“As Is” System Functionality

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#	Activity	Description	Dependencies	Uniqueness/Customizations
Address Scrubbing Process				

1.1	Address Scrubbing Process	Address scrubbing is used to format and update or create a User's mailing address record in the People First System	User must be either an active employee (salary or Other Personal Services (OPS)) or a non-active benefits (e.g., retiree, layoff, etc.)	Address scrubbing is performed in the People First System on an annual basis (normally in July – before the Address Verification process is activated) for all employees
				
				The address scrubbing process includes:
				• Address Matching (address standardization) - uses the Coding Accuracy Support System (CASS) database to use the correct United States Postal Service (USPS) formatting
				  ○ Applies the official USPS abbreviations for physical address suffixes (e.g., street, alley, road) and secondary units (e.g., apartment, building)
				  ○ Applies the Zip code+4 logic (e.g., 32301-1234)
				• Address Correction (change of address) – uses the USPS National Change of Address (NCOA) database to capture and update the User's current address as reported to the USPS
				  ○ The NCOA database contains all change of addresses completed by postal customers
				
				The address scrubbing process is handled as follows:
				• Step 1: The vendor sends an Outbound file that contains each User's mailing address record (if no mailing address record, then the home address is sent) to the postal vendor
				  ○ Data sent from vendor is stored in a custom table in Systems, Applications and Products in Data Processing (SAP) and is used to compare the address returned by the postal vendor (Inbound file)
				• Step 2: The postal vendor validates the mailing address (i.e., address standardization and/or change of address) and sends the results to the vendor (Inbound file)
				  ○ The same number of records sent on

#	Activity	Description	Dependencies	Uniqueness/Customizations
				Outbound file are returned on the Inbound file and includes the actual mailing address that was sent on the Outbound file ○ Each address record contains return codes that identify what occurred with the mailing address (e.g., address standardization and/or change of address) • Step 3: The vendor runs an automated program that reviews the Inbound file and looks for specific return codes (CASS codes 31 and 32; NCOA codes 36 and 37) and only compares the address on the Inbound file that has any of the valid return codes to the address that was sent on the Outbound file • Step 4: The vendor updates or does nothing to the mailing address record in People First based on the comparison of the address records on the Outbound and Inbound files ○ If the addresses match (i.e., abbreviations, Zip Code) as part of the address standardization process, no changes are made to the mailing address ○ If the mailing address record is modified as part of the address standardization process; a new record is not created and the effective date is not changed, but the address is updated to reflect the correct formatting and Zip Code ○ If the User does not have a mailing address (home address was sent as the mailing address on the Outbound file) and the address on the Inbound file does not match the User’s current home address (e.g., User created new home address after Outbound file was sent), no update is made to the mailing address ○ If a User does not have a mailing address record in People First, but does have a home

#	Activity	Description	Dependencies	Uniqueness/Customizations
				address record that matches an address in the USPS NCOA database, a new mailing address record is created in People First using the User's current address in the USPS NCOA database (new effective date) ○ If the address on the Outbound file is no longer the User's address in the USPS NCOA database, a new mailing address record (using the address in the NCOA database) is created in People First (new effective date) ○ If the address on the Outbound file is the same as the address in the USPS NCOA database, no change is made in People First (if the address sent on the Outbound file is the mailing address) ○ If no match is found for the address provided, only the address standardization is applied to the existing record (effective date is maintained if the only change is to standardized the address) ○ When a new address record is created, the run date (included on Inbound file) is used as the effective date ○ If the User's current mailing address in People First has effective date on or after run date (on Inbound file), no change is made to the mailing address record ○ Home address record is **not** updated as part of the address scrubbing processes
Address Verification Process				
2.1	Address Verification Process	A custom annual Address Verification process that requires Users to validate their address information in the People First System	Address verification must be active Individual must not have completed the verification for the active period	• The Address Verification process can be activated within People First at any time; the following are examples of specific events where the process is currently activated: ○ Each year prior to the beginning of the annual benefits Open Enrollment period (triggered for all Users)

#	Activity	Description	Dependencies	Uniqueness/Customizations
			Individual must be either an active employee (salaried or OPS) or a non-active benefit participant (e.g., retiree, layoff, etc.)	o New Hire (new to the State of Florida) • DMS controls the date range (i.e., start date and end date) of the Address Verification process using SAP Graphical User Interface (GUI) o Currently, all Users of the People First System (e.g., active employees, benefits only Users,- university employees, retirees) must complete the Address Verification process • The landing pages, verification screens, informational screens (e.g., Overlay screen and Thank You screen) and email messages related to the Address Verification process are configurable and are maintained using custom SAP backend tables (accessed through SAP GUI); refer to the SAP GUI requirements for details on configuration • During the Address Verification process, each of the following address types must be validated: o Home Address o Mailing Address o Notification Email (although this address type must be validated during the process, the User has the option to not provide a notification email address) • Each address type (home, mailing and notification email) is presented during the Address Verification process prompting the User to verify/update the address (seamless process): *Home Address* first, *Mailing Address* second and *Notification Email* last o If a User does not have an active record for a specific address type, the User is able to create a new record during the process • In order for the Address Verification process to be considered completed, the User must navigate through all three address types (home, mailing and notification email) • All three address types (home, mailing and notification email) are tracked for verification completion

#	Activity	Description	Dependencies	Uniqueness/Customizations

				separately
				  ○ For example, if a User completes the first verification (Home Address) in its entirety but exits out of the process before completing the second verification (Mailing Address), then only the first verification (Home Address) is marked completed
				  ○ If a User does not complete all three address verifications, when the User returns to the Address Verification process, only the verifications that have not been completed are presented (User picks up where they left off)
				• A custom SAP backend table (accessed through SAP GUI) is used to track if all three verifications have been completed; each address type is tracked separately
				• In order for an employee to make benefit changes during either the annual benefits Open Enrollment period or during a qualified status change period, the User must have completed the Address Verification process
				  ○ If the Address Verification process has not been completed for the active period, the verification process is presented to the User when attempting to make a benefits election change; User is forced to complete the verification process before being able to add dependents or access the benefits summary enrollment page to complete an election change
				• The Address Verification process does not allow another state User (e.g., manager, HR) to complete the process on behalf of an employee, unless the process is pending for an employee and the User has authorization (HR) for and is attempting to process a benefits elections change for the employee. If attempting to process a benefits election change and

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				the address verification process has not been completed for the active period, the User is forced to complete the Address Verification process on behalf of the employee prior to accessing the benefits enrollment summary page
				• The People First Service Center staff, has a separate security role that allows them to surf as the employee (able to log in to the system as the employee) and complete the Address Verification process on behalf of the User if the User cannot access the internet or otherwise has accessibility issues navigating the process
				• A custom process is used to present city, state and county options when the User enters a zip code (User is prevented from entering/selecting city, state and county code until they enter the zip code) on a home address or mailing address record
				  ○ The city, state and county options presented when a zip code is entered is completed by using a lookup in a custom SAP table; the data in the custom table is loaded monthly from a file from the USPS and identifies valid city, state, county and zip code combinations in the United States
				• When any type of correspondence related to the Address Verification process (e.g., Thank You email) is sent to a User, a record is created in People First (within the *Correspondence History* screen) to capture the following information:
				  ○ Order Number – numeric code that is system generated
				  ○ Document ID – four character code used to identify the subject of the correspondence sent (e.g., address verification); email correspondences all start with the letter E
				  ○ Description – correspondence description (e.g., Address Verification Reminder, Address

#	Activity	Description	Dependencies	Uniqueness/Customizations
				Verification Thank You) ◦ Date Created – date correspondence was created ◦ Date Sent – date correspondence was sent to user ◦ Status – correspondence status (e.g., fulfilled, pending)
2.2	Address Verification Overlay Screen	A custom overlay screen that is presented each time a User logs in to the People First System when the Address Verification process is pending for the User	Screen is only presented for Users that are required to complete the Address Verification process and have not yet completed the process in the system	• Once the Address Verification process is active, a custom *Overlay* screen is presented each time a User logs in to the People First System and will continue to be presented until the User has completed the entire address verification process for the active period (i.e., all three address types are validated) • Information regarding the Address Verification process and executable buttons (i.e., Start and Remind Me Later buttons) are displayed within the *Overlay* screen; the User can begin the Address Verification process by selecting the Start button or be reminded to complete the process later by selecting the Remind Me Later button ◦ Users will not be able to navigate within the People First System until one of the executable buttons is selected ◦ If the Start button is selected, the *Overlay* screen closes and the User is presented with the first step (*Home Address* screen) in the Address Verification process ◦ If the Remind Me Later button is selected, the *Overlay* screen is closed and the People First Home Page is presented (default landing page when User logs in)
2.3	Verify My Contact Information Task	A task presented within the My Tasks Due section of the People First Home Page when a User has not completed the Address Verification	Task is only presented if the Address Verification process has not been completed	• Once the Address Verification process is active, a task titled Verify My Contact Information is system generated and displayed in the My Tasks Due section of the custom People First Home Page; the task continues to be displayed until the User has completed the entire verification process (i.e., all three

#	Activity	Description	Dependencies	Uniqueness/Customizations

		process		address types are validated)
				• The Verify My Contact Information task is presented as an executable link; when the task (link) is selected the first address (i.e., home, mailing, notification email) pending verification is presented for the User to complete the process; the address verification *Overlay* screen is not presented when the task is selected
				• Once the Address Verification process is completed (i.e., all three address types are validated), the task is systematically removed
				• The address verification task will appear as the first My Task Due in all cases
				  o If the address verification is active and the employee also has an Open Enrollment task, only the Open Enrollment task is presented
				    ▪ Once the User selects the Open Enrollment task, the User is presented with the address verification process to complete
				  o Once the address verification process is completed, the User is prompted to complete the dependent certification process; when both processes are completed the User is asked if they would like to complete their enrollment changes

2.4	Home Address Verification (step 1)	Home Address is the first verification presented when a User begins the Address Verification process for the first time	Home Address verification is only presented when the User has not completed this step in the process	The Home Address is the first verification presented during the Address Verification process; the following are the screens presented for Users to validate/update their home address: • Home Address 1 screen - if the User has a home address record in People First and the home address record passes the system address edits (e.g., zip code is valid for the city/state/county), the address is displayed and the User is prompted to validate/update o If home address is correct, the User selects the Yes button and is then presented with a new screen (Home Address 3 screen) where they can elect to use the home address as

#	Activity	Description	Dependencies	Uniqueness/Customizations
				their mailing address ▪ Home Address 3 screen - if User elects to use home address (selects the Yes button) as mailing address, the following occurs: • New mailing address record is created, as of the system date, using the home address • Both the Home Address and Mailing Address verifications are marked completed in the custom backend SAP table • Notification Email verification step is presented to the User ▪ Home Address 3 screen - if User elects to not use home address (selects the No button) as mailing address, then the following occurs: • Home Address verifications is marked completed in custom backend SAP table • Mailing Address verification step is presented • Home Address 1 screen - if the User does not have a home address record in People First <u>or</u> the home address record fails the system address edits (e.g., zip code is not valid for the city/state/county), the User is presented with a new screen (Home Address 2 screen) where they are prompted to enter (or correct) a home address ○ Home Address 2 screen - User enters home address, selects the Save button and a new screen (Home Address 3 screen) is presented where the User can elect to use the home address as their mailing address (the remaining steps to elect to use/not use the home address as mailing address are the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				same as identified for the Home Address 3 screen)
2.5	Mailing Address Verification (step 2)	Mailing Address is the second verification presented when a User begins the Address Verification process for the first time	Mailing Address verification is only presented when the User has not completed this step in the process	The Mailing Address is the second verification presented during the Address Verification process and is only presented if the User does not elect to use home address as mailing address; the following are the screens presented for Users to validate/update their mailing address: • Mailing Address 1 screen - the User's mailing address record is displayed and the User is prompted to validate/update when all three of these conditions are met: User indicated home and mailing addresses are not the same, User has a mailing address record <u>and</u> the mailing address record passes address edits (e.g., zip code is valid for the city/state/county) ○ Mailing Address 1 screen - if mailing address is correct, the Yes button is selected and the following occurs: ▪ Mailing Address verification is marked completed in custom backend SAP table ▪ Notification Email verification is presented ○ Mailing Address 1 screen - if mailing address is not correct (No button is selected), there is no active mailing address record or the mailing address fails system address edits (e.g., zip code is not valid for the city/state/county) the User is presented with a new screen (Mailing Address 2 screen) and is prompted to enter (or correct) a mailing address ▪ Mailing Address 2 screen - User enters mailing address, the Save button is selected and the remaining steps are the same as when confirming if mailing address is correct

#	Activity	Description	Dependencies	Uniqueness/Customizations

2.6	Notification Email Verification (step 3)	Notification Email is the last verification presented when a User begins the Address Verification process for the first time	Notification Email verification is only presented when the User has not completed this step in the process	The Notification Email is the last step presented during the Address Verification process; the following are the screens presented for User to validate/update notification email address:
				• Notification Email 1 screen - if the User has a notification email record in People First, the email address is displayed and the User is prompted to validate/update
				  ○ Notification Email 1 screen - if notification email is correct, the Yes button is selected and the User is presented with a new screen (Notification Email 4 screen) where they can elect to have their benefits confirmation statement sent to their mailing address; if they do not elect to receive through the mail, the User is only sent an email advising the confirmation statement is available online
				    ▪ Notification Email 4 screen - once the User makes an election to have/not have (selects either the Yes or No button) People First correspondence sent to the mailing address, the following occurs:
				      • The custom backend SAP table that captures the election is updated to reflect the User's election; if the User elects to also have People First correspondence sent to the mailing address (selects the Yes button), the custom table is populated with "X" (i.e., X = Yes, Blank = No in custom table)
				      • Notification Email verification is completed (marked completed in custom backend

#	Activity	Description	Dependencies	Uniqueness/Customizations
				SAP table) • Confirmation email is sent to the notification email on record • Thank You screen is presented; if the User has a different verification process pending (e.g., home address verification, mailing address verification), that process is presented for the User to complete (this only applies if the current order of the address types presented is changed and the notification email is not the final verification presented) • Notification Email 1 screen - if notification email is not correct, the No button is selected and the User is presented with a new screen (Notification Email 2 screen) and is prompted to either enter a notification email or remove the existing notification email ○ Notification Email 2 screen - if User enters new notification email and selects the Save button, a notification email record is not created in People First (within the *Contact Information* screen) and the User is presented with a new screen (Notification Email 4 screen) where they can elect to have their benefits confirmation statement sent to the mailing address ▪ Notification Email 4 screen – the remaining steps to elect to have/not have People First correspondence also sent to the mailing address are the same as identified for the Notification Email 4 screen above

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ Notification Email 2 screen executable buttons – the following identifies the buttons that are presented on the screen and the function of each button when selected: ▪ Save Button – validates specific elements of email address (e.g., both original entry and re-entry match, @ symbol is used), saves notification email record, creates notification email record in People First (within the *Contact Information* screen) and presents User with a new screen (Notification Email 4 screen) ▪ Back Button – takes User to Notification Email 1 screen ▪ Remove Button – a pop-up custom screen is presented and warns the User if the notification email record is deleted they will not receive some communications (emails); the following identifies the buttons that are presented on the pop-up screen and the function of each button when selected: • Delete Button – end dates the User's notification email record in People First (within the *Contact Information* screen), Notification Email verification is completed (marked completed in custom backend SAP table) and Thank You screen is presented; if the User has a different verification process pending (e.g., home address verification, mailing address

#	Activity	Description	Dependencies	Uniqueness/Customizations
				verification) that process is presented for the User to complete (this only applies if the current order of the address types presented is changed and the notification email is not the final verification presented) • Do Not Delete Button – closes pop-up screen and User is presented with a new screen (Notification Email 2 screen) where they can enter a new notification email address; the remaining steps are the same as identified for the Notification Email 2 screen above Notification Email 3 screen - if the User does not have a notification email record in People First, the User is prompted to enter a notification email address • Notification Email 3 screen - if User enters new notification email and selects the Save button, a notification email record is created in People First (within the *Contact Information* screen) and the User is presented with a new screen (Notification Email 4 screen) where they can elect to have the People First correspondence that is sent to the notification email address to also be sent to their mailing address ○ Notification Email 4 screen – the remaining steps to elect to have/not have People First correspondence also sent to the notification email are the same as identified for the Notification 4 screen above • Notification Email 3 screen executable buttons – the following identifies the buttons that are presented on

#	Activity	Description	Dependencies	Uniqueness/Customizations
				the screen and the function of each button when selected: ◦ Save Button – same process as identified for the Notification Email 2 screen above ◦ Next Button – a pop-up custom screen is presented and warns the User that if a notification email is not provided they will not receive some communications; the following identifies the buttons that are presented on the pop-up screen and the function of each button when selected: ▪ Back Button – closes pop-up screen and User is presented with a new screen (Notification Email 2 screen) where they can enter a notification email address; the remaining steps are the same as identified for the Notification Email 2 screen above ▪ Next Button – Notification Email verifications is completed (marked completed in custom backend SAP table) and Thank You screen is presented; if the User has a different verification process pending (e.g., home address verification, mailing address verification) that process is presented for the User to complete (this only applies if the current order of the address types presented is changed and the notification email is not the final verification presented)
2.7	Thank You Screen	A custom pop-up screen that is presented when a User completes the entire Address Verification process	Screen is only presented when the User completes all verifications (i.e., home, mailing and notification email) for the Address Verification process	• When a User completes the entire Address Verification process (i.e., all three address types are validated), the User is presented with a *Thank You* screen • The *Thank You* screen includes a message that lets the User know the Address Verification process has

#	Activity	Description	Dependencies	Uniqueness/Customizations
				been completed (e.g., Thank you for completing…) and an executable button (Return to Home Page button) is displayed within the *Thank You* screen; if the Return to Home Page button is selected, the People First Home Page is presented (default landing page when User logs in)
General Portal Requirements				
3.1	General Portal Requirements	The People First portal (SAP front-end solution) is custom designed to present a user-friendly access point to current and former state employees The custom portal framework is primarily business server pages (BSP) and WebDynpro pages	N/A	• A set of frameworks were designed to drive the BSP; frameworks exist for HR, payroll, organization management, benefits, mass change engine (mass loads), reporting and timesheet; each framework consists of custom created configuration tables, BSP Models, Views, and Controllers; the frameworks allow for adding new pages through configuration in the custom tables and creation of new function modules without changing or adding any new BSP functionality • All screens, except the employee timesheet and reports were built using the BSP technology; the employee timesheet, reporting module and reports were built using WebDynpro • The supported web browsers are Internet Explorer and Firefox
3.2	Log In Page	The Log In page (screen) is a custom portal screen that includes the following sections: • Header • Message Area • Job Seekers Section • State Employees & Retirees Section • Helpful Websites	SAP GUI access required to maintain configurable areas	• Access to the custom Login In page (screen) is not restricted; it can be accessed by anyone using the correct URL • The information presented on the custom screen is divided into different sections (screen frames) • Specific Users in DMS have access to SAP GUI (requires license) to configure (e.g., add, update or remove text and/or links) the individual sections within the screen, or in some cases only specific areas within the section; the DMS Users who have access to SAP GUI are referred to as "state SAP GUI Users"

#	Activity	Description	Dependencies	Uniqueness/Customizations
		Section • Why Work for the State of Florida? Section • Footer		
3.3	Header and Footer	The header is presented at the top of the Log In screen and contains the People First logo The footer section is presented at the bottom of the Log In page and contains informational links (e.g., internet privacy policy, accessibility statement, E-verify website)	SAP GUI access required to maintain configurable areas	• The header is not configurable by the state SAP GUI Users • The footer section is completely configurable by the state SAP GUI Users
3.4	Message Area	This section of the Log In screen (located under the header) is used to post important information/messages related to the People First System	SAP GUI access required to maintain configurable area	• The entire section is configurable by the state SAP GUI Users
3.5	Job Seekers Section	This section of the Log In screen allows employees and/or job seekers to search for job vacancies and/or create an account in order to establish a User profile, save job searches and apply for job vacancies This section links to a third-party recruiting	Job seeker must have an account created within the job site in order to apply for vacancies SAP GUI access required to maintain configurable area	• While presented on the People First Log In screen, if an action (e.g., Search, Log In) or the Job Seekers map is selected the User is taken to the recruiting site hosted by a third party vendor (is not SAP) • The entry point for registered Users to log in to the online job site, create account to use the job site or search for job vacancies • Access to information in this section is not restricted; anyone can access the information presented when links are selected; only Users that have created an account can log in to the job site • Only the service center contact information area is

#	Activity	Description	Dependencies	Uniqueness/Customizations
		provider		configurable by the state SAP GUI Users
3.6	State Employees & Retirees Section	This section of the Log In screen allows authorized Users (e.g., employee, benefits only (BENO) entities, retirees) to log in to the People First System; provides contact information for the People First Service Center	A User ID, password and security profile is required to access the People First System (refer to the Security requirements for details on User ID and password requirements) SAP GUI access required to maintain configurable areas	• The only entry point for a User to log in to the People First portal • Access to view the information in this section is not restricted; access to log in is restricted to authorized Users only • Only the lead-in paragraph, bulleted list and service center contact area are configurable by the state SAP GUI Users
3.7	Why Work for the State of Florida? Section	This section of the Log In screen is used to provide information on the benefits (e.g., leave, benefit options, retirement) of working for the State of Florida	SAP GUI access required to maintain configurable areas	• The entire section is configurable by the state SAP GUI Users
3.8	Helpful Websites Section	This section of the Log In screen provides links to helpful websites (e.g., retirement, deferred compensation) that are not hosted by the vendor	SAP GUI access required to maintain configurable areas	• The entire section is configurable by the state SAP GUI Users; links are clickable, and when selected the links take the User to the applicable website
3.9	Home Page	The Home Page is a custom portal screen that is the landing page when a User logs in to the People First System The Home Page includes the following sections: • Header • Navigational Tabs	Employee must have an active User ID and must log in to the People First System to access	• The Home Page (screen) is the default screen (landing page) displayed when a User logs in to the system • The information displayed on the custom screen is divided into different sections (screen frames) • Only the Helpful Websites and Announcements sections" are configurable by the state SAP GUI Users • Current User Dropdown allows access to different employee IDs, e.g., retiree, state employee, multiple employee IDs for state employee (access to two or more agencies)

#	Activity	Description	Dependencies	Uniqueness/Customizations
		• Current User Dropdown • My Quick Links Section • Helpful Websites Section • My Tasks Due Section • Alerts Section • Announcements Section • Footer		

3.10	Header	The header is presented at the top of all People First screens	Navigational tabs presented are based on the User’s security role code
			
			Options presented in the Current User Dropdown are based on position the User actively holds or has separated from in the last 30 days (from system date)
				• Header is always displayed, regardless of the screen being accessed
				• Header contains the following elements:
				  ○ Navigational links (e.g., timesheet, alerts, log off) - when a link is selected, the User is taken to the applicable screen
				  ○ Navigational tabs - used to navigate to the individual functional areas within the system; when a navigational tab is selected, the User is taken to the applicable Landing Page for the tab selected; these tabs are based on the User’s role within the system (e.g., agency, benefits only User)
				    ▪ Hover menu and submenus – used to navigate directly to a specific screen within the system without having to navigate to the landing page first and then selecting the screen
				  ○ Current User Dropdown – allows Users to switch between employee IDs without reentering log in credentials

3.11	Footer	The footer is presented at the bottom of all	None	• The footer is only displayed on landing pages and contains the service center contact information

#	Activity	Description	Dependencies	Uniqueness/Customizations
		landing pages		

3.12	My Quick Links Section	This section of the Home Page contains links (executable) to the most frequently used screens or screens that are critical during a specific time period (e.g., Open Enrollment)	Links presented are based on various conditions (e.g., enrollment in FSA, role code, specific time period (e.g., Open Enrollment), employee type (e.g., benefits only, temporary (OPS), terminated)	• Access to links within this section is defined in a custom table in SAP and are not based on the frequency of the Users visitation to those links/screens
				• The section is displayed on the left side of the Home Page
				• When a link is selected, the applicable screen is launched
				• The following links are displayed (based on the dependencies the employee meets):
				  ○ Open Enrollment – only displayed during annual open enrollment period and only available for employees who are benefits eligible (infotype PA0171 (Health & Insurance benefits eligibility) is set to an eligible benefits grouping); launches the *Process Benefits Election* screen (if User has an open address verification and/or dependent certification event, User must complete the event(s) before starting the enrollment activity)
				  ○ My Direct Reports - launches the Management screen.
				  ○ Current Benefits – launches the *My Benefits* screen
				  ○ Benefits Confirmation Statement – launches the *Benefits Materials* screen for User to select their confirmation statement (PDF file) to view
				  ○ Emergency Contact – launches the *Emergency Contact* screen; link is not displayed for benefits only Users (e.g., university employees, retirees) or terminated Users
				  ○ Contact Information – launches the "*Contact Information* screen that contains the User's home address, mailing address and notification email address

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ Leave Balance Overview – launches the *Leave Balance Overview* screen; link is not displayed for benefits only Users (e.g., university employees, retirees), terminated Users or Users in agency code 2100 and 2200 ○ Timesheet – launches the *Employee Timesheet* screen in the current pay period; link is not displayed for benefits only Users (e.g., university employees, retirees), terminated Users or Users in agency code 2100 and 2200 ○ Training History – launches the employee’s *Training Transcript*; link is not displayed for benefits only Users (e.g., university employees, retirees) or terminated Users ○ Form W-4 - launches the *W-4* screen; link is not displayed for benefits only Users (e.g., university employees, retirees) or terminated Users ○ FSA Information – launches the custom *Flexible Spending Account* site; link is displayed based on the User being enrolled in one of the applicable reimbursement accounts
3.13	Helpful Websites Section	This section of the Home Page provides links to helpful websites (e.g., retirement, payroll information)	SAP GUI access required to maintain configurable areas	• Access to view this section is not restricted; anyone can access the information presented when a website link is selected • The entire section is configurable by state SAP GUI Users; links are clickable, and when selected a separate window is opened taking the User to the applicable website
3.14	My Tasks Due Section	This section of the Home Page captures specific tasks assigned to the User that need to be completed	Tasks presented are based on missing records, actions needing to be completed in the system and specific time periods (e.g., Open	• Tasks are generated based on predefined conditions being met in SAP for the User and are only displayed in the My Tasks Due section of the Home Page; the following are the tasks (links) that are generated: ○ Set Up Direct Deposit - link only appears if the

#	Activity	Description	Dependencies	Uniqueness/Customizations
			Enrollment)	User does not have an active Direct Deposit record as of the system date; when link is selected, the *Direct Deposit* screen is launched; link is not displayed for benefits only Users (e.g., university employees, retirees) or terminated Users ○ Complete W-4 – link only appears if the User does not have an active Form W-4 record as of the system date; when link is selected, the *Form W-4* screen is launched; link is not displayed for benefits only Users (e.g., university employees, retirees) or terminated Users ○ Maintain Contact Information – link only appears if the User does not have an active Home Address record as of the system date; when link is selected, the *Contact Information* screen is launched ○ EEO Veterans – link only appear if the User does not have an active EEO Veteran record as of the system date; when link is selected, the *EEO Veteran* screen is launched; link is not displayed for benefits only Users (e.g., university employees, retirees) or terminated Users ○ Emergency Contact – link only appears if the User does not have an active Emergency Contact records as of the system date; when link is selected, the *Emergency Contact* screen is launched; link is not displayed for benefits only Users (e.g., university employees, retirees) or terminated Users ○ Outstanding Timesheets – link only appears if the User has an outstanding (missing) timesheet (based on defined criteria) for a timesheet period that has ended; when link is selected, the *Employee Timesheet* screen is

#	Activity	Description	Dependencies	Uniqueness/Customizations
				launched and the view is defaulted to the missing timesheet period; link is not displayed for benefits only Users (e.g., university employees, retirees), terminated Users, temporary employees (i.e., OPS) or Users in agency code 2100, 2200, 3600, 4890 and 6200 ○ Timesheets Needing Action or Approval – link only appears for Users that have access to the *Employee Timesheet Approval* screen (for direct reports or a time group); when link is selected, the *Timesheet Approval* screen is launched and the view is defaulted to the period that includes timesheets that need approval; link is not displayed for benefits only Users (e.g., university employees, retirees), terminated Users or Users in agency code 2100, 2200, 3600, 4890 and 6200 ○ PARs Pending Approval - link only appears if the User has a PAR form that needs approval; when link is selected, the *PAR menu* screen is launched; link is not displayed for benefits only Users (e.g., university employees, retirees), terminated Users or Users assigned an "E" security role code ○ PARs Pending Action – link only appears if the User has a PAR form that requires an action; when link is selected, the *PAR menu* screen is launched; link is not displayed for benefits only Users (e.g., university employees, retirees), terminated Users or Users assigned an "E" security role code ○ Verify My Contact Information - link only appears if the User has not completed the annual *Address Verification* process; when link is selected, the process is started (if User has started the process, but has not

#	Activity	Description	Dependencies	Uniqueness/Customizations
				completed it, the area where the User left off will be presented) ◦ Dependent Verification - link only appears if the User has not completed the annual *Dependent Verification process*; when link is selected, the process is started (if User has started the process, but has not completed it, the area where the employee left off will be presented) ◦ Open Enrollment – link only appears during the annual open enrollment period and only for employees that are benefits eligible (infotype 0171 is set to an eligible benefits grouping); when link is selected, the *Open Enrollment event is displayed (if address verification or dependent certification have not been completed they are presented first)*), link is not displayed for terminated Users; if User has an open address verification and/or dependent certification event, User must complete the event(s) before starting the enrollment activity • Tasks are displayed as executable links; when the link is selected the applicable screen is presented • Once task is completed, the link no longer appears
3.15	My Alerts Section	This section of the Home Page captures alerts that are generated when specific conditions are met	Alerts presented are based on various conditions	• Alerts are triggered to different User types (i.e., employee, manager, HR) based on the criteria for the alert and the Users security role code • When a trigger occurs meeting the alert condition (e.g., background check is expiring, complete financial gift disclosure form), an alert is system generated and displayed in the My Alerts section ◦ Manager alerts are generated based on criteria on the employee's (manager's direct reports) position ◦ Alerts are only sent to the manager if the manager has any security role code other

#	Activity	Description	Dependencies	Uniqueness/Customizations
				than "E" ∘ If the manager position the employee reports to is vacant or does not have the correct security role code, the alert will be sent to the next level manager ▪ The system will only go two levels up (i.e., manager, second-level manager) to find a valid manager for a position (e.g., manager position doesn't' have right role code, manager position is vacant or manager position does not have a reporting relationship (top of agency); if a valid manager is not found the alert is sent to Users assigned a human resource role (e.g., A, H, X) • Alerts are displayed as text; alerts are not executable from the alert text • Most alerts have to be manually removed once the alert has been cared for (e.g., financial disclosure form completed); some alerts (e.g., dependent documentation needed, position being locked) are systematically removed once the action is completed • Some alerts are generated in real-time(e.g., financial disclosure required on position) while others are generated using a nightly batch process (e.g., background check)
3.16	Announcements Section	This section of the Home Page is used to post important information/messages related to the People First System or Users of the system	SAP GUI access required to maintain configurable areas	• Access to view the messages is not restricted; any User that can log in to People First can view the messages and select executable links (e.g., website link, link to PDF document), that might be included in the message • The entire section is configurable by state SAP GUI Users
3.17	Landing Pages	Each functional area within the system includes a custom	User's role within the system (e.g., agency employee, benefits only User)	• Data presented on a landing page is based on role that the User has in the system • When a navigational tab is selected, the User is taken

#	Activity	Description	Dependencies	Uniqueness/Customizations
		landing page	determines what functional area they can access	to the applicable landing page for the tab selected • Landing page is the home page for the area selected; once on the landing page, the screens within the area are captured under categories • Custom landing pages exist for Performance & Talent Management System and Flexible Spending Account

