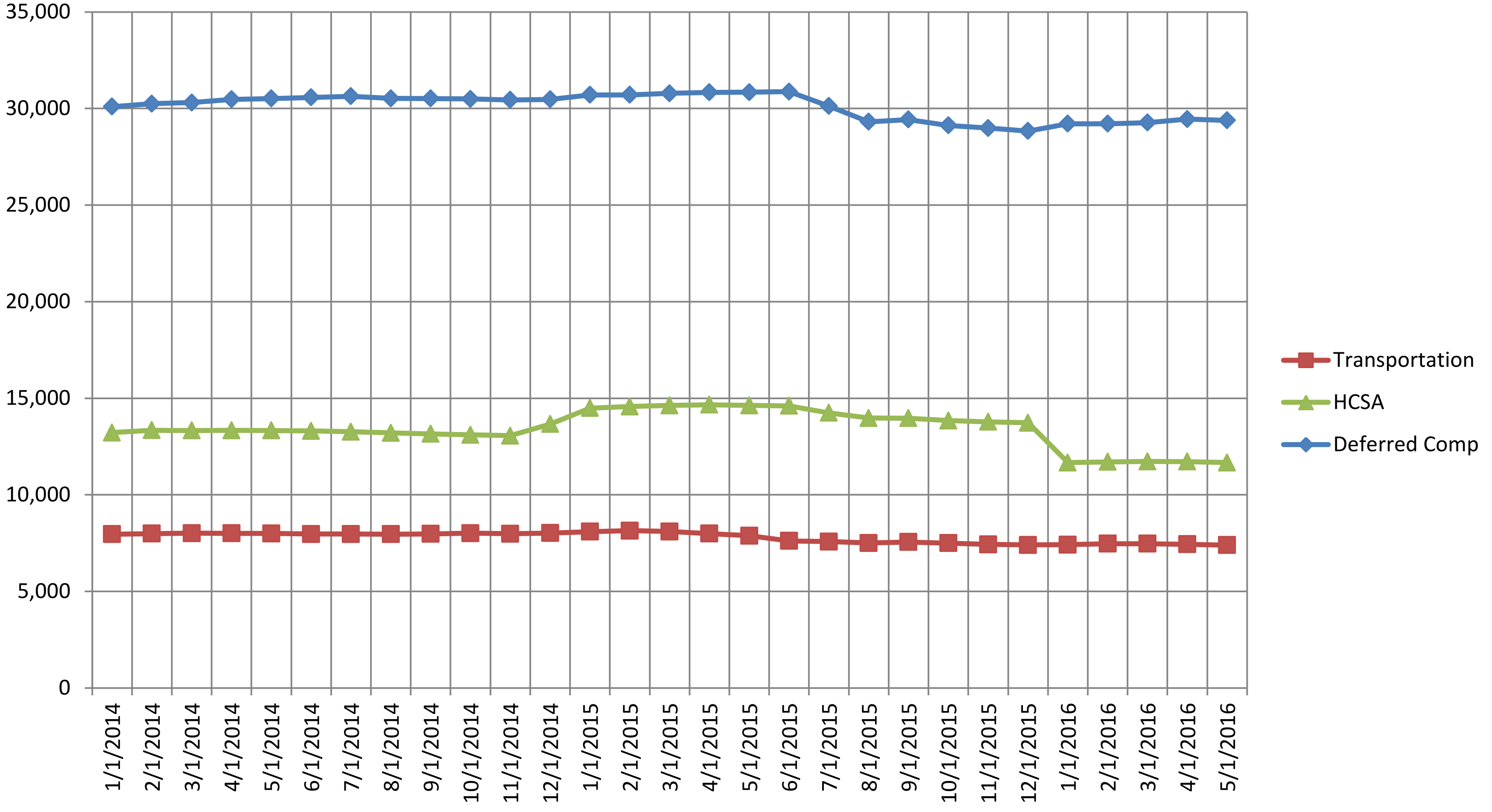


Organizational Charts

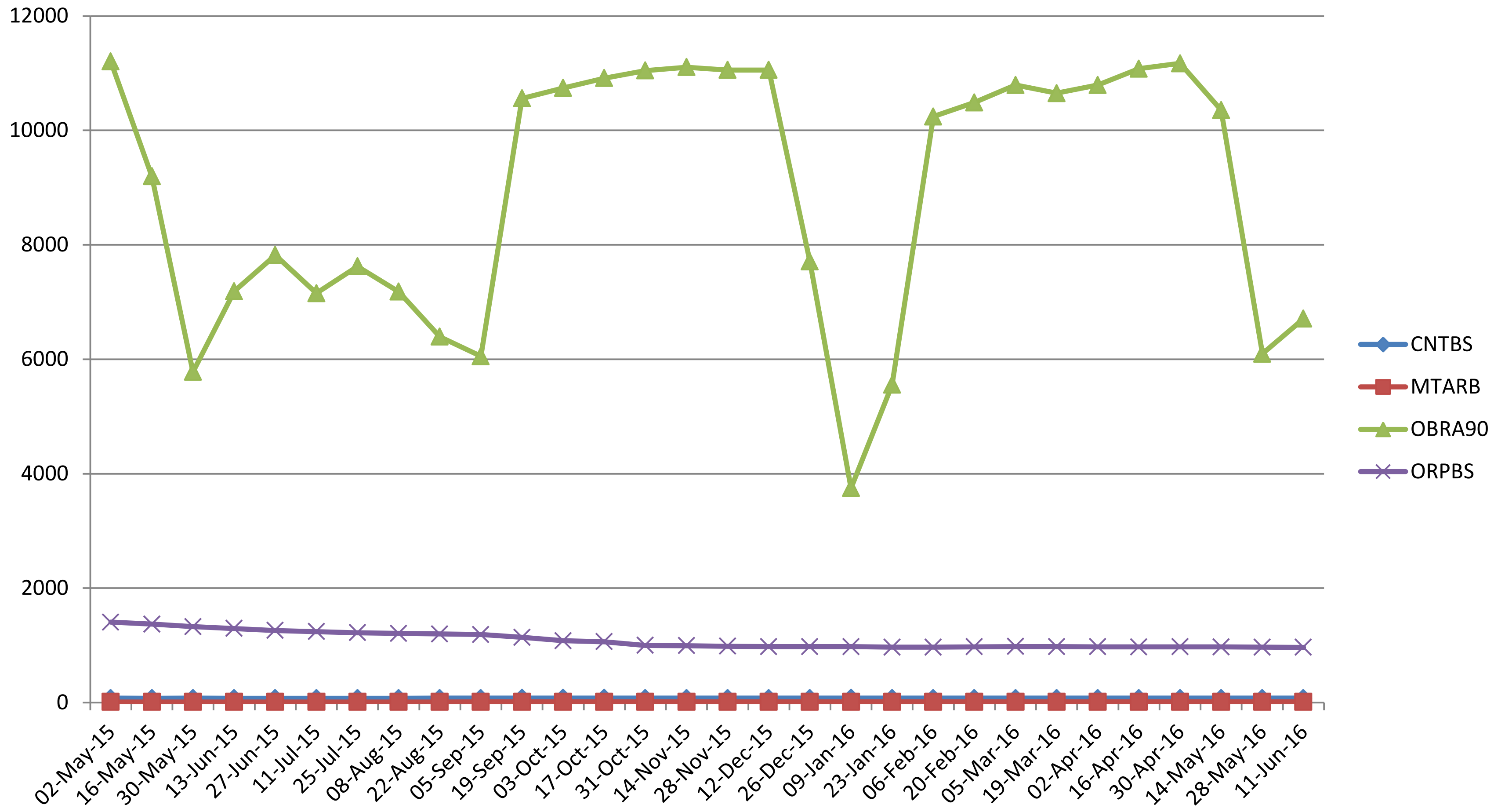



THAT'S THE
SEALIEST THING I'VE EVER HEARD

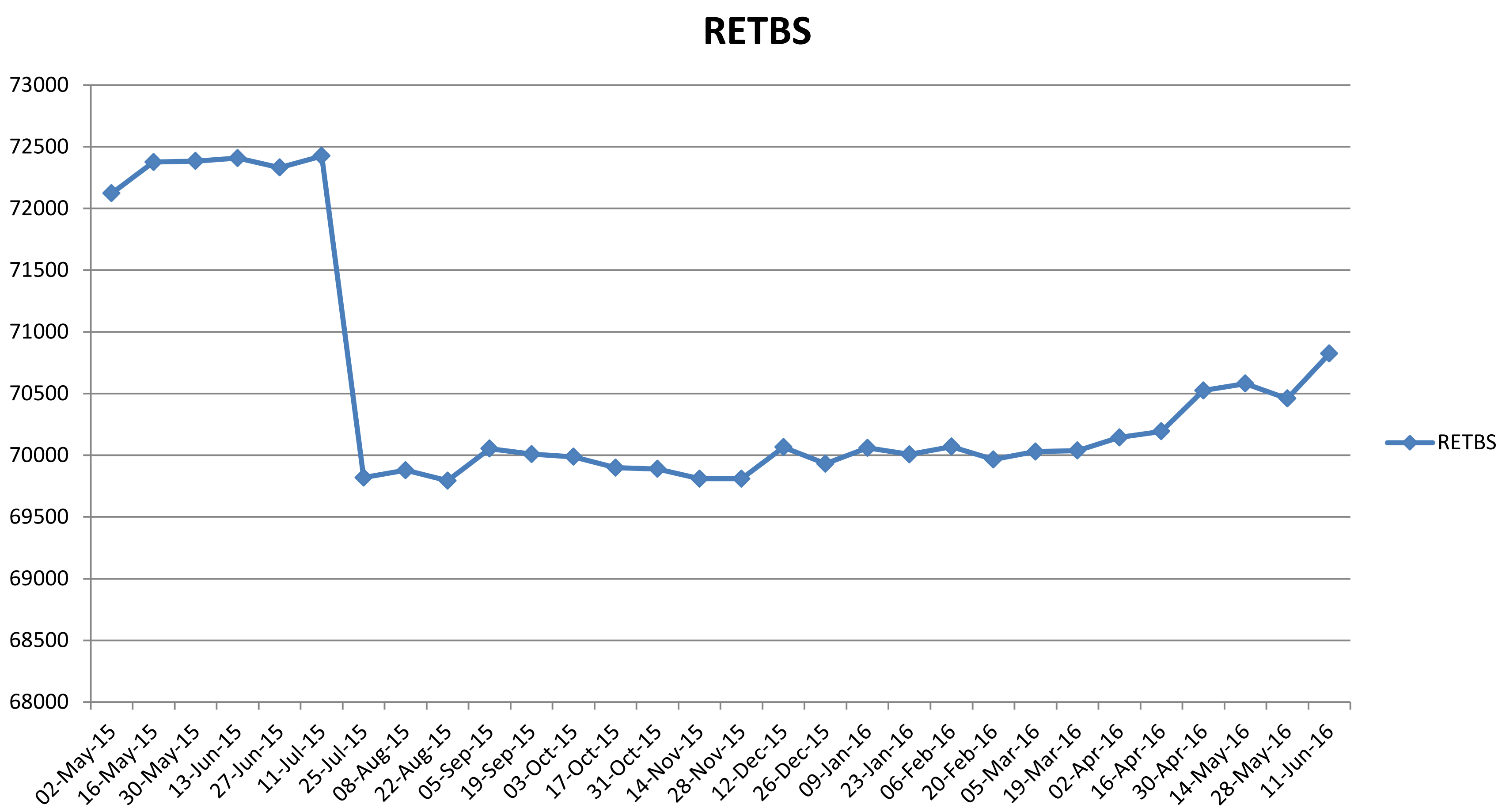
Employee Voluntary Pre-Tax Deduction Participation over last 29 Months



Retirement Deductions (non- RET)



State Retirement



Paperless Payroll

Segment of Government	# on Direct Deposit	Suppressed	% Suppressed
ATTORNEY GENERAL	557	555	100%
DISTRICT ATTORNEY	1,617	1,334	82%
ENVIRONMENTAL AFFAIRS	3,364	1,832	54%
EXECUTIVE OFFICE FOR ADMINSTRATION & FINANCE	3,224	3,036	94%
EXECUTIVE OFFICE OF ECONOMIC DEVELOPMENT	852	852	100%
EXECUTIVE OFFICE OF EDUCATION	17,105	15,367	90%
EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES	22,215	15,997	72%
EXECUTIVE OFFICE of LABOR and WORKFORCE DEVELOPMENT	1,353	1,341	99%
EXECUTIVE OFFICE OF PUBLIC SAFETY & HOMELAND SECURITY	9,029	6,694	74%
GOVERNOR	69	62	90%
JUDICIARY	7,290	2,680	37%
LEGISLATURE	958	306	32%
MASSACHUSETTS DEPARTMENT OF TRANSPORTATION	4,210	2,400	57%
MASSACHUSETTS GAMING COMMISSION	81	81	100%
OFFICE OF COMPTROLLER	126	126	100%
SECRETARY OF STATE	532	90	17%
SHERIFF DEPARTMENTS	6,352	4,551	72%
STATE AUDITOR	219	177	81%
TREASURER & RECEIVER GENERAL	655	649	99%
OTHER INDEPENDENT	244	109	45%
Grand Total	**80,052**	**58,239**	**73%**

