ALASBO Power Lunch
Tuesday, February 26, 2008.
11:00 a.m. to noon

Facilitator – Nancy Barto, Finance Officer
Juneau School District
907 523-1780
nancy_barto@jsd.k12.ak.us

Phase V – scheduled to be completed some time in the next 6 months
Phase VI – scheduled to be completed some time in the next 12 months

Discussion Points

1. Dates -- Have all dates format themselves. It is time consuming to enter MM / DD / YYYY on all transactions. At least make it so users do not have to enter the slashes. (repeat from last year) Several users mentioned this issue.

   Scheduled for Phase V

2. Freeze panes -- On the payroll screens have titles that freeze. It is difficult to scroll down and keep track of the column headings. (repeat from last year)

   Scheduled for Phase V

3. Next and Previous -- On the Payroll screens (and others if appropriate) have "next" and "previous" tabs at the top and bottom. They are currently only on the bottom of the page. It will make navigation easier. Navigation is very slow between pages. Maybe have page numbers on the top and bottom of the screen. (repeat from last year)

   Or, do not have page breaks at all. Have the payroll report as one long page.

   Scheduled for Phase V – Looking at making this a choice at log-in since employer have differing preferences.

4. PPE dates -- Allow for employers to submit more than one payroll for a pay period ending date. For example, there are times when time sheets and/or errors input errors are made causing incorrect net payments. This may happen after the payroll has been submitted to the State. Currently

employers must change the PPE date or put through as an adjustment the next PR cycle. (repeat from last year)

Cannot accommodate -- this will not be scoped in the future

5. The Group Update feature -- It would be nice if somehow once an employee is selected and a stat change is made, eliminate those employees from the list to make selection easier for the next group/date. Otherwise there could be some kind of a designation that it had been "used". This is critical when we do TSE dates and LWP dates at the end of the school year. (repeat from last year) Response from R&B “item is scoped and in the works.”

   This is in the test mode – hopefully will be available next month

6. New Employee Record -- It would be beneficial to have these records "saved" and be able to go back in and make changes to these records instead of going to Events or Personnel Change. (repeat from last year)

   No – cannot accommodate

7. Critical error messages -- The critical error messages are difficult to understand and how to fix. For example "Hire Event missing for 'new' Personnel record." It would be helpful if the user could go into "new employee record" to fix this error. Make the error message more meaningful. (repeat from last year) Some progress has been made.

   Phase V will improve validation process. R&B staff needs additional feedback from users

8. Name search option -- How about adding a "name search" option. This would make it easier to navigate among pages within the payroll and other reports. (repeat from last year)

   Scheduled for Phase VI – R&B staff need additional feed back from users

10. Drop down boxes -- it would be beneficial if they cleared out after each PR especially the addresses, dates, etc. Keeping those dates make it difficult to navigate quickly. (repeat from last year) This may be done.

    R&B need screen prints to be able to understand and address concern. This could possibly be fixed with browser setting.

12. Reports tab -- On the reports page for payroll reports, the drop down should have a default to "name". (repeat from last year) Currently the drop down on the PR report is “none.”

R&B should pick either the SS# or the name as a default – not "none"

13. Confirmation emails --- Email us back that the reports have been received. I have submitted (faxed) the Summary Report and have received calls from R&B that they have not received my fax. I then forward the Summary Report (again) along with my fax confirmation. This has happened several times over the last year.

    R&B staff cannot call employers – too many employers and not enough resources to accommodate this request.

16. Sort by column headings on PR tab -- Have the ability to sort the Payroll screen by Gross, PT, FT, DB, DC, etc.--not just by SSN and Name. (repeat from last year)

    Scheduled for Phase V

17. Events / Personnel records -- Allow user to see more than first page of "Events" or "Personnel Changes". Currently users must print a report to check if you have everything entered.

    Scheduled for Phase V - This ties to #3

18. Save -- When you have changed or updated a screen in payroll and you hit "save" and the system says there is an error -- you lose all your changes. This should not happen.

    Completed – If this is not working for users, fax print screens to Tammy (465-3291) for assistance.

19. When entering information for new employees, personnel changes, and events, when you hit enter have it automatically save the information.

    Enter will not work – cannot accommodate this request

20. Excel -- Export information into an Excel spreadsheet and then import back into E-reporting would solve many issues. This process has to be easy for the user.

    Scheduled for Phase V – Export into Excel (but not import?) Hopefully, sorting by column heading help with this.

21. Validation process -- Significant issues with system freezing during validation process. System can sometimes be locked for hours. R&B must be called to "release" the payroll from the validation process.

Completed – call R&B if you still have problems after validation goes for 20 minutes or more.

22. Control screen -- On the Control tab use commas for number delineation. It makes it easier to read the numbers.

    Scheduled for Phase V – be aware of a size limitation for large payrolls. Not all payrolls will be able to comma delineation.

23. On the Events and Personnel Tabs – when you want to edit or delete, you must select "cancel" for the list to appear and then you can select edit or delete. This is not presented clearly in the instructions.

    Will be updated in User Guide

24. When adding a line in the payroll tab it would be nice to be able to see prior records for examples – this is nice for novice users.

    Scheduled for Phase VI -- R&B staff will add examples in the user guides. Possibility of creating an example that can not be changed or putting better examples in the user's manual.

25. It would be nice to be able to see the changes that occurred in prior payrolls if they have not been posted. So we don't duplicate them.

    May be able to give examples in User Guide – Refer to prior printed payroll reports.