3.18	Navigational Tabs	Custom navigation that takes the User to the landing page for the area selected	User's role within the system (e.g., agency employee, benefits only User) determines what functional area they have access to	• Navigational tabs are displayed based on the User's security profile and employee group
				• If a User does not have access to a specific area, the navigational tab for that area will not be displayed
				• When a navigational tab is selected, the User is taken to the applicable landing page for the tab selected
				• The following are all the possible navigational tabs that could be displayed:
				  ○ Home Page - default landing page when User logs in to system; includes quick links and helpful websites; tasks, alerts and important announcements are displayed on this screen
				  ○ Management - where management and human resource activities are performed on employees (or on behalf of employees)
				  ○ PAR - where appointment, separation and employee actions are performed
				  ○ Employee Information –where employee self-service activities are completed; when accessing this tab, the User has employee access only (E security role code), regardless of security role code assigned
				  ○ Health & Insurance - where benefit-related employee self-service activities are completed; when accessing this tab, the User has employee access only (E security role code), regardless of security role code assigned
				  ○ Performance & Talent Management – where performance and talent management activities are performed; separate system from the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				People First System with single sign-on (SSO); once User is successfully logged in to the People First System, they are able to access the site ○ Training - where training-related employee self-service activities are completed; when accessing this tab, the User has employee access only (E security role code), regardless of security role code assigned ○ Org Management –where position, organization, broadband/class (job) and funding tables are maintained • Every navigational tab includes a hover menu and some navigational tabs include a submenu; the hover menu is displayed when a User places the cursor over a navigation tab and the submenu is displayed when the cursor is placed over a hover menu; the hover menus and submenus allow Users to launch a specific screen without having to navigate through the landing page and then selecting the screen ○ Options presented for selection in the hover menu and submenu include all screens that are available within the tab and are the same screens that can be selected from each functional area's landing page ○ If a User does not have access to a specific area and/or screen, the selection will not be displayed in the hover menu/submenu ○ When a selection is made from the hover menu or submenu, the selected screen is launched
3.19	Tooltips/Hover Messages	Hover messages are used to provide additional information on fields, buttons and images	Web browser being used must support tooltips and hover messaging	• Most employee screens contain table driven configured text that is displayed; when a User places the cursor over fields, buttons, navigational tabs/links, dropdowns, menus, images, etc.
3.20	Default View	The view that is	User must have security	• Data is displayed in a table grid format that allows a

#	Activity	Description	Dependencies	Uniqueness/Customizations
		displayed when a User first accesses the *My* Direct Reports screen	access that allows them to access the screen	User to select a record (row) that they want to view or maintain • My Default View is the default view that is displayed when a User first accesses the screen • Positions reporting to the User (i.e., direct report) are displayed in the view and are identified with a "DR" indicator • Positions that do not report to a supervisor (e.g., top of agency) are displayed in the view for Users with an agency-wide security role code (i.e., A, C, G, H and X) and are identified with a "Top" indicator • For Users with an agency group structural security role code (i.e., B, R and T), employees assigned to the organization(s) tied to their security role code are displayed in the view; these positions are identified with a "Grp" indicator • For Users with an agency structural security role code (i.e., K, U and Y), only direct reports ("DR" indicator) are displayed in the Position Maintenance view; positions with no reporting relationship ("Top" indicator) and positions assigned to the organization(s) tied to their role code are not displayed in the view • For Users that do not have security access that triggers the display conditions (i.e., DR, Top, Grp), no positions are displayed in the view • Security role codes with statewide, agency or manager access can navigate down the reporting structure from positions presented in view; structural role codes (e.g., B, K, R, T, U and Y) can only navigate down the reporting structure for their direct reports • When the Reset button is selected, the default view is restored
3.21	Search	Allows for search by employee name, User ID, unique employee ID	User must have security access that allows them to search and that allows them	• Search access and results are defined using SAP structural authorizations, standard SAP role definition

#	Activity	Description	Dependencies	Uniqueness/Customizations
		(Emp ID) and Social Security Number (SSN) in the Search by Employee section or by custom position number and position title in the Search by Position section; combination of search parameters can be used in each section as well	to search for the entered parameters Employee being searched must exist in SAP Position being searched must exist and be active in SAP as of the system date Search results for employee and position records are based on the User's security role code	and custom security tables; • Not able to search for employees with a future dated appointment (i.e., employee hire date is after system date) • The "Term" indicator must be selected to search for a terminated employee (e.g., employee not active as of the system date) • Because an employee is always associated with a position, there could be both active and terminated record(s) for the employee • Only active positions (i.e., effective date of position is on or before system date) can be searched; inactive (i.e., end date of position is before system date) and future dated (i.e., effective date of position is after system date) positions cannot be searched • Either the User ID, Emp ID or social security number can be used when searching for an employee; for active employees, the results returned are for the Emp ID record that is for the position the employee holds as of the system date ○ The ability to search by social security number is restricted based on the User's security role code • Wildcard (asterisk) can be used in all position search fields and all employee search fields, except the User ID/Emp ID and SSN fields; when using an asterisk, User must include at least one identifier (e.g., first digit of the position, first letter of the name, etc.) in conjunction with the asterisk • Search results will only include employees or positions the User has access to, based on the security role assigned and any structural or organizational restrictions tied to the security role (e.g., K, U, Y, G, B, R, T) • Security role codes with statewide, agency or manager access can navigate down the reporting structure from employees returned in the search

#	Activity	Description	Dependencies	Uniqueness/Customizations
				results; structural role codes (e.g., B, K, R, T, U and Y) can only navigate down the reporting structure for their direct reports • Security prevents a User's own record from being returned in search results on the *My Directs Report* screen; a User cannot access own employee record outside the *Employee Information*, *Health & Insurance* and *Training* tabs (employee self-service functionality) • If more than 500 records meet the search criteria, a standard message is presented notifying the User to refine the search conditions • Search results can be sorted by selecting the column headings presented in the search results table • When the Reset button is selected, the search results are removed and the User's default view is restored • Records returned in the search results can be viewed or maintained by selecting the record (row); access to maintain the data elements are defined by User's security role code
3.22	Access to Data	The *My Direct Reports* screen is used to access employee records by User's with specific security role codes to: • access (i.e., view or maintain) an employee's personal, work, attendance, payroll, training and benefits information • process leave and payroll transactions (e.g., leave	Access is based on the security role code assigned to the User	• Access to data and the type of access (view only, write) on the *My Direct Reports* screen is based on the User's security role code • The *My Direct Reports* is not accessible by Users with an "E" security role code; these Users access their own records through the *Employee Information*, *Health & Insurance* and *Training* tabs (employee self-service functionality) • The records available on the *My Direct Reports* screen include all the screens (except direct deposit records) available through the employee self-service functionality • The following are the possible categories that can be presented on the *My Directs Reports* screen; the actual categories presented are based on the User's security role code: ○ Approvals

#	Activity	Description	Dependencies	Uniqueness/Customizations
		payout, stop/cancel payment, create payment, leave adjustment, leave transfer) • approve leave • approve employee timesheets • approve extraordinary pay • charge object administration • Wage Type Permissibility administration		○ Administration ○ Personal Information ○ Work Information ○ Time & Payroll ○ Positions ○ Performance Management ○ Training ○ Benefits • When a category is selected, the screens associated with that category are displayed in alphabetical order; the following are the possible screens available for selection (based on the User's security role code): ○ Approvals ▪ Employee Timesheet Approval ▪ Extra Pay Approvals ▪ Leave, OT and Other Approvals ○ Administration ▪ Assign Org Range to a Charge Object ▪ Assign Position to a Charge Object ▪ Charge Objects ▪ Maintain Projs/Acts/SubActs ▪ Wage Type Permissibility ○ Personal Information ▪ Contact Information ▪ Correspondence History ▪ Driver's License ▪ EEO-Veteran ▪ Emergency Contact ▪ Employee Education ▪ Employee Languages ▪ Form W-4 ▪ Outside Employment ▪ Personal Info ▪ Professional Licenses & Certs ○ Work Information ▪ Action History ▪ Appointment Status Details

#	Activity	Description	Dependencies	Uniqueness/Customizations
				▪ Assigned Property ▪ Background Check ▪ Background Check - Abuse Case ▪ Base Work Schedule Assignment ▪ DROP / Retirement ▪ Drug Screening ▪ Dual Employment ▪ Fingerprints ▪ Fitness Test ▪ Key Service Dates ▪ Organizational Work Assignment ▪ Telework/Carpool ▪ Tuition Waiver ▪ Work Contact Information o Time & Payroll ▪ Alternate Time Entry ▪ Award Payments ▪ Base Work Schedule Assignment ▪ CJIP ▪ Employee Gross Salary ▪ Employee Timesheet ▪ FMLA/FSWP Leave Request ▪ Flexible Work Schedule ▪ Form W-4 ▪ Gross Pay History (Pre-Tax) ▪ Leave Balance Adjustments ▪ Leave Balance Overview ▪ Leave Balance Transfer ▪ Leave Payout ▪ Leave and OT Request on Behalf OT Election ▪ One-Time Pay Deductions ▪ One-Time Regular Payroll Pay ▪ Pay Info ▪ Recurring Payments/Deductions ▪ Recurring Pay Deductions ▪ Stop/Cancel Payment

#	Activity	Description	Dependencies	Uniqueness/Customizations
				▪ Supplemental Pay ○ Positions ▪ Open/Close Vacancy ○ Performance Management ▪ Performance Appraisal ○ Training ▪ Employee Training Entry ○ Benefits (Selected employee must be benefits eligible) ▪ Change My Benefits (only presented to HR Users) ▪ Confirmation Statement ▪ Medicare Details ▪ My Benefits ▪ My Dependent Information ▪ Premium History • The categories show at all times; the screens associated with a category are displayed once an employee or vacant position is selected • Only a single category is expanded (to display associated screens) at one time; once a different category is selected, the other category is collapsed to no longer display associated screens • Only the screens the User has access to are displayed when a category is expanded • When the User selects a screen, the screen launches to allow the User to view the record, maintain the record or process a transaction (e.g., leave payout, stop/cancel payment, create payment, leave adjustment) • Only Users with specific security role codes (i.e., F and S) can maintain the Wage Type Permissibility table, which is used to control one-time pay deductions, recurring pay deductions, supplemental and award payments • Only Users with an agency human resource security role code can approve or reject entries in the Extra

#	Activity	Description	Dependencies	Uniqueness/Customizations
				Pay Approvals screen
3.23	Screens with Combined Views (SAP Infotypes)	Certain records associated with an employee are combined to show all records across all the employee IDs for the person being viewed	User must have security access that allows them to access a screen; access is based on the security role code assigned to the User Combined records are displayed when employee has more than one employee ID	• A custom process was implemented to combine records for all employee IDs related to the employee being viewed; this was done so that Users do not have to access each employee ID to review those records • User can only maintain the record(s) belonging to the employee ID in which they have access to, based on the security role code assigned • The following records are combined in one screen for employees that have more than one employee ID ○ Personal Information ▪ Correspondence History ▪ Employee Education ▪ Employee Languages ▪ Outside Employment ▪ Professional Licenses & Certs ○ Work Information ▪ Action History ▪ Appointment Status Details ▪ DROP / Retirement ▪ Key Service Dates ▪ Organizational Work Assignment ○ Time & Payroll ▪ FMLA/FSWP Leave Request ▪ Gross Pay History (Pre-Tax) ▪ One-Time Pay Deductions ▪ One-Time Regular Payroll Pay ▪ Pay Info ▪ Recurring Payments/Deductions ▪ Recurring Pay Deductions • When a User launches one of the above screens, the information for the screen is combined and presented as individual records in the Overview section of the selected screen (displayed in descending order by effective date); the combined records allow the User to view all records for the screen selected; the position

#	Activity	Description	Dependencies	Uniqueness/Customizations
				number and agency associated with each record is displayed
3.24	Effective Date for Potential Payroll Impacted Actions	The effective date assigned to potential payroll impacted actions and individual infotypes cannot be more than two pay periods earlier than the current pay period, based on the system date	The two pay period restriction is determined by the payroll area (e.g., bi-weekly, monthly) assigned to the position being maintained Once payroll is processed, a new pay period begins for the purpose of restricting the effective date	• The payroll area is stored in State Org Data (infotype HRP9100) on the Organization Unit • The two pay period restriction is determined based on the Organization Unit Code (Object Relationships – infotype HRP1001) assigned to the position • Custom edits are implemented throughout the system in all areas that have a potential payroll impact to prevent transactions from being made effective more than two pay periods earlier than the current pay period, based on the system date • If the effective date entered for the pay impacted action is more than two pay periods in the past, the User is presented with an error message and must use another effective date that falls within the applicable two pay periods
3.25	Historical Records	Records stored for historical purposes due to a new active record (for the same infotype) being created; the end date of a infotype identifies if the record is active (based on the system date)	A new active record (based on the effective date and/or end date) for the same infotype must be created in order for a record to become historical	• Infotypes are systematically end dated the day before the effective date of a record with the same infotype • Each infotype record (both active and historical) has an end date; an active infotype has an end date of 12/31/9999 • An infotype record that is end dated (with any date except 12/31/9999) becomes the historical record • Infotypes can only have one active record, except for infotypes that have multiple subtypes (e.g., position records–infotypes HRP1001 (Object Maintenance, HRP9126 (Addresses) and HRP9130 (License/Cert & State Prop) • Future dated records can be created (i.e., end date is after system date) • Historical records cannot be maintained on the front-end; if historical records are updated in SAP, active records may also need to updated if effective date and/or end date changes are made
3.26	Copy Across Emp IDs	Certain employee	User must have security	• Access to infotypes with "copy across Emp ID"

#	Activity	Description	Dependencies	Uniqueness/Customizations

		master data is systematically copied across all of the Emp IDs associated to the employee using standard SAP copy infotype functionality	access to maintain the screen
			
			Employee has more than one employee ID
				functionality is based on the User’s security role code
				• Only infotypes belonging to the EMP ID for the position the employee currently holds can be maintained
				• Once a change is made to an infotype that has the “copy across Emp ID” functionality, the other identical infotype belonging to the employee is systematically updated to reflect the change; all the data will be the same (e.g., same effective date)
				• The “copy across Emp ID” functionality applies, regardless if the employee is active; the applicable infotypes are copied to both active and inactive records
				• The following screens contain the “copy across” Emp ID functionality:
				  ○ Personal Information
				    ▪ Contact Information
				      • Home Address
				      • Mailing Address
				      • Notification Email
				    ▪ Direct Deposit
				    ▪ Driver’s License)
				    ▪ EEO-Veteran
				    ▪ Emergency Contact Form W-4
				    ▪ Personal Info
				  ○ Work Information
				    ▪ Dual Employment
				  ○ Benefits
				• Dependents Medicare Information

3.27	System Screen Edits, Error/Warning Messages and Static Messages	Various edits are in place within each SAP infotype to prevent incorrect transactions		• Each edit triggers informational, warning and/or error messages that are presented within the screen to the User • Each message clarifies the type of update that should be made to complete the transaction • There are static messages that are displayed on various SAP infotypes throughout the system

#	Activity	Description	Dependencies	Uniqueness/Customizations

3.28	Mass Loads	Custom framework that allows for loading large volumes of data into the People First System	The same dependencies apply that would if the action is processed in the front-end
			
			Only the vendor is able to process mass loads
				• The following two processes are utilized to load large volumes of data in the system:
				  ○ Mass Change Engine – custom built BSP framework that allows for uploading data from an excel spreadsheet into SAP
				  ○ Batch Programs – custom built programs to load mass quantity of data from an excel spreadsheet into SAP; these can be scheduled to load at anytime
				• Templates have been provided by the vendor that are completed and sent to vendor for loading into SAP

SAP Graphical User Interface (GUI)				

4.1	SAP GUI Access	Specific Users in DMS have statewide view access to SAP GUI for infotypes that are used to support the online human resource information system (i.e., People First System) and that contain State of Florida data
		
		Access includes the ability to run reports, export data and complete limited updates to screen configurations (e.g., post messages, update URL links, etc.)
			SAP GUI access required to view SAP infotypes, People First data and maintain applicable configuration	• Access to SAP GUI requires a User license, User name (assigned by the vendor) and password (created by the User); DMS currently has seven (7) User licenses (provided by the vendor as part of the current contract); DMS Users are referred to as "state SAP GUI Users"
				• In addition to having access to the SAP production environment (People First System), state SAP GUI Users have access to a SAP test environment (UAT – copy of production environment) through SAP GUI; the test environment allows the state SAP GUI Users to make configuration changes/updates and review those changes before applying to the production environment (People First System)
				• State SAP GUI Users have access to the following SAP transactions that provide view only access:
				  ○ CADO – Timesheet Display Data
				  ○ PA20 – Display HR Master Data (access to employee personal, work, time, leave and payroll data)
				  ○ PO03D – Display Job (Broadband/Class)
				  ○ PO10D – Display Organizational Unit
				  ○ PO13D – Display Position
				  ○ PP01_DISP – Display Objects
				  ○ PPOSE – Organization and Staffing Display

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ PPOS_OLD – Organizational Plan / Display ○ SU53 – Evaluate Authorization Check ○ ZAUDITI (custom transaction) – Infotype Access Audit Report ▪ Report allows state SAP GUI Users to run a standard User audit report (what infotypes the User accessed, what type of transaction (view or update) the User completed) and a reverse audit report (who accessed a particular User and what type of transaction (view or update) completed) ○ ZBR_031 (custom transaction) – Fiscal Over/Under Payment Report ○ ZQUOTA (custom transaction) – Leave Used and Accrual ○ ZSE16 (custom transaction) – DMS User Data Browser (access to raw data stored in the SAP database) ▪ Custom version of the standard SE16 to allow state SAP GUI Users to access tables and programs in SAP and download data for further analysis ▪ Custom programs and tables are available for selection to create a query from ▪ State SAP GUI Users can also run reports off each infotype that is used for the People First solution by directly entering the infotype number ○ ZSLUA (custom transaction) – Browse User Access Log ○ ZZFILE1(custom transaction) – SAP Directory (includes interfaces) ○ State SAP GUI Users have access to the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				following custom SAP transactions to maintain the backend tables: ○ ZBE_012 – maintain the text and groups for Helpful Links and Important Information sections within the *Health & Insurance* screens; maintain the text for the *Overlay* screens, *Thank You* screens and email messages related to the *Dependent Certification, Address Verification and Open Enrollment* processes in People First ○ ZBE_013 – utility program used to upload mass changes to the Helpful Links sections ○ ZBE_014 – utility program used to upload mass changes to the Important Information sections ○ ZBE_015 – maintain the groups for the *Overlay* and *Thank You* screens in People First and turn on/off the *Dependent Certification for QSC events, Open Enrollment (active and passive Open Enrollment periods) and dependent audits; ability to turn on/off the Address Verification and Open Enrollment* event (passive and active enrollment) in People First ○ ZLOGONMSG – maintain configurable sections on the *Log In* page and *Home* Page in People First ○ ZPE_WAGETXT – update deduction code descriptions on the Wage Type Permissibility Table in People First ▪ Allows the state SAP GUI Users to either update the title for an active deduction or to activate a deduction for use in the portal; once activated for use in the portal, the deduction has to be activated for specific agencies and security role codes

#	Activity	Description	Dependencies	Uniqueness/Customizations
				using the Wage Type Permissibility table in the portal ◦ Z_RESET_PW – User ID Maintenance; reset User passwords and security questions in People First ◦ ZSPCBE – maintain SPC and BE relationships in People First ◦ ZTEAMS – maintain approver assignments (staffing) ◦ ZTRAIN – maintain the Training Videos screen in People First • When a state SAP GUI User accesses the following SAP infotypes, the system records the activity in the audit logs: ◦ PA0002 – Personal Information ◦ PA0006 – Address/Emergency Contact ◦ PA0009 – Direct Deposit (no bank information is displayed) ◦ PA0021 – Family/Related Person (Benefit Dependents) ◦ PA0167 – Health Plans ◦ PA0211 – COBRA Qualified Beneficiary ◦ PA0212 – COBRA Health Plans ◦ PA9000 – Driver's License • The system logs the following information when any of the above SAP infotypes are accessed by a state SAP GUI User: ◦ Access Date ◦ Access Time ◦ Access User ◦ Infotype ◦ Info Subtype ◦ Access Type ◦ Log Source ◦ Object Type ◦ Object ID
4.2	Configuration Using SAP	State SAP GUI Users	SAP GUI access required to	• The backend tables that are used to configure specific

#	Activity	Description	Dependencies	Uniqueness/Customizations
	GUI	have access to configure some sections of the People First landing pages, screens and benefit-related processes and email messages using SAP GUI	maintain configuration	People First landing pages, screens, benefit-related processes and email messages are accessed through SAP GUI • The following landing pages, screens, benefit-related processes and email messages (within the People First System) are configurable using SAP GUI and are maintained by the state SAP GUI Users: ○ *Log In* Page ○ *Home* Page ○ *Training Video* Screen ○ *Health & Insurance* Screens ○ *Dependent Verification* Process ○ *Address Verification* Process ○ *Benefit-Related Email* Messages • Configuration for all applicable landing pages, screens, benefit-related processes and email messages allows state SAP GUI Users to control the start date/time (i.e., when information will display), end date/time (i.e., when information will no longer display), text, links, formatting (e.g., font, color, size) and the sequential order in which certain data (e.g., messages, information) is displayed; some of the screens and processes allow for additional configuration, which is identified in the applicable sections below • Some configuration requires HTML language (e.g., font color, font size, bullets, paragraph break) • The following sections/areas on the *Log In* Page are configurable, using the ZLOGONMSG transaction: ○ Message Area – entire section is configurable and is used to provide important information/messages related to the People First System ○ Job Seekers Section – informational area within this section is configurable and is used to display service contact information/hours of operation and contains a link to a Frequently

#	Activity	Description	Dependencies	Uniqueness/Customizations
				Asked Questions (FAQs) document for job applicants ○ State Employees & Retirees Section – lead-in paragraph, bulleted list and informational area within this section are configurable ○ Lead-in Paragraph – provides instructions for logging in to the People First System ○ Bulleted List - identifies key activities than can be completed in People First ○ Informational Area – displays service contact information/hours of operation and contains a link to a FAQs document related to People First password requirements • Helpful Websites Section – entire section is configurable and is used to provide links to State of Florida websites (e.g., retirement, deferred compensation) • Why Work for the State of Florida? Section – entire section is configurable and is used to provide information on the benefits (e.g., leave, benefit options, retirement) of working for the State of • Footer – entire section is configurable and is used to provide informational links (e.g., internet privacy policy, accessibility statement, E-verify website) • The following sections on the *Log In* Page are configurable, using the ZLOGONMSG transaction: ○ Helpful Websites Section – entire section is configurable and is used to provide links to specific websites (e.g., retirement, payroll information) that are of importance to Users of the People First System ○ Announcements Section – entire section is configurable and is used to provide important information/messages related to the People First System or Users of the system • The entire *Training Videos* screen is configurable, using the ZTRAIN transaction; includes the ability to

#	Activity	Description	Dependencies	Uniqueness/Customizations
				add and remove training videos as needed and maintain the following fields within the screen: ○ Training Video Name Field – displays the statewide training video title ○ Access Videos Field – provides the direct URL/link to the applicable statewide training video • The following sections within the *Health & Insurance* screens are configurable, using the ZBE_012 transaction; configuration includes the ability to control the type of Users (e.g., benefits only; university employees, retirees) and subgroups (e.g., Users within a specific employee subgroup) that can view the information/links (using the ZBE_015 transaction): ○ Important Information Section – entire section is configurable and is used to provide detailed information/help related to the specific screen that is being viewed; the information presented vary from screen to screen ▪ ZBE_014 – utility program used to upload a tab delimited text file to a custom table (ZBE_UPLOAD_DOWNLOAD_IMP_INFO) to update the Important Information sections within the *Health & Insurance* screens; this program is only used when there are mass changes needed to the Important Information sections, otherwise individual changes are made using transaction ZBE_012 ○ Helpful Links Section– entire section is configurable and is used to provide links to benefit-related documents, forms and websites (e.g., myBenefits website) related to the specific screen that is being viewed; the links presented vary from screen to screen

#	Activity	Description	Dependencies	Uniqueness/Customizations
				▪ ZBE_013 – utility program used to upload a tab delimited text file to a custom table (ZBE_UPLOAD_DOWNLOAD_HELP_LNK) to update the Helpful Links sections within the *Health & Insurance* screens; this program is only used when there are mass changes needed to the Helpful Links sections, otherwise individual changes are made using transaction ZBE_012 • The following elements associated with the *Dependent Certification, Address Verification*, benefits enrollment (qualifying event) and *Open Enrollment* processes are configurable, which includes the ability to control what screens and information is presented for specific Users (e.g., benefits only; university employees, retirees) and the type of email messages sent (e.g., reminder, thank you, action needed): ○ Overlay Screen – entire screen is configurable and is used to provide information and instructions for completing the applicable benefit-related process (i.e., dependent certification, address verification, open enrollment); screen is presented when a User logs in to the People First System while the applicable process is active ○ Thank You Screen – entire screen is configurable and is used to let the User know they have successfully completed the applicable benefit-related process (i.e., dependent certification, address verification, open enrollment) ○ Email Messages – specific messages/notifications for benefit-related processes (i.e., dependent certification,

#	Activity	Description	Dependencies	Uniqueness/Customizations
				address verification, benefits enrollment, open enrollment) are configurable; email messages are used to notify Users of action needed, confirm applicable process completion, and notify/remind them of benefit-related events (e.g., Open Enrollment begin/end dates)
4.3	Maintain State Program Component (SPC) and Budget Entity (BE) Relationships	State SAP GUI Users have access to create custom SPC and BE relationships using SAP GUI	SAP GUI access required to maintain SPC and BE relationships SPC and BE codes must exist in custom table in SAP	▪ The custom backend table used to create custom SPC and BE relationships (funding codes) is accessed through SAP GUI ▪ Custom SPC and BE relationships must be created before either funding code can be assigned together to Organization Units or positions in the People First System ▪ Creating a custom SPC to BE relationship, using the ZSPCBE transaction, allows state SAP GUI Users to maintain the effective date and end date of the relationship; once the SPC and BE relationship is established, the funding codes can be assigned together in the People First System
Security				
5.1	Security - Log In	A custom process used to authenticate a User in order to provide access and entry into the People First System	User ID must exist in SAP with a valid employee ID and password User must have previously selected and answered three security questions or do so upon initial log in User must be logging in with a supported browser System must be available (not unavailable due to payroll processing or any other scheduled/unscheduled downtime)	• The custom portal is used to access the People First System (front-end solution); Users are required to log in using their unique User ID and password • The custom process includes the ability to authenticate a User with multiple employee IDs and give the User the ability to switch between the IDs without having to log out and log back in with different User IDs and passwords • Users are assigned a unique temporary password that is only used the first time they log in (temporary password must be changed at log in) or when the service center staff resets the password at the User's request • The first time a User logs in to the system, they are required to create a new password and set up security questions • User logon, logoff, password change, authentication

#	Activity	Description	Dependencies	Uniqueness/Customizations
				failure and transactions (date and time they logged in and IP address) are captured in a custom table in SAP for audit purposes • No separate login for other sites (Recruitment, Performance Management and Flexible Spending Accounts) that are administered through third party vendors; access to those sites is performed using single sign-on (SSO) algorithms ○ Once a User is successfully logged in to the People First System, they are able to access the other sites, based on either or both their security role code and/or enrollment in one of the tax-favored accounts (i.e., FSA or HSA) • A User ID is locked after 30 days of inactivity for brand new Users that have never logged into the system; this will require the User ID to be unlocked by the service center staff
5.2	Password	Password is used in conjunction with the employee's unique User ID to gain access to the People First System; password restrictions exist to force Users to create strong passwords	Password must: • contain 8-30 characters • begin with a letter (upper or lower case) • contain at least one upper case letter, one lower case letter and one number • not contain any spaces • not contain any of the following special characters: ^ = " { } • differ from the User's old password by at least one character • be different from the last ten passwords	• Upon hire, all Users are given a unique temporary password that is only used the first time they log in (must log in within 30 days or the temporary password is locked); once the temporary password is successfully entered, the User is required to create a new password (taken to a custom *Change Password* screen where they will create a new password) before being able to move to the next step (i.e., setting up security questions) in the initial log in process • Once the password is changed from the temporary password, the new password must be used each time the User logs in to the system • A password can be changed once a day by the User; navigation links titled "Change Your Password?" and "Forgot Your Password" are presented on the People First System log in screen; when a link is selected, the User is taken to either the custom password reset or custom password change screen ○ If, for any reason, a password needs to be changed more than one time in a day, the

#	Activity	Description	Dependencies	Uniqueness/Customizations
			used • have at least one different character in the first three characters (e.g., cannot be AAA)	User must call the service center for assistance • Passwords expire after 90 days and the User is forced to change their password the first time they log in on or after the 90th day; if the User returns to work or otherwise gains login rights (e.g., retroactive retirement) after being terminated the employee must reset their password using the Forgot Your Password page before logging in • If a User attempts to log in and is unsuccessful after three attempts in a row, the User's account is locked and the User is automatically transferred to the "Forgot Your Password?" page where they can unlock their account and create a new password; User must use the automated password reset process ("Forgot Your Password?" link on the log in screen) to unlock their account or call the service center for assistance • When a User's password is changed, the new password is synchronized with the DW
5.3	Security Questions	Custom process used to capture security questions and answers that will be used during the automated password reset process	User must have successfully logged in (valid User ID and password) to system Security questions and answers are not yet established for the User	• Each User of the People First System is required to set up and answer three security questions the first time they log in to the system or their security questions have been reset • Security questions can only be reset (removed) by the service center staff after they have been successfully saved by the User; once the security questions are reset, the User is required to set up new ones the next time they log in to the system • User selects each security question from a pre-defined list and is required to enter an answer for each security question selected (answers are not case sensitive) • Security questions are used in the automated password reset process to validate the User's identity when the User attempts to unlock their User ID or reset their password • The answers to the security questions are encrypted

#	Activity	Description	Dependencies	Uniqueness/Customizations
				and stored in a custom table in SAP and are not viewable by any Users

5.4	Password Reset	Custom process that allows a User to unlock their User ID and/or reset (change) their password without going through the People First Service Center for assistance	User ID must exist in SAP
			
			User must have successfully set up three security questions
			
			User must verify personal information and answer the security questions presented
			
			User must not have already changed their password on the system date (can only change password once per day)
			
			User must only be locked due to invalid password log in attempts
				• If the User is redirected to the *Password Reset* screen due to three invalid log in attempts in a row, a custom message is presented at the top of the *Password Reset* screen letting the User know they were redirected and must complete the reset process to log in to the system
				• Navigation link titled "Forgot Your Password?" is presented on the People First System log in screen and "Change Your Password" screen; when link is selected, the User is taken to a custom password reset screen that presents a two-step verification process that must be successfully completed before allowing the User to unlock their User ID or change their password
				  ○ Step One: Provide personal information (i.e., User ID, last five digits of social security number and date of birth); the information provided is verified by the system before User is able to proceed to step two of process
				  ○ Step Two: Provide the answer to one of the security questions (randomly selected by the system); the answer provided is verified by the system before User is able to unlock their User ID
				• If the User attempts to unlock their account or reset their password and is unsuccessful three times in a row at either step one or step two, the User's account is administratively locked and they must call the People First Service Center to unlock their account
				• The system password rules are still enforced when the User changes their password through the Password Reset process
				• The User is not able to immediately log in to the system when the password is successfully reset if payroll is processing

#	Activity	Description	Dependencies	Uniqueness/Customizations

				• Both the User and the service center staff have the ability to unlock the User ID or reset password
				  ○ if the unlock/reset is completed by the service center staff, the User is given a temporary password (that can only be used once) and is required to create a new password the next time they log in to the system
				  ○ if the unlock/reset is completed by the User online, the User establishes their new password during the reset process

5.5	Portal Application Timeout	A custom timeout feature is used to log a User out of the portal when there is no activity by that User for a specified amount of time	No activity within the portal for 60 minutes	• The portal application timeout feature is set to 58 minutes; each time the User completes an activity in the custom portal application the timeout is reset to 58 minutes; after 58 minutes of inactivity in the portal, the following occurs:
				  ○ Soft log out is performed on the User at the portal application layer (the custom portal continues to be presented to the User) and the User is presented with a pop-up screen that gives the options to continue working within the system or be systematically logged out
				    ▪ If the User selects to continue working, the User has an additional two minutes to perform any activity in the system
				      • If the User does not perform any activity within the two minutes, the system logs the User out of the custom portal application and presents the User with the Log In screen; User must enter User ID and password to log back into the system
				      • If the User performs any activity in the system within

#	Activity	Description	Dependencies	Uniqueness/Customizations
				the two minutes, the system timeout resets to 58 minutes ▪ If the User selects to be logged out, the system logs the User out of the custom portal application and presents the User with the Log In screen; User must enter User ID and password to log back into the system
5.6	Access in the People First System	Custom security was developed for handling access levels of each User in the People First System; security role codes are used in the People First System to restrict access to employee, position and organization data; every User of the system is assigned a security role code Access within the Performance & Talent Management System is defined within the Performance & Talent Management System; access to the FSA site is based on the User being enrolled in one of the applicable reimbursement accounts or the User having HR access and viewing an employee who is enrolled in either a FSA	To have any access other than employee self-service, the User must be an active employee	• Security role codes are defined in a custom security table in SAP; access to data and the type of access (i.e., view only, write or combination of both) for each security role code is also defined in the custom security table in SAP • There are 21 custom security role codes that can be assigned in SAP; a security role code is an alpha code (e.g., A, H) and defines the Users access in the system • Each security role code is assigned a specific level of access to employee, position and organization data; access is defined as statewide access, agency access (or a combination of both) or structural access ○ Administrator – allows User to access all data (except direct deposit) across all agencies; includes update access statewide for organization management ○ Statewide – allows User to access selected data across all agencies ○ Agency – allows User to only access data in User's own agency ○ Structural – allows User to access selected data using an assigned authorization structure • The specific type of access is assigned to individual infotypes, screens, data fields, transactions, action buttons (e.g., edit, save) and tabs/navigational links; the type of access is defined as view access or write access (or a combination of both) ○ View Only – ability to only view data, but not