Paperless Payroll

- Over 11,300 W-2's were suppressed for tax year 2015 …a 68% increase from 2014…but we still have a ways to go
- Need to create and promote the suppression of the ACA 1095-C forms
- At 98% compliance with Direct Deposit we are nearly "Checkless", but we still have pockets of high non-compliance
  - Look for route cause: improvements in onboarding may help compliance

Commonwealth of Massachusetts

HR Analytics
Payroll User Group
June 15, 2016

HR Analytics is taking Massachusetts from this…

A highly IT focused process to get HR information via queries:

```
SELECT dbo_wh_job.date_to_warehouse AS as_of, dbo_wh_job.department AS dept, dbo_wh_employees.last_name,
dbo_wh_employees.first_name, dbo_wh_job.key2_emplid AS EmpID, dbo_wh_job.key3_empl_rcd AS rcd, dbo_wh_employees.national_id
AS SSN, dbo_wh_employees.birthdate AS DOB, dbo_wh_job.hire_dt, dbo_wh_job.service_dt, dbo_wh_job.dept_entry_dt,
dbo_wh_job.ma_civsrv_dt, dbo_wh_job.ma_cert_nbr, dbo_wh_job.location AS loc, dbo_wh_job.mail_drop, dbo_wh_job.position_nbr AS
posn, dbo_wh_job.grade_entry_dt, dbo_wh_job.sal_admin_plan AS sal_plan, dbo_wh_job.grade, dbo_wh_job.step_entry_dt,
dbo_wh_job.step, dbo_wh_job.xref_action AS ACT, dbo_wh_job.action_reason AS RSN, dbo_wh_job.acct_cd, dbo_wh_job.union_cd AS
BU, dbo_ps_posn_data.ma_aces_eligible AS ACES, dbo_wh_employees.xref_ethnic_group AS eth, dbo_wh_employees.xref_sex AS sex,
dbo_wh_employees.xref_military_status AS vet, dbo_wh_job.jobcode, dbo_wh_job.description AS title,
dbo_ps_reports_to_supervisor.descr AS func, dbo_ps_reports_to_supervisor.supervisor_name,
dbo_ps_reports_to_supervisor.supervisor_emplid, dbo_ps_reports_to_supervisor.supervisor_emplid_rcd,
dbo_ps_reports_to_supervisor.supervisor_jobcode, dbo_ps_reports_to_supervisor.supervisor_descr, dbo_wh_job.ma_posn_type AS
ptype, dbo_wh_job.wh_calculated_fte AS FTE, dbo_wh_job.std_hours, dbo_wh_job.hourly_rt AS hrly, dbo_wh_job.comprate,
dbo_wh_job.annual_rt, dbo_wh_job.xref_empl_status AS stat
((dbo_wh_job LEFT JOIN dbo_ps_reports_to_supervisor ON dbo_wh_job.key2_emplid = dbo_ps_reports_to_supervisor.key2_emplid) LEFT
JOIN dbo_ps_posn_data ON dbo_wh_job.position_nbr = dbo_ps_posn_data.key2_position_nbr) LEFT JOIN dbo_wh_employees ON
dbo_wh_job.key2_emplid = dbo_wh_employees.key2_emplid
WHERE (((dbo_wh_job.department)="ALA") AND ((dbo_wh_job.action_reason)<>"RT") AND ((dbo_wh_job.xref_empl_status) In
("L","P","S")))
ORDER BY dbo_wh_job.date_to_warehouse, dbo_wh_job.department, dbo_wh_employees.last_name, dbo_wh_employees.first_name,
dbo_wh_job.key2_emplid, dbo_wh_job.key3_empl_rcd, dbo_wh_employees.national_id, dbo_wh_employees.birthdate DESC ,
dbo_wh_job.hire_dt;
```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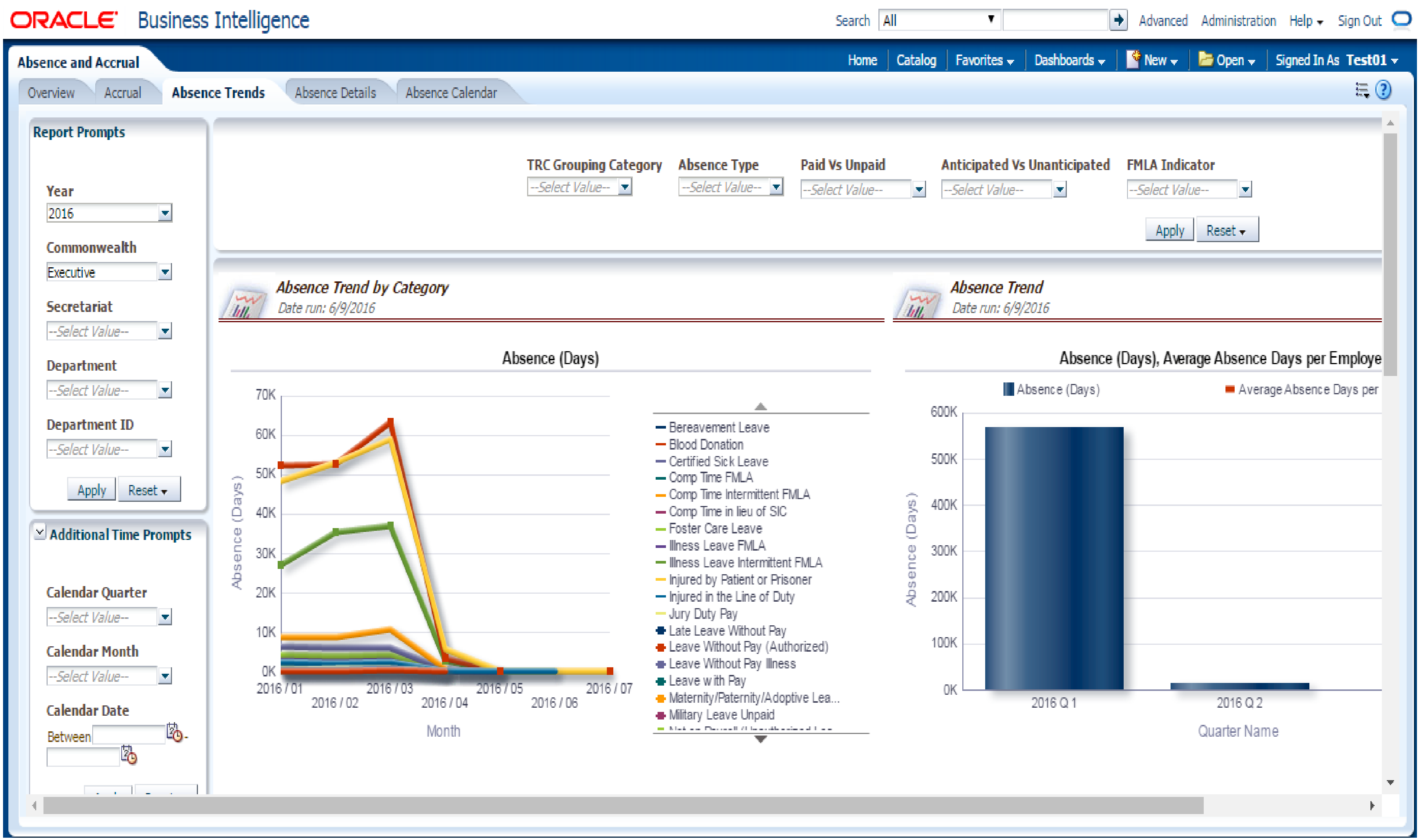
…to this!