26. Once a payroll is imported, users check the report tabs for critical errors and there are none. However, when user validates the payroll critical errors exist. This situation was mentioned at the 2007 R&B conference.

    There are two error categories: Import and validation. Updates are schedule in Phase V

27. Why do we have to sign on with our personal social security number?

    Initially users did not want two sign-on ID's – one for e-reporting and one for Member Access. Member Access has to use SS#'; however, Phase VI is looking at changing sign-on requirements.

28. I have to manually enter alternative option employees all the time? Am I missing something?

R&B need additional information. Whoever submitted this issue, please contact R&B directly.

29. How about having a "change" button so you don't have to differentiate between personnel and event change.

    Users wanted a comprehensive screen that would accommodate both events and personnel changes. Maybe have an "employee profile" screen that users could update and have the system identify changes only. Tammy discussed that Events and Personnel changes are different; however, it would be easier if users could have once screen to maintain both event and personnel information.

30. How about splitting up the DB and DC employees?

    Scheduled for Phase V – will be addressed with sort capabilities

31 Once you key the SS number, automatically populate the next three fields.

    Scoped for Phase VI – need additional information from users

32. TSE's – How are they handled? Event change? (Yes, they are event changes) How can they be done more efficiently?

    Need additional information from users. You may want to use the group update feature.

33. Can we have a year-end true up and not each payroll?

    No because R & B is required to collect short term
    Discussion with R & B after the phone call this should state over/short monthly. True up will be handle like last year, not monthly.

34. How is the information available from the conference for those who could not attend?

    R&B website

35. Semi monthly vs monthly PERS processing. Cannot use the same period end twice and must send an adjustment.

    You can use the same period end date with different pay cycles.

36. Establish a statewide "User Group" to give input the R&B on e-reporting issues.

Anyone interested in participating, please email Tammy Rohaus

37. Add additional options in the Adjustments tab. (i.e. over/short on turn around reports) What exactly does "DB suspense" include? It seems like a catch all.

    Scheduled in Phase V – All over/short amounts are to be adjusted through the suspense line – will also have an option to type in information.

38. eReporting training session using overhead or Web based. I would like to learn how to use eReporting correctly and am interested in having R&B walk through various scenarios for each tab using examples with complex reporting issues along with over/sort situations.

    R&B would like feedback from users on training topics. Wait and see after Phase V, this might help you.

39. Re-do the eReporting manual to make it detailed for each tab. Manual is extremely simplistic and not very useful.

    Employers need to let R&B know what they need. Contact your payroll contact.

40. Set-up one State Department's payroll through eReporting so the people in R&B's actually work with eReporting like all of us users do.

    R&B staff does not process any payrolls.

41. Better training for the technicians in the field and at R&B.

    Contact Erica 907-465-5716 and report any problems with your payroll contact.

42. True-up Report in excel so it can be sorted. Include the service years information with True-up Report, otherwise the figures cannot be verified.

    Ask you Payroll contact for true up and over and short reports.

43. Change HRA to a % rather than flat rate. Our financial system does not work well with a combination of % and Flat Rate.

    Cannot change due to Federal and IRS rulings based on our plan

44. Add running total of DBUL on the Turn-Around report.

    Scoped for the future.

Lessons learned the hard way:

1. Cannot have any spaces in any field on the payroll screen. It will cause validation errors and the system will freeze.

   Scheduled for Phase V

2. System will allow the PPE date to come after the PR issue date. There will be no error.

   Scheduled for Phase V

3. New Hires, Events, and Personnel information must be entered prior to importing the payroll. If not, eReporting does not update certain info, such as a name change.

   Scheduled for Phase V

4. There is some problem on R&B's end where Status Change Dates are not getting to the Member Services screens. I have been asked repeatedly for LWOP & return dates for the same people, when they were reported through eReporting.

   R&B staff need additional information and examples of issues and will work individually with employers to resolve issues

5. Do the Validation process often as you are working in eReporting.

Topics for discussion:

1. Review DBUL calculation and discuss "True Up" procedures

   R&B staff are working on FY08 True Up's Cannot do just a DBUL "True Up" it would have to include all categories.

2. Is there going to be another R&B conference in 2008? If so, when and where?

   Not this year…they are scheduled every other year.

3. What is the schedule for updates?

Phase V – next six months
Phase VI – next 12 months (Depending on legislative session and how much time is required for R&B staff)

4. Who is on the user advisory team? How often do they meet?

   Please email Tammy if you are interested in participating

5. Who should be contact at R&B for problems/concerns with e-reporting? What have been some of their suggestions?

   R&B Payroll contact

   Tammy Rohaus 465-5715

   Erica Burkhouse 465-5716

6. Workers Comp reporting…..this is so complicated, that I don't even know what to ask. Having to report hours worked causes nightmares with the HRA.

   Bernadatte Blankenship at R&B

7. Can a date be set for eReporting refresher session, using an overhead projector and having various scenarios for each tab with examples of complex reporting issues along with over/sort situations?

   Users need to send topics to R&B staff

8. Review Over/Short situations

   Work with your PR contact to resolve these issues

9. Who should be contacted at R&B for problems/concerns with eReporting?

   - The order of trouble shooting we have been told is:
     - (1) Refer to User Manual
       - Problem: the Manual is EXTREMELY deficient in information.
     - (2) Ask Technician
       - Problem: Technician's need more training.
       - Problem: Technician's give out wrong information
     - (3) Question ends up being answered by Tammy

   Processing time for a payroll after R&B receives submission of payment is between 3 days and a week.