#	Activity	Description	Dependencies	Uniqueness/Customizations
		or HSA		make any changes ◦ Write – ability to view and update data and process transactions ◦ Yes – used when view/write access it not applicable (e.g., allows User to press a button, select a link, view data within a SAP report) ◦ Maintain – used to determine the type of access (view/write) to separated employees when the employee has separated the agency and is still in inactive status • Custom security logic prevents Users assigned a security role code with write access from maintaining historical records (records that are end dated) • If User is employed in multiple agencies at same time (dual employment), a toggle function (dropdown selection) is presented after the User logs into the system; the User will select a position from the dropdown and security is applied based on the role code assigned to the position being accessed ◦ If the User has a different role code assigned to each dual employment position, the access when logging in to the system is based on security role code hierarchy that is defined in a custom table in SAP (e.g., preference is given to security role code that provides the highest level of access) • Refer to the Security Role Code Definitions instructional guide for a complete list of the custom security role codes, descriptions and access levels; the State's custom security roles codes and all levels of access for each role code are further defined in the User Role Code Security Matrix (URCSM)
5.7	Search	Security role codes restrict access to the data returned when a User performs a search within People First,	User must have security access that allows them to search for the applicable data Position and organization	• Access is assigned to individual security role codes • Search results will include any information the User has access to display, based on the security role assigned and any structural or organizational restrictions tied to the security role (e.g., B, G, K, R, T,

#	Activity	Description	Dependencies	Uniqueness/Customizations
		regardless of what area the search is being performed (e.g., employee, position, organization)	searches are based on the date/date range selected	U, Y) • Custom security prevents User from accessing their own data from the My Direct Reports screen; search results from this screen will not include the User's own record (even when looking at the reporting relationships for their manager) • Users do have the ability to access their own position and organization unit to which the employee is assigned; User cannot make any updates to the position in which they are an active holder • Security role codes with statewide, agency or manager access can navigate down the reporting structure; structural role codes (e.g., B, K, R, T, U and Y) can only navigate down the reporting structure for their direct reports
5.8	Org Restricted Access - Agency, Organization, Group or Reporting Structure	In addition to controlling the level (i.e., statewide, agency) and type of access (i.e., view, write), certain security role codes further restrict access to employee, position and organizational data within the People First System	Organizational code or agency code being assigned to security role code must exist For organizational restricted access (K, U and Y roles), the position must have an Organizational range assigned on infotype HRP9105 (Security) For agency restricted access (G role), the position must have an agency assigned on infotype HRP9105 (Security) For group access (B, R and T roles), the position must have a position to group administrator relationship	• Restricted access is defined in the custom security table in SAP • The organization(s) and agency assigned to an applicable security role code is maintained on infotype HRP9105 (Security) • Three security role codes (K, U and Y) restrict access by requiring one or more ranges of organizational codes to be assigned with the security role code (to and from can be the same organizational code); when any of these role codes are used, the User can only access data for employees, positions and organizational units that fall within the organizational code range(s) assigned • Three security role codes (B, R and T) restrict access for Users who have additional responsibilities for approving employee timesheets (i.e., timekeeper), posting job advertisements (i.e., requisition manager) or both combined (i.e., time and requisition manager); these role codes are assigned to positions where the position holder is an administrator of groups where access is defined by the organizational codes assigned to the group; when any of these role codes

#	Activity	Description	Dependencies	Uniqueness/Customizations
			For reporting structure access (M role), the position must have a Line Supervisor of relationship assigned on infotype HRP1001 (Object Relationships)	are used, the User can only access data for employees and/or positions that are in the organizational code(s) assigned to the group • One role code (M) restricts access for Users who have direct reports (subordinates) by only allowing access to employees that report to User or are within the User's reporting structure (i.e., access is given down the reporting structure, not up reporting structure); regardless of the User's security role code (must be anything other than E), they have manager access by default • One role code (G) restricts access by requiring that one or more agency codes be assigned with the security role code; when this role code is used, the User can only access the applicable data for employees, positions and organizational units that are in the agency (or agencies) assigned • In addition to the organizational, agency and structural access, custom filters are applied to all security role codes to further restrict access to data for specific types of Users (e.g., temporary (i.e., OPS)) or groups of Users (e.g., retirees, universities, BENO entities) and data (e.g., employee timesheet); filtering is based on the access of the User and the type of employee, position and organizational unit the User is accessing
5.9	Access – to and by Terminated Employees	In addition to controlling access to specific employee, position and organizational data within the People First System, custom security coding further restricts access to data based on the status of the employee being accessed (active or inactive)	Status (e.g., active, terminated) of employee being accessed System date is used to determine the type of access (i.e., view, write) for employee record System date is used to determine if terminated employee can log in to	• Access to employee data for active and inactive (terminated) employees is defined for each security role code in the custom security table in SAP • Agency human resource security role codes (e.g., A, H) and managers that have access to employee data while the employee is active will continue to have either view or write access to the employee, once employee terminates, for 60 days from the last day employed as long as the employee is not active in another employment position in the system • After 60 days, the manager no longer has access. Access for agency human resource staff is generally

#	Activity	Description	Dependencies	Uniqueness/Customizations
			system and/or view own data associated with terminated position	limited to view only access. However, until the employee returns to an active status (same or different ID), the agency human resource staff will have update (maintain) access to certain infotypes (e.g., address, W-4) • If the employee is not active in another position, the employee will only have access to the system for 30 days from the last day employed, but only for own information and for specific activities (e.g., submit employee timesheet, maintain contact information, form W-4) ○ When an employee separates, the system automatically assigns employee only access (E role code) at midnight on the day after the last day employed, regardless of the employee's security role code assigned while active • If employee is active in another position, they will continue to have access to their data associated with the inactive position for 30 days
5.10	Security Role Code Assignment	There are multiple types of security roles in the People First System. The type of security role code assigned to a User is determined by the employing agency and is based on the User's role in the agency, level of responsibility and/or type of job duties Security role codes are assigned to a position (infotype HRP9105) and access is given to the holder (employee) of the	Position must exist in SAP Security role code being assigned must exist in SAP Organizational codes assigned with specific security role codes must exist in SAP and be within the position's agency (i.e., agency code; first two digits of organizational code must match the first two of agency code, except in some cases where the first four digits must match the first four of agency code	• Various system edits are in place based on the requirements defined in the custom security table in SAP; applicable error messages are presented to the User if any of the defined requirements are not met when assigning a security role code • Security role codes are assigned and maintained on positions (infotype HRP9105 – Security screen), which then gives the position holder (employee) the applicable access • Logic for assignment of role codes is defined in a custom security table in SAP • Effective date of security role code is systematically assigned based on the system date the record is created (saved); exact time record is effective (i.e., when save is selected) is systematically displayed after record is saved; effective date can only be changed to current date or to a future date and cannot

#	Activity	Description	Dependencies	Uniqueness/Customizations
		position	Agency code being assigned with auditor security role code must exist in SAP Security role codes that are presented for selection are restricted based on the following • agency code assigned to the position • type of position being assigned the security role code • security role code of User assigning the role code • employee group of the position being updated	be back dated • Certain types of positions (employee groups other than 1 or 2) cannot be assigned specific role codes • Certain role codes (F, S and Z) can only be assigned to specific agencies • Security role codes (A, F, G, N, S, X, Y and Z) that allow any type of statewide access can only be assigned by administrator/super User (S role code) • Only certain role codes (E, N, U and Y) can be assigned to Users in the universities and BENO entities (e.g., legislature); the auditor role code (G) can be assigned to Users in Employee Groups 1, 2 and employee group 8, with agency code of 9999 • Only the security role codes that a User has access to assign are presented for selection on the security screen (infotype HRP9105 – Security screen) • The organizational code fields are presented when an agency human resource structural role code (K, U and Y) is assigned; one or more ranges of organizational codes are required (to and from can be the same organizational code) to be assigned with these security role codes; access to data is restricted by the organizational code range(s) assigned; when assigning an organizational code range, edits force the User to enter either an equal or lower organizational code for the from organizational code (from can’t be after to) • The agency code field is presented when an auditor role code (G) is assigned; one or more agency codes are required to be assigned with this security role code; access to data is restricted by the agency code(s) assigned • If a groups structural based role code (B, R and T) is assigned, then one or more organizational codes are required to be assigned; however, the assignment of the required organizational code(s) is completed in a separate custom groups table within the People First

#	Activity	Description	Dependencies	Uniqueness/Customizations
				System and not on the position's *Security* screen (infotype HRP9105)
5.11	Tracking User Access - Audit Log	User access within the People First System is tracked through a custom audit logging process and the results are captured in SAP Audit Logs	Transaction (view, update, create) must have been completed	• The screens, infotypes, fields and actions that are tracked are defined in custom tables in SAP • The audit tracking process includes identifying if a User viewed or updated information; if data was updated, it shows the old value and new value of the information ○ When data is changed or viewed by a User acting as another User (e.g., service center staff viewing employee information as the manager), the person actually accessing the data is shown on the report as viewing/changing the data

5.12	SAP (Management) Reports and DW Reports – Security Access	There are two types of reports available in the core People First System: SAP (Management) Reports and DW Reports	User's security role code determines access allowed to each report	• Access to both SAP and DW reports is based on the User's security role code and is specifically defined in the custom security table in SAP
				• DW reports are stored outside the custom portal; access to the reports does not require a separate sign-on (uses single sign-on)
				• Filters are used to define specific data to be included in a report; the filters applied to the report are selected by the User
				  ○ Data presented in the reports is based on the filters selected and access the User has to the data included in the report; if the User's security role code does not allow access to certain employees, then those employees will not be presented in the report
				  ○ The User's own data will not be included in the report
				• SAP report data is real-time; DW report data is based on the previous day, with a few exceptions
				• Refer to the Reports Summary Matrix instructional guide to identify all reports available in the system, the location of each report, a summary of each report, and the security role codes that have access to run the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				applicable report
5.13	Recruiting Center and Performance Management – Security Access	Security requirements for the Recruiting center (hiring manager/requisition access) and Performance management system (setting employee expectations and conducting employee evaluation) is administered outside the People First System; the sites can be accessed through the Performance & Talent Management tab	The User's position type and security role code assigned to the User determines the type of access User must be an active employee and not be a benefits only User	• Access to the recruiting center and performance management site and the associated reports is managed through separate security within the Performance & Talent Management System • People First System custom security role codes are sent to the Performance & Talent Management System, and from there the security role codes are mapped to the applicable performance security roles to allow access to performance management and the associated reports
5.14	Online Job Site – Security Access	Online job site where State of Florida job vacancies are posted; job seekers use the job site to apply for job vacancies	Job seeker must have an account created within the job site in order to apply for vacancies	• Access to the online job site is managed separate from the People First System • Any job seeker can access the online job site to search for job vacancies • Job seekers must create an account using a unique email address before being able to apply for job vacancies • Job seeker has the ability to create a profile that can be used to match job vacancies
5.15	Flexible Spending Accounts – Security Access	Flexible Spending Accounts (FSA) are handled outside the People First System; eligible Users can access the FSA site from the People First Home Page using single sign-on	User must have access to the FSA site; User's security role code and/or enrollment status in a FSA account (e.g., medical reimbursement account, dependent care reimbursement account) determines access	• Access to the Flexible Spending Accounts (FSA) site is managed through separate security within the FSA site • User must be enrolled in one of the applicable reimbursement accounts to have access to the FSA site
5.16	Service Center –	Ability for service center	Ability to view certain data	• Level of access to SAP infotypes (screens) and data

#	Activity	Description	Dependencies	Uniqueness/Customizations
	Security Access	agents to access the People First System using the custom portal as an employee would navigate	elements is restricted based on security assigned	is defined in custom SAP tables • Service center access to system includes the ability to navigate as the employee; service center staff is essentially able to log in to the system as the employee to be able to navigate as the employee would ○ This functionality includes specific security for the service center staff, audit logging and a custom logon process from eCase (vendor's service center call tracking and ticketing system)

5.17	Update User Security	A custom process that identifies Users that are missing the needed elements to log in to the People First System	Process has to be scheduled to run	• The custom process is scheduled to run daily at every hour starting at 12:15 a.m. and performs the following validations:
				  ○ Checks to ensure Users have the correct security roles assigned to their profile based off of the security role code assigned to their position
				  ○ Checks to ensure a User ID exists for an employee
				  ○ Checks to ensure administrative locks are as they should be based on an employee's status
				• If a User ID does not meet any of the above conditions, the program makes the appropriate changes

Training				

6.1	Training Library	The Training Library (custom table) identifies agency and statewide training courses and the dates (i.e., begin date, end date) the training is available	The type of training course (e.g., agency, statewide) that can be created is based on the User's security role code
			
			The agency options presented in the "Agency" dropdown is based on the agency code of the User creating the training course;
				• All fields are required to be completed when adding a training course to the Training Library; the following are the fields presented when a training course is added:
				  ○ Agency - select from dropdown (i.e., specific agency or statewide)
				  ○ Course Name – text entry field
				  ○ Course Begin Date - restricts when the training course is available for selection in the *Employee Training Entry* screen; the course is

#	Activity	Description	Dependencies	Uniqueness/Customizations
			for Users with a "S" security role code, all agencies are presented in the dropdown	only available for selection in the training entry screen when the begin date is on or before the system date ○ Course End Date - restricts when the training course is available for selection in the *Employee Training Entry* screen; the course is only available for selection in the training entry screen when the end date is on or after the system date • When accessing the Training Library directly, all training courses will show regardless of begin and end dates assigned • Once a training course is added to the Training Library, it can be entered on an employee's training record (as long as it is active on the system date, i.e., training course begin date is on or before system date and end date is on or after system date) and will be captured in the Training Library Report (SAP Report) • Only Users with a security role code of "S" can enter statewide training courses in the Training Library; this role code also allows the User to create an agency training course for any agency
6.2	Employee Training Entry (infotype PA9025)	Allows managers and other agency Users (based on security role code) to add training courses to an employee's training record	User must have security access that allows them to access the screen Training course being added to the employee's record must be in the Training Library Only active training courses (i.e., training course begin date is on or before system date and end date is on or after system date) are available for selection in the	• Access to the custom *Employee Training Entry* screen is based on the User's security role code • The screen is not accessible by Users with an "E" security role code; Users can access their own training records through the *Training* tab (employee self-service functionality) • Only agency training courses for the employee's own agency (based on agency code) can be added to the employee's training record • Statewide courses can be added to the employee's training record (no agency code restriction) • The following are the fields presented when adding a training course to the employee's training record: ○ Agency - select from dropdown (i.e., agency or statewide); required field

#	Activity	Description	Dependencies	Uniqueness/Customizations
			"Course Name" dropdown field	○ Course Name - select from dropdown; options presented is based on the selection made in the "Agency" field (i.e., only the agency courses for the agency selected are presented and only statewide courses are presented when statewide is selected) and training course being active in the Training Library on the system date; required field ○ Completion Date - date training course was completed; required field ○ Result - select from dropdown (i.e., pass, fail, not applicable); required field ○ Comments - optional field • Once a training course is entered on an employee's training record, it will be captured in the Training Summary Report (SAP Report) and the Training History Report
6.6	Training Videos Screen	The Training Videos screen is used by the employee to access online statewide training videos	User must have access to the Training tab (employee self-service)	• Access to the Training Videos screen is part of the employee self-service functionality and is only accessible by the employee through the *Training* tab ○ The Training tab is not available for benefits only Users (e.g., university employees, retirees) • When the Training Videos link is selected from the Training tab, the Training Videos screen is launched and the employee is able to select a training video to view • The following four statewide training videos are currently available on the Training Videos screen: ○ State of Florida Sexual Harassment Awareness Training ○ State of Florida Ethics Training ○ State of Florida Diversity Training ○ State of Florida Americans with Disabilities Act (ADA) Training • The employee can view the training video by selecting the applicable link; when the training video link is

#	Activity	Description	Dependencies	Uniqueness/Customizations
				selected, the statewide training video is launched in a separate window • Specific Users in DMS have access (via SAP GUI; requires license) to configure (e.g., add, delete and maintain training video titles and links) the Training Videos screen • The URL addresses for the individual statewide videos are maintained by DMS and all the training videos are housed on a DMS server
User ID and Employee ID				

7.1	User ID and Employee ID Assignment	A custom unique ID is assigned to every User within the People First System; the type of ID assigned (i.e., User or Employee) is determined based on specific criteria; the state does not use SAP's concurrent employment functionality
		• A User ID is assigned to every User when their first appointment (hire) action is completed
		An additional employee ID is assigned to a User based on specific actions, but only after the User has been assigned a User ID
			User ID – assigned during the employee's first appointment in the People First System
			
			Employee ID
			• User has no assigned employee ID at agency or if User has no assigned employee ID in payroll area being appointed within the same agency
			• User is separating with a reason of retirement
			• User is being appointed with a Dual Hire action
				• The type of ID (i.e., User or Employee) is standard SAP
				  ○ User ID is also referred to as the Central ID (CP)
				  ○ Employee ID is also referred to as the PERNR
				• The ID can be six to eight digits; the ID is displayed with leading zeroes if not eight digits
				• Upon initial hire (User never existed in the system; no matching social security number in database) the User is assigned a Central (User) ID and employee ID (the IDs are the same upon initial hire)
				  ○ A Central (User) ID is only created if the User does not exist in the system
				  ○ The User ID is system generated and is unique to the User; the User ID never changes and is what the User will always use to log in to the People First System
				• When specific conditions are met, a new employee ID is assigned
				• The status of the IDs is based on the User's employment status (i.e., active, terminated); when a User separates, the ID tied to the position being separated will have a status of withdrawn
				• The following are the conditions for creating a new employee ID:
				  ○ Appointment of a User that exists in the

#	Activity	Description	Dependencies	Uniqueness/Customizations

				system but has no assigned employee ID(s) in the agency and payroll area of the position being appointed into
				  ○ User separates with reason of retirement and the User does not have an existing employee ID as a state retiree
				  ○ User is being appointed with a Dual hire action and has an active employment status on or before the effective date of the appointment
				• The following are the conditions for reusing an existing employee ID
				  ○ User has been previously employed in the agency being appointed and in the same payroll area of the position being appointed into
				  ○ User is being appointed within same agency and is not changing payroll area
				• Employee data is mapped to the ID that is specific to the agency; historical records are separated using the employee ID

DW Technical				
8.1	DW Architecture	The DW functions as an operational data store (ODS) of data from different source systems, including People First (SAP), the legacy HRIS (COPES), and the Department of Financial Services (DFS) Bureau of State Payrolls (BOSP). The technology utilized to load data includes Oracle Database 11g Enterprise Edition	N/A	• On a nightly basis, scheduled jobs as defined in Redwood Cronacle are executed in order to perform extract, transform, and load (ETL) of data from the source system into the DW. At approximately 7:00 p.m. EDT, data from SAP is extracted using custom Advance Business Application Programming (ABAP) programs, which load records into the DW "staging" database. The load of staging table records to DW tables occurs after 12AM EDT in order to logically group all records loaded as of the prior day. Custom Oracle Procedural Language/Structured Query Language (PL/SQL) programs are executed to determine the records to insert, update, or delete in the DW • State of Florida ad-hoc Users are provided the ability

#	Activity	Description	Dependencies	Uniqueness/Customizations
		Release 11.2.0.3.0 - 64bit Production database stored programs and shell scripts on LINUX file servers		to query records compiled in various Oracle database views which are based upon queries against tables and materialized views (i.e., "snapshots"). The materialized views provide pre-aggregated and combined data from multiple sources (tables, views, and other MV's) in order to include certain business logic and provide enhanced performance for end-User queries • The DW reports portal is accessible via a single sign-on "external reports" link within People First. The portal is based on Oracle Application Express (APEX) v4.2, which provides a GUI for executing reports formatted for Microsoft file format (XLS) and Portable Document File (PDF) download. The XLS reports are a result of Oracle Application Express (APEX) reports based on SQL and PL/SQL, whereas the PDF reports are generated using Oracle Reports 10g
8.2	Available Labor Market (ALM) Data Table Load	ALM consists of population demographics derived from the American Community Survey (ACS) data provided by the U.S. Census Bureau, which provides population counts by Equal Employment Opportunity (EE04) Job Category, Race/Ethnicity, Gender and location (county, city, CDP, Metro Area, Florida, etc.) by place of residence and place of work The federal census data	The census data must be provided from the Census Information Center to the People First DW in a specific format in order to load properly in the DW table. (See data format requirements described in the Uniqueness/Customizations column.)	• The census data is provided in a columnar formatted Excel spreadsheet that includes the following data fields: ○ Location (county, city, Census Designated Place (CDP), Metro Area, Florida, etc.) ○ Gender ○ Work/Residence Indicator ○ EEO Job Category ○ EEO Race/Ethnicity ○ Count ○ Census Year

#	Activity	Description	Dependencies	Uniqueness/Customizations
		is obtained by the Division of Human Resource Management as new data is released by the U.S. Census Bureau to the Census Information Centers. ALM data shall be provided to the vendor by the DMS The census data is loaded into a table within the DW and is utilized in the EEO Utilization reports		

8.3	User Security	The Data Warehouse utilizes User Security in order to determine who has access based upon role code, agency and ORG range to specific reports, catalogs, and other functions available through the Data Warehouse portal or ad-hoc reporting	Active User	User security encompasses the following areas:
				• Ad hoc report Users
				  ○ single sign-on access
				  ○ row-level security for queries
				• Reports portal Users
				  ○ single sign-on access
				  ○ row-level security for reports
				• Common ID's utilized by specific agencies (i.e., database link (dblink) Users)
				• Ad hoc report Users are defined as those Users who connect directly to the DW Oracle database in order to perform their own defined reports or queries against DW Oracle database views. Ad hoc security is based on the position an employee has. Each position has agency or organization codes, defined in People First, which establish the data that the User can access. Users are limited to records based on the role granted to their User ID. Specific DMS Users control ad hoc User access from a GUI interface featured in the DW reports portal
				• Upon initial login to People First or during change of

#	Activity	Description	Dependencies	Uniqueness/Customizations
				password within People First, the ad hoc User's password is synchronized with the DW Oracle database User ID. This is accomplished with a remote procedure call from People First to a stored procedure in the DW • Access to the DW reports portal is based on a User's profile in People First. As part of the nightly batch cycle, an extract of User role codes and org-level access is sent to the DW from SAP. This information along with the role, report category, and report name are used to control which reports a User has access to execute. In addition, the DW User security table is also used to control agency access, while the position and role extract from SAP determines which records (row-level) are included on a report that a User executes • A process to automatically revoke DW access from any User who either terminates employment at the State of Florida or transfers to another state agency is currently in production
8.4.	DW Reports Portal	The DW portal is used to present canned reports to Users and to provide certain Users the ability to update/maintain DW information. The portal in the People First System is presented using Oracle – Application Express 4.2	• The core HRIS is available • The DW web portal is available • The DW is available • The User security code drives accessibility to specific report categories (See Security Role Code Definitions)	• Certain tabs are hard coded and limited to specific User ids. The portal utilizes a single sign on process and links the User to DW reports • The DW defines the security authorizations for User level access to reports. The DW reports are accessible to those who have access to the "Management" tab in People First. The role code that a User is assigned in People First defines what reports they are authorized to view in the reports list. Access is defined in the DW Security Matrix • See descriptions below for each tab's uniqueness/customizations
8.5	Home tab	This tab allows access to DW pre-built reports grouped by categories A display is located on	• The core HRIS is available • The DW web portal is available	The following categories are available under the **Home** tab. • All Reports **-** contains all of the reports in alphabetical order • Benefits Reports **-** contains all reports pertaining to

#	Activity	Description	Dependencies	Uniqueness/Customizations
		the far right of the web page for helpful links for DW Users and important information	• The DW is available • The User security code drives accessibility to specific report categories (See [Security Role Code Definitions)](#)	the cancelation of, changes of, underpayment or overpayment of, and premium history of an employee's benefits • Budget Reports **-** contains all reports dealing with an agency's budget within regards to HR budgetary costs. For example, leave liability, salary by class code or pay grade and legislative mandated budget reports • HR Reports **-** contains all reports that report HR data, such as, employee transactions, new hires, overlap and shared positions, - EEO reports, etc. • Leave Reports **-** contains reports regarding actual leave balances that have been earned, used, or adjusted • Payroll Reports **-** contains all reports dealing with payroll and associated costs • Test Reports **-** category contains any reports that are in the testing phase and only the DW team members have access to this category (used only by specific User ids) • Data Dictionary - This tab provides a listing of all current DW views with their definition. Access is hard coded giving only select DMS DW staff access to this tab via User ids. There is a search feature and a create option for adding new terminology • Report Usage - category contains an overview of all of the DW reports that have been viewed by month/year and only specific DMS User ids have access to this category. The report can be run as far back as October 2010 • The current helpful links are: ○ DW Reports Manual ○ DW Users ○ Contact Us • Important Information listed on the page is static
8.6	System Status tab	This tab displays various	• The core HRIS is	• The three icons used to represent the warehouse

#	Activity	Description	Dependencies	Uniqueness/Customizations
		DW materialized view names and the last date and time the view update was completed The DW 'Today's Status' is also displayed with a large icon to represent the warehouse status. There is also a display on the far right of the page for helpful links for DW Users and important information	available • The DW web portal is available • The DW is available • The User security code drives accessibility to specific report categories (See [Security Role Code Definitions)](#)	status are: ○ Green check mark in a circle – represents DW is fully refreshed ○ Yellow minus sign in a circle - represents DW not fully refreshed. Views that are not fully refreshed are highlighted in yellow ○ Red 'X' in a circle - represents DW not refreshed since the previous batch cycle. Views that are not refreshed are highlighted in red • The current helpful links are: ○ DW Reports Manual ○ DW Users ○ Contact Us • Important Information listed on the page is static
8.7	OLO Directory tab	This tab provides a listing of all current Operating Level Organization (OLO) codes (agency identifier) within the People First System. Access is hard coded giving only DMS DW team members have access to this tab via User ids	• The core HRIS is available • The DW web portal is available • The DW is available • The User security code drives accessibility to specific report categories (See [Security Role Code Definitions)](#)	• OLOs are listed sequentially • Only 15 OLOs are displayed per page • The layout includes the following fields: ○ OLO Code ○ OLO Name ○ OLO Abbreviation ○ Omit all – field no longer utilized; leftover from legacy HRIS ○ Omit Sworn – field no longer utilized; leftover from legacy HRIS ○ Replace Sworn – field no longer utilized; leftover from legacy HRIS ○ PH AGY – field no longer utilized; leftover from legacy HRIS • Ability to add, delete, modify, or search
8.8	Retirement Codes tab	This tab provides a listing of all current retirement plan codes within the People First System. Access is hard coded giving only DMS DW team members	• The core HRIS is available • The DW web portal is available • The DW is available • The User security	• Retirement code plans are listed alphabetically • Only 15 Retirement code plans are displayed per page • The layout includes the following fields: ○ Retirement plan code ○ Retirement plan description

#	Activity	Description	Dependencies	Uniqueness/Customizations
		access to this tab via their User ids. There is a search feature and a create option for adding new retirement coded plans	code drives accessibility to specific report categories (See Security Role Code Definitions)	○ Associated percentage of employer contribution ○ The FICA indicator • Ability to add, delete, modify, or search
8.9	User Maintenance tab	This tab provides a listing of all current DW Users. Access is hard coded giving only DMS DW team members access to this tab via User ids. There is a search feature and a create option for adding new Users. This functionality is used to allow Users access to the DW for ad-hoc reporting purposes	• The core HRIS is available • The DW web portal is available • The DW is available • The User security code drives accessibility to specific report categories (See Security Role Code Definitions)	• DW Users are listed by User ID. • Only 15 Users are displayed per page. • The layout includes the following fields: ○ User id ○ Name • Ability to add, delete, or search. • Ability to add security levels by ORG and confidential access • When a termination PAR is processed in SAP for an employee access is systematically removed • Once employee access is granted, employee must change People First password in order to sync password with DW
8.10	Data Dictionary tab	This tab provides a listing of all current DW views with their definition. Access is hard coded giving only select DMS DW team members' access to this tab via User ids. There is a search feature and a create option for adding new terminology	• The core HRIS is available • The DW web portal is available • The DW is available • The User security code drives accessibility to specific report categories (See Security Role Code Definitions)	• DW views are listed alphabetically • Only 15 views are displayed per page • The layout includes the following fields: ○ View name ○ Column name ○ Column description ○ Valid values ○ Column Alias ○ Data Type ○ Data Length ○ Data Precision ○ Data Scale ○ Nullable ○ SAP Screen Reference • Ability to add, modify, export or search
8.11	Report Usage	This report provides an overview of the usage	• The core HRIS is available	• The Report Usage tab is a report in and of itself. The report shows a monthly report usage of all DW portal

#	Activity	Description	Dependencies	Uniqueness/Customizations

		for the reports available through the DW portal. Access is hard coded giving only select DMS DW team members' access to this tab via User ids	• The DW web portal is available
			• The DW is available
			• The User security code drives accessibility to specific report categories (See [Security Role Code Definitions)](#)
				reports, report type, the number of views per report type (PDF, XLS), and the percentage of total views.
				• In the event there is a report with multiple format versions (e.g., EEO reports, budget reports); a function is used to determine which of the specific reports were executed
				• The report includes the following filters:
				  ○ Month
				  ○ Year
				  ○ Box for key word search
				• The report includes the following fields:
				  ○ Report name
				  ○ Report type (PDF or XLS)
				  ○ Views
				  ○ Percentage of total views

8.12	Salary Detail Files	Monday through Friday flat files are received via Secure File Transfer Protocol (SFTP) from BOSP containing salary detail records	The interface files from the DFS must have been executed and the data must have been loaded into the DW Salary Detail tables	• The salary detail flat files include Monthly, Biweekly, On Demand, Supplemental and Cancelations/Adjustment details • The records are read and appended to the DW Salary Detail Tables • Views exist that are accessed by the agencies. • The salary details records are for use in pre-built and ad-hoc reporting • A specific file layout exists for purposes of loading the data
8.13	Historical Schemas	Pertinent, historical data was provided from multiple sources for loading into the DW at the beginning of the People First System. The data provided is currently stored in schemas within the DW	N/A	• Data was received from DMS at the start of this project which are stored in the following schemas: ○ DSGI (27 tables), CV (169 tables, 79 views), TDAHCA (57 tables), TDAWI (57 tables), TDDCF (57 tables), TDDEP (59 tables), TDDJJ (55 tables), TDDMS (56 tables, 8 views), TDDOH (58 tables), TDDOS (57 tables), TDEOG (54 tables), TDFDLE (54 tables), TDFPC (54 tables), TDFWCC (57 tables, 2 views),TDPSC (54 tables), TRAC (98 tables, 160 views), SOF_HIST (3 tables, 1

#	Activity	Description	Dependencies	Uniqueness/Customizations
				view)
8.14	Statewide Views	The DW contains separate statewide views (broken up in to the same groupings as the materialized views) that contain data for BENO entities in addition to all of the data held in the materialized views. The statewide views also do not run against the security table so the run time is shortened for the query writer. Access to statewide views is limited to specific People First team members and vendor employees	To access any of the statewide views the User must be assigned specific access	Data is statewide and is not restricted by agency

8.15	Materialized view	ADDRESS_ACTIVE
		
		This view contains address, phone and cellular numbers for employees or emergency contact information for the employees divided up by address type. If the position or employee is marked as confidential the record is inaccessible unless you have been flagged as allowed to look at
			The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes address records for the following Address Types:
				  ○ 1 - Home
				  ○ 2 - Temporary Residence
				  ○ 3 - Mailing
				  ○ 5 - Emergency Contact
				  ○ 7 - Notification Email Address
				  ○ 10 - Benefits Address
				• Contains translation of CONFID_IND and POS_CONFID_IND values to determine the "restricted" employee and position column values
				• Based on MV_ADDRESS_ACTIVE, which includes data from ADDRESS, EMPLOYEE, ORGANIZATION, and REFERENCE tables

#	Activity	Description	Dependencies	Uniqueness/Customizations
		confidential information from the DW		
8.16	Materialized view	AGENCY_ACTIVE This view contains a listing of the active and inactive agencies	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Contains details of active agency records • Based on DW V_AGENCY_ACTIVE view which is a query returning active agency-level (ORG_WK = ORG_RK) records from the ORGANIZATION table
8.17	Materialized view	ALL_CER_EMP_ REPORT This view contains combined employee records (position, appointment, and employee data) updated the 1st day of each month for the previous month	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes CER records from the DW as well as COPES history table • The information in this view can be used to determine state of employee records (org, position, appointment and employee record attributes) "as of" the run date (beginning of month)
8.18	Materialized view	ALL_CER_VAC_EMP_ REPORT This view contains Combined Employee Records (CER) for vacated positions; those positions which were end-dated before the beginning of the month	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes Combined Employee Records (CER) for vacated positions; those positions which were end-dated before the beginning of the month • The view is based on records loaded by DW program LOAD_CER_VACANT_EMP_REPORT which processes records from the POSITION and POSITION_ACTIVITY tables
8.19	Materialized view	APPOINTMENT_ ACTIVE This view contains information associated with an appointment of an employee into a position	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes active appointment and records • Based on query using MV_APPOINTMENT_ACTIVE and MV_EMPLOYEE_ACTIVE
8.20	Materialized view	APPOINTMENT_	The data extract from the	• Record of equipment (e.g., Telephone Card, Parking