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Objectives of this Session

- Provide introduction to HRD's HR Analytics initiative
- Provide overview of HR Analytics subject areas: Workforce, Absence, Recruitment, Retention, and Compensation subject areas

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HR Analytics Introduction

Background

- Basic information critical to managing workforce to deliver and support program/service delivery is difficult to access and requires specialized skills

Project Objective

- Provide the Commonwealth with enhanced capability to use data and analysis to better manage human resources and to enable higher performing and more cost-effective delivery of programs and services
- Supports Commonwealth's commitment to using data and analysis to inform business

Details

- Leverage HR Analytics product
- Prebuilt reports and analytics that align with HR Data
- Integrates with HR/CMS, and MassCareers, and Labor Cost Management (LCM)

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Secretariat Participation in HR Analytics Design & Development

Commonwealth-Wide Initiative

Secretariat and Agency Participation in HR Analytics

- **Human Resources Advisory Council (HRAC):** Existing, cross-Secretariat HR advisory forum who have served as HR Analytics project advisors and liaisons to Secretariats
- **Business Champions:** Business users from across the Secretariats who participated in development activities to validate report design and advise on other project topics, e.g. rollout strategy
- **Data Champions:** Advanced data users involved in detailed design and development activities, validating reports, data, and filters for accuracy and completeness

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HR Analytics Subject Areas

Utilizing tool's reporting capabilities across the following subject areas:

Workforce	Provides a core data foundation for HR reporting and analysis for headcount, demographics, headcount movement, etc.	*What is the profile of my workforce and how is it changing over time?*
Absence	Displays multiple views of absenteeism, enabling HR reporting and analysis on patterns of sick leave, vacation usage, and lost productivity at an organizational and employee level	*Are there patterns to absenteeism that need to be addressed?*
Recruitment	Provides multiple views of recruitment metrics to measure the efficiency and effectiveness of the recruitment lifecycle	*Are the characteristics of the people we are recruiting changing over time?*
Retention	Provides insight into patterns of attrition and turnover among employees, job functions, and organizations, enabling targeted workforce planning	*Can I do smarter workforce planning by better understanding patterns of attrition and new entrants?*
Compensation	Provides a core data foundation for HR reporting and analysis related to salaries/payroll, overtime, funding, budgeting, and absence liability	*Can I understand how the use of overtime compares across agencies?*

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HR Analytics Functionality

What are HR Analytics Dashboards?

- Contain one or more pages that display reports targeted to a specific group of end users
- Provide specific, actionable HR data to users
- Based on a user's access, an individual can view pre-configured Dashboards or create their own

At a glance…

1 Summary Dashboard
5 Subject Areas
31 Subject Dashboards
86 Reports

…thousands of ways to slice and view the data

Each dashboard has tabs within it

- Each tab contains a grouping of like reports displaying metrics, comparisons of data over time, trends, and more
- Each tab contains search filters, interactive graphic displays based on data sets, pivot tables based on data sets, and options for printing and exporting data
- Reports allow the user to drill down through agency organization

Additionally, HR Analytics will send alerts based on determined criteria, such as an alert when an employee is moving out of probationary status