#	Activity	Description	Dependencies	Uniqueness/Customizations
		EQUIPMENT_ACTIVE This view contains equipment that is assigned to employees	People First System must have been executed and the data must have been loaded into the DW	Tag, etc.) associated with an employee’s appointment • Records include columns from APPOINTMENT, POSITION, ORGANIZATION, APPOINTMENT_EQUIPMENT, and EMPLOYEE tables • The appointment equipment comments field contains the alpha description for the numerical code
8.21	Materialized view	AVAIL_LABOR_ MARKET This view contains the 2010 available labor market (ALM) data	The census data must have been received and the data must have been loaded into the DW	• Contains ALM census data which is loaded from a file provided by DMS • Translates EEO4 Code, EEO4 Race, Gender, and EEO4 Work /Residence based on corresponding codes in the REFERENCE table
8.22	Materialized view	BEN_ADDRESS- ACTIVE_SW	The data extract from the People First System must have been executed and the data must have been loaded into the DW	•
8.23	Materialized view	BEN_DWSOF_ALL_SW	The data extract from the People First System must have been executed and the data must have been loaded into the DW	•
8.24	Materialized view	BENEFIT_COVERAGE_ PERIOD This view contains the begin date and end date of coverage periods as they relate to participant insurance plans	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Contains the Begin and End Dates of coverage periods • Based on a query on BENEFIT_COVERAGE_PERIOD table
8.25	Materialized view	BENEFIT_DEPENDENT This view contains details of active dependent records for	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes details of active dependent records from the BENEFIT_DEPENDENT table

#	Activity	Description	Dependencies	Uniqueness/Customizations
		those covered by a plan participant		
8.26	Materialized view	BENEFIT_ DEPENDENT_HISTORY This view contains details of active and inactive dependent records	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes details of active and inactive dependent records from the BENEFIT_DEPENDENT table
8.27	Materialized view	BENEFIT_EVENT_ CHANGE This view contains data related to the various events that qualify an employee to make changes to benefits and information on the related benefit changes	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes employee and benefit coverage information • Based on EVENT_TYPE and EMPLOYEE tables. Translates Pay Plan Title, Plan Type, and Benefit Plan found in the REFERENCE table
8.28	Materialized view	BENEFIT_FSA This view contains employee flexible spending account information including the benefit plan and plan type	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes employee FSA information, including Benefit Plan and Plan Type from the BENEFIT_FSA table
8.29	Materialized view	BENEFIT_GENERAL_ INFO This view contains general information with regards to active benefits	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Contains active records from the BENEFIT_GENERAL_INFO table which contains an employee's Benefit Area, Benefit Group and effective dates
8.30	Materialized view	BENEFIT_HEALTH_ PLANS	The data extract from the People First System must	• Contains active records from BENEFIT_HEALTH_PLANS table

#	Activity	Description	Dependencies	Uniqueness/Customizations
		This view contains information related to active benefit health enrollments	have been executed and the data must have been loaded into the DW	• Includes Benefit Plan, Full Time Equivalency (FTE), Dependent Coverage, Dependent Object ID, Dependent Type, and cost information
8.31	Materialized view	BENEFIT_INSURANCE_PLANS This view contains data related to all benefit plans	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes Benefit Plan, Coverage Group, EMPLOYEE_WK, Plan Type, and effective dates • Based on query of BENEFIT_INSURANCE_PLANS table
8.32	Materialized view	BENEFIT_PREMIUM_AMOUNT_DUE This view contains information related to the premiums due based for the plans the employee is enrolled in	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes the PERNR, EMP CP, Coverage Period, Plan Code, and contribution amounts. Based on the BENEFIT_EXPECTED_DEDUCTIONS table
8.33	Materialized view	BENEFIT_PREMIUM_AMOUNT_PAID This view contains information related to the premiums paid for the plans the employee is enrolled in	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes records from the BENEFIT_PREMIUM_HISTORY, APPOINTMENT, and REFERENCE tables • Features translation of Payment Type based on a payment type code, and translation of Plan Type, Pay Plan Title, Benefit Plan, and Dependent Coverage based on corresponding value in REFERENCE table
8.34	Materialized view	BEN_COBRA_BENEFICIARY This view contains information for all current COBRA beneficiaries including the effective dates, benefit area, program group, and event type	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes COBRA record details such as effective dates, Benefit Area, Benefit Program Group, Event Type • Based on active records from BEN_COBRA_BENEFICIARY table

#	Activity	Description	Dependencies	Uniqueness/Customizations
8.35	Materialized view	BEN_COBRA_PLANS This view contains COBRA plan details including benefit plan, plan type, dependent coverage, object ID, dependent type, and cost information	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Contains COBRA plan details including Benefit Plan, Plan Type, Dependent Coverage, Object ID, Dependent Type, and cost information • Records are from BEN_COBRA_PLANS table
8.36	Materialized view	BEN_REFERENCE_ ACTIVE This view contains a reference of benefits codes in the People First System	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Provides a translation of codes to a descriptive value for Benefit Plan, Plan Type, Benefit Group, Dependent Coverage Code, Benefit Status, COBRA Status, Benefit Program Group, Dependent Type, Event Type, Family Type, Health Plan Option, and Insurance Option • Query is based on active records in REFERENCE table
8.37	Materialized view	BROADBAND_ CROSSWALK_ACTIVE This view contains broadband information such as broadband code, broadband name, job family number, etc.	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Based on a query of active records in the CLASS_BROADBAND table
8.38	Materialized view	BUILDING_FACILITIES _ACTIVE This view contains the current buildings and facilities, including address, building or facility name, campus name, city, county, etc., by building type	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Based on a query of active records from the BUILDING_FACILITIES table • The records contained in this view are deleted and replaced nightly
8.39	Materialized view	CERTIFICATION	The data extract from the People First System must	• Includes records from MV_CERTIFICATION_WITH_REQUIRED

#	Activity	Description	Dependencies	Uniqueness/Customizations
		This view contains certification information for employees and contains Certification Active Date, Certification Active Flag, Certification Effective Date, Certification Expiration Date, Certification Number, Certificate Name, Certificate State, Confidential Indicator, Full Name, Issuing Country, Position Confidential Indicator and Social Security Number by Certificate Type	have been executed and the data must have been loaded into the DW	• Based on a query of active records from CERTIFICATION, EMPLOYEE, APPOINTMENT, POSITION, and ORGANIZATION tables
8.40	Materialized view	CHG_OBJ_ACTIVITY This view contains a listing of the Activity codes used with time sheets	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes active records from the CHG_OBJ_ACTIVITY table
8.41	Materialized view	CHG_OBJ_COMPREHENSIVE_ACTIVE This view contains listing of all charge objects, activities, sub activities, and project codes. This view can be used to obtain the alpha description for the charge object code. Includes active and inactive records	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Based on query on MV_CHG_OBJ_COMPREHENSIVE which is based on records in CHG_OBJ_ACTIVITY, CHG_OBJ_PROJ, CHG_OBJ_SUB_ACT, CHG_OBJ_TIME_CHRG, CHG_OBJ_TIME_COST tables

#	Activity	Description	Dependencies	Uniqueness/Customizations
8.42	Materialized view	CHG_OBJ_PROJ This view contains a listing of the Project codes used with time sheets	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes all records from the CHG_OBJ_PROJ table
8.43	Materialized view	CHG_OBJ_SUB_ACT This view contains a listing of the Sub Activity codes used with time sheets	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes active records from CHG_OBJ_SUB_ACT table
8.44	Materialized view	CHG_OBJ_TIME_CHRG This view contains a listing of the Time Charge codes used with time sheets	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes active records from CHG_OBJ_TIME_CHRG table
8.45	Materialized view	CHG_OBJ_TIME_COST This view contains a listing of the Time Cost codes used with time sheets	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes active records from CHG_OBJ_TIME_COST table
8.46	Materialized view	CJIP This view contains active and inactive Criminal Justice Incentive Pay (CJIP) records. Requires use of the end date to identify active CJIP records. Historical records may not have class title	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Active records from MV_CJIP_47, which includes records from CJIP, APPOINTMENT, EMPLOYEE, POSITION, CJIP_CHANGES, and REFERENCE tables. Translates CJIP EDU INCENT 37 values from the REFERENCE table
8.47	Materialized view	CLASS_ACTIVE	The data extract from the	Includes records from MV_CLASS_ACTIVE, which is based

#	Activity	Description	Dependencies	Uniqueness/Customizations
		This view contains information specifically related to class codes	People First System must have been executed and the data must have been loaded into the DW	on a query joining active records from CLASS, PAY_GRADE, and REFERENCE table records. Translates values for collective bargaining unit (CBU), EEO4 Code, and Pay Plan Title from the REFERENCE table
8.48	Materialized view	COPESVIEW_MAPPING This view contains a crosswalk of COPES view data elements to the People First DW. Not all data elements that were in COPES view are addressed. This is a static view	The DW must be available	Includes static records from the COPES_VIEW_MAPPING table which contains combinations of the COPES table & column, and equivalent DW table and column
8.49	Materialized view	DRIVERS_LICENSE This view contains data on Driver's License information	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes active records from LICENSE, MV_EMPLOYEE_ACTIVE, and MV_APPOINTMENT_ACTIVE. Excludes OLO 4900 (Universities) and 9999 (Benefits Only) employee records
8.50	Materialized view	DWSOF_ALL This view contains appointment information on active and inactive employees. This view is mainly used to join with satellite views such as the Time Sheet Active when appointment data for active and inactive employees is needed	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes active and inactive employee records from various DW tables, including ORGANIZATION, POSITION, EMPLOYEE, and APPOINTMENT • Excludes OLO 4900 (Universities) and 9999 (Benefits Only) employee records
8.51	Materialized view	DWSOF_ALL_ACTIVE This view contains information on all employees who are	The data extracts from the People First System must have been executed and the data must have been loaded into the DW	• Includes active employee records from various DW tables, including ORGANIZATION, POSITION, EMPLOYEE, and APPOINTMENT • Excludes OLO 4900 (Universities) and 9999 (Benefits Only) employee records

#	Activity	Description	Dependencies	Uniqueness/Customizations
		currently employed, including OPS. This view does not have vacant position information Organizational data (budget entity, Florida Accounting Information Resource (FLAIR) account code, etc.) pulled from this view reflects the default codes associated with the People First Org Code (24-digits) and does not necessarily match the information shown on the position funding screen		
8.52	Materialized view	DWSOF_ALL_INACTIVE This view contains information on all employees who are termed employees	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes inactive employee records from DW DWSOF_ALL_INACTIVE table which is populated by DW load programs as employee records are inactivated.
8.53	Materialized view	DWSOF_DATA_ DICTIONARY This view contains the data dictionary (descriptions of the data elements) for the People First DW. This information is static and has not been updated	The DW must be available	Includes records from DWSOF_TAB_COL table which is maintained by a GUI interface to insert/update table records

#	Activity	Description	Dependencies	Uniqueness/Customizations
		since implementation		
8.54	Materialized view	DWSOF_PAR	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from DW_ ZBSP_PAR table where CP and Pernr are populated and organization is active. SAP extract only pulls status of 'Completed' records.
8.55	Materialized view	EDUCATION_ACTIVE This view contains information on the educational level for employees	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from MV_EDUCATION_ACTIVE which includes active records from EDUCATION and MV_EMPLOYEE_ACTIVE
8.56	Materialized view	EEO4_CODES This view contains the EEO codes	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes all active EEO4 Codes from the REFERENCE table
8.57	Materialized view	EEO_BY_CLASS This view contains EEO demographic information by class code. It cannot be joined to other views	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes all active records from MV_DWSOF_ALL_ACTIVE, groups by the Class Code, Class Title, Class Description, Pay Plan, Gender, and Race
8.58	Materialized view	EEO_BY_COUNTY This view contains EEO demographic information by county. It cannot be joined to other views	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes all active records from MV_DWSOF_ALL_ACTIVE, groups by the Physical County Code, Physical County Description, Gender, and Race
8.59	Materialized view	EEO_BY_EEO4 This view contains EEO demographic information by EE04. It cannot be joined to other views	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes all active records from MV_DWSOF_ALL_ACTIVE, groups by the EEO4 Code, Physical EEO4 Description, Gender, and Race
8.60	Materialized view	EEO_BY_OLO	The data extract from the People First System must	Includes all active records from MV_DWSOF_ALL_ACTIVE, groups by the OLO Code, OLO Name, Gender, and Race

#	Activity	Description	Dependencies	Uniqueness/Customizations
		This view contains EEO demographic information by OLO code. It cannot be joined to other views	have been executed and the data must have been loaded into the DW	
8.61	Materialized view	EEO_BY_ORG This view contains EEO demographic information by Org Code (24-digit). It cannot be joined to other views	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes all active records from MV_DWSOF_ALL_ACTIVE, groups by the Org Code, Org Name, Gender, and Race
8.62	Materialized view	EEO_BY_PAYGRADE This view contains EEO demographic information by Pay Grade. It cannot be joined to other views	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes all active records from MV_DWSOF_ALL_ACTIVE, groups by the Pay Grade Code, Pay Grade Description, Gender, and Race
8.63	Materialized view	EEO_BY_STATE This view contains EEO demographic information for the entire State. It cannot be joined to other views	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes all active records from MV_DWSOF_ALL_ACTIVE, groups by the Gender, and Race
8.64	Materialized view	ELEARNING_ACTIVE This view contains training information for employees. The alpha description for the ELearning course is found in the ELearning Text field	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from MV_ELEARNING_ACTIVE, which is based on records from MV_EMPLOYEE_ACTIVE, MV_APPOINTMENT_MAX, ELEARNING, MV_POSITION_MAX, and MV_ORGANIZATION_MAX tables
8.65	Materialized view	EMPLOYEE_411 This view contains the data used to update the	The data extract from the People First System must have been executed and the data must have been loaded	Includes active records from APPOINTMENT, POSITION, ORGANIZATION, and EMPLOYEE_411_INTERFACE tables

#	Activity	Description	Dependencies	Uniqueness/Customizations
		411, Online Telephone Directory. If the employee's record is marked as Protected Identity or Restricted Relative, the record is not available in this view	into the DW	
8.66	Materialized view	EMPLOYEE_ACTIVE This view contains demographic and key service date information related to the employee	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes records from MV_EMPLOYEE_ACTIVE, which is based on active records in the EMPLOYEE table • Contains translated values from REFERENCE table for CITDOC, ETHNIC, ETHNICITY, MILITARY STATUS, RACE, and MARITAL STATUS
8.67	Materialized view	EMPLOYEE_COUNT This view contains monthly counts of active employees. OPS employees are not included	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Provides employee record counts by month based on MV_ORGANIZATION_ACTIVE and EMPLOYEE_SNAPSHOT_DETAIL, which is populated monthly
8.68	Materialized view	EMPLOYEE_ TRANSACTION This view contains information related to transactions for an employee from hire to separation. For OPS employees you can also use the OPS Employee Trans CV to obtain historical information prior to People First. It provides transaction data back to when an agency migrated to COPES	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Consists of records from DWSOF_EMP_TRANSACTION2 and DWSOF_EMP_TRANS_COPES_ALL tables

#	Activity	Description	Dependencies	Uniqueness/Customizations
8.69	Materialized view	EMP_VERIFICATION_ ACTIVE This view contains a listing of all active employees who have verified their addresses and/or completed their dependent certification	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes all records from MV_EMP_VERIFICATION_ACTIVE, which is based on a joins between the EMPLOYEE table and the EMP_VERIFICATION table • Table expressions of the EMP_VERIFICATION table are referenced in order to retrieve the most recent record of each verification type
8.70	Materialized view	EMP_VERIFICATION_ HIST This view contains a listing of all inactive employees who have verified address and/or dependent information	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes all records from the EMP_VERIFICATION table • The values for reference type are translated using the REFERENCE table
8.71	Materialized view	F01_OTHER_REQ_ DETAIL_ACTIVE This view contains the payroll input file (F0001) information for all supplemental payments. i.e., bonus payments, uniform allowance, one time payments	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes active records based on joins between APPOINTMENT, POSITION, ORGANIZATION, and OTHER_REQ_DETAIL tables. REFERENCE table included to translate values for MARITAL STATUS, APPOINTMENT STATUS, COUNTY CODES, PAY CYCLE, PAY PLAN CODE, PAY PLAN TITLE, and RETIREMENT CODE
8.72	Materialized view	F01_WAGE_REQ_ DETAIL_ACTIVE This view contains the F0001 data for regular payrolls	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes active records based on joins between APPOINTMENT, POSITION, ORGANIZATION, and EMP_WAGE_REQ_DETAIL tables. REFERENCE table included to translate values for MARITAL STATUS, APPOINTMENT STATUS, COUNTY CODES, PAY CYCLE, PAY PLAN CODE, PAY PLAN TITLE, and RETIREMENT CODE
8.73	Materialized view	F01_WAGE_REQ_PRE LIM_ACTIVE	The data extract from the People First System must have been executed and the	Includes active records from EMP_WAGE_REQ_DETAIL_PRELIM table

#	Activity	Description	Dependencies	Uniqueness/Customizations
		This view contains Preliminary F0001 data (before it is processed by BOSP) for each payroll. This is preliminary data only, not what is actually sent to BOSP	data must have been loaded into the DW	
8.74	Materialized view	FILE1_SUPP_UNION_ACTIVE This view contains the combination of the F0001 Wage Reg Detail and F0001 Other Reg Detail data. It contains both regular and supplemental payments	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes a combination (union) of records from F01_WAGE_REQ_DETAIL_ACTIVE and F01_OTHER_REQ_DETAIL_ACTIVE • The REFERENCE table is used to translate WAGE_TYPE values
8.75	Materialized view	FLAIR_ACCT_ACTIVE This view contains all active FLAIR account codes	The data extract from the People First System must have been executed and the data must have been loaded into the DW	All active records from FLAIR_ACCT table
8.76	Materialized view	FMLA_EVENT_ACTIVE This view contains appointment information for employees who have requested leave under the Family Medical Leave Act (FMLA)	The data extract from the People First System must have been executed and the data must have been loaded into the DW.\	Includes active records from MV_FMLA_EVENT_ACTIVE which is based on a query of active records from the APPOINTMENT, POSITION, ORGANIZATION, EMPLOYEE, and FMLA_EVENT tables
8.77	Materialized view	LANGUAGE_ACTIVE This view contains information related to the proficiency of different languages	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Based on records from MV_LANGUAGE_ACTIVE, which includes active records from LANGUAGE and MV_EMPLOYEE_ACTIVE

#	Activity	Description	Dependencies	Uniqueness/Customizations
		associated with employees		
8.78	Materialized view	LEAVE_BAL This view contains the COPES leave balances for each employee for the last pay period before go-live in the People First System. This data is static and does not change	The DW must be available	Includes records from COPES T_LEAVE_BAL table where the OLO code matches the value in ORGANIZATION_ACTIVE view
8.79	Materialized view	LEAVE_BALANCE_PF This view contains People First leave information, used and earned since April 2008. This view is updated every Saturday morning. Effective July 20, 2010 leave payout hours are stored in the leave balance adjustment column (after the payment is processed in People First)	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from LEAVE_BAL, ORGANIZATION, and DWSOF_ALL_SW. Special Comp Hourly Rate of Pay is only displayed for Leave Type = 55
8.80	Materialized view	LEAVE_LIABILITY This is a monthly extract run on the first weekend of each month. Starts at 7 p.m. on Saturday and normally finishes early Sunday morning. Edits and calculations in accordance with	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes all records from LEAVE_LIABILITY_FY table broken down by fiscal year for each payable leave type per employee • Each leave type record for an employee is deleted and replaced each month when the extract is loaded • At the end of the fiscal year that leave type record becomes static and a new record is created for the new fiscal year

#	Activity	Description	Dependencies	Uniqueness/Customizations
		external reports (e.g. 480 hours SL cap). Only DMS DW Team members have access to this view		
8.81	Materialized view	LEAVE_PAYOUT This view contains leave payout transactions that were entered into People First and submitted to the BOSP for processing. The payment data is not loaded until the payment is submitted on the F0001. This view is updated after payroll runs	The data extract from the People First System must have been executed and the data must have been loaded into the DW	All records from MV_LEAVE_PAYOUT, which is based on records from EMPLOYEE, APPOINTMENT (most recent record based on APPT_WK and APPT_ACTIVE_DATE), POSITION, and ORGANIZATION. REFERENCE table is used to translate values for ABSENCE QUOTA and TIME BALANCE
8.82	Materialized view	LEAVE_PREV_PAYOU T This view contains data regarding lifetime leave payout totals by time balance codes	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes records from MV_LEAVE_PREV_PAYOUT, which is based on a query of active records from APPOINTMENT, TIME_BALANCE, CHANGES, POSITION, ORGANIZATION, and EMPLOYEE. Limited to Time Balance Types 5601, 5602, 5603, 5604, and 5606 • The REFERENCE table translates values to an alpha description for TIME BALANCE codes
8.83	Materialized view	LOAD_ERRORS This view contains error records from selected DW load programs	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from INTEGRATED_LOAD_ERRORS table for DW load programs
8.84	Materialized view	OCA_PERCENT_ ACTIVE This view contains information related to	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes all active records from OCA_PERCENT table where the Begin Date >= sysdate or End Date > sysdate

#	Activity	Description	Dependencies	Uniqueness/Customizations
		Other Cost Accumulator (OCA) percentages and is used by agency Financial Management and Budget staff to generate several of their internal reports. This view contains information for the Department of Children and Families, Agency for Persons with Disabilities and the Department of Health. There are no OLO restrictions in this view		
8.85	Materialized view	ONETIME_PAY_ DEDUCT_ACTIVE This view contains information transactions entered on the one time pay deduction screen	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes records from MV_ONETIME_PAY_DEDUCT_ACTIVE, which includes active records from APPOINTMENT, POSITION, ORGANIZATION, ONETIME_PAY_DEDUCT, and EMPLOYEE tables • Excludes Wage Types 0790 (State Life-full time employee contribution) and 0799 (State Health-full time employee contribution)
8.86	Materialized view	ON_CALL_SCHEDULE _ACTIVE This view contains employee position, appointment, and organizational data and on call scheduled hours	The data extract from the People First System must have been executed and the data must have been loaded into the DW.	Includes records from MV_ON_CALL_SCHEDULE_ACTIVE, which is based on active records from APPOINTMENT, POSITION, ORGANIZATION, and ON_CALL_SCHEDULE tables
8.87	Materialized view	OPS_ELIGIBILITY This view contains data related to OPS employee eligibility for	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from DW PA9302 (Benefits Eligibility Key) table

#	Activity	Description	Dependencies	Uniqueness/Customizations
		benefits		
8.88	Materialized view	OPS_EMPLOYEE_ COUNT This view contains monthly counts of active OPS employees	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Count of employees based on a query of MV_ORGANIZATION_ACTIVE, POSITION, and EMPLOYEE_SNAPSHOT_DETAIL (as of current month) tables • Excludes OLO 4900 (Universities) and 9999 (Benefits Only); includes employee groups 4 and 5
8.89	Materialized view	OPS_EMP_TRANS_CV This view contains COPES OPS employee transactions prior to People First. This information is static	The DW must be available	Includes records from MV_OPS_EMP_TRANS_CV, which is based on a query of ORGANIZATION and T_OPS_TRANS (COPES records)
8.90	Materialized view	OPS_FYTD_HOURS_ SUMMARY This view contains active OPS employees and their fiscal year to date (FYTD) hours worked. This view is updated every Saturday morning	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes active records from OPS_FYTD_SUMMARY and APPOINTMENT tables • For records prior to 07/14/2010, POS_HIRE_DATE is displayed, otherwise POSITION_APPT_DATE is displayed
8. 91	Materialized view	ORGANIZATION_ ACTIVE This view contains information on the organization code structure that is in People First. This view contains all agencies	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes all records from MV_ORGANIZATION_ACTIVE, which is based on a query of active records from ORGANIZATION, FLAIR_ACCT, ORG_HIERARCHY_ACTIVE tables. The REFERENCE table is used to translate values for BUDGET ENTITY and SPC CODE
8.92	Materialized view	OUTSIDE_ EMPLOYMENT This view contains	The data extract from the People First System must have been executed and the data must have been loaded	Includes records from MV_OUTSIDE_EMPLOYMENT, which is based on a query of OUTSIDE_EMPLOYMENT, APPOINTMENT (latest record), POSITION (latest record), EMPLOYEE, and ORGANIZATION tables.

#	Activity	Description	Dependencies	Uniqueness/Customizations
		outside employment data for active employees	into the DW	OE_ACTIVE_FLAG is determined by END_DATE. WORK_DAY_IND is based on an 'X' found in either the Mon - Sun columns in the OUTSIDE_EMPLOYMENT table
8.93	Materialized view	PAYMENTS_NOT_ SENT This view contains payments not sent to BOSP. These are retro payments (e.g., regular salary payments, overtime payments and on call payments) that were not sent on the F0001 to BOSP for two pay periods prior to the current pay period	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes records from MV_RETRO_PAYMENTS, which is based on active records from the RETRO_PAYMENTS table • The REFERENCE table is used to translate values for WAGE TYPE
8.94	Materialized view	PAY_ADDITIVE_ACTIV E This view contains current information on pay additives for active employees. It is updated by payroll. The additive information is stored by pay period	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from MV_PAY_ADDITIVE_ACTIVE, which is based on active records from APPOINTMENT, POSITION, ORGANIZATION, and PAY_ADDITIVE tables
8.95	Materialized view	PAY_CHANGE_ TRANSACTIONS This view contains pay change transactions from July 1, 2012 to current and can be used to monitor agency pay change input. Only transaction code 14 (pay	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from DWSOF_GOVN_RPT_SELECTION. Excludes OLO 4900 (Universities) and 9999 (Benefits Only) records

#	Activity	Description	Dependencies	Uniqueness/Customizations
		change) is stored in this view. OPS employees are not included. Agency DW Users with org range restrictions are only able to retrieve records for their org codes		
8.96	Materialized view	PAY_GRADE_ACTIVE This view contains information on the pay grade	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes active records from PAY_GRADE. The REFERENCE table is used to translate values for PAY PLAN TITLE
8.97	Materialized view	PAY_GRADE_CAD_ ACTIVE This view contains information on pay grade CAD amounts by county and pay grade	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes active records from PAY_GRADE_CAD table • The following are calculated columns: ○ ANNUAL_MIN - ROUND(ANNUAL_MIN/100, 2) ○ MONTHLY_MIN - ROUND(MONTHLY_MIN/100, 2) ○ BI_WEEKLY_MIN - ROUND(BI_WEEKLY_MIN/100, 2) ○ HOURLY_MIN - ROUND(HOURLY_MIN/100, 2) ○ ANNUAL_MAX - ROUND(ANNUAL_MAX/100, 2) ○ MONTHLY_MAX - ROUND(MONTHLY_MAX/100, 2) ○ BI_WEEKLY_MAX - ROUND(BI_WEEKLY_MAX/100, 2) ○ HOURLY_MAX - ROUND(HOURLY_MAX/100, 2)
8.98	Materialized view	PAY_PERIOD_ACTIVE This view contains information on pay period dates in People First	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes active records from PAY_PERIOD table

#	Activity	Description	Dependencies	Uniqueness/Customizations
8.99	Materialized view	PERF_MGMT_EVAL_ ACTIVE This view contains information on employee performance evaluations and ratings	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes active records from APPOINTMENT, POSITION, ORGANIZATION, and PERF_MGMT_EVAL tables. Only the most recent records are included from PERF_MGMT_EVAL table
8.100	Materialized view	PERSONAL_WORK_ SCHEDULE_ACTIVE This view contains information on the employee's work schedule. It is the work schedule chosen by the employee. This view only contains data for the last two months (60 days). The Personal Work schedule (PWS) data is loaded using the Base Work Schedule. If there is a Flexible Work Schedule, it overrides the Base Work Schedule	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes records from MV_PERSONAL_WORK_SCHED_ACTIVE, which is based on APPOINTMENT, POSITION, ORGANIZATION, and PERSONAL_WORK_SCHEDULE tables • Only records from the last 60 days are included from PWS table
8.101	Materialized view	PFLUENT_EVAL This view contains information on the employee's ratings from the Performance & Talent Management System	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes all records from PFLUENT_RATINGS table
8.102	Materialized view	PLANNED_WORK_ TIME_ACTIVE This view contains	The data extract from the People First System must have been executed and the data must have been loaded	Includes records from MV_PLANNED_WORK_TIME_ACTIVE, which is based on APPOINTMENT, POSITION, EMPLOYEE, ORGANIZATION, and PLANNED_WORK_TIME

#	Activity	Description	Dependencies	Uniqueness/Customizations
		employee scheduled (or planned) work time based on position, appointment, organization and employee data	into the DW	
8.103	Materialized view	POSITION_ACTIVE This view contains position information for all established positions (OPS and Salaried) in People First. It does contain information for vacant positions	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes records from MV_POSITION_ACTIVE and STATE_PROPERTY (for doc type descriptions) • MV_POSITION_ACTIVE records are sourced from the POSITION, CLASS, POSITION_FUND_SOURCE, PAY_GRADE, BROADBAND, BUILDING_FACILITIES, ORGANIZATION, and PAY_GRADE_CAD tables • The REFERENCE table is used to translate values for COUNTY CODES, EEO4 CODES, SPC CODE, CBU, BUDGET ENTITY, SHIFT PERCENT, PAY PLAN TITLE, ST COUNTY CODES, PAY CYCLE, and PAY PLAN TITLE
8.104	Materialized view	POSITION_FUND_ SOURCE_ACTIVE This view contains state and federal funding information for positions	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from MV_POSITION_FUND_SOURCE_ACTIVE, which is based on POSITION, ORGANIZATION, and POSITION_FUND_SOURCE
8.105	Materialized view	POSITION_ TRANSACTION This view contains information on position transactions and position history	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from MV_POS_TRANS, which is a combination (union) of records from DWSOF_POS_TRANSACTION and MV_POS_TRANS_CV (COPES records)
8.106	Materialized view	POS_RATE_ACTIVE This view contains the derived data used for the creation of position rate. It contains budget	The data extract from the People First System must have been executed and the data must have been loaded into the DW	• Includes active records from POS_RATE and POSITION • Includes records from MV_POSITION_ACTIVE where pay cycle is not 'ZM' and pay_cycle is not 'ZB'. Combines all data for every position to calculate vacant rates, base rate amounts, annual rate

#	Activity	Description	Dependencies	Uniqueness/Customizations

		information. This file is used for creating budget and rate related reports. This file contains the Other Cost Accumulator (OCA) code		amounts, and retirement amount (includes pay additives)
				• Other tables that are read include POSITION_FUND_SOURCE, PAY_GRADE_CAD, BASIC_PAY, RETIREMENT, and MV_APPOINTMENT_ACTIVE. If Pay cycle = 'UM', 'UQ', 'UR' or 'US' then pay cycle becomes 'UM' otherwise pay cycle becomes 'UB'
				
				Special coding for vacant positions:
				• Vacant OPS positions employee group 4 or 5, (OPS Included OPS Excluded) will default retirement code:
				  ○ ZZ for agency (OLO code) 2100 OR for employee subgroup = "K" (AmeriCorps).
				  ○ ZA for all other OPS positions
				• Vacant employee group 1 or 2 (Included, Excluded) positions with the special risk retirement flag will default the retirement code to HB.
				• Vacant employee group 1 or 2 (Included, Excluded) positions where the OLO code is 2200 AND the employee subgroup is 05 will default the retirement code to HC.
				• Vacant employee group 1 or 2 (Included, Excluded) positions with an employee subgroup 15 OR 16 will default the retirement to HG
				• Vacant employee group 1 or 2 (Included, Excluded) positions where the OLO code is 2100 AND the employee subgroup is 05 will default the retirement code to HH
				• Vacant employee group 1 or 2 (Included, Excluded) positions will default HM for:
				  ○ employee subgroup 09,
				  ○ employee subgroup 33
				  ○ employee subgroup 05 with an HRP9121.class code equal to 9675 or 9681
				  ○ employee subgroup 84 with an HRP9121.class code equal to 8819 or 9819

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ employee subgroup 85 with an HRP9121.class code equal to 4801 or 4803 or 4805 or 4806 or 4809 or 4811 or 4900 ○ employee subgroup 87 with an HRP9121.class code equal to 6900 or 6901 ○ employee subgroup 88 with an HRP9121.class code equal to 5901 or 5909
8.107	Materialized view	POS_SUPERVISOR_ ACTIVE This view contains appointment information for any employee who has direct reports in the People First System. This view, when linked with any of the employee views, can provide supervisor information	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from MV_POS_SUPERVISOR_ACTIVE, which is based on MV_POSITION_ACTIVE and MV_DWSOF_ALL_ACTIVE2
8.108	Materialized view	RECURRING_PAY_ ADDITIVES This view contains pay additive information for active employees	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from MV_RECURRING_PAY_ADDITIVES, which is based on active records from APPOINTMENT, POSITION, ORGANIZATION, and RECURRING_PAY_ADDITIVES
8.109	Materialized view	RECURRING_PAY_ DEDUCT_ACTIVE This view contains information on active payments and deductions for employees. It does not contain pre-tax health and insurance	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from MV_RECURRING_PAY_DEDUCT_ACTIVE, which is based on active records from APPOINTMENT, POSITION, ORGANIZATION, and RECURRING_PAY_DEDUCT. Excludes Wage Types 0790 (State Life-full time employee contribution) and 0799 (State Health-full time employee contribution)

#	Activity	Description	Dependencies	Uniqueness/Customizations
		information		
8.110	Materialized view	REFERENCE_ACTIVE This view contains a reference view for codes in the People First DW. This view useful for finding alpha description for the various numerical codes	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from V_REFERENCE_ACTIVE, which is a query based on all active records from the REFERENCE table
8.111	Materialized view	REFERENCE_GENDER This view contains gender reference codes	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Active records from the REFERENCE table where the REFERENCE_TYPE = 'GENDER'
8.112	Materialized view	ROLE_ORGCODE_ RESTRICT This view contains organization code allowances for role codes assigned to the position. It can only be joined to the position active view. The data stored in the Org Code column is associated with the position record. The Org Range Low and Org Range High data fields contain the role code allowance assigned to the position	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from V_POS_ROLE_ORG, which is based on active records from ORGANIZATION, POS_ROLE_ORGS, POSITION, and APPOINTMENT tables
8.113	Materialized view	SALARY_DETAIL_ 04_07	The DW must be available	Includes all records from SALARY_DETAIL_I40 table

#	Activity	Description	Dependencies	Uniqueness/Customizations
		This view contains the BOSP File 13 data (actual payments to employees) for each payroll from go-live to December 31, 2007. Information in this view is for actual warrants processed for regular and supplemental payrolls by BOSP. Only Users with Agency level access can retrieve information from this view. This is a static view		
8.114	Materialized view	SALARY_DETAIL_ 08_11 This view contains the BOSP File 13 data (actual payments to employees) for each payroll from implementation, January 1, 2008 through December 31, 2011. Information in this view is for actual warrants processed for regular and supplemental payrolls by BOSP. Only Users with Agency level access can retrieve information from this view. This is a static view	The DW must be available	Includes all active records from SALARY_DETAIL_2008_2011 table

#	Activity	Description	Dependencies	Uniqueness/Customizations
8.115	Materialized view	SALARY_DETAIL_ ACTIVE_2 This view contains the BOSP File 13 data (actual payments to employees) for each payroll from January 1, 2012 to current. Information in this view is for actual warrants processed for regular and supplemental payrolls by BOSP	The DW must be available	Includes active records from SALARY_DETAIL_2 where the Warrant Date >= 01/01/2012
8.116	Materialized view	SUPPLEMENTAL_PAY _DEDUCT_ACTIVE This view is not used	The DW must be available	Includes records from MV_SUPP_PAY_DEDUCT_ACTIVE, which is based on active records from APPOINTMENT, POSITION, ORGANIZATION, and SUPPLEMENTAL_PAY_DEDUCT tables
8.117	Materialized view	TD_COURSE This view contains the Training Direct course information. This is a static view	The DW must be available	Includes all records from T_COURSE table
8.118	Materialized view	TD_PEOPLE_FIRST_ TRAINING_HIST This view contains the Training Direct training history. This is a static view	The DW must be available	Includes records from T_PEOPLE_FIRST_TRAINING_HIST and ORGANIZATION tables
8.119	Materialized view	TD_PROVIDER This view contains the Training Direct provider information. This is a static view	The DW must be available	Includes all records from T_PROVIDER table

#	Activity	Description	Dependencies	Uniqueness/Customizations
8.120	Materialized view	TD_PROVIDER_ ADDRESS This view contains the Training Direct provider address information. This is a static view	The DW must be available	Includes all records from T_PROVIDER_ADDRESS
8.121	Materialized view	TIME_BALANCE_ ACTIVE This view contains information on employee time balances	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from MV_TIME_BALANCE_ACTIVE, MV_APPOINTMENT_ACTIVE, and MV_EMPLOYEE_ACTIVE
8.122	Materialized view	TIME_SHEET_ ACTIVE_2 This view contains information on timesheets by work day. If an employee enters or saves the timesheet multiple times there may be multiple entries in the view. The timesheet status code should be used to select the record type being sought. Each leave type taken creates a new entry on the view. Only Users with Agency level access can retrieve information from this view. This view is updated in January of each year to place the previous fiscal year's timesheets into a new	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from MV_TIME_SHEET_7031852, which is based on MV_TIME_SHEET_ACTIVE_2 minus records from MV_TIME_SHEET_7031852_40 (rejected time sheets)

#	Activity	Description	Dependencies	Uniqueness/Customizations
		view. It can contain up to 18 months of timesheet information		
8.123	Materialized view	TIME_SHEET_ACTIVE_FY04 This view contains timesheet information for Fiscal Year 04-05 only. This is a static view	The DW must be available	Includes all records from TIME_SHEET_ACTIVE_FY04
8.124	Materialized view	TIME_SHEET_ACTIVE_FY05 This view contains timesheet information for Fiscal Year 05-06 only. This is a static view	The DW must be available	Includes all records from TIME_SHEET_ACTIVE_FY05
8.125	Materialized view	TIME_SHEET_ACTIVE_FY06 This view contains timesheet information for Fiscal Year 06-07 only. This is a static view	The DW must be available	Includes all records from TIME_SHEET_ACTIVE_FY06
8.126	Materialized view	TIME_SHEET_ACTIVE_FY07 This view contains timesheet information for Fiscal Year 07-08 only. This is a static view	The DW must be available	Includes all records from TIME_SHEET_ACTIVE_FY07
8.127	Materialized view	TIME_SHEET_ACTIVE_FY08 This view contains timesheet information for Fiscal Year 08-09 only.	The DW must be available	Includes all records from TIME_SHEET_ACTIVE_FY08

#	Activity	Description	Dependencies	Uniqueness/Customizations
		This is a static view		
8.128	Materialized view	TIME_SHEET_ACTIVE FY09 This view contains timesheet information for Fiscal Year 09-10 only. This is a static view	The DW must be available	Includes all records from TIME_SHEET_ACTIVE_FY09
8.129	Materialized view	TIME_SHEET_ACTIVE_ FY10 This view contains timesheet information for Fiscal Year 10-11 only. This is a static view	The DW must be available	Includes all records from TIME_SHEET_ACTIVE_FY10
8.130	Materialized view	TIME_SHEET_ACTIVE_ FY11 This view contains timesheet information for Fiscal Year 11-12 only. This is a static view	The DW must be available	Includes all records from TIME_SHEET_ACTIVE_FY11
8.131	Materialized view	TIME_SHEET_ACTIVE_ FY12 This view contains timesheet information for Fiscal Year 12-13 only. This is a static view	The DW must be available	Includes all records from TIME_SHEET_ACTIVE_FY12
8.132	Materialized view	TIME_SHEET_ACTIVE_ FY13 This view contains timesheet information for Fiscal Year 13-14 only. This is a static view	The DW must be available	Includes all records from TIME_SHEET_ACTIVE_FY13
8.133	Materialized view	TIME_SHEET_	The data extract from the	Includes all records from TIME_SHEET_COMMENTS_FINAL

#	Activity	Description	Dependencies	Uniqueness/Customizations
		COMMENTS_ACTIVE This view contains comments from approved timesheets	People First System must have been executed and the data must have been loaded into the DW	table
8.134	Materialized view	TIME_SHEET_ERROR This view contains error messages for mass loads of time data for agencies that do not use the timesheet segment of People First. Data is loaded into this view within two hours of an agency processing an upload file. Loads every hour	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from TS_TRAN_ERRS table
8.135	Materialized view	TS_TRAN_ERRS_ ACTIVE This view contains error messages for mass loads of time data for agencies that do not use the timesheet segment of People First. Only a few agencies use this view. Data is loaded into this view within two hours of an agency processing an upload file. Loads every hour	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes records from TS_TRAN_ERRS table where the error source = INPUT_TECH
8.136	Materialized view	TUITION_WAIVER This view contains historical data for	The data extract from the People First System must have been executed and the data must have been loaded	Includes active records from APPOINTMENT, POSITION, ORGANIZATION, and TUITION_WAIVER tables

#	Activity	Description	Dependencies	Uniqueness/Customizations
		employees who have utilized the tuition waiver program when the data has been entered into the People First System	into the DW	
8.137	Materialized view	T_EMP_AGY This view contains a historical listing of agencies that an employee has worked for. It contains data from COPES. Data elements include stop and start date for each agency prior to the People First Implementation. This file does not include OPS employees. This is a static view	The DW must be available	Includes static records from COPES T_EMP_AGY table
8.138	Materialized view	UNIVERSITY_ SECURITY_ROLE This view contains employee name, Emp id, group, sub group, and manager self-service code for university employees only	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Includes active records from APPOINTMENT, EMPLOYEE and POSITION tables for OLO 4900 (Universities)
8.139	Materialized view	W4_W5_ACTIVE This view contains employee's W-4 data. This view is no longer used	The DW must be available	Includes active records and most recent records from EMPLOYEE, APPOINTMENT, POSITION, ORGANIZATION, and W4_W5 tables
8.140	DW Extracts	411	HRIS is available	• SAP EXTRACT: ZPA_EXTRACT411_DW

#	Activity	Description	Dependencies	Uniqueness/Customizations
		This extract pulls data for employee contact information		• DW STAGE TABLE: STAGE_411 • DW BASE TABLE: EMPLOYEE_411 • DW LOAD PROGRAM: LOAD_411 • SAP INFOTYPES/TABLES: HRP9126, PA0001, PA0002, PA0105, ZCC_CITY, ZCC_BUILDING • JOBNAME=ECSF_DLY_DW_411_SAP USED TO CREATE DATA FOR INPUT TO STATE MAINFRAME - HAS PERNR, CITY CODE, BUSINESS PHONE
8.141	DW Extracts	ADDRESS This extract pulls all addresses (i.e., mailing, home, notification) for an employee	HRIS is available	• SAP EXTRACT: ZPA_STAGE_ADDRESS_DW • DW STAGE TABLE: STAGE_ADDRESS • SAP INFOTYPES/TABLES: PA0001, PA0000, PA0006, PA0105, HRP1001 • JOBNAME= ECSF_DLY_DW_STG_ADDR_SAP

8.142	DW Extracts	APPOINTMENT
		
		This extract pulls all data related to an employee’s appointment to a position including pay related information
			HRIS is available	• SAP EXTRACT: ZPA_STAGE_APPOINTMENT_DW, ZPA_STAGE_APPOINTMENT_2_DW
				• DW STAGE TABLE: STAGE_APPOINTMENT, STAGE_APPOINTMENT_2
				• SAP INFOTYPES/TABLES: PA0000, PA0001, HRP1001, PA0041, PA0008, PA0028, PA0094, PA0171, PA9003, PA9004, PA9005, PA9006, PA9008, T500P, T001P, T501T, T503T, T549T, HRP9121, HRP1000, HRP1001, HRP9126, T5UBF, ZAE_P9004_RETRCD, T578W, ZAE_P9006_AP_STA, T529T, T530T, T509I, T505V, T509G, T591S, T549T, ZBSP_MASSN_VIEW,
				    ○ FUNCTION: RP_ANSAL_FROM_PERNR, Z_GET_BENEFIT_KEY_DATES, Z_UTL_BEN_GET_PARTICIP_HEALTH, Z_UTL_BEN_GET_PARTICIP_LIFE,
				    ○ METHOD: ZCL_POS_CLASS_ASSIGN_DATE = GET_EMP_ASGMT_HISTORY, ZCL_POS_CLASS_ASSIGN_DATE=GET_POS_APPT_DATE,

#	Activity	Description	Dependencies	Uniqueness/Customizations
				ZCL_POS_CLASS_ASSIGN_DATE=GET_CLASS_ASSIGN_DATE, ZCL_TM_LEAVE_BALANCE=GET_LEAVE_BALANCE_SUM, ZCL_INFOTYPE_9410_CHECK=CALC_HOURLY_RATE_PAY, ZCL_PY_GROSS_SAL=GET_WAGE_TYPE_AMOUNTS, ○ FUNCTION: Z_UTL_GET_HEALTH_LEGACY_CODE • JOBNAME=ECSF_DLY_DW_STG_2_APP_SAP_(1-8) • JOBNAME=ECSF_DLY_DW_STG_APP_(1-10)_SAP
8.143	DW Extracts	APPT_EQUIPMENT This extract pulls data related to equipment assigned to an employee	HRIS is available	• SAP EXTRACT: ZPA_STAGE_APPT_EQUIP_DW • DW STAGE TABLE: STAGE_APPT_EQUIPMENT • SAP INFOTYPES/TABLES: T591S • JOBNAME=ECSF_DLY_DW_STG_APPT_EQUIP_SAP
8.144	DW Extracts	BASIC_PAY This extract pulls basic pay information for all employees	HRIS is available	• SAP EXTRACT: ZPA_STAGE_BASIC_PAY_LOAD_DW • DW STAGE TABLE: STAGE_BASIC_PAY • SAP INFOTYPES/TABLES: GET PERNR, ○ FUNCTION: RP_ANSAL_FROM_PERNR, Z_UTL_AGENCY_LIVE_PERNR • JOBNAME=ECSF_DLY_DW_STG_BAS_PAY_SAP
8.145	DW Extracts	BEN_COBRA_ BENEFICIARY This extract pulls information related beneficiaries of a COBRA plan	HRIS is available	• SAP EXTRACT: ZKC_BEN_COBRA_BEN_DW • DW STAGE TABLE: STAGE_BEN_COBRA_BENEFICIARY • SAP INFOTYPES/TABLES: PA0211, ○ FUNCTION: Z_UTL_GET_CP_NUMBER, Z_UTL_AGENCY_LIVE_PERNR • JOBNAME=ECSF_DLY_DW_STG_BEN_COBRA_SAP
8.146	DW Extracts	BEN_COBRA_PLANS	HRIS is available	• SAP EXTRACT: ZKC_BEN_COBRA_PLANS_DW • DW STAGE TABLE: STAGE_BEN_COBRA_PLANS

#	Activity	Description	Dependencies	Uniqueness/Customizations
		This extract pulls information related to current COBRA plans		• SAP INFOTYPES/TABLES: PA0212, T5UC1, ○ FUNCTION: Z_HR_BEN_COB_READ_HEALTH_PLANS, Z_UTL_COBRA_PLAN_PART_DAT, Z_UTL_GET_CP_NUMBER, Z_UTL_AGENCY_LIVE_PERNR • JOBNAME=ECSF_DLY_DW_STG_BEN_CBRA_PLN_SAP
8.147	DW Extracts	BEN_DEPENDENT This extract pulls data related to the dependents of an employee's insurance plan	HRIS is available	• SAP EXTRACT: ZRP_BEN_DEP_DW • DW STAGE TABLE: STAGE_BEN_DEPENDENT • SAP INFOTYPES/TABLES: PA0171, PA0021, PA0106, ○ FUNCTION: Z_UTL_GET_CP_NUMBER, Z_UTL_AGENCY_LIVE_PERNR • JOBNAME=ECSF_DLY_DW_STG_BEN_DEP_SAP
8.148	DW Extracts	BEN_EXPECTED_ DEDUCTION This extract pulls expected deduction amounts for the various health, life, and supplemental benefit plans	HRIS is available	• SAP EXTRACT: ZBD_BEN_EXPCT_HIST_DW • DW STAGE TABLE: STAGE_BEN_EXPECTED_DEDUCTION • SAP INFOTYPES/TABLES: ZBI_EXPECTED_DED • JOBNAME=ECSF_DLY_DW_BEN_EXCPT_HLTH, ECSF_DLY_DW_BEN_EXCPT_LIFE, ECSF_DLY_DW_BEN_EXCPT_SUPPS
8.149	DW Extracts	BEN_FSA This extract pulls all information related to employee's flexible spending accounts	HRIS is available	• SAP EXTRACT: ZKC_BEN_FSA_DW • DW STAGE TABLE: STAGE_BEN_FSA • SAP INFOTYPES/TABLES: PA0170, T5UC1, T5UCA, ○ FUNCTION: Z_UTL_GET_CP_NUMBER, Z_UTL_AGENCY_LIVE_PERNR • JOBNAME=ECSF_DLY_DW_STG_BEN_FSA_SAP
8.150	DW Extracts	BEN_GENERAL_INFO This extract pulls general information related to benefits	HRIS is available	• SAP EXTRACT: ZKC_BEN_GEN_BEN_INFO_DW • DW STAGE TABLE: STAGE_BEN_GENERAL_INFO • SAP INFOTYPES/TABLES: T5UCT, PA0171, ○ FUNCTION: Z_UTL_GET_CP_NUMBER, Z_UTL_AGENCY_LIVE_PERNR • JOBNAME=ECSF_DLY_DW_STG_BEN_GEN_SAP

#	Activity	Description	Dependencies	Uniqueness/Customizations
8.151	DW Extracts	BEN_HEALTH_PLANS This extract pulls all data related to the current health plans offered	HRIS is available	• SAP EXTRACT: ZRP_BEN_HEALTH_PLN_DW • DW STAGE TABLE: STAGE_BEN_HEALTH_PLANS • SAP INFOTYPES/TABLES: PA0167, T5UC1, T5UCA, T5UCF ○ FUNCTION: HR_BEN_READ_HEALTH_PLANS, Z_UTL_GET_CP_NUMBER, Z_UTL_AGENCY_LIVE_PERNR • JOBNAME=ECSF_DLY_DW_STG_HLTH_PLN_2_SAP, ECSF_DLY_DW_STG_HLTH_PLN_1_SAP, ECSF_DLY_DW_STG_HLTH_PLN_1_SAT
8.152	DW Extracts	BEN_INSURANCE_PLANS This extract pulls data relates to current insurance plans	HRIS is available	• SAP EXTRACT: ZRP_BEN_INS_PLAN_DW • DW STAGE TABLE: STAGE_BEN_INSURANCE_PLANS • SAP INFOTYPES/TABLES: PA0168, T5UC1, T5UCA, ○ FUNCTION: Z_UTL_GET_CP_NUMBER, Z_UTL_AGENCY_LIVE_PERN • JOBNAME=ECSF_DLY_DW_STG_INS_PLN_SAP
8.153	DW Extracts	BEN_PREM_HISTORY This extract pulls historical benefits premium data	HRIS is available	• SAP EXTRACT: ZBD_BEN_PREM_HIST_DW • DW STAGE TABLE: STAGE_BEN_PREM_HISTORY • SAP INFOTYPES/TABLES: PA0167, PA0212, PA0168, HRP9121, HRP9124, PA0001, PA0000, HRP9100, PA0008, T549Q, T530F, ○ FUNCTION: ZBI_DP_LN_ITEM, ZBI_BOSP_DED, ZCL_CU_UTILITIES= GET_SAMAS, ZCL_HR_EMP_ATTRS= GET_EMP_ALL_IDS • JOBNAME=ECSF_DLY_DW_PRE_HST_SUPP_(1-2), ECSF_DLY_DW_PRE_HST_LIFE_(1-12), ECSF_DLY_DW_PRE_HST_HLTH_(1-12), ECSF_DLY_DW_PRE_HST_DENT_(1-12), ECSF_DLY_DW_PRE_HST_FSA
8.154	DW Extracts	BLDG_FACILITIES This extract pulls building facility data	HRIS is available	• SAP EXTRACT: ZAD_STAGE_BUILDING_DW • DW STAGE TABLE: STAGE_BLDG_FACILITIES • SAP INFOTYPES/TABLES: ZCC_BUILDING • JOBNAME=ECSF_DLY_DW_STG_BLDG_SAP

#	Activity	Description	Dependencies	Uniqueness/Customizations
8.155	DW Extracts	BROADBAND This extract pulls data related to established broadband codes	HRIS is available	• SAP EXTRACT: ZAD_STAGE_BROADBAND_DW • DW STAGE TABLE: STAGE_BROADBAND • SAP INFOTYPES/TABLES: HRP1000, HRP1001, HRP1005, T710 ○ FUNCTION: ZAE_BRDBND_CLASS
8.156	DW Extracts	CERTIFICATION This extract pulls data related to certifications held by an employee	HRIS is available	• SAP EXTRACT: ZPA_STAGE_CERTIFICATION_DW • DW STAGE TABLE: STAGE_CERTIFICATION • SAP INFOTYPES/TABLES: T591S, HRP1001, GET PERNR, * RP_PROVIDE_FROM_LAST P9001, PN-BEGDA PN-ENDDA., ○ FUNCTION: Z_UTL_AGENCY_LIVE_PERNR • JOBNAME=ECSF_DLY_DW_STG_CERT_SAP
8.157	DW Extracts	CERTS_REQUIRED This extract pulls certifications that are required by position	HRIS is available	• SAP EXTRACT: ZAD_STAGE_9130_REQ_CERTS_DW • DW STAGE TABLE: STAGE_CERTS_REQUIRED • SAP INFOTYPES/TABLES: HRP9130 • JOBNAME=ECSF_DLY_DW_STG_9130_REQ_CER_SAP, ECSF_DLY_DW_STG_9130_RQ_CR_SAP_2
8.158	DW Extracts	CHG_OBJ_ACTIVITY This extract pulls time data related to charge object activities	HRIS is available	• SAP EXTRACT: ZAD_STAGE_ACTIVITY_DW • DW STAGE TABLE: STAGE_CHG_OBJ_ACTIVITY • SAP INFOTYPES/TABLES: ZTE_ACTIVITY • JOBNAME=ECSF_DLY_DW_STG_ACTIVITY_SAP
8.159	DW Extracts	CHG_OBJ_PROJ This extract pulls data related to charge object projects	HRIS is available	• SAP EXTRACT: ZAD_STAGE_PROJECT_DW • DW STAGE TABLE: STAGE_CHG_OBJ_PROJ • SAP INFOTYPES/TABLES: ZTE_PROJECT • JOBNAME=ECSF_DLY_DW_STG_PROJECT_SAP
8.160	DW Extracts	CHG_OBJ_SUB_ACT This extract pulls data related to charge object sub-activities	HRIS is available	• SAP EXTRACT: ZAD_STAGE_SUB_ACTIVITY_DW • DW STAGE TABLE: STAGE_CHG_OBJ_SUB_ACT • SAP INFOTYPES/TABLES: ZTE_SUBACTIVITY • JOBNAME=ECSF_DLY_DW_STG_SUB_ACT_SAP
8.161	DW Extracts	CHG_OBJ_TIME_CHRG	HRIS is available	• SAP EXTRACT: ZAD_STAGE_TIME_CHARGE_DW • DW STAGE TABLE: STAGE_CHG_OBJ_TIME_CHRG

#	Activity	Description	Dependencies	Uniqueness/Customizations
		This extract pulls data related to time assigned to specific charge objects from approved timesheets		• SAP INFOTYPES/TABLES: ZTE_TIME_CHARGE • JOBNAME=ECSF_DLY_DW_STG_TIME_CHG_SAP
8.162	DW Extracts	CHG_OBJ_TIME_COST This extract pulls time allocated on approved timesheets related to charge object	HRIS is available	• SAP EXTRACT: ZAD_STAGE_TIME_COSTS_DW • DW STAGE TABLE: STAGE_CHG_OBJ_TIME_COST • SAP INFOTYPES/TABLES: ZTE_TIME_COSTS • JOBNAME=ECSF_DLY_DW_STG_TIME_CST_SAP
8.163	DW Extracts	CJIP This extract pulls CJIP data for eligible employees	HRIS is available	• SAP EXTRACT: ZPA_CJIP_DATA_DW • DW STAGE TABLE: STAGE_CJIP • SAP INFOTYPES/TABLES: PA9014 • JOBNAME=ECSF_DLY_DW_STG_CJIP_DATA_SAP
8.164	DW Extracts	CJIP_CHANGES This extract pulls data input into the system to make changes to CJIP records	HRIS is available	• SAP EXTRACT: ZPA_CJIP_CHANGES_DW • DW STAGE TABLE: STAGE_CJIP_CHANGES • SAP INFOTYPES/TABLES: ZPI_CJIP_CHANGES • JOBNAME=ECSF_DLY_DW_STG_CJIP_CHGS_SAP
8.165	DW Extracts	CLASS This extract pulls all class data information from position and broadband data	HRIS is available	• SAP EXTRACT: ZAD_STAGE_CLASS_DW • DW STAGE TABLE: STAGE_CLASS • SAP INFOTYPES/TABLES: HRT1002, HRP1000, HRP1002, HRP1005, HRP9110, T5UEE, ZAE_BRDBND_CLASS, ZCC_POS_OCCGROUP • JOBNAME=ECSF_DLY_DW_STG_CLASS_SAP
8.166	DW Extracts	CLASS_BROADBAND This extract pulls class code and related broadband data	HRIS is available	• SAP EXTRACT: ZAD_STAGE_BB_CROSSWALK_DW • DW STAGE TABLE: STAGE_CLASS_BROADBAND • SAP INFOTYPES/TABLES: ZAE_BRDBND_CLASS • JOBNAME=ECSF_DLY_DW_STG_CLASS_BB_SAP
8.167	DW Extracts	EDUCATION This extract pulls	HRIS is available	• SAP EXTRACT: ZPA_STAGE_EDUCATION_DW • DW STAGE TABLE: STAGE_EDUCATION • SAP INFOTYPES/TABLES: T519T, U_17013,

#	Activity	Description	Dependencies	Uniqueness/Customizations
		employee education related data		HRP1001, GET PERNR, ○ FUNCTION: Z_UTL_AGENCY_LIVE_PERNR, RP_PROVIDE_FROM_LAST P0000, PN-BEGDA PN-ENDDA, * RP_PROVIDE_FROM_LAST P9009, PN-BEGDA PN-ENDDA • JOBNAME=ECSF_DLY_DW_STG_EDUC_SAP
8.168	DW Extracts	ELEARNING This extract pulls any classes an employee has attended and/or completed that has been input into the People First System	HRIS is available	• SAP EXTRACT: ZPA_STAGE_ELEARNING • DW STAGE TABLE: STAGE_ELEARNING • SAP INFOTYPES/TABLES: PA9025, ZEL_COURSE, DATABASE PCL1(TX) • JOBNAME=ECSF_DLY_DW_STG_ELEARN_SAP
8.169	DW Extracts	EMAIL This extract pulls in all email address and related data	HRIS is available	• SAP EXTRACT: ZPA_EXTRACT_ACTIVE_EMAILADD_DW • DW STAGE TABLE: STAGE_EMAIL • SAP INFOTYPES/TABLES: PA0001, PA0105, ○ FUNCTION: Z_UTL_GET_CP_NUMBER • JOBNAME=ECSF_DLY_DW_STG_EMAILADD_SAP
8.170	DW Extracts	EMPLOYEE, EMP_ORG This extract pulls employee related data including, but not limited to employee actions, EEO data, I9 data, etc.	HRIS is available	• SAP EXTRACT: ZPA_STAGE_EMPLOYEE_DW • DW STAGE TABLE: STAGE_EMPLOYEE, STAGE_EMP_ORG • SAP INFOTYPES/TABLES: PA0000, PA0002, PA0077, PA9301, PA0094, T505S, T502T, T505N, DD07V, T529T, T530T, HRP1001, T509G, T509I, ZCC_EMPLOYEE, AND ZBSP_MASSN_VIEW. • JOBNAME=ECSF_DLY_DW_STG_EMP_SAP
8.171	DW Extracts	EMP_VERIFICATION This extract pulls data related to all active employees who have verified address and/or	HRIS is available	• SAP EXTRACT: ZPA_STAGE_VERIFICATIONS_DW • DW STAGE TABLE: STAGE_EMP_VERIFICATION • SAP INFOTYPES/TABLES: ZCE_VER_CONFIG, ZCE_VER_TXT_MOD, ZCE_VER_COMP, ZBR_OE_STATS, ZBE_ENR_COMPL • JOBNAME=ECSF_DLY_DW_STG_VERIFICATION

#	Activity	Description	Dependencies	Uniqueness/Customizations
		dependent information		
8.172	DW Extracts	EMP_WAGE_DETAIL This extract pulls data related to the wage type records sent on the F0001 to the BOSP	HRIS is available	• SAP EXTRACT: ZCD_STAGE_FILE1 • DW STAGE TABLE: STAGE_EMP_WAGE_DETAIL • SAP INFOTYPES/TABLES: ZPI_BOSP_F1_HIST • JOBNAME=ECSF_AWD_DW_STG_FILE1_SAP, ECSF_FIN_BW_DW_STG_FILE1_SAP, ECSF_FIN_MN_DW_STG_FILE1_SAP, ECSF_FIN_SUP_DW_STG_FILE1_SAP
8.173	DW Extracts	EMP_WAGE_DETAIL_ PRELIM This extract pulls data related to wage detail for preliminary F0001	HRIS is available	• SAP EXTRACT: ZCD_STAGE_PRELIM_FILE1 • DW STAGE TABLE: STAGE_EMP_WAGE_DETAIL_PRELIM • SAP INFOTYPES/TABLES: ZPI_BOSP_F1_HIST • JOBNAME=ECSF_PRE_SUP_PRO_089_STG_SAP, ECSF_PRE_MN_PRO_089_STG_SAP, ECSF_PRE_BW_PRO_089_STG_SAP
8.174	DW Extracts	EVENT_TYPE This extract pulls data related to events that occur for an employee and result in a change to benefits coverage	HRIS is available	• SAP EXTRACT: ZBN_STAGE_EVENT_TYPE_DW • DW STAGE TABLE: STAGE_EVENT_TYPE • SAP INFOTYPES/TABLES: T74IA, T549Q, PA0000, PA0021, PA0167, PA0168, PA0170, PCL4, • FUNCTION: Z_UTL_BEN_GET_PARTICIP, Z_UTL_HEALTH_SPOUSE_PROGRAM, Z_UTL_GET_BENEFITS_PERNR, ZBU_MOVE_EXCEPT, ZBE_RETIRE_ACT, RP_CALC_DATE_IN_INTERVAL • JOBNAME=ECSF_DLY_DW_STG_EVENT_TYPE_SAP
8.175	DW Extracts	FLAIR_ACCT This extract pulls FLAIR account code data	HRIS is available	• SAP EXTRACT: ZAD_STAGE_FLAIR_ACCT_DW • DW STAGE TABLE: STAGE_FLAIR_ACCT • SAP INFOTYPES/TABLES: ZAD_FLAIR_ACCNT • JOBNAME=ECSF_DLY_DW_STG_FLR_ACCT_SAP
8.176	DW Extracts	FMLA_EVENT This extract pulls all timesheet and employee information related to FMLA code usage	HRIS is available	• SAP EXTRACT: ZPA_STAGE_FMLA_EVENT_DW • DW STAGE TABLE: STAGE_FMLA_EVENT • SAP INFOTYPES/TABLES: PA0672, PA0000, ○ FUNCTION: Z_UTL_AGENCY_LIVE_PERNR • JOBNAME=ECSF_DLY_DW_STG_FMLA_EVENT_SAP