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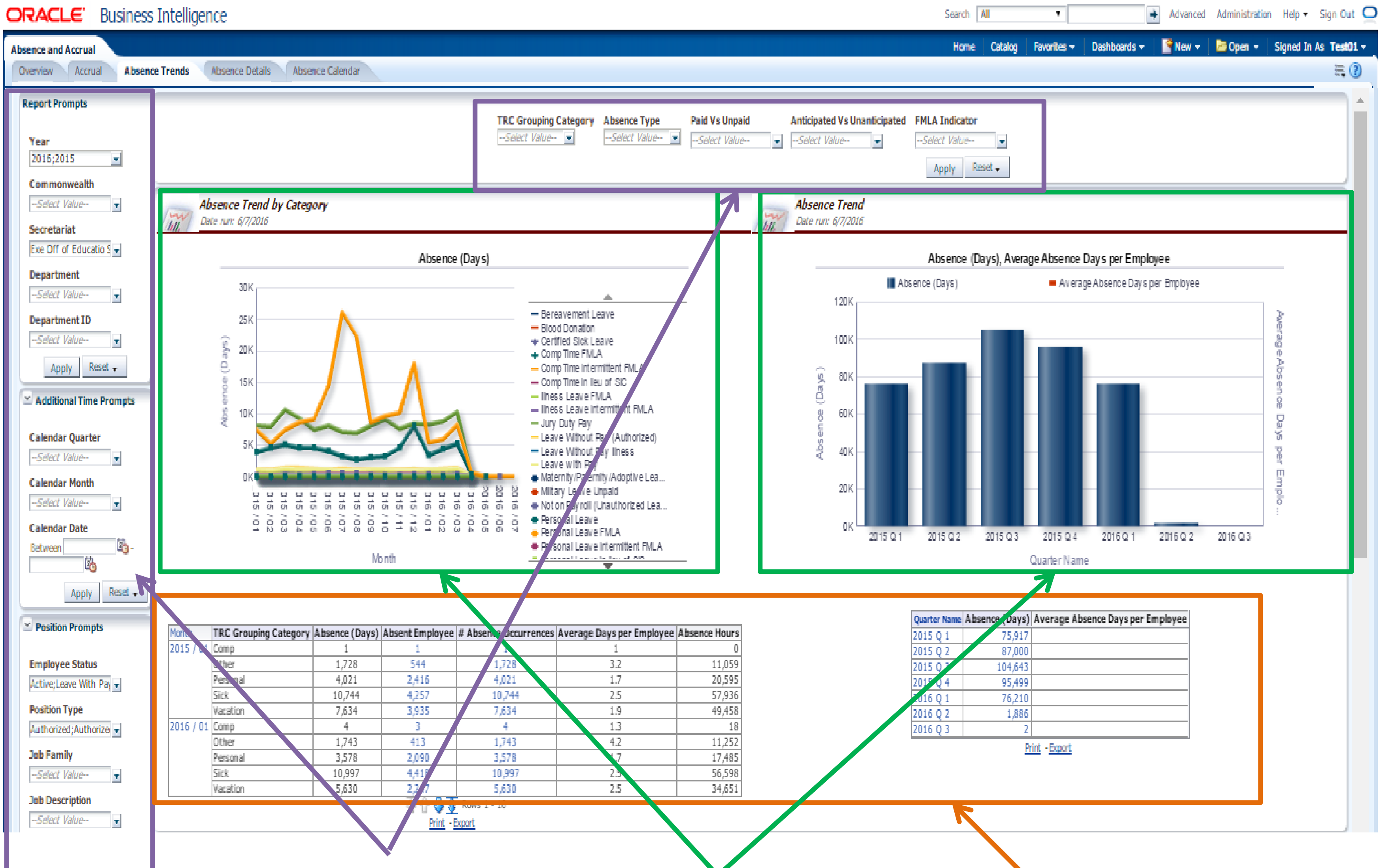
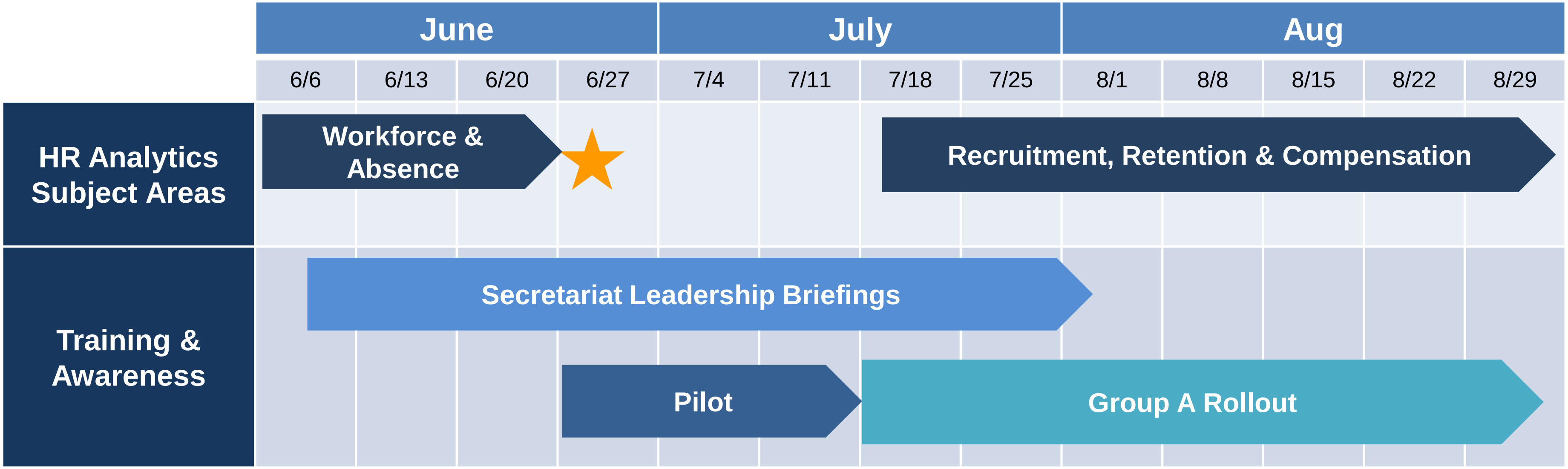
Dashboard Basics



- Filters
- Reports
- Datasets

HR Analytics Rollout – Summer 2016

- Initial Rollout will Include approximately 200 people across Secretariats and GOV's Office
- Initial training will focus on Workforce and Absence, with an overview to Retention, Recruitment, and Compensation reports that will be released later this summer
- Over time, additional reports will be released, and opportunities for further training will be available



Secretariat Briefings	Briefings for Secretariat Leadership
Pilot	HRAC members, Business and Data Champions, ANF / GOV's office representatives
Group A	Solution Training for heavy consumers of reports, active CIW users, and key HR and financial constituents

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HR Analytics Business Application: HR Practitioner

Maria, an HRD executive, is interested in conducting workforce planning as we enter FY17 to understand any major changes in the age distribution in the Commonwealth's workforce.

How can HR Analytics help Maria?

- Login to HR Analytics
- Navigate to the Workforce – Trends tab
- Adjust the filters to match her desired organizational view:
  - Executive
- Adjust the filters to match her desired time frame:
  - 2015; 2016
- Locate the report: Headcount Demographic Trend
  - Choose the metric: Employee Headcount
  - Choose the view by: Age Band

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HR Analytics Business Application: Business Manager

David, a supervisor, has noticed that his people seem to be taking sick leave the day before holidays, and wants to explore the patterns of absence this year.

How can HR Analytics help David?