#	Activity	Description	Dependencies	Uniqueness/Customizations
8.177	DW Extracts	HSA_REVERSAL This extract pulls data related to a Health Savings account (HSA) reversal	Interface file has been received from HSA provider	• A FLAT FILE FROM THE BOSP IS PLACED ON DW FILE SERVER. • DW STAGE TABLE: STAGE_HSA_REVERSAL • DW BASE TABLE: HSA_REVERSAL • DW LOAD PROGRAM: LOAD_HSA_REVERSAL
8.178	DW Extracts	KSA This extract pulls data related to a position's required knowledge, skills and abilities	HRIS is available	• SAP EXTRACT: ZAD_STAGE_KSA_DW • DW STAGE TABLE: STAGE_KSA • SAP INFOTYPES/TABLES: HRT1002, HRP1002, HRP1001, HRP1008 • JOBNAME=ECSF_DLY_DW_STG_KSA_SAP
8.179	DW Extracts	LANGUAGE This extract pulls data related to employees and languages they speak	HRIS is available	• SAP EXTRACT: ZPA_STAGE_LANGUAGE_DW • DW STAGE TABLE: STAGE_LANGUAGE • SAP INFOTYPES/TABLES: T574B, T777Q, HRP1001, ZAU_PA_LOGGING, GET PERNR. RP_PROVIDE_FROM_LAST P0000, PN-BEGDA, PN-ENDDA, RP_PROVIDE_FROM_LAST P0024, PN-BEGDA PN-ENDDA, ○ FUNCTION: Z_UTL_AGENCY_LIVE_PERNR • JOBNAME=ECSF_DLY_DW_STG_LANG_SAP
8.180	DW Extracts	LEAVE_BAL This extract pulls leave balances for each employee with a balance greater than zero for any accrued leave type. (i.e., annual, sick, special compensatory leave, etc.)	HRIS is available	• SAP EXTRACT: ZTR_STAGE_LEAVE_BALANCE_DW • DW STAGE TABLE: STAGE_LEAVE_BAL • SAP INFOTYPES/TABLES: PA0001, PA0000, HRP9121, PA0002, PA2012, PA2013, PA9006, PA0014, PA9014, PA0008, PA0041, HRP9100, HRP9124, PA9004, HRP1000, HRP9122, ZPU_PAY_SCHEDULE, ○ FUNCTION: REMAINING_TIMEQUOTA, Z_UTL_GET_CP_NUMBER, IMPORT ZES TO T_ZES FROM DATABASE PCL2(B2) • JOBNAME=ECSF_DLY_DW_STG_LV_BAL_BW2, ECSF_DLY_DW_STG_LV_BAL_BW3, ECSF_DLY_DW_STG_LV_BAL_MN1
8.181	DW Extracts	LEAVE_LIABILITY_FY	HRIS is available	• SAP EXTRACT:

#	Activity	Description	Dependencies	Uniqueness/Customizations
		This extract pulls all data related to the leave types with inherent liability associated with them, the number of hours per leave type per employee along with the associated employer costs for paying the liability		ZTR_STAGE_LEAVE_LIABILITY_DW • DW STAGE TABLE: STAGE_LEAVE_LIABILITY_FY • SAP INFOTYPES/TABLES: PA0001, PA0000, HRP9121, PA0002, PA0008, PA0014, PA2012, PA2013, PA0041, HRP9100, PA9004, HRP1000, ZTE_PAYOUT_TYPE, ○ FUNCTION: REMAINING_TIMEQUOTA, IMPORT ZES TO ITAB_ZES FROM DATABASE PCL2(B2), HRP9124, PA9014 • JOBNAME=ECSF_ZTR_STG_LVE_LIABLTY_TRUNCAT, ECSF_ZTR_STG_LEVE_LBLTY_DW_SAP_(1-4)
8.182	DW Extracts	LEAVE_PAYOUT This extract pulls all leave payouts made through the People First System	HRIS is available	• SAP EXTRACT: ZPA_STAGE_LEAVE_PAYOUT_DW • DW STAGE TABLE: STAGE_LEAVE_PAYOUT • SAP INFOTYPES/TABLES: PA9410 • JOBNAME=ECSF_FN_SUP_DW_STG_LEV_PYOUT_SAP, ECSF_FIN_MN_DW_STG_LV_PYOUT_SAP, ECSF_FIN_BWK_DW_STG_LV_PYOUT_SAP, ECSF_AWD_DW_STG_LEAV_PYOUT_SAP
8.183	DW Extracts	LICENSE This extract pulls data related to employee driver’s license information including code, description, and number	HRIS is available	• SAP EXTRACT: ZPA_STAGE_LICENSE_DW • DW STAGE TABLE: STAGE_LICENSE • SAP INFOTYPES/TABLES: PA0000, PA9000, ○ FUNCTION: Z_UTL_GET_CP_NUMBER JOBNAME=ECSF_DLY_DW_STG_LICENSE_SAP
8.184	DW Extracts	OCA_PERCENT This extract pulls all funding data related to OCA codes used by Agency for Persons with Disabilities, Department of Children and Families and Department of	HRIS is available	• SAP EXTRACT: ZAD_STAGE_OCA_PERCENT • DW STAGE TABLE: STAGE_OCA_PERCENT • SAP INFOTYPES/TABLES: ZAD_OCA_PERCENTS • JOBNAME=ECSF_DLY_DW_STG_OCS_PER_SAP

#	Activity	Description	Dependencies	Uniqueness/Customizations
		Health		
8.185	DW Extracts	ONETIME_PAY_DED This extract pulls data related to one time pay deduction data from employee payments	HRIS is available	• SAP EXTRACT: ZPA_STAGE_ONETIME_PAYDEDUCT_DW • DW STAGE TABLE: STAGE_ONETIME_PAY_DED • SAP INFOTYPES/TABLES: PA0015, RP_PROVIDE_FROM_LAST P0000, PN-BEGDA PN-ENDDA, ZAU_PA_LOGGING, ○ FUNCTION: Z_UTL_AGENCY_LIVE_PERNR • JOBNAME=ECSF_DLY_DW_STG_ONETIME_DED_SAP
8.186	DW Extracts	OPS_HOURS This extract pulls hours of worked for OPS employees from approved timesheets	HRIS is available	• SAP EXTRACT: ZPR_OPS_HOURS_SUMM • DW STAGE TABLE: STAGE_OPS_HOURS • SAP INFOTYPES/TABLES: PA0000, PA0001, PA0002, HRP9100, HRP1000, HRP9124, PA9006, PA0041, HRP9122, PA0008, PA2010, ○ FUNCTION: Z_UTL_GET_CP_NUMBER, CATSDB, ZCL_OM_BASIC_ATTRIBUTES=>GET_MANAGER_FOR_EMP_POS, ZCL_HR_EMP_ATTRS=>GET_EMP_NAME, ZCL_OM_BASIC_ATTRIBUTES=>GET_STATE_POS_NUM_FROM_ID • JOBNAME=ECSF_DMS_MN_OPS_HOURS_(OLO)
8.187	DW Extracts	ORGANIZATION This extract pulls all organization related data	HRIS is available	• SAP EXTRACT: ZAD_STAGE_ORGANIZATION_DW • DW STAGE TABLE: STAGE_ORGANIZATION • SAP INFOTYPES/TABLES: HRP1000, HRP1001, HRP1008, HRP9100, HRP9101, HRP9102, T500P, ZAU_OM_LOGGING, ZCL_HR_BASIC_ATTRIBUTES=;GET_AGENCY_FOR_ORG_CODE (I_HRP9100-ORG_CODE), <SPAN>GET_OBJECTS_FROM_SELECTION_SCR • JOBNAME=ECSF_DLY_DW_STG_ORG_SAP
8.188	DW Extracts	OTHER_REQ_DETAIL This extract pulls the F0001 information for all	HRIS is available	• SAP EXTRACT: NONE • DW STAGE TABLE: NONE • PROCESS: DW PROGRAM LOAD_WAGE_DETAIL READS STAGE_EMP_WAGE_DETAIL AND WHEN

#	Activity	Description	Dependencies	Uniqueness/Customizations
		supplemental payments, e.g., bonus payments, uniform allowance, one time payments		COLUMN REC_TYPE_34 IS OTHER THAN '10', INSERTS THIS RECORD INTO OTHER_REQ_DETAIL
8.189	DW Extracts	OUTSIDE_ EMPLOYMENT This extract pulls all data related to an employee's outside employment	HRIS is available	• SAP EXTRACT: ZHR_STAGE_OUTSIDE_EMP_DW • DW STAGE TABLE: STAGE_OUTSIDE_EMPLOYMENT • SAP INFOTYPES/TABLES: PA9002 • JOBNAME=ECSF_DLY_DW_STG_OUT_EMP_SAP
8.190	DW Extracts	PA0302 (Additional Actions) This extract pulls additional actions for OPS employees	HRIS is available	• SAP EXTRACT: ZHR_STAGE_PA0302_DW • DW STAGE TABLE: STAGE_PA0302 • SAP INFOTYPES/TABLES: PA0302, PA0002, HRP1001, PA0001, ZBSP_MASSN_VIEW • JOBNAME=ECSF_DLY_DW_STG_PA0302_SAP
8.191	DW Extracts	PA9302 (Benefits Eligibility Key) This extract pulls key dates for OPS employees	HRIS is available	• SAP EXTRACT: ZHR_STAGE_PA9302_DW • DW STAGE TABLE: STAGE_PA9302 • SAP INFOTYPES/TABLES: PA9302, ○ FUNCTION: Z_UTL_GET_CP_NUMBER, ZCL_BEN_OPS= GET_EVAL_DATES • JOBNAME=ECSF_DLY_DW_STG_PA9302_SAP
8.192	DW Extracts	PAY_ADDITIVE This extract pulls data related to pay additive data attached to position/employee	HRIS is available	• SAP EXTRACT: ZPI_STAGE_PAY_ADDITIVES_DW • DW STAGE TABLE: STAGE_PAY_ADDITIVE • SAP INFOTYPES/TABLES: PA0001, T512T, T549A, T549Q, REFRESH RGDIRSEL., RP-IMP-C2-CU., REFRESH: P_RT, METHOD ZCL_PY_GROSS_SAL= HOURLY_RATE_PAY • JOBNAME=ECSF_DLY_DW_STG_PAY_ADDTIVES _SAP
8.193	DW Extracts	PAY_ADDITIVE_PCR This extracts pulls data for active pay additives for employee	HRIS is available	• SAP EXTRACT: ZPI_STAGE_PAY_ADDITIVES_PCR_DW • DW STAGE TABLE: STAGE_PAY_ADDITIVE_PCR • DW BASE TABLE: PAY_ADDITIVE_PCR • DW LOAD PROGRAM: LOAD_PAY_ADDITIVE_PCR • SAP INFOTYPES/TABLES: PA0001, T512T, T549A,

#	Activity	Description	Dependencies	Uniqueness/Customizations
				T549Q, REFRESH RGDIRSEL, RP-IMP-C2-CU, REFRESH: P_RT, METHOD ZCL_PY_GROSS_SAL= HOURLY_RATE_PAY • JOBNAME=ECSF_DLY_DW_STG_PAY_ADD_PCR_B, ECSF_DLY_DW_STG_PAY_ADD_PCR_M
8.194	DW Extracts	PAY_BAND This extract pulls data from broadband compensation and maintenance	HRIS is available	• SAP EXTRACT: ZAD_STAGE_T710_DW • DW STAGE TABLE: STAGE_PAY_BAND • SAP INFOTYPES/TABLES: T710 • JOBNAME=ECSF_DLY_DW_STG_T710_DW_SAP
8.195	DW Extracts	PAY_GRADE This extract pulls all pay grade related data	HRIS is available	• SAP EXTRACT: ZAD_STAGE_PAY_GRADE_DW • DW STAGE TABLE: STAGE_PAY_GRADE • SAP INFOTYPES/TABLES: T710 • JOBNAME=ECSF_DLY_DW_STG_PAY_GRD_SAP
8.196	DW Extracts	PAY_GRADE_CAD This extract pulls competitive area differentials available based on county, class and pay grade	HRIS is available	• SAP EXTRACT: ZPA_STAGE_PAY_GRADE_CAD_DW • DW STAGE TABLE: STAGE_PAY_GRADE_CAD • SAP INFOTYPES/TABLES: ZCC_PAYCAD • JOBNAME=ECSF_DLY_DW_STG_PAY_GRD_CAD_SAP
8.197	DW Extracts	PAY_PERIOD This extract pulls pay period data based on payroll cycle	HRIS is available	• SAP EXTRACT: ZPU_STAGE_PAY_SCHEDULE_DW • DW STAGE TABLE: STAGE_PAY_PERIOD • SAP INFOTYPES/TABLES: ZPU_PAY_SCHEDULE • JOBNAME=ECSF_DLY_DW_STG_PAY_SCHD_SAP
8.198	DW Extracts	PERF_MGMT_EVAL This extract pulls employee performance evaluations and ratings data	HRIS is available	• SAP EXTRACT: ZPA_STAGE_PERF_MGMT_DW • DW STAGE TABLE: STAGE_PERF_MGMT_EVAL • SAP INFOTYPES/TABLES: PA0025, T513F, PCL1(TX) • JOBNAME=ECSF_DLY_DW_STG_PER_MGM_SAP
8.199	DW Extracts	PER_WORK_SCHED This extract pulls data	HRIS is available	• SAP EXTRACT: ZPA_STAGE_PER_WORK_SCHED_DW • DW STAGE TABLE: STAGE_PER_WORK_SCHED

#	Activity	Description	Dependencies	Uniqueness/Customizations
		related to work schedule		• SAP INFOTYPES/TABLES: GET PERNR, RP_PROVIDE_FROM_LAST, P0002, PN-BEGDA, PN-ENDDA, RP-IMP-C2-B2 • JOBNAME=ECSF_DLY_DW_STG_WORK_SCHD_SAP
8.200	DW Extracts	PFLUENT_RATINGS This extract pulls evaluation ratings for specified evaluation periods per employee	HRIS is available	• Extract is run from the Performance & Talent Management System nightly creating a flat file that is placed on DW file server. • DW STAGE TABLE: STAGE_PFLUENT_RATINGS • DW LOAD PROGRAM: LOAD_PFLUENT_RATINGS • OTHER TABLES: ZAUTH_PFLUENT

8.201	DW Extracts	POSITION
		
		This extract pulls all position related data including incumbent information
			HRIS is available	• SAP EXTRACT: ZAD_STAGE_POSITION_DW
				• DW STAGE TABLE: STAGE_POSITION
				• SAP INFOTYPES/TABLES: HRP1000, HRP1001, HRP1005, HRP1007, HRP1008, HRP1010, HRP1013, HRP9100, HRP9120, HRP9121, HRP9122, HRP9123, HRP9124, HRP9128, T77MB, HRP9126, T005F, T512L, T549T, ZCC_SPC, ZAD_BUDGET_ENTIT, ZCC_CBU, ZAE_BRDBND_CLASS, ZAD_FLAIR_ORG, ZCC_BUILDING, ZCC_POS_OCCGROUP, T503T,
				  o METHOD: CAD- GET_CAD_ELIGIBILITY,
				  o FUNCTION: Z_UTL_GET_POSITION_DATA
				• JOBNAME=ECSF_DLY_DW_STG_POS_SAP_(1-10)

8.202	DW Extracts	POS_FUND_SOURCE This extract pulls position funding data from position	HRIS is available	• SAP EXTRACT: ZAD_STAGE_POS_FUND_DW • DW STAGE TABLE: STAGE_POS_FUND_SOURCE • SAP INFOTYPES/TABLES: HRP9124, HRP1001, HRP1008, HRP9100, ZAD_ST_FED_PERC, ZAD_OCA_PERCENTS, ZAD_FUNDINGCODES • JOBNAME=ECSF_DLY_DW_STG_POS_FUND_SAP_(1-10)
8.203	DW Extracts	POS_SECURITY This extract pulls the position security related data	HRIS is available	• SAP EXTRACT: ZSC_STAGE_POS_SECURITY_DW • DW STAGE TABLE: STAGE_POS_SECURITY • SAP INFOTYPES/TABLES: ZSC_HRP9105_V • JOBNAME=ECSF_DLY_DW_STG_POS_SEC_SAP

#	Activity	Description	Dependencies	Uniqueness/Customizations

8.204	DW Extracts	RECURR_PAY_ DEDUCT
		
		This extract pulls data related to recurring pay deductions from employee payments
			HRIS is available	• SAP EXTRACT: ZPA_STAGE_RECUR_PAY_DEDUCT_DW
				• DW STAGE TABLE: STAGE_RECURR_PAY_DEDUCT
				• SAP INFOTYPES/TABLES: PA0000, PA0001, HRP9120, PA0014, PA0008, T512T, ZAU_PA_LOGGING,
				  ○ FUNCTION: Z_UTL_GET_RATE_FOR_LGART,
				  ○ METHOD ZCL_PY_GROSS_SAL= GET_EMPLOYEE_SHIFT_PREMIUM
				• JOBNAME=ECSF_DLY_DW_STG_RECUR_PAY_SAP

8.205	DW Extracts	REFERENCE This extract pulls system codes and associated code descriptions	HRIS is available	• SAP EXTRACT: ZPA_STAGE_REFERENCE_DW, ZPA_STAGE_VERIFICATIONS_DW • DW STAGE TABLE: STAGE_REFERENCE • SAP INFOTYPES/TABLES: T591S, T519T, T517X, T005T, T005U, ZAE_P9000_DLCLAS, ZAE_P9000_DLSTAT, T574B, T777Q, T529T, T530T, T513F, T510A, T510G, T5UCT, T5UC9, T5UCE, T591S, T555B, T74GA, T591S, ZEL_COURSE, ZPXX_EVNT_PERMIS, ZAE_P9006_ST_TYP, T559B, T577S, T5UCA, ZT549Q_FLSA, DD07V, T5UVETT, T5UEE, ○ FUNCTION: Z_BSP_LIST • JOBNAME=ECSF_DLY_DW_STG_REFER_SAP
8.206	DW Extracts	RETRO_PAYMENTS This extract pulls data regarding any retro payments made by the system	HRIS is available	• SAP EXTRACT: ZCD_STAGE_RETRO_PAYMENTS • DW STAGE TABLE: STAGE_RETRO_PAYMENTS • SAP INFOTYPES/TABLES: ZPI_BOSP_F1_RETP • JOBNAME=ECSF_FIN_SUP_DW_STG_RTRO_PAY_SAP, ECSF_FIN_MN_DW_STG_RETRO_PAY_SAP, ECSF_FIN_BWK_DW_STG_RTRO_PAY_SAP
8.207	DW Extracts	SALARY_DETAIL This extract loads all	Interface file has been received from BOSP	• Flat file is received from BOSP and put on DW file server for processing • SAP EXTRACT: NONE

#	Activity	Description	Dependencies	Uniqueness/Customizations
		salary related information per employee from the nightly interface file provided by BOSP		• DW STAGE TABLE: STAGE_SALARY_DETAIL • DW BASE TABLE SALARY_DETAIL_2 • DW LOAD PROGRAM LOAD_SALARY_DETAIL_2 • JOBNAME=ECSF_PRI_061_SALDETAIL_(B/M/O/C)_FTP_DW, ECSF_DLY_DW_LD_SALDET2_S
8.208	DW Extracts	SAP_BEN_OU This extract pulls data related to over and underpayments of benefit premiums	HRIS is available	• SAP EXTRACT: ZBI_UNDER_OVER_PYMT_RPT • DW FLAT FILE: UNDER_OVER_RPT_DW_(BENO/CORE)_M(00-23) UNDER_OVER_RPT_DW_(BENO/CORE)_P01 • DW STAGE TABLE: STAGE_SAP_BEN_OU • SAP INFOTYPES/TABLES: T5UCA, PA0212, PA0106, PA0021,T549Q, T549R, PA0171, HRP9100, PA0001, HRP1001,PA0002, ZCL_CU_UTILITIES=>GET_SAMAS, ZCL_HR_EMP_ATTRS=>GET_EMP_ALL_IDS • JOBNAME=ECSF_DLY_DW_UNDOVR_M(00-06)_CORE_(1-2), ECSF_DLY_DW_UNDOVR_M(00-06)_BENO_(1-2), ECSF_DLY_DW_UNDOVR_M(07-23)_CORE_2, ECSF_DLY_DW_UNDOVR_M(07-23)_BENO_2, ECSF_DLY_DW_UNDOVR_P01_CORE_1, ECSF_DLY_DW_UNDOVR_P01_BENO_1
8.209	DW Extracts	SUBSTITUTIONS The SUBSTITUTIONS extract pulls data from the Base Work Schedule. If there is a Flexible Work Schedule, it overrides the Base Work Schedule Extract is no longer run	HRIS is available	• SAP EXTRACT: ZPA_STAGE_SUBSTITUTIONS_DW • DW STAGE TABLE: STAGE_SUBSTITUTIONS • SAP INFOTYPES/TABLES: PA0000, PA2003 ○ FUNCTION: Z_UTL_AGENCY_LIVE_PERNR • JOBNAME=ECSF_DLY_DW_STG_SUBSTIT_SAP
8.210	DW Extracts	SUPP_PAY_DEDUCT This extract pulls all data	HRIS is available	• SAP EXTRACT: ZPA_STAGE_SUPPL_PAY_DEDUCT_DW • DW STAGE TABLE: STAGE_SUPP_PAY_DEDUCT

#	Activity	Description	Dependencies	Uniqueness/Customizations
		related to employee with regards to a one-time payment		• SAP INFOTYPES/TABLES: ZAU_PA_LOGGING, GET PERNR, RP_PROVIDE_FROM_LAST P0015, PN-BEGDA PN-ENDDA, • FUNCTION: Z_UTL_AGENCY_LIVE_PERNR • JOBNAME=ECSF_DLY_DW_STG_SUPL_PAY_SAP
8.211	DW Extracts	TIME_BALANCE This extract pulls employee time balance data	HRIS is available	• SAP EXTRACT: ZPA_STAGE_TIME_BALANCE_DW • DW STAGE TABLE: STAGE_TIME_BALANCE • SAP INFOTYPES/TABLES: PA0001, PCL2, ZPI_TIMEBAL_EXCL, • FUNCTION: Z_BSP_TM_ENTRY_FLSA_WWEEK, HR_INITIALIZE_BUFFER, Z_UTL_AGENCY_LIVE_PERNR • JOBNAME=ECSF_DLY_DW_STG_TIME_BAL_LVPYOUT, ECSF_DLY_DW_STG_TIME_BAL_SAP, ECSF_DLY_DW_DEL_TIME_BAL_TBL, ECSF_DLY_DW_DEL_TIME_BAL_TBL_1, ECSF_DLY_DW_DEL_TIME_BAL_TBL_2
8.212	DW Extracts	TIME_COMMENTS This extract pulls comments from approved timesheets	HRIS is available	• SAP EXTRACT: ZRP_STAGE_TIME_COMMENTS_DW • DW STAGE TABLE: STAGE_TIME_COMMENTS • SAP INFOTYPES/TABLES: ZTM_WD_COMMENTS • JOBNAME=ECSF_DLY_DW_STG_TIME_COMM_SAP
8.213	DW Extracts	TIME_EVAL_MSG This extract pulls the messages generated during the time evaluation for the employee. Not necessarily all employees/pay periods have the messages generated, it depends on the data evaluation	HRIS is available	• SAP EXTRACT: ZPA_STAGE_TIME_EVALUATION_DW • DW STAGE TABLE: STAGE_TIME_EVAL_MSG • SAP INFOTYPES/TABLES: RP-INIT-BUFFER, RP-IMP-C2-B2 o FUNCTION: Z_UTL_AGENCY_LIVE_PERNR, GET PERNR • JOBNAME= ECSF_DLY_DW_STG_TIME_EVAL_SAP
8.214	DW Extracts	TIME_SHEET	HRIS is available	• SAP EXTRACT: ZRP_STAGE_TIMESHEET_DW

#	Activity	Description	Dependencies	Uniqueness/Customizations
		This extract pulls all timesheet hours and associated hours type, work day, charge objects and pay period for saved, submitted or approved timesheets		• DW STAGE TABLE: STAGE_TIME_SHEET • SAP INFOTYPES/TABLES: CATSDB, CATSDEL, • FUNCTION: CHECK_DOMAIN_VALUES, GET TIME. • JOBNAME=ECSF_DLY_DW_STG_TIME_SHT_SAP_(00-23), ECSF_DLY_DW_STG_TIME_SHT_SAP_D2
8.215	DW Extracts	TIME_WAGE This extract pulls employee's base work schedule, organizational work assignment, and wage types	HRIS is available	• SAP EXTRACT: ZPA_STAGE_TIME_WAGE_SAP, ZPA_STAGE_TIME_WAGE_DW: • DW STAGE TABLE: STAGE_TIME_WAGE • SAP INFOTYPES/TABLES: PA0001, PA0007, ZDW_TIME_WAGE, PCL2, ZDW_TIME_WAGE • JOBNAME=ECSF_DLY_DW_STG_TIME_WAGE_SAP, ECSF_DLY_DW_STG_TIME_WAGE_(OLO/NEW)
8.216	DW Extracts	TUITION_WAIVER This extract pulls tuition waiver information related to employee	HRIS is available	• SAP EXTRACT: ZPA_STAGE_TUITION_DW • DW STAGE TABLE: STAGE_TUITION_WAIVER • SAP INFOTYPES/TABLES: PA9010, T519T • JOBNAME=ECSF_DLY_DW_STG_TUITION_SAP
8.217	DW Extracts	W4_W5 This extract pulls employee W-4 data. W-5 data is no longer maintained in SAP	HRIS is available	• SAP EXTRACT: ZPA_STAGE_W4_W5_DW • DW STAGE TABLE: STAGE_W4_W5 • SAP INFOTYPES/TABLES: PA0210, ○ FUNCTION: SELECT_OPTIONS_RESTRICT • JOBNAME=ECSF_DLY_DW_STG_W4_W5_SAP
8.218	DW Extracts	WAGE_TYPE This extract pulls data related to the wage types used in the People First System	HRIS is available	• SAP EXTRACT: ZCD_STAGE_F0001_WAGE_TY • DW STAGE TABLE: STAGE_WAGE_TYPE • SAP INFOTYPES/TABLES: ZPI_F001_WAGE_TY • JOBNAME=ECSF_DLY_DW_STG_F0001_WGTYP_SAP
8.219	DW Extracts	ZAUTH_PFLUENT This extract pulls data from Performance & Talent Management	HRIS is available	• SAP EXTRACT: ZPA_STAGE_ZAUTH_PFLUENT • DW STAGE TABLE: STAGE_ZAUTH_PFLUENT • DW BASE TABLE: <FONT SIZE="2">ZAUTH_PFLUENT</FONT>

#	Activity	Description	Dependencies	Uniqueness/Customizations
		System related to evaluations		• SAP INFOTYPES/TABLES: ZAUTH_FILE_SENT, ZCI_CONTROL • JOBNAME=ECSF_DLY_DW_STG_PFL_SAP
8.220	DW Extracts	ZBI_DED_FILES_ FISCAL_ADMIN This extracts pulls all active health, life, supplemental and flexible savings account deductions for all participants	HRIS is available	• SAP EXTRACT: ZBI_DED_FILES_FISCAL_ADMIN READS RECORDS IN DATABASE PSOFPAY • STAGE TABLES: BNI030_F25DED, BNI036A_F250D, BNI035_F25CAN, BNI032_F42DED, BNI036B_F420D, BNI034_F42CAN, BNI031_F105DED, BNI036C_F1050D, BNI033_F105CAN, BNI123_UNIV, BNI107_RP280, • SAP INFOTYPES/TABLES: T549Q, T5UCA, T5UBA, ZBI_BOSP_DED, ZBI_FIS_UNIV_DD, PA0168, TVARV, PA0002, PA0001, ZBI_BNI_CONTROL, ZBI_FIS_DED_ERR, ZBI_FIS_DED_TOT, ZBN_UNDERPAY ○ FUNCTION: Z_UTL_BE_FA_CALC_ACTUAL_COSTS, Z_UTL_BE_FA_EXPECTED_DEDUCTION, Z_UTL_GET_BENEFITS_PERNR, MONTH_PLUS_DETERMINE, Z_UTL_CONVERT_ANSVH, RP_CALC_DATE_IN_INTERVAL, RP_LAST_DAY_OF_MONTHS • JOBNAME=ECSF_BNX_FISCAL_ADMIN_LOAD_SAP1, ECSF_BNX_FISCAL_ADMIN_LOAD_SAP2, ECSF_BNX_FISCAL_ADMIN_LOAD_SAP3
Flexible Spending Account (FSA)/Health Savings Account (HSA)				
9.1	FSA/HSA Compliance	Vendor is responsible for complying with all Internal Revenue Code (IRC) sections governing the FSA and HSA plans	N/A	Includes the following support: • Provides and supports the following State of Florida plan documents and forms: Claim Form, MRA Options when Employment Ends, Letter of Medical Need for MRA, Personal Use Statement, Capital Expenditure Worksheet, Tax-favored Accounts Guide • Provides regulatory alerts and bulletins (provided to

#	Activity	Description	Dependencies	Uniqueness/Customizations
				State via email) • Compliance with all IRC codes governing FSA and HSA administration • Provides support for the "pay and chase" process • Provides data and support for HSA reversals
9.2	Enrollment	See enrollment section of Health & Insurance "As Is" requirements. State employees can enroll in FSA/HSA programs in accordance with IRC guidelines regarding tax-favored accounts. Employees can enroll via People First System or through service center toll-free number	Employees wish to enroll in FSA/HSA offerings	The following processes support FSA/HSA enrollments: • Enrollments, updates/changes for qualifying events are communicated to 3rd party administrator through an automated file process from the People First System twice, weekly (Tuesdays and Fridays) • 3rd party administrator receives a stand-alone open enrollment file in December following open enrollment period • Online enrollment (paperless enrollment in People First System) for participation in all plans and associated accounts • Call center enrollments • Messaging and link to complete an application with the HSA trustee
9.3	myMRA Card Activation	Participant must elect to Go Green and activate the myMRA card through the Go Green Process	Participant activates myMRA card via the Go Green process	Go Green Process Steps • Participant logs in to https://peoplefirst.myflorida.com • In the My Quick Links menu on the left of the home page, employee clicks *FSA Information* • Participant clicks Go Green icon and enters email address to receive all reimbursement account correspondence electronically (required to activate the card) • Participant clicks *Activate myMRA Card* and participant signs myMRA card to complete the process
9.4	myMRA Card support	The 3rd party	Employee enrollment into an	3rd Party Administrator is responsible for:

#	Activity	Description	Dependencies	Uniqueness/Customizations
		administrator provides all MRA account holders a myMRA card (currently Visa) to make point of sale purchases for eligible expenses. It is the account holder's option whether or not to activate and use the card	MRA and activates the Go Green process	• Managing relationship with custodian bank for card support • Auto adjudication of claims (process of paying or denying a claim, quickly and without making a decision on each claim manually) • Auto substitution of claims (process of replacing an ineligible claim with an eligible claim submission) • Mailing of card holder pin mailer • Mailing of card and terms of use myMRA Card process includes the following: • Pay by card swipe at the point of service • Online activation of card (only the employee can activate) • Online and phone request capabilities for additional card(s) (free to participant and plan) • Multiple cards for one account (no limit) • Ability for participant to report card as lost or stolen (free replacement of card) • Ability for State to customize card within VISA guidelines • Ability for State to customize card mailer within VISA guidelines
9.5	Claims, Payment and Reimbursement	The vendor supports the following claims and payment functionality	Account holder swipes their MRA card or encumbers an eligible claim	3rd Party Administrator supports: • Printable claim forms • Fillable claim forms (form sums claim amounts) that can be scanned and uploaded or faxed for submission • Electronic submission of claims (upload fillable form and claim documentation) • Mail/Fax submission using a toll-free number (vendor provides toll-free number)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Grace period for provided services through March 15 (use of previous years plan funds through March 15 of following year) • Run-out period for claims that ends with the IRS tax filing cut-off date (claims must be submitted by tax filing date) • Documentation cut-off date in accordance with State of Florida rules for any claims incurred and submitted timely if the services require additional documentation
9.6	Claims, Payment and Reimbursement Email Communications	The vendor provides emails to the participant notifying them of card activities or actions required to be taken by participant	To trigger myMRA emails, the following must occur: • Employee must have signed up for Go Green process • Paper claim is submitted or a myMRA card is flagged for follow-up • Adjudication of the claim • Adjudication of the claim 2-3 days after card usage • Transaction is outstanding the month after the transaction posts to the system • Transaction is outstanding two months after the transaction posts to	The following emails are initiated by vendor when trigger (to the left) exists: • "Claim received" • "Payment Approved" • "Claim Rejected Email" • "Card Transaction (Documentation Required)" • "Card Scheduled for Suspension" • "Card Suspended Email" • "Card Reinstated Email"

#	Activity	Description	Dependencies	Uniqueness/Customizations
			the system • Outstanding card transaction is approved with participant submitted documentation	
9.7	Claims, Payment and Reimbursement Reports	The vendor provides reports to the State notifying them of card activities or actions to be taken by account holder	To trigger reports, the following must occur, as applicable to MRA, Limited Purpose Medical Reimbursement Account (LPMRA), Dependent Care Reimbursement Account (DCRA) and HSA activity: • Claim activity resulting in card suspension or reactivation • myMRA outstanding card transactions > 70 days old • Participants have paid or cleared their claim and thus drop off the card suspension report • Results of OE reported to the vendor; notifies Division of State Group Insurance (DSGI) of enrollment	The following reports are initiated by the 3rd party administrator when the applicable dependency (to the left) exists: • Card Suspension/Reactivation Report (bi-annual) • Initial Payback Report (bi-annual; payback schedule coordinated between vendor and DSGI) • Payback/Collections Drop off Report (weekly) • Preliminary and Final Enrollment and OE funding Report (annual; November/December) • Daily Funding Report for MRA Bank Funding - settlement email notification and detail claim data file • Forfeiture Reconciliations Report (annual) • Reconciliation Report (monthly)Underpaid Due to Debit PIN issue Report (daily) • Medical FSA and DCRA Pending and suspended contribution Report (monthly) • Monthly Account Balance Report – MRA, DCRA, LPMRA (monthly) • Daily Claims File Report (daily – to vendor and BOSP) • Monthly MRA Activity (statistics) Report (monthly) • Auto-substitution Report (weekly) • Weekly Check and Refund Report (weekly) • Weekly Appeal Report (weekly) • Non-Sufficient Funds (NSF) Report (monthly)

#	Activity	Description	Dependencies	Uniqueness/Customizations
			and myMRA prefunding requirements • myMRA card transactions cleared • End of plan year close out • myMRA card transactions cleared through daily settlement • Daily myMRA transaction exceptions that were not included in daily settlement • Contributions reported to vendor that cannot be applied to participant account • Contributions applied and claims paid activity • Paper claims processed for payment by vendor • High level summary of stats – cards activated, % claims auto adjudicated • Outstanding myMRA	

#	Activity	Description	Dependencies	Uniqueness/Customizations
			transactions cleared by paper claim submission • Payments received at Lockbox applied to participants accounts and recorded on weekly check log; overpayments caused by manual payments identified for refund to participant • Participant files appeal • Reversal adjustments completed in system corresponding to receipt of unpaid bank drafts	
9.8	Access to Account Information	3rd Party Administrator supports participant electronic access to information	Participant enrolls in an FSA product in People First	3rd Party Administrator supports: • Secure electronic account access via single sign-on to the FSA website that shows personalized transaction details, balances, claims status, etc. • User home page that shows a dashboard summary, alerts, quick links, etc. • State of Florida branding • Participant online access to current list of eligible expenses and over the counter list • Participant access to online HSA bank account transactions, balance, etc. • 100% of participants

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• have access to their benefits on January 1 (card received and loaded) when enrollment occurs through open enrollment
9.9	Customer and Client Services	3rd Party Administrator supports customers and clients	State employee seeks information on FSA offerings and/or participant enrolls in an FSA product	3rd Party Administrator supports: • Toll-free telephone number for customer support • 24/7/365 IVR access • Satisfaction Survey of customer and client services via email • Access to plan tools and resources electronically • Semi-annual meeting to review program with client • Designated service team for State of Florida • Ability for State to review customer service online reference guide and recommend edits • Ability for State to customize email notifications and alerts • Level 1 appeals • Ability for client to perform employee look up by role code to show real-time employee balance, claims information and status, etc. • Providing subject matter expertise regarding compliance with all IRC codes governing FSA and HSA administration
9.10	Involuntary Wage Deductions (IWD)	3rd Party Administrator supports IWD activities of the State	Participant neglects to remedy ineligible card swipe	3rd Party Administrator supports: • Printing and mailing letters (approved by DSGI) informing impacted participants of an impending involuntary wage deduction or collections process • Provides Weekly Drop off Report that details the participants who have paid or cleared their claim and thus drop off the card suspension report • Ability to schedule, edit, and delete a 0580 wage deduction (myMRA payroll deduction) through a mass

#	Activity	Description	Dependencies	Uniqueness/Customizations
				upload into the People First System • Ability to update participant records with money collected via Collections Process • Ability to update participants' records via mass loads (this process is handled by People First, not 3rd party administrator)
9.11	Integration	Integration with other systems	N/A	3rd Party Administrator Supports: • Integration with the core HRIS and the custodial bank using custom file layouts • Integration with DFS for claims files Real-time account activity and available balance updates
9.12	HSA offering	Support of State's offering of HSA to employees	Employee enrolls in an HSA	Vendor Supports: • Eligibility determination and enrollment activities • Health Savings Account reversal rules (separate Processes for state agencies and for state University • participants) • Automatic monitoring of account for maximum contribution limits (i.e., catch up amount, annual • contribution changes) • Full client and customer service/support capabilities • for all HSA • Deposits, rejected contributions, and all other • banking activities • Automatic monitoring of account for age limitations • (i.e., catch up 55, cut off 65 or when Medicare eligible) • Welcome kit from the HSA trustee, including the credit card • (Transition plan for current participants if moving from Tallahassee State Bank to another HSA trustee) • Monthly member statement • Investment of funds if balance is $2,500 or higher

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• No minimum balance requirement • Minimal monthly fee if balance falls below $2,500 • Client portal to HSA trustee to facilitate all weekly deposits and contribution distributions to participant records, and notification or retrieval of ACH rejections • Participant access to online HSA bank account transactions • Ability to order paper checks and use with minimal processing fee • Notifies participant if there is an issue with the application • Issue 1099s annually as required by IRS
9.13	HSA Reports	The vendor provides reports to the State	To trigger HSA reports, the following must occur: • Contributions prepared for deposit into bank • Contributions received in payroll file that cannot be applied to participant account in subcontractor's system (pended to employee record, cannot be submitted to bank for deposit into HSA • Contributions to be reversed and returned to trust fund or refunded to	The following reports are initiated by vendor when trigger (to the left) exists: • HSA Remittance Report (weekly) • HSA Suspense Report (bi-monthly) • HSA Reversal Report (monthly) • HSA Medicare Eligible Report (monthly) • ACH rejection report (as occurs)

#	Activity	Description	Dependencies	Uniqueness/Customizations
			participant • Identifies participants who are deemed eligible for Medicare resulting in end dating HSA benefit • Contribution cannot be applied to participant's HSA bank account	
Health and Insurance				
10.1	Benefit Eligibility Groups Overview	The State has various health and insurance benefits eligible groups (active employee, COBRA, Layoff, Retiree, Vested Legislator, Life Waiver, Surviving Spouse, Surviving Spouse/Child of a Law Enforcement Officer, Retired Teacher or Injured in the Line of Duty) To be eligible to enroll or continue coverage, the individual must qualify for at least one of the Health & Insurance benefits eligible groups	Individual must be eligible to participate in one of the health and insurance benefit groups	▪ Active employees are either salaried holding an established position (position is specifically funded in the General Appropriations Act) or are being paid from OPS funds and are eligible to participate in all health and insurance plans offered as part of the state's cafeteria plan ▪ OPS are eligible to participate in all plans except optional life and the Medical Reimbursement Account ▪ COBRA participants are eligible to participate in health, dental and vision insurance plans. COBRA participants can continue with these plans for up to 18 months (or 36 months for a dependent who becomes ineligible due to a loss of coverage). To enroll in COBRA coverage, the individual must have been enrolled in the plan and have lost coverage ▪ Retirees and Layoff participants are eligible to participate in the health and basic life insurance plans (if enrolled while employed). They can also enroll in COBRA for their dental and vision insurance plans (if enrolled while employed). Layoff participants can continue with the health and basic life plans for up to 24 months ▪ Vested legislators can also enroll in certain health and insurance benefit plans (e.g., health, vested legislator life insurance)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				▪ Life Waiver participants are eligible to participate in the life insurance plans and may also be eligible to participate in the health insurance plan if they are eligible as a retiree; however, there is no premium waiver for health insurance (must have kept health insurance continuously since employment ended in order to enroll as a retiree). These retirees may also participate in a disability waiver for Colonial disability plan ▪ Surviving Spouses, Retired Teachers, Law Enforcement Surviving Spouse/Child and Injured in the Line of Duty participants are eligible to participate in the health insurance plan if enrolled at the time of the event. Note: the Retired Teachers are a group of teachers that were granted the benefit of free health insurance. The Retired Teachers group is locked and no new enrollments can occur
10.2	Benefits Plans	As part of the state's cafeteria plan, employees are offered the following health and insurance options: • Health Insurance: Preferred Provider Organization (PPO) and Health Maintenance Organization (HMO) standard; PPO and HMO health investor health plan (HIHP) (HIHP is a high	Individual must be eligible to participate in one of the health and insurance benefit groups To be eligible to enroll in the following plans, the employee must meet the age requirement: • Aflac Cancer – coverage available through payroll deduction through age 70 (employee must be under age 71 on the effective date of the policy) • Aflac Intensive Care— employee must be under age	The following enrollment restrictions exist for health and insurance benefits eligible employees. • Health Insurance plans – custom coding is used to limit the HMO(s) an employee can enroll in based on the employee's live and work county • Optional Life Insurance – employee must be enrolled in the basic life insurance plan in order to be eligible for optional life insurance. Any enrollment requested outside of the new hire qualifying status change (QSC) event window requires underwriting (unless during Open Enrollment, where an employee can increase coverage by one level, up to five times (total policy value must be $500,000 or less, if more, medical underwriting is required for the amount over $500,000) their salary without requiring medical underwriting). Medical underwriting is also required for an increase in coverage tier by more than one level; increase in coverage tier to six or seven times; increase in coverage that results in a policy value

#	Activity	Description	Dependencies	Uniqueness/Customizations
		deductible health plan) with health savings account (HSA); over-aged dependent plan • Dental Insurance (prepaid; PPO; indemnity) • Vision Insurance • Basic Life Insurance • Optional Life Insurance (seven tiers; maximum benefit of $1 million) • Spouse Life Insurance ($15,000 or $20,000) • Child(ren) Life Insurance ($10,000) • Vested Legislator Life Insurance • Tax-favored Accounts [MRA; LPMRA; DCRA]; • Supplemental Insurance Plans (cancer; disability;	70 on effective date of policy • Hospitalization Preferred Provider Plus (PPP) plan – employee must be under age 70 and not enrolled in Medicare to enroll • Hospitalization 30/20 plan – employee must be under age 70 and not enrolled in Medicare to enroll • Hospitalization New Era – employee and spouse must be under age 66 to enroll or increase coverage • Colonial Life Accident— employee and spouse must be under age 80 to enroll • Colonial Life Cancer— employee and spouse must be under age 70 to enroll and continue coverage • Colonial Disability – issue age is 17 -69	greater than $500,000 • Spouse Life Insurance – employee must be enrolled in the basic life insurance plan to enroll; may elect either a $15,000 or $20,000 policy • Child(ren) Life Insurance – employee must be enrolled in the basic life insurance plan to enroll; if elected, covers all children the subscriber has certified as eligible • Vested Legislator Life Insurance – enrollment is restricted to former Florida Legislators; enrollment process is not available through the People First portal and is handled by a request from the Legislative human resources office; is treated as a separate life insurance plan; eligible members can be enrolled in both vested legislator life insurance plan and either the retiree life insurance or active employee basic life insurance plan • HSA – the employee must be enrolled in a HIHP, under age 65 and not Medicare enrolled; additional customizations exist to allow the employee to waive the employer contribution for the HSA as well as to limit the amount the employee can contribute (based on IRS maximum amount for the year); if the employee is moving from a standard plan to an HIHP plan and was enrolled in a MRA plan, the effective date of the HSA plan is restricted to 4/1 of the new plan year to allow time for the MRA run-off period that expires March 15 of the new plan year • MRA – employee must **NOT** be enrolled in an HIHP plan • Cancer and intensive care plans offered by Aflac – medical underwriting is required before coverage begins ○ Separate interface integration exists with the life insurance and the cancer and intensive care providers to support the medical underwriting process

#	Activity	Description	Dependencies	Uniqueness/Customizations
		employer paid disability plan for Selected Exempt Service/Senior Management Service (SES/SMS) employees; intensive care; accident; hospitalization)		• Supplemental plans – most supplemental plans have age restrictions (e.g., some plans phase out eligibility based on age of the employee); some supplemental insurance benefit plans are grandfathered plans and are closed to enrollments and coverage tier changes. (For these grandfathered plans, any change to the plan, including a decrease in coverage, results in cancellation of coverage) • Over-aged Dependent Health Insurance – individual must be an eligible dependent between the ages of 26 and 30 (requires separate premium to be paid); to enroll a dependent in the over-aged dependent plan, the participant must be enrolled in at least single coverage; over-aged dependent must be enrolled in the same carrier and plan type as the primary participant

10.3	Coverage Levels	Coverage level options are driven by the health and insurance benefit plan type, the type of eligible dependents and the participant's eligibility (e.g., some plans have an age limit)	To be eligible to enroll in a coverage tier greater than single (individual) coverage, the participant must have eligible, registered dependents	• Coverage level options vary by plan type:
				  ○ Health: employee only (single), family, spouse program, non-Medicare eligible retiree single, non-Medicare eligible retiree family and Medicare I, II, III
				  ○ Dental, vision and supplemental plans: employee only, employee+spouse, employee+child(ren), family (some supplemental plans offer employee only coverage)
				• Tax- favored accounts (MRA, LPMRA, and DCRA) allow the employee to elect a set dollar amount for the calendar year up to the current IRS maximums. The HSA requires HIHP enrollment and the amount can be changed anytime during the plan year
				• Optional life insurance is available as an employee ONLY plan and includes levels of one–seven times the employee's salary up to $1million
				• For the spouse program (applies to health insurance only): although the enrollment is manual, custom logic exists to link the two married state employees together

#	Activity	Description	Dependencies	Uniqueness/Customizations
				and to split the cost between the two spouses and their respective employers. A separate coverage level does not exist for the spouse program in the system; rather two custom fields were added to indicate the participants are in the spouse program. The two custom fields are on infotype PA0021 (Family Related Person). The two fields are Primary Participant indicator and dependent CP. The dependents exist on both the primary and the secondary spouse, but are only linked to the health insurance coverage on the primary participant. For the spouse program, all enrollments and changes in dependents must be completed by the service center (separate forms exist for this process) • For retiree coverage, the health and/or life insurance elections are rolled over to retiree coverage based on the employee enrollments at retirement. Retiree must either elect to waive the coverage, change the coverage level or start making payments. If the retiree takes no action (does not waive and does not pay), their coverage will terminate for non-payment. Once the coverage is terminated, the retiree cannot elect to add the coverage back (health and insurance benefits must be maintained without a break in service when moving from active employee to retiree status and must remain in force as a retiree). If their spouse is still an active employee with the state, then they can be covered as a dependent under the spouse's employment coverage for health insurance and continue coverage for health insurance as a retiree when the spouse terminates employment with the state. Retiree life insurance is defaulted to the $2,500 retiree life insurance plan; the retiree can elect to change to the $10,000 retiree life insurance plan • Medicare I coverage is for a retiree who is eligible for Medicare and has no covered dependents (single coverage). Medicare II applies if the coverage is for a

#	Activity	Description	Dependencies	Uniqueness/Customizations
				retiree with one covered dependents and one, but not both are Medicare eligible and when the retiree has two or more dependents and at least one member is Medicare eligible. Medicare III coverage is for a retiree with one covered dependent and both are eligible for Medicare. Retirees are systematically assigned to the appropriate Medicare upon either the retiree or a covered dependent gaining Medicare eligibility. The retiree is also systematically moved between the Medicare tiers based on the retiree and their dependents Medicare eligibility (age 65 or Medicare eligible disabled). Medicare tier changes are effective the first day of the month of the eligibility change (unless eligibility change occurs effective the first day of the month, in which case the Medicare tier change is applied the first day of the prior month)
10.4	Premium cost for the benefit plans	Health and insurance benefit plans (except basic life insurance) require an employee contribution The state (employer) contributes to both the health insurance and basic life insurance plans based on the employee's employment status (full-time or part-time). The state pays the full premium or the basic life insurance plan for full-time (100%) employees The state pays the full premium for a separate	Active employees must not be on a leave of absence without pay (other than FMLA and Military Leave) to be entitled to the employer contribution	• The employer contribution for health insurance is derived based on the employee's FTE for all salaried positions the employee holds plus the percentage of hours worked or estimated for any OPS employment (must equate to at least 30 hours per week to be entitled to the full employer contribution). If salaried and less than 30 hours per week (less than 0.75 FTE), the employee is responsible for a pro-rata share of the employer cost, based on the employee's combined salaried FTE, the pay plan of the health and insurance benefits assigned position, and by certain class codes within a specific pay plan (e.g., career service (CS),State Courts). If an employee meets multiple criteria for a given month, the employee is granted the most cost beneficial option for payroll deductions for that month (next month's coverage month) • If the employee's pay plan is SES, SMS or equivalent, the employee's health insurance contribution is less and the employer contribution is comparable to the employee whose pay plan is CS or equivalent • If both spouses are state employees and both

#	Activity	Description	Dependencies	Uniqueness/Customizations
		disability plan for SES/SMS employees The HSA includes both an employer contribution and an optional employee contribution. All other plans are 100% employee funded		spouses are health and insurance benefits eligible, the employees may enroll in the Spouse Program for family coverage and each employee and their respective employers pay a reduced contribution compared to the CS employee contribution for family coverage • For Surviving spouse/child of law enforcement employees, the employer pays the full premium for health insurance coverage • For Retired Teachers, the employer pays the full premium for health insurance coverage • For Injured in the Line of Duty, the employer pays the full premium for health insurance coverage • For employees on leave without pay (LWOP) the employee pays the full premium for health insurance coverage, unless the employee is on medical or parental leave covered by either the Family and Medical Leave Act (FMLA) or the Family Support Work Program (FSWP), or on military leave • Retirees (surviving spouse, Vested Legislator) who have coverage as an early retiree (not eligible for Medicare coverage) pay the full premium (employee plus employer amounts) for the health insurance coverage. For Medicare eligible members, the premium is based on the plan and carrier they are enrolled in • COBRA participants pay the full premium amount (employee plus employer amounts) for the health insurance coverage plus a 2% administrative fee (premium rate is 102% the active employee total contribution) • For Layoff participants, the participant pays the full premium (employee plus employer amounts) for the health insurance coverage • For basic life insurance, if the total FTE for all salaried positions is less than 1.0 the employee contribution due is derived based on the employee's total FTE for

#	Activity	Description	Dependencies	Uniqueness/Customizations
				all salaried positions and the employee is responsible for a pro-rata share of the employer contribution • Eligible and enrolled OPS employees are responsible for the full basic life insurance premium • Retiree basic life – premium is based on the coverage level selected ($2,500 or $10,000) • Vested Legislator life –coverage and premium amount differ from both active employee basic life insurance and retiree life insurance. Vested Legislators may not be simultaneously enrolled in active basic life insurance and retiree life insurance • Life waiver – employer paid premium for former employees; for transmitting to the current life insurance vendor; only former employees who qualified for life waiver under their contract are provided on the life insurance enrollment files. Employees who qualified for life waiver prior to the current vendor are included on an exclusion list to prevent the employees from being provided to the current vendor. The former life insurance provider is responsible for payouts for the individuals who are on the exclusion list • For optional life, the premium is based on the employee’s age as of the last day of the coverage month (age bands rates are set by the life insurance company), employee’s salary and the coverage level the participant has elected • The employee is subject to medical underwriting: ○ If the employee was already enrolled in an optional life plan (not subject to underwriting), the employee is guaranteed one coverage level increase (as long as the one level up is a coverage level between 3-5 and does not increase the coverage value to greater than $500k). The one level increase premium is deducted until the medical underwriting is cleared for the additional coverage

#	Activity	Description	Dependencies	Uniqueness/Customizations
				◦ If the employee is not enrolled when medical underwriting was triggered, no payroll deductions begin until/if medical underwriting is cleared ◦ If/when the employee clears medical underwriting; the life insurance vendor sends an indicator that the medical underwriting has cleared. When this occurs, the new enrollment is unlocked and effective dated based on the payroll calendar. The increased payroll deductions occur based on the effective date • Employee must be in an active pay status for at least one day in the month prior to the coverage month, or on FMLA, FSWP or military leave to be entitled to the employer contributions for the health and basic life plans and the HSA. If the employee is in any other LWOP status (other than FMLA, FSWP and military leave), the employee is required to pay the full premium (both the employee and employer contributions) for health and basic life • For all plans, except for the tax-favored accounts, payroll deductions are processed the month prior to the coverage month. Deductions for tax-favored accounts are payroll deducted during the plan year, starting with the first pay warrant in January for the January coverage month • For the current active supplemental disability plans (does not apply to the grandfathered plans) premium is based on the age at the time of enrollment and the coverage level selected. The premium is locked as long as the employee continues the same coverage level. If the coverage level is changed, the premium is adjusted based on the coverage level selected and age at the time of the enrollment into the new coverage level • For one of the hospitalization plan providers, all premiums are based on the age of the employee at

#	Activity	Description	Dependencies	Uniqueness/Customizations
				the beginning of the plan (calendar) year. For the other hospitalization plans, the rates are across the board and are not based on age • For the tax-favored accounts, the amount to be deducted each payroll is recalculated based on the employee's annual election minus the payroll deductions to date divided by the remaining payrolls for the calendar year for the employee • For Aflac cancer and intensive care plans, any coverage change (other than removing a dependent or canceling coverage) triggers medical underwriting. If the employee was enrolled in a plan prior to triggering medical underwriting, payroll deductions continue based on the previous enrollment until/if medical underwriting is cleared. If Aflac sends the indicator that the medical underwriting has cleared, the new enrollment is unlocked and the effective date is based on the payroll calendar. The increased payroll deductions occur based on the effective date
10.5	Federal Health Care Reform Insurance Eligibility Requirements - OPS Eligibility Overview	As part of the Federal Health Care Reform, eligible OPS employees (variable hour employees) are allowed to enroll in certain health and insurance plans	N/A	The following processes include customization to support OPS employee participation in the health and insurance plans: • PAR process is customized to include questions that assist in determining OPS employees' eligibility at the point of hire and subsequent decisions during the initial twelve-month measurement period • State University System (SUS) interface process includes indicators from the university (same fields as are included in the PAR) indicating eligibility • Separate health and insurance benefit groupings exist for eligible OPS employees and employees who are dually employed between salaried and OPS positions • Custom Infotype PA9302 (Benefits Eligibility Key), which is used to determine eligibility for full time premiums, (defined below), includes key dates and additional critical information required to support eligibility for OPS employees, to track eligibility for full-time contributions for part-time salaried employees

#	Activity	Description	Dependencies	Uniqueness/Customizations
				and to trigger eligibility on infotype PA0171 (Health & Insurance benefits eligibility) record • Move program (defined below) includes highly complex decision logic used to prioritize when health and insurance benefits are moved to and from an OPS position/employee ID • Custom measurement process is used to determine health and insurance benefits eligibility at the end of each measurement period

10.6	New Hire Eligibility	Eligibility for new OPS employees at the point of hire is driven based on a customized human resource process (PAR/BNI_001). While completing an appointment action for a new OPS employee (employee is new to the state, or returning after a qualifying break in service), agencies are required to answer a set of questions that are used to obtain key information for determining eligibility
		
		New hire salaried employees (new to the state, or returning after a qualifying break in service) are eligible to participate in the health and insurance plans at the point of hire (premiums may be
			To trigger new hire eligibility the appointment must be:
			• An original appointment (employee is new to the state); or
			• Appointment after a qualifying break in service (full-month if salaried FTE, 13 weeks, 26 weeks or rule of parity)
			
			If new hire event is for an OPS appointment, the employee must also:
			• Be appointed to work at least 30 hours per week
			• Not be appointed for seasonal work only
				Separate custom logic exists to support OPS employee's initial eligibility decision and dual employment appointments (applies to OPS and part-time employees) during the initial period as follows:
				• PAR process has a pre-defined set of questions used to trigger eligibility.
				  ○ How many hours is the employee expected to work per week
				  ○ If the employee is being hired into an additional OPS position (dual employment) while in the new hire measurement period and the employee is not already health and insurance benefits eligible, an additional step is prompted to the User completing the PAR asking if the new appointment combined with the existing appointments makes the employee eligible for health and insurance benefits
				  ○ Based on the answer to these questions, the infotype PA9302 (Benefits Eligibility Key) is created as either eligible or not eligible
				  ○ For OPS employees the answers to these questions drives their eligibility to participate in the health and insurance plans
				    ▪ If estimated hours are equal to or greater than 30 hours and the appointment is not a seasonal appointment the infotype

#	Activity	Description	Dependencies	Uniqueness/Customizations
		prorated based on the employee's FTE)		PA9302(Benefits Eligibility Key) employee record is created as eligible ▪ If estimated hours are less than 30 hours, or the appointment is seasonal, health and insurance benefits eligibility is assigned to another eligible active employee ID; if available, and the PA9302(Benefits Eligibility Key) record is created as not eligible with an ineligibility reason of insufficient hours ▪ If the appointment is a dual hire OPS appointment and the total hours for all positions is at least 30 hours, eligibility on the PA9302 is set to eligible • If the appointment changes the employee from not eligible to eligible, the new appointment ID is assigned the health and insurance benefits eligibility and all other IDs for the employee are updated to have an ineligibility reason of eligibility assigned to another OPS employee ID ▪ If the appointment is a dual hire OPS appointment and the total hours for all positions is less than 30 hours, eligibility is set to not eligible on the PA9302 (Benefits Eligibility Key) with an ineligibility reason of insufficient hours ○ For salaried employees these questions are not presented ○ For part-time employees, the appointment

#	Activity	Description	Dependencies	Uniqueness/Customizations
				drives their eligibility for full-time employee rates: ▪ If the appointment is at an FTE of at least 0.75, the benefits eligibility is set to eligible, indicating full-time state contributions toward the premiums ▪ If the appointment is at an FTE less than 0.75 (assumes not a dual appointment), the benefits eligibility is set to not eligible, indicating the employee is responsible for a pro-rata share of the employer contribution plus the employee contribution ▪ If the appointment is a dual appointment and when combined with the other salaried appointment is at least 0.75, the benefits eligibility is set to eligible, indicating full-time state contributions toward the premiums ▪ If the appointment is a dual appointment and when combined with the other salaried appointment is less than 0.75, the benefits eligibility is set to not eligible, indicating the employee is responsible for a pro-rata share of the employer contribution plus the employee contribution • If eligibility is gained, the system creates the applicable benefits grouping on the PA0171 (Health & Insurance benefits eligibility) infotype as eligible and full-time state contributions toward the premiums and a new hire OPS event is created to allow the employee to enroll in the health and insurance plans (if OPS, can enroll in all active plans (not grandfathered) except the MRA, LPMRA and Optional Life Plans; if salaried, can enroll in all active plans. For OPS New Hire Eligibility:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ If state agency, OPS eligibility decision is presented at the point the PAR questions are answered. If eligible, an alert is sent to the HR professionals (A and X roles only) at the hiring agency advising that the OPS employee is eligible to participate in certain health and insurance plans (this alert is ONLY triggered for eligible OPS employees) ○ If SUS, OPS eligibility decision (as well as full-time state contributions toward the premiums for part-time salaried employees) is determined when the BNI_001 appointment action is processed. The eligibility decision is sent back to the university on the BNO_002 interface file ○ If eligible, the new hire OPS event is created to allow the employee to enroll. This is a custom event that is only presented to eligible OPS employees. The event is a copy of the new hire salaried QSC, except that plans OPS employees are not entitled to (MRA, LPMRA and Optional Life Insurance) are not presented for enrollment and the OPS employees are not defaulted into the basic life insurance plan
10.7	Subsequent New Hire Eligibility Decision During Initial 12-Month Period	Eligibility for employees in the initial new hire measurement period can be changed from ineligible to eligible if the employee either experiences a status change (increase in hours for OPS employees or increase in FTE for salaried employees) or the	The employee either receives an additional appointment (dual employment) that triggers eligibility for OPS employees or triggers full-time premiums for salaried employee or the employee experiences a status change (increase in hours to at least 30 hours per week for OPS employees or increase in FTE to at least 0.75 for salaried	Custom process exists to re-evaluate the health and insurance benefits eligibility of an OPS employee in the new hire measurement period based on either a new OPS appointment (new position, update to current position or dual employment) or an update received on the BNI_001 interface file from the entity • If a PAR is processed (or an action received on the BNI_001) to place the employee into an additional OPS position and the employee is not already eligible for health and insurance benefits, additional questions and decision points are included in the PAR process. These include:

#	Activity	Description	Dependencies	Uniqueness/Customizations
		employee receives an additional (dual) appointment. When this occurs, a new PA9302 (Benefits Eligibility Key) record is created, retaining all key dates, but changing the employee's eligibility status from ineligible to eligible	employees) that triggers eligibility for OPS employees or triggers full-time premiums for salaried employee	▪ If the hours for the new appointment are less than 30 hours, an employee history report is presented showing the current employment for the employee. The PAR creator is then presented with an additional question asking if, when considering all OPS appointments, the employee is expected to work at least 30 hours per week. If yes, eligibility is triggered ▪ If the new appointment is not seasonal and the hours for the new appointment are equal to or greater than 30, eligibility is triggered and the additional question is not presented ○ If a PAR is processed to change the employee's status in the current position and the PAR increases the hours to at least 30 hours per week and is not a seasonal appointment, eligibility is created ○ If already employed as OPS, the answer to final question works as a manager override for establishing eligibility (yes or no) • Even if the employee gains eligibility in the last day of the OPS measurement period, the employee is offered coverage and if enrolls is entitled to twelve-months of guaranteed health coverage (stability period)
10.8	Eligibility Determination at the end of the New Hire Measurement Period for OPS employees	OPS employees who were not eligible to participate in the health and insurance plans during the new hire (initial) measurement period are measured to determine eligibility. The new hire measurement	Employee must have been ineligible, must have completed their initial twelve-month new hire measurement period and must not have experienced a qualifying break in service (13 weeks in general, 26 weeks for academic employees, a break	At the end of the twelve-month new hire measurement period, OPS employees who were not eligible for benefits are measured using a custom process to determine their eligibility. The process includes: • Total timesheet hours and alternate timesheet hours for all positions held during the measurement period are summed and averaged (divided by the lesser of 52 weeks and 52 weeks minus days the employee was on either FMLA leave (limited to twelve weeks),

#	Activity	Description	Dependencies	Uniqueness/Customizations
		period begins the first day of the month following the month of hire and continues for twelve consecutive months	that is greater than the preceding employment period (rule of parity), or a break after an initial employment that was less than four weeks)	an academic break (limited to 12.5 weeks) or military leave (not limited)) to determine if the employee averaged at least 30 hours per week over the measurement period • If the employee averaged at least 30 hours per week eligibility is triggered (PA0171 (Health & Insurance Benefits Eligibility) is updated) and a custom OPS QSC is triggered to allow the employee to elect health and insurance benefits • If the employee averaged less than 30 hours per week ineligible status is maintained • The measurement is processed the first three Saturdays in the month following the end of the new hire measurement period. The first measurement includes all employees whose measurement period ended on the last day of the prior month. To account for late timesheet submissions, the second measurement only includes employees who failed the first measurement, and the third measurement only includes employees who failed the second measurement • A new PA9302 (Benefits Eligibility Key) record is created for the new measurement period, reflecting the eligibility status for the employee ID
10.9	Open Enrollment Measurement for OPS Employees	Each Open Enrollment, the hours of all OPS employees who are eligible to be measured are summed and averaged to determine eligibility (note: OPS employees who are in the new hire measurement period are not measured at Open Enrollment. If they are eligible during the new	Employee must have been employed from 10/03 of the prior year through 10/02 of the current year without experiencing a break in service (13/26 weeks, break meeting rule of parity or a break after an initial employment that was less than four weeks)	Each Open Enrollment period, OPS employees are measured using a custom built process to determine their eligibility for the next twelve-month period. The process includes: • Total timesheet hours and alternate timesheet hours for all positions held during the measurement period are summed and averaged (divided by the lesser of 52 weeks and 52 weeks minus days the employee was on either FMLA leave (limited to twelve weeks), an academic break (limited to 12.5 weeks) or military leave (not limited)) to determine if the employee averaged at least 30 hours per week over the measurement period • If the employee averaged at least 30 hours per week,

#	Activity	Description	Dependencies	Uniqueness/Customizations
		hire period, they can participate in Open Enrollment, if not eligible they are not able to participate in Open Enrollment)		the following occurs: ○ If the employee was previously ineligible, eligibility is triggered (PA0171 (Health & Insurance Benefits Eligibility) is updated) and the Open Enrollment event is generated to allow the employee to elect health and insurance benefits during the Open Enrollment period for coverage beginning 1/1 of the next plan year ○ If the employee was previously eligible, eligibility is maintained, elections are rolled to the new plan year, and the Open Enrollment event is created to allow the employee to change their elections during the Open Enrollment period • If the employee averaged less than 30 hours per week over the Open Enrollment measurement period, the following occurs: ○ If the employee was previously ineligible, ineligible status is maintained ○ If the employee was previously eligible, the employee's eligibility status is changed to ineligible (PA0171 (Health & Insurance Benefits Eligibility) record is set to an ineligible benefits grouping). Health plans are end dated at the end of the twelve-month guaranteed coverage period (not measurement period; typically 12/31 of the current plan year) and all other plans are end dated with the same end date as the health plan, and a COBRA package is sent the first of the month prior to the coverage end date • The measurement is processed the first three Saturdays in the month of October, following the completion of the Open Enrollment Preparation activities. The first measurement includes all employees who meet the measurement criteria. To

#	Activity	Description	Dependencies	Uniqueness/Customizations
				account for late timesheet submissions, the second measurement only includes employees who failed the first measurement, and the third measurement only includes employees who failed the second measurement • Whether eligibility is maintained, initiated or removed, a new PA9302 (Benefits Eligibility Key) record is created for the new measurement period, reflecting the eligibility status
10.10	Additional Eligibility for Salaried Employees	Once appointed to a salaried position (initial employment with the state or hire from non-eligible OPS), the employee is immediately eligible to participate in the health and insurance plans. Additionally, part-time salaried employees can gain full-time status for health insurance at any point during the year based on an increase in their salaried FTE to 0.75	Employee must be appointed to a salaried position from an OPS position where the employee was not eligible to participate in the health and insurance plans or the employee must have experienced an FTE change in their salaried employment	For part-time salaried employees, the employee can gain eligibility for full-time state health insurance contribution towards premiums outside of the initial twelve-month window by having an FTE increase to at least 0.75 in the current position, gaining an additional salaried position and the combined FTE of both positions is at least 0.75 or by being measured at the end of the twelve-month initial period or twelve-month Open Enrollment measurement and having averaged at least 30 hours (equivalent of 0.75 FTE) per week during the period. For salaried employees, gaining full-time status for health insurance is not dependent on being in the initial measurement period • Measurement calculations include all time worked during the twelve-month period as OPS, as well as the equivalent hours for salaried employment (40 hours multiplied by the employee's FTE multiplied by weeks employed at that FTE) during the period
10.11	Stability Period	OPS employees who gain eligibility and enroll in a health insurance plan are placed in a stability period that starts with the employee's enrollment in a health insurance plan. Salaried employees who gain full-time status are maintained in their	Employee must be eligible to participate in the health and insurance plans as an OPS employee or be a salaried employee	For OPS employees: • If gaining eligibility during the initial period based on either an initial appointment where the employee is expected to work at least 30 hours per week or an increase in hours, the twelve-month stability period begins with the date of the enrollment in a health insurance plan and continues for twelve-months • If gaining eligibility based on the initial measurement, the stability period begins with the later of the first day of the second month following the end of the initial measurement period or the employee's enrollment in

#	Activity	Description	Dependencies	Uniqueness/Customizations

		current stability period, but with a full-time state contribution toward the health premium (and toward life if 1.0 FTE) for the remainder of the stability period. Each time the employee is measured and determined eligible to continue health and insurance benefits or full-time status, the employee is given a new twelve-month stability period		a health insurance plan
				• If gaining eligibility based on the Open Enrollment measurement, the stability period is 1/1 – 12/31 of the next calendar year
				
				For Salaried employees:
				• Stability period starts on the effective date of a new hire employee's enrollment in the health insurance plan and continues for twelve-months
				• If gaining eligibility outside of the initial measurement or the Open Enrollment measurement, the full-time rate applies for the remainder of the stability period (does not start a new stability period)
				• If gaining eligibility for full-time premiums during either the initial period or the Open Enrollment period, the stability period applies for twelve-months as follows:
				  ○ Initial period measurement – starts the first of the second month after the end of the previous measurement period and continues for twelve-months
				  ○ Open Enrollment measurement – applies for January 1 to December 31 of the next calendar year

10.12	Benefits Eligibility Key Information (Infotype PA9302)	This infotype is used to track core information related to employees' health and insurance benefits eligibility status. For OPS employees, this infotype stores the employee's health and insurance benefits eligibility status, including the reason the employee is not eligible (if not eligible). For salaried employees, this	Individual must be an active employee	Infotype PA9302 (Benefits Eligibility Key) is used to track eligibility to enroll in certain health and insurance plans. This custom infotype includes key fields that are used to track eligibility (for OPS – drives the employee's eligibility for health and insurance benefits and is fed to infotype PA0171 (Health & Insurance Benefits Eligibility); for salaried – drives eligibility for full-time contribution treatment). A separate record is created for each employee ID (dual employment). However, there is custom logic that only allows one PA9302 (Benefits Eligibility Key) record to drive an employee's eligibility. The fields in the PA9302 (Benefits Eligibility Key) are shared and updated across each PA9302 (Benefits Eligibility Key) record to ensure an accurate determination of eligibility is made

#	Activity	Description	Dependencies	Uniqueness/Customizations

		infotype is used to track employees' eligibility for the full-time contribution toward the health premium and the total life premium		Each infotype PA9302 (Benefits Eligibility Key) record contains the following information:
				• Employee ID (PERNR)
				• Begin Date
				• End Date
				• Changed By
				• Changed On
				• Continuous Employment Date for Benefits – field is copied across each PA9302 (Benefits Eligibility Key) record; date is reset if employee has a qualified break in employment (for OPS – either 13 weeks or 26 weeks, or a break between four weeks and 13/26 weeks if the period of service prior to the break is less than the period of the break; for salaried – break of a full calendar month)
				• Measurement Date – field is copied across each PA9302 (Benefits Eligibility Key) record; new hire measurements (initial period) – first day of the month after the Continuous Employment Date for Benefits; Open Enrollment measurements – 10/03/Y1 (year 1)
				• Measurement Type – field is copied across each PA9302 (Benefits Eligibility Key) record
				  ○ Initial (IN) – first twelve-month new hire measurement period
				  ○ New Hire Batch (NB) – gap between completion of the new hire measurement period (initial) and the Open Enrollment measurement period
				  ○ New Hire Override (NO) – override by service center based on agency documentation
				  ○ OE Batch (OB) – period of 10/03/Y1 to 10/02/Y2
				  ○ OE Override (OO) – override by the manager if the employee is employed in more than one OPS position and the subsequent appointment during the new hire measurement period made the employee

#	Activity	Description	Dependencies	Uniqueness/Customizations
				eligible. May also be updated by the service center based on agency documentation (agency error process) • Estimated Weekly Hours – field is not copied across each PA9302 (Benefits Eligibility Key) record; however, the value on each PA9302 (Benefits Eligibility Key) record is considered if employee receives an additional appointment during the new hire measurement period. Value is provided during the original appointment, as well as any additional appointments during the new hire measurement period; while in the new hire measurement period, this field, in combination with the seasonal indicator, drive the employee's eligibility for enrollment in the health and insurance plans; field does not apply if the employee is in the NB, NO, OB or OO measurement types • Measured Total Hours – Field is not copied across each PA9302 (Benefits Eligibility Key) record. Once measured, this field includes the total hours for that PA9302 (Benefits Eligibility Key) record. Field sums all time worked as an OPS employee during the period, plus hours recorded as Jury Duty time (wage type 2024), plus the equivalent hours (40 hours multiplied by the employee's FTE) for any salary position held during the measurement period • Measured Weekly Hours – Field is not copied across each PA9302 (Benefits Eligibility Key) record. Calculated by summing the time worked as an OPS employee during the period, plus hours recorded as Jury Duty time (wage type 2024), plus the equivalent hours (40 hours multiplied by the employee's FTE) for any salary position held during the measurement period, for the employee ID, and dividing that total by the lesser of 52 weeks and 52 weeks minus days the employee was on either FMLA leave (limited to 12 weeks), an academic break (limited to12.5 weeks) or

#	Activity	Description	Dependencies	Uniqueness/Customizations
				military leave (not limited)) • Measured Total Weekly Hours – Once measured, this field sums all Measured Weekly Hours to determine if the employee is eligible for coverage going forward; must be at least 30 hours for an OPS employee to be eligible to continue or gain eligibility and must be at least 30 hours for a part-time salaried employee to continue or gain full-time health and insurance benefits status (though, as noted above, part-time salaried employees can become eligible for the full-time state contribution toward the health insurance premium outside the measurement process by experiencing an increase in their salaried FTE to at least 0.75) • Academic Break in Service – Field is not copied across each PA9302 (Benefits Eligibility Key) record and only applies for OPS employees. Field is used to capture the number of weeks the employee was in an academic break status. If the employee is on an academic break for more than 12.5 weeks, field is populated with 12.5 (maximum exclusion for any one measurement period). Calculations only count days the employee is in an academic break status with no time entries (timesheet or alternate time entry). If employee is placed on an academic break (LWOP action), the number of weeks the employee is on an academic break (up to 12.5 weeks) is excluded from the denominator in the measurement calculation for that measurement period (i.e., 52 minus the lesser of 12.5 and the number of weeks on an academic break) • Short-Term Indicator – Field is not copied across each PA9302 (Benefits Eligibility Key) record. Field is used during initial OPS (only applies to OPS) appointments that result in a new hire (initial) measurement period being created. If employee is marked as short-term (employment is expected to last 90 days or less), that appointment is not considered for determining

#	Activity	Description	Dependencies	Uniqueness/Customizations
				eligibility during the new hire measurement period. Field ONLY applies during the new hire measurement period; this field was removed with the 10/2/15 release and is only available in the back-end GUI screens for records created prior to this date • Manager Eligibility (only applies to OPS) – Regardless of the number of OPS employment records, field can only be used on one PA9302 (Benefits Eligibility Key) record. This field serves as an override to the employee eligibility making the employee eligible to participate in health and insurance benefits. Manager/HR populates the field when either the employee is dually hired in more than one OPS position and the second or subsequent appointment triggers eligibility, but one record by itself is not eligible, or the eligibility is overridden on the BNI_001 interface from a state university. When the manager eligibility field is updated to Y, the eligibility indicator is automatically set to Y • Eligibility Indicator – for OPS – drives the employee's eligibility for benefits and is fed to infotype PA0171 (Health & Insurance Benefits Eligibility) to trigger health and insurance benefits eligibility; for salaried – drives eligibility for full-time state contribution toward the premium • Ineligibility Reason – Field is correlated across each PA9302 (Benefits Eligibility Key) record for the employee (except during new hire measurement period). Field is used to track the reason the employee is not eligible to participate in health and insurance. Depending on the reason, there is logic with the move program that moves health and insurance benefits between employee IDs based on key events (e.g., employee terminates eligible position, moves health and insurance benefits to remaining position; employee gains a salaried employee ID). If health and insurance benefits are moved to an employee ID that

#	Activity	Description	Dependencies	Uniqueness/Customizations
				was previously ineligible, the ineligible status is removed and the eligibility indicator is updated to eligible. The following are the ineligibility reasons: o EF – Health and insurance benefits eligibility is assigned to salaried employee ID and employee is entitled to full-time state contribution toward the premium o EE – Health and insurance benefits are assigned to another OPS employee ID and the employee is eligible for health and insurance benefits o IF – Health and insurance benefits eligibility is assigned to salaried employee ID, but employee is not entitled to full-time state contribution toward the premium o IH and MO – insufficient hours (if presented for salary position, means the employee is not entitled to full-time state contribution toward the premium) o SE – seasonal appointment o ST – short-term appointment (short-term was removed with the 10/2/15 release and is only available in the back-end GUI screens on records created prior to this date) o TE – employee ID is terminated
10.13	Benefits Only (BENO) Entity Process Overview	The benefits only (BENO) entities only use the People First System for Health and Insurance benefits administration (i.e., they don't use the PAR process, time and attendance or payroll processes). As such, separate custom integration processes exist with each BENO	Entities are BENO only Users	The following processes exist for use by BENO entities only: • Integration via nightly interface files (files are defined below); full process is used by the state universities (except Florida Polytechnic University); additional BENO entities use the BNI_001 and/or the BNI_123 (but not the BNO_002) • HR Action Form is used by the smaller BENO entities, and non-technical BENO (incapable of implementing full integration) entities. HR offices send HR Action forms to the People First Service Center to be manually entered • A separate employee group (8) and multiple separate

#	Activity	Description	Dependencies	Uniqueness/Customizations
		entity's human resource management and payroll systems		subgroups (21-25 and 96-99) exist to support the BENO entities • BNO_002 Open Enrollment File – at the end of the annual Open Enrollment period, each BENO entity that uses the BNO_002 process is provided both a changes only and a full BNO_002 file that shows its employees' elections (change file includes only what was modified during OE; full shows all elections) • PRI_458 – Time Data file – is used by the state universities to report time worked for OPS employees; time is ONLY used for health and insurance benefits eligibility measurements
10.14	BNI_001 Process	The BNI_001 interface file is provided by the BENO entity to People First. This interface file is used to transmit the employee status (appointments, separations, pay changes, status changes, etc.) as well as updates to the employee's contact information (home, mailing and email addresses). This process is a change based, not full file process	Must be a BENO entity that uses the integration process	• BNI_001 process is used in place of the PAR process for the BENO entities • The BNI_001 file is loaded into the People First System using a custom program that includes numerous edits that are used to determine if the record should be processed, converted (action/action reason change) or rejected • All errors (fatal and warning) are sent back to the BENO entity for each file processed using a BNI_001 error file. Errors range from invalid combinations of data (e.g., employee group and subgroup combination submitted is invalid; invalid file or field format) • Separate positions exist in People First for each employee group, subgroup, BENO entity (based on the agency and sub agency) and security role code combination (not for each employee). The employee is placed in the applicable position based on the data provided by the BENO entity on the BNI_001 interface file. By default, all Users are defaulted into positions with employee only access. A separate position exists for each BENO entity for HR access. A separate request must be submitted to the service center to move an employee into the HR position. Each position is created when the BENO entity is created • For the state university system employees, separate

#	Activity	Description	Dependencies	Uniqueness/Customizations
				coding exists for 9-month employees to indicate the employee as a 9-month employee and health and insurance deductions will be double deducted during the spring for the summer coverage months
10.15	BNO_002 Process	The BNO_002 is sent back to the BENO entity and reflects both the changes that were processed as a result of the last BNI_001 interface file that was submitted from the entity and changes that were entered directly in People First. In addition to the work and personal information, this interface file also includes the employee's health and insurance plan elections (elections are processed directly in People First), coverage levels, dependents information and contribution rates. The BENO entities load the health and insurance information into their human resource and payroll systems for payroll deduction. This process is a change based (only employees with a change are included in the file), not a full file process	Change must have occurred to the employee record in People First or a premium change must have occurred	A custom program is used to identify updates processed in the People First System for each BENO entity's employee population. Updates are sent back to the BENO entity based on the following criteria: • Personal and work information – updates are provided on the next BNO_002 file to process after the update was completed in the People First System • Health and insurance plans – in general, updates are sent based on the health and insurance benefit plan enrollment/change effective date based on the state payroll schedule. For example, if the enrollment is effective for June 2014 coverage, the change is sent to the BENO entity after the last payroll has processed in April 2014. Updates for the tax-favored accounts (MRA, LPMRA, DCRA and HSA) are provided after the last payroll in the month prior to the effective date has processed. For example, if the tax-favored account is effective June 2014, the tax-favored enrollment is sent after the last payroll in May is processed • Open Enrollment changes – in addition to using the daily interface logic described in the previous bullets, special enrollment files are provided as a result of the annual Open Enrollment process in advance of the changes being provided on the daily file. These files (changes only and full files) are provided to allow the BENO entities additional time to process the changes in their payroll system and to validate all changes are processed before the first payroll is processed for January coverage

#	Activity	Description	Dependencies	Uniqueness/Customizations
10.16	BNI_123 Process	The BNI_123 interface file is provided by the BENO entity to People First. This interface file is used to transmit the payroll deductions for the health and insurance plans for the BENO entity employees and is transmitted based on the payroll schedule	SSN provided must exist in SAP	• The BNI_123 is pre-processed through a custom DW program that validates the plan totals in the detail records match the plan totals in the footer of the file. If the totals do not match, an automated report is sent back to a custom distribution list for the entity showing the plan totals that do not match and advising that a corrected file must be provided. The custom contact list is maintained as part of the custom program • Once the data is validated both through the pre-processing program and DSGI (validated totals must match the amounts deposited), the extract is generated out of the DW and sent to SAP for loading. A custom program is used to load the health and insurance contributions/premiums provided by the BENO entity on the BNI_123 file into each employee's record in People First ○ If the employee is not enrolled in the plan, the plan code provided does not exist, a negative value is sent or multiple records are provided on a single file for the same employee for the same plan on the same file, the contribution/premium is loaded to the error table for the service center operations team to review and handle. • Double deduction process is used to post premiums to future coverage (summer) months for 9-month university staff. Process checks next coverage, if premium paid, continues to the next month, etc. until the premiums can be posted without creating an overpayment
10.17	PRI_458 (Time Data File)	The PRI_458 interface file is used by the BENO entity to transmit the time worked for all OPS employees for health and insurance plans	Employee must be active in the People First System for the effective date of the time entry provided on the PRI_458 interface file	Interface file is only used to transmit time for OPS employees. Time is NOT transmitted to People First for salaried employees The hours are loaded to infotype PA2010 (Employee Remuneration Info), hours type 2023 and are used by the

#	Activity	Description	Dependencies	Uniqueness/Customizations
		eligibility only. This file is transmitted at least monthly for each BENO entity. The file can be sent on any frequency that best supports each BENO entity’s need		OPS eligibility calculator to determine the employee’s eligibility to participate in the health and insurance plans based on the hours worked during the applicable measurement period (new hire (initial) or Open Enrollment)
10.18	9-Month Holding Table Process	Universities typically employ faculty on 9-month contracts to work the fall and spring semesters and are required to offer coverage for 12 months (through September), even if the employee is terminating employment at the end of the spring semester. A separate process exists to ensure the employees are covered during the summer semester	University must send the applicable 9-month termination indicators on the BNI_001 file at the end of the spring semester	Based on the data received on the BNI_001 file at the end of the spring semester, 9-month employees are loaded to a custom holding table. At the end of the summer semester, each university is responsible for sending the correct BNI_001 transaction to remove the employee from the holding table. If an action is not received to terminate the employee from the holding table, a custom program is used to terminate employees from the 9-month holding table, terminating their health and insurance plans. The custom program is run after the SUS have validated all remaining employees are not being brought back in the fall semester
10.19	Health and Insurance System Programs - Benefits Eligibility Key Information Build Program (function module)	The infotype PA9302 (Benefits Eligibility Key) build program is used to determine if a new measurement period should be created or an existing measurement period should be used	Appointment action is being completed on the employee (either PAR or BNI_001 load)	• If the employee is being dually employed or is being returned to employment (whether same employee ID, different or new employee ID) without a qualifying break in service, the existing measurement period is maintained and the key PA9302 (Benefits Eligibility Key) attributes [eligibility indicator (if Y, if N and in initial period, and new appointment increased expected hours to at least 30 hours per week, eligibility indicator is set to Y), measurement start date, continuous employment date for benefits, measurement type, ineligibility reason (if not eligible and new appointment doesn’t make employee eligible)] are copied over to the PA9302 (Benefits Eligibility Key) record for the new employee ID.

#	Activity	Description	Dependencies	Uniqueness/Customizations
				Estimated hours for the appointment are captured on the PA9302 (Benefits Eligibility Key) for the new appointment • If the employee is being hired for their initial appointment or after a qualifying break in service, a new measurement period is created and the previous PA9302 (Benefits Eligibility Key) records are end dated
10.20	Dependent Certification Process	The dependent certification custom process includes a system generated process flow that navigates the employee through both registering and certifying their dependents' eligibility for coverage under the health and insurance plans	Process must have been triggered in SAP GUI for the QSC/Open Enrollment event	• Process is completely customized. When active, the process triggers and is presented to the employee upon login to the People First System as an overlay on top of the People First System. The employee must either complete the process or elect to complete the process later before they are allowed to conduct any other activity in People First • The dependent certification process must be completed for each QSC event or during Open Enrollment if the employee wants to change any of their health and insurance enrollments and/or enroll eligible dependents. The dependent certification process can also be triggered as an audit process outside of the either a QSC or Open Enrollment event. When triggered as an audit, only the certification steps are presented (register dependents steps are not included when in audit mode). If the User elects to complete the process later, then selects to complete either a QSC event or their Open Enrollment process, the User is navigated back to complete the dependent certification process and subsequently access the Summary Enrollment screen to process health and insurance plan elections. Once the User completes the dependent certification process, the User is presented with an option to navigate (enroll now button) to the enrollment summary page or to enroll later (separate button) • If the participant is a surviving spouse, edits prevent the User from registering a dependent as a spouse

#	Activity	Description	Dependencies	Uniqueness/Customizations

				• If the User wants to register an over-aged dependent (age 26 – 30), they must call the People First Service Center to complete the registration and certification
				• If the User is currently enrolled in the spouse program for health insurance, changes to remove dependents must be completed through the service center. If the User adds a dependent during the dependent certification process, the employee must contact the service center to add the dependent to the health insurance plan
				• Through both the registration and certification steps, various edits exist to validate eligibility. For example, there are edits to require valid SSNs, to not allow a spouse to be enrolled if the spouse's age is under 13, not allow a spouse to be added with the same gender as the participant, not allow a grandchild to be enrolled if there is not a child dependent at least age 13 already covered, only allow a grandchild to be added within 60 days of their birth date, etc.
				    o If the dependent SSN is left blank during the registration process or if the SSN on file for the dependent is invalid, the user is sent several notices to provide or correct the SSN for the dependent.
				        ▪ When adding the dependent, the subscriber is a warning message advising that the SSN is required and that failure to provide could result in a penalty to the subscriber
				        ▪ After completing the registration process and certifying the dependent, the subscriber is sent a separate communication advising they must provide a valid SSN (notice is sent by email if the user has a notification email address on file, otherwise is sent through the USPS mail process);

#	Activity	Description	Dependencies	Uniqueness/Customizations
				if the enrollment was completed in December, the letter is mailed in January ▪ If on December 1 of the year the enrollment was completed the subscriber has not provided or corrected the dependents SSN, the subscriber is mailed a letter advising they must provide the correct SSN ▪ If on December 1 of the following year the subscriber has not provided or corrected the dependents SSN, the subscriber is mailed a final letter advising they must provide the correct SSN • If a participant marks a previously eligible dependent as not eligible, a custom program is run to remove that dependent from all health and insurance plans and to change the coverage level for that plan based on the remaining dependents (if any) • During the dependent certification process, the User is presented two steps for each dependent asking the User to certify that the dependents’ information (name, date of birth, SSN) are correct, the dependent relationship is accurate and the dependent is still an eligible dependent based on State of Florida rules. As part of the process, the participant is presented a definition for the dependent’s relationship type (e.g., child, spouse, step-child). If the dependent’s SSN is invalid based on the edits, a separate step is presented forcing the User to correct the SSN to continue • Once all dependents have been presented for certification, the User is presented the option of registering new eligible dependents. If the User selects to register new dependents, the User is presented with the Dependent Registration page,

#	Activity	Description	Dependencies	Uniqueness/Customizations
				requiring the dependent's name, SSN, date of birth and relation to User. The User can repeat the process to add all eligible dependents • Once all dependents have been certified (or removed if no longer eligible) and the User has completed the register dependent process, the User is presented a final certification page that includes a summary (name, dependent relationship, date of birth, gender, SSN and eligibility end date) of all dependents and their eligibility status. The User is also presented static language that advises the User that if they falsely register/cover a dependent they will be responsible for reimbursing the state or the carrier for any medical expenses incurred. The User must enter their People First password and select the certify button to complete the registration process
10.21	Move Program	The Move Program is a custom program that evaluates work events for participants to determine if health and insurance benefits should be moved. If health and insurance benefits should be moved from one employee ID to another employee ID, both the health & insurance benefits eligibility (infotypePA0171) and health and insurance enrollments are moved	Employee must have a qualifying trigger as defined in the uniqueness /customizations column	• A custom program evaluates work related events (employee terminates employment and they have another health and insurance benefits eligible employee ID, employee moves from one agency to another, employee gains additional employment, employee returns to work without experiencing a qualified break in service (salaried – one full calendar month; OPS either 13 or 26 weeks), etc.) and moves health and insurance benefits from one employee ID to another employee ID • The program includes custom logic based on the employment type (salaried or OPS) of each position held by the employee, the effective and end dates of each position held, the health and insurance benefit contribution level required for each position (provides preference to the health and insurance benefit contribution level that most benefits the employee), as well as the employment status (gives preference to active employee status over retiree and other non-active employee statuses). If the current position provides the better benefit, plans are moved the first

#	Activity	Description	Dependencies	Uniqueness/Customizations
				of the second month. If the new position provides the better benefit, plans are moved the first of the next month • When the move program identifies a need to move the health and insurance benefits from one employee ID to another employee ID, a custom program is triggered to update infotype PA0171 (Health & Insurance Benefits Eligibility) on both employee IDs. A separate program is used to move the health and insurance plans across employee IDs. Only Health and Insurance benefit plans that the participant is eligible for under the employee ID obtaining the health and insurance benefits are moved • As part of the move program, an exclusion list is used to ensure that health and insurance benefits are not moved to the same employee ID more than once • If a retiree becomes an active employee (salaried or health and insurance benefits eligible OPS), the health and insurance benefits enrolled in as a retiree are moved to the active employee ID • If an employee was enrolled in health and insurance benefits as a retiree and the employee's health and insurance elections were moved to an active employee ID, the health and life benefits (assuming the participant was enrolled as a retiree) are systematically moved back to the retiree ID if the participant is no longer eligible for active employee benefits (benefits must have been maintained without a break in coverage to move back to the retiree ID) • If an early retiree requested to maintain health and insurance benefits on the retiree ID, a separate flag is marked on custom table ZBU_Move_Retiree for the plan year. During the Open Enrollment preparation process, the flag is removed and if the early retiree is eligible for health and insurance benefits as an active employee, the health and insurance benefits are moved back to the active employee ID. The retiree

#	Activity	Description	Dependencies	Uniqueness/Customizations
				must request each plan year they are eligible for health and insurance benefits as an active employee to keep health and insurance benefits on the retiree ID. If the employee requests to keep their health and/or life on their retiree ID, the User is not entitled to enroll in any other health and insurance benefit options (e.g., dental, vision, optional life, etc.) ○ Note: The process described only applies to early retirees; Medicare eligible retirees who are employed in a benefits eligible position are required by federal law to maintain benefits on the active employee ID until they are no longer an active employee or until they lose eligibility on their active employee ID
10.22	Open Enrollment Preparation Process	The Open Enrollment preparation process is used to prepare the employee data and election opportunities for the annual Open Enrollment period	Individual must be eligible for health and insurance benefits as of January first of the new plan year and in the system as of the point the Open Enrollment preparation jobs are processed	The Open Enrollment preparation process includes a series of custom programs that run prior to the start of the annual Open Enrollment period. These processes are completed approximately three weeks prior to the beginning of annual Open Enrollment period. The programs include: • Program to remove over-age dependents who are no longer eligible to participate in insurance; program also triggers notification for the COBRA program to generate a COBRA package for the dependent losing coverage • Program to map employee's health insurance plan enrollment based upon county code changes (mapped to either another HMO or the PPO plan, based on the employee's eligibility) • Program to create new plan year records for flexible spending accounts • Program to delimit plans for employees exceeding age eligibility for the plan (applies to supplemental plans only) • Program to delimit or adjust enrollment for plans that are being closed (includes mapping from one plan to another plan) • Program to remove non-covered dependents

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Program to end all pending evidence of insurability records that are over six months old • Program to adjust coverage levels for any participants where the dependents do not match the enrolled coverage level
10.23	Open Enrollment Benefit Statements	The Open Enrollment Benefits Statement process is used to create health and insurance benefits statements for all participants who are eligible for health and insurance benefits as of 1/1/NY	Participant must be eligible for health and insurance benefits as of 1/1/NY and in the system as of the point the Open Enrollment preparation jobs are processed. Benefits statement process is dependent on the Open Enrollment preparation having been completed for the individual	Open Enrollment Benefits Statement process is executed after both the Open Enrollment preparation jobs have been completed and the Open Enrollment system enhancements have been implemented (includes plan changes, rate changes, etc. for the new plan year) Benefits statements are mailed to all eligible Users and provide the User information for all plans they are currently enrolled in and plans they are eligible to enroll in as of 1/1 of the new plan year. The benefits statement process is broken out into separate groups of Users. The following are the current groups (subject to change each year as part of the standard Open Enrollment process): • Active employees (state agencies and BENO entities other than state universities) • State universities (treated same as active employees) • Retirees, Vested Legislators and survivors • COBRA and layoff • OPS The process continues to run for new hires and changes between eligibility groups (status change) from the point the Open Enrollment preparation process has been processed, up through the next to last week of Open Enrollment
10.24	Confirmation Statements	Confirmation statements are issued to all participants who either made a change or had a change made to their plan elections on their behalf (e.g., completed by service center or	Participant must have had an election change	Confirmation statements include all plans the participant is enrolled in (not just changes). Confirmation statements do not include any plans the User either waived or never enrolled in Confirmation statements are stored online in People First for up to seven-years (up to seven-years available at any given time). As part of the address verification process, Users have the option to either receive an email notification that their

#	Activity	Description	Dependencies	Uniqueness/Customizations
		Open Enrollment preparation jobs)		confirmation statement is available or to continue to receive their confirmation statement through the mail (or both) Confirmation statements are generated for the following changes: • Changes made during Open Enrollment • Changes made during the Open Enrollment correction period • Changes made as the result of a qualifying status change event • Changes based on gaining Medicare eligibility or a change in Medicare tier • Changes based on medical underwriting being either approved or rejected
10.25	Employee Email Notification Process	Process used to generate emails to employees based on either the User completing a process or a batch reminder being triggered	Participant must have provided a notification email address in People First	The following email notifications are sent to employees based on the participant completing the related process in People First: • EAVU – Address Verification Thank You • EDCU – Dependent Certification Thank You – No New Dependents are Added • ERDE – Dependent Certification Thank You –When New Dependents were Registered – Enroll Now • EOEC – Open Enrollment Elections Completed • EQSC –- QSC Elections Completed • ENCH – Enrollment Completed with No Changes The following email notifications are sent to participants using a batch process (state controls the dates these are sent): • EAVC – Coming Soon: Verify Your Addresses • EAVR – Reminder: Address Verification • EDAC – Coming Soon: Certify Your Dependents (Audit) • EDAR – Reminder: Certify Your Dependents (Audit) • EOEA – Open Enrollment is Coming – Active • EOES – Open Enrollment is Here – Active

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• EOEO – Open Enrollment Reminder – Active • EOEF –- Open Enrollment Final Reminder – Active (Triggers Wednesday night of last week of OE) • EOEP – Open Enrollment is Coming – Passive (and non-active participants when active employee participants have active Open Enrollment) • EOEB – Open Enrollment is Here – Passive • EOED – Open Enrollment Reminder – Passive • EOEL – Open Enrollment Final Reminder – Passive (Triggers Wednesday night of last week of Open Enrollment)
10.26	Annual Health Insurance Portability and Accountability Act (HIPAA) Statements	The annual HIPAA statement process is run after the annual Open Enrollment period has been completed. The process is used to generate HIPAA notification to all participants who dropped coverage or whose coverage was terminated and a COBRA package was not triggered	Participant had a change in coverage that either resulted in a dependent being removed from coverage or the entire enrollment was cancelled	Program must consider all employee IDs associated with the participant when determining whether to generate and send If a COBRA package is also triggered, the HIPAA notification is included in the COBRA package and is not sent separately
10.27	Investment Plan Retirement Integration/Decision Process (Retiree)	A separate integration process is used with the state’s investment plan provider to trigger retiree eligibility for investment plan members	For the process to apply, the participant must be in an inactive status in People First and must have taken a withdrawal from their investment account	The process evaluates all individuals provided on the file from the investment plan provider to determine if the participant meets the retiree eligibility for state Health and Insurance benefits (years of service (25 years for special risk employees, 30 years for all other employees) or years of service and age requirements (6 years of service and at least age 52 for special risk employee and at least age 59 ½ for everyone else)) If the participant is determined to be retiree eligible, the retiree action is systematically completed to trigger a separate retiree employee ID (if one is not available for reuse) for the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				participant as a state retiree The User must continue their health and insurance benefits through COBRA until the point they become retiree eligible. If the User does not continue health and insurance benefits through COBRA and had a break in continuous coverage, the participant is not eligible to enroll in retiree health and insurance benefits
10.28	Retiree Sweeper Program	Retiree Sweeper Program is used to identify all participants who are eligible for retiree health and insurance benefits, trigger applicable fulfillment documents and create a retiree ID (or determine ID to be reused)	Retirement PAR must have been completed OR Individual identified as retirement eligible through Investment Plan Process OR Retirement action received on BNI_001 interface from SUS OR Service center must have processed a retirement action	The retiree sweeper program includes identifying all participants who had a retirement action processed through the People First portal or as part of the BNI_001 load process, and participants who were determined retirement eligible through the investment plan load program. The program: • Identifies retirement eligible participants • Determines if the User has an existing retirement eligible employee ID (PERNR); if no existing retirement eligible employee ID, creates a retirement employee ID • Triggers the retiree packet and COBRA packet (including HIPAA notification • Triggers evaluation of the move program (move program determines if the retiree ID should receive health and insurance benefits and if so, moves health and insurance benefits to the retiree ID) • Generates retirement QSC event • If a participant retires and the participant's enrollment in the health insurance HMO plan was based on the participant's work county and the participant's home county is not eligible for the same HMO, the participant's HMO eligibility is changed to an HMO based on the home county. If more than one HMO is available, the participant is defaulted to the PPO plan. As part of the retirement QSC, the retiree will then have the option to change between the available HMO(s) and the PPO plan • If retiree or spouse is aged $\geq$ 65, then the retiree is mapped to the appropriate Medicare tier (