- Login to HR Analytics
- Navigate to the Absence – Absence Calendar tab
- Adjust the filters to match his Secretariat, Agency, Department, and Department ID:
  - Executive → A&F
- Locate the report: Absence Calendar
- Analyze: Notice the number of people absent on days before holidays (red boxes)
- Filter by Unanticipated Leave; and then by Sick Leave

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Absence Trends: 2014 – Present

Date	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Total	Average	
1	61	399	380	184	163	510	518	489	499	511	184	162	573	493	476	458	471	162	203	61	478	478	456	477	163	143	516	496	465	429	464	11522	371.677	
2	161	141	545	530	400	506	496	170	183	512	490	480	430	502	183	140	78	493	467	480	501	179	146	458	433	422	449	462				10437	372.75	
3	172	153	508	481	454	471	452	138	164	513	437	461	492	457	185	162	496	466	432	454	464	142	142	497	467	462	460	423	155	171	512	11443	369.129	
4	485	475	432	456	145	145	542	452	434	451	462	198	160	482	455	457	417	450	158	97	62	428	418	428	421	140	136	441	478	433		10738	357.933	
5	469	485	203	167	513	466	407	478	508	201	174	530	484	426	443	435	171	170	458	442	477	425	421	159	179	67	444	431	475	454	182	11344	365.935	
6	229	557	479	471	487	516	241	232	510	457	423	449	495	212	210	508	426	460	478	493	243	225	488	440	428	432	500	205	178	492		11964	398.8	2014
7	449	416	402	61	195	217	471	472	445	465	464	203	204	461	427	415	449	496	201	180	482	442	455	419	490	190	150	449	417	465	472	11524	371.742	
8	481	198	165	431	441	446	456	499	227	204	501	464	436	448	472	224	228	441	414	434	430	454	202	181	483	501	492	472	446	204	157	11632	375.226	
9	81	467	441	463	484	202	181	470	448	454	485	511	207	207	498	475	492	504	498	195	198	489	435	465	450	490	210	201	542	516		11759	391.967	
10	490	533	536	219	184	555	504	488	512	512	196	196	89	494	533	533	528	184	193	538	473	488	497	477	215	182	478	512	501	477	479	12796	412.774	
11	225	207	481	512	541	502	509	205	171	513	70	431	461	506	164	162	546	519	487	476	492	162	182	515	494	371	77	331	188	191		10691	356.367	
12	555	522	512	555	548	183	187	611	620	575	539	586	195	197	526	551	530	520	582	232	228	542	552	276	76	361	214	228	515	515	383	13216	426.323	
1	70	400	143	146	475	530	519	547	497	218	168	551	508	508	475	490	159	195	87	554	502	502	482	159	163	521	366	424	574	502	157	11592	373.935	
2	185	717	650	577	549	533	171	167	399	473	511	523	515	193	165	97	504	547	516	519	201	188	566	517	496	488	454	148				11569	413.179	
3	176	538	523	506	481	494	170	161	534	500	501	488	501	199	153	500	485	522	492	491	155	149	500	459	453	487	489	142	161	505	539	12454	401.742	
4	467	511	505	183	117	532	504	478	469	482	210	178	533	517	450	459	479	168	182	85	435	405	444	438	209	171	472	488	504	486		11561	385.367	
5	530	239	224	541	464	471	487	505	215	145	446	441	425	467	510	184	196	473	465	461	482	444	201	181	64	503	464	508	475	201	158	11570	373.226	
6	501	463	461	499	517	192	214	517	468	487	525	523	220	222	545	508	479	511	526	242	173	525	512	513	513	545	241	180	433	424		12679	422.633	2015
7	449	438	237	38	188	401	411	420	428	476	204	209	481	413	441	461	440	186	244	495	453	438	447	471	199	194	416	403	470	472	477	11500	370.968	
8	219	217	478	442	461	456	463	219	184	493	438	419	442	483	240	227	475	472	440	426	445	197	198	470	453	430	475	497	235	220	538	11852	382.323	
9	554	482	462	473	200	224	79	493	465	537	516	202	207	498	504	454	483	514	194	212	489	469	451	466	480	185	219	533	477	510		12032	401.067	
10	459	515	195	189	478	490	460	497	506	247	247	89	547	451	496	503	193	212	481	453	459	498	505	194	230	533	480	462	525	502	198	12294	396.581	
11	189	479	458	500	500	487	178	188	480	420	84	433	439	178	198	523	482	439	470	492	197	196	503	497	341	70	358	200	203	510		10692	356.4	
12	524	532	522	510	224	203	596	554	520	536	521	235	258	560	512	519	541	599	256	242	561	513	514	313	62	162	226	488	553	523	381	13260	427.742	
1	61	148	163	486	507	472	476	466	153	162	477	459	456	496	454	225	201	75	528	466	487	426	162	217	540	502	483	504	458	159	168	11037	356.032	
2	513	514	474	488	524	176	167	492	542	494	516	528	186	211	87	529	473	508	520	178	181	492	495	516	480	484	193	215	525			11701	403.483	2016
3	546	491	501	502	212	175	489	527	567	532	521	201	213	551	533	495	471	505	198	187	540	479	458	511	486	187	129	520	504	459	500	13190	425.484	

Weekend | Holiday | Christmas | Snow Storm | High Occurrences

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Absence Trends: 2014 – Present

Top 10 Days of Unanticipated Absences since 1/1/14		
#	Date	Reason
717	2/2/2015	Snowstorm
650	2/3/2015	Snowstorm
620	12/9/2014	Snowstorm
611	12/8/2014	Snowstorm
599	12/18/2015	Friday (before Christmas)
596	12/7/2015	Monday
586	12/12/2014	Snowstorm
577	2/4/2015	Snowstorm
582	12/19/2014	Friday (before Christmas)
575	12/10/2014	Snowstorm

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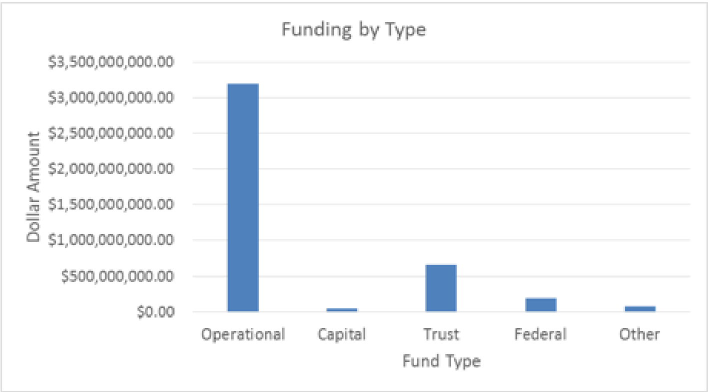
Preview of Coming Attractions: Compensation Subject Area

Provides a core data foundation for HR reporting and analysis related to salaries/payroll, overtime, funding, budgeting, and absence liability

- Salary Comparisons by Job
- Monthly Compensation Trend
- Payroll Overview
- Overtime Spend Summary
- Accrual Balance
- Manager Collision / Compression by Org

Funding by Appropriation Type



Fund Type Name	Appropriation type	Dollar amount	No. of Employees
Operational	1CN, 1CS, 1RN, 1RS	$3,194,800,149.25	91201
Capital	2CN	$40,272,338.56	1445
Trust	3TN	656,046,641.20	67283
Federal	4FN	[illegible]	8805
Other	1IN	[illegible]	[illegible]
Grand Total		[illegible]	[illegible]

How does our agency's use of overtime this year compare to last year at the same time?

Can I identify which of my employees are funded by which appropriation type (including capital)?

Overtime Spend Summary

Overtime Pay	$45,024, 624.00
Overtime Hours	656826
Overtime Pay Year Ago	$ 45,024,624.00
Overtime As % of Regular Pay	17.5%
Overtime Hours As % of Regular Hours	7.3%
Overtime % Change to Year Ago	0.0%

What is my future liability associated with leave, vacation, and comp time?

Note: Screenshots show sample data, as Compensation reports are not yet built.

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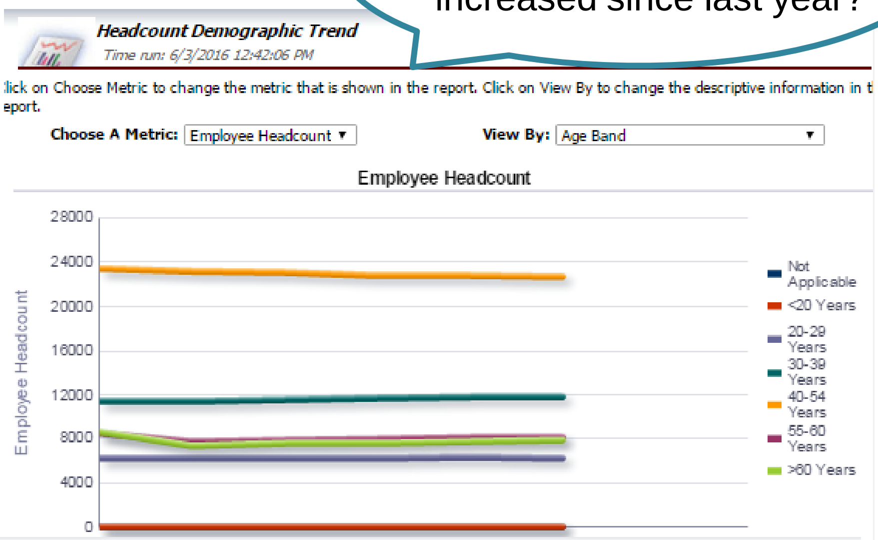
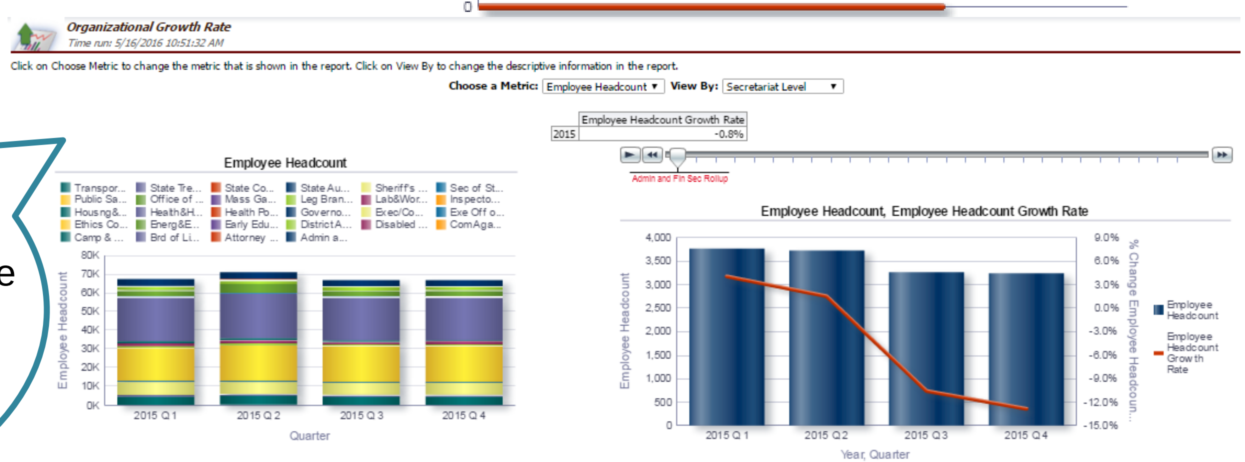
Workforce Subject Area

The Workforce reports provide a core data foundation for HR reporting and analysis for headcount, demographics, headcount movement, etc.

- Headcount Key Performance Indicator
- Turnover Key Performance Indicator
- Headcount Demographics
- Job Demographics
- Organizational Growth Rate

Has the headcount of Millennials in our Agency increased since last year?





Which demographic groups have experienced significant changes in headcount over the past year? How can we plan targeted interventions to increase engagement in these groups?

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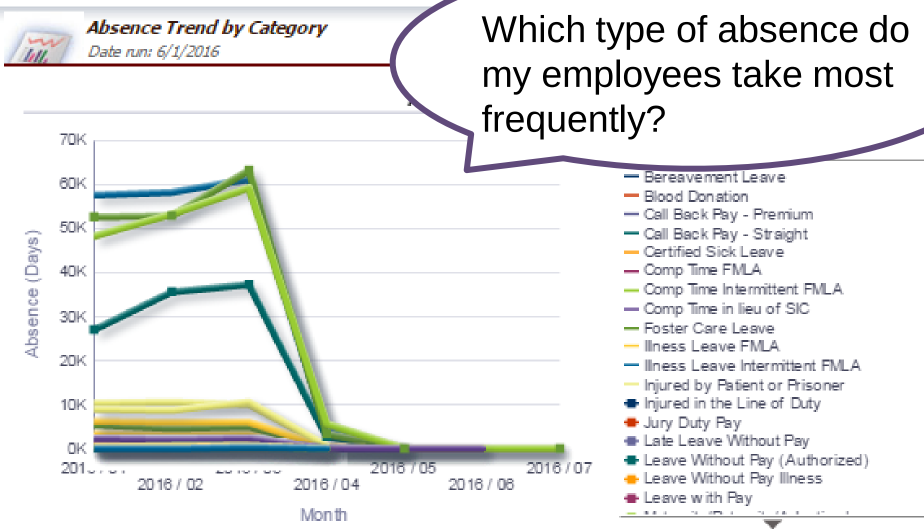
Absence Subject Area

Absences reports display multiple views of absenteeism, enabling HR reporting and analysis on patterns of sick leave, vacation usage, and lost productivity at an organizational and employee level

- Total Absence Days
- Absence by Absence Type
- Employee Accrual Balance
- Absence by Absence Category
- Absence Calendar
- Absence Trend



Which type of absence do my employees take most frequently?

Month	TRC Grouping Category	Absence (Days)	Absent Employee	# Absence Occurrences	Average Days per Employee	Absence Hours
2016 / 01	Comp	940	331	940	2.8	6,182
	Other	19,527	4,391	19,527	4.4	118,555
	Overtime	71,218	15,124	71,218	4.7	289,339
			15,857	28,275	1.8	145,855
			29,891	74,141	2.5	420,125
			20,015	51,258	2.6	297,903
			312	955	3.1	6,101
			4,344	18,811	4.3	113,575
			15,912	72,142	4.5	296,380
			20,688	36,598	1.8	187,919

Rows 1 - 10

Are there seasonal patterns to my employees' use of leave?

Absence Calendar
Time run: 6/1/2016 9:45:30 AM

Year Name 2016

Absence Occurrences

Month Name / Day Of Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
2016 / 01	3520	3712	3338	11472	10769	10750	10907	11745	4198	3267	9774	9814	10093	10398	12115	4602	3663	3710	10362	9617	9905	10448	4218	4406	10359	9506	9494	10047	10881	4179	3317
2016 / 02	9997	9532	9494	10196	14012	4515	3884	9447	10978	9919	10563	12479	4343	4064	3820	13286	11869	12243	13337	4437	3318	10208	10025	10517	10903	11517	4566	3488	10661		
2016 / 03	10570	10348	10491	11701	4283	3345	10125	9880	10909	10804	12061	4792	3721	11246	10779	10858	11761	12879	4029	3753	13040	9414	9622	10384	13535	4207	3653	10896	9665	9572	10260
2016 / 04	10914	3590	286	515	413	383	357	368	101	22	119	92	105	112	107	36	12	45	524	477	521	856	115	10	53	48	55	54	43	23	
2016 / 05	5	12	15	15	10	10	9	4	6	9	11	10	7	2	1	4	7	10	6	6	2	2	3	2	4	4	4	2	1		5
2016 / 06	4	4	2			0	0	0	1	1			1	1	1	1	1			1	1	1	1	1		1	5	5	1	7	
2016 / 07	6	2	3	3	9	9	6	5	2						1			1	1	1	2	2									

Legend
<= 9 Employees | 10-18 Employees | 19-27 Employees | > 28 Employees | Holiday

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Recruitment Subject Area

Provides multiple views of recruitment metrics to measure the efficiency and effectiveness of the recruitment lifecycle

- Recruitment Pipeline and Stages
- Requisition Recruitment Activities
- Candidate Sourcing
- New Hires by Source Type
- Diversity of Applicants

Are candidates getting "stuck" in one stage of the hiring workflow? How can we solve that?

Requisition & Recruitment Duration by Stage
Time run: 3/25/2016 9:02:24 AM

Diversity Count by Stage
Time run: 3/26/2016 9:02:24 AM

View By Requisition Job Family Description
HR Owner Name
Organization Hierarchy Name

What is the diversity of my recruiting pipeline?

			Candidate Stages										
			/ HR en	HM Screen from New	First Interview	Second Interview	MV and Above Finalists	Third Interview	Pre-Offer Checks	Offer Extended	Offer Accepted	OB/Hire	Time to Hire
			10	14	21	15	10	18	20	10	5	10	12
			37	21	24	23	7	4	14	9	6	8	10
		1	1	15	14	7	2	7	7	21	0	17	9
Requisition(s)													
1500025: Audio Visual Equipment Technician	5	1	10	14	21	15	10	18	20	10	10	5	12
150000R7: Epidemiologist II	4	1	7	12	14	6	7	6	12	10	2	2	8

Note: Screenshots show sample data, as Recruitment reports are not yet built.

Retention Subject Area

Provides insight into patterns of attrition and turnover among employees, job functions, and organizations, enabling targeted workforce planning

- Turnover Key Performance Indicator
- Turnover Distribution by Job
- Turnover Distribution by Org and Location
- Turnover Distribution by Demographics
- Tenure of Terminations
- Turnover 3-Year Trends
- Probationary Period

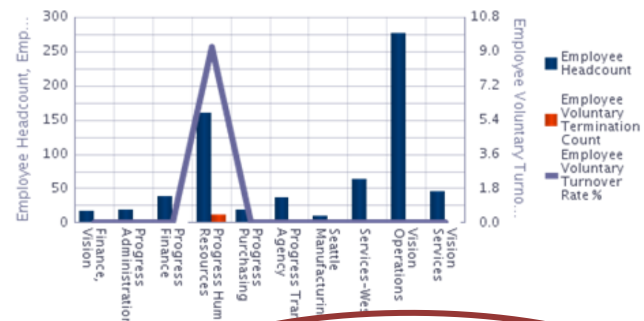
Are certain agencies in my Secretariat experiencing higher turnover than others?

Turnover Distribution by Org & Location

Time run: 4/11/2016 10:42:35 AM

View By

- Secretariat Level
- Department Level
- Department ID Level
- Employee Location Name



Probationary Period

Time run: 3/26/2016 9:02:24 AM

Employee ID	Employee Record No.	Employee Name	Job Code Description	Supervisor Name	Hi
26463	72673	Adams, Brian	Clerk I	Palmer, Blair	
46346	23467	Carter, Brigitte	Archivist II	Bay, Robert	12/14/2015
35644	56327	Dorat, Melanie	Dental Hygienist I	Smith, Thomas	1/2/2016
23352	12254	Savitt, Michael	HR Manager	Jerome, Lana	1/15/2016

Note: Data as of report run time on 4/26/2016

Employee is within 30 days of transitio

Which of my employees is nearing the end of their Probationary Period?

Note: Screenshots show sample data, as Retention reports are not yet built.

Discussion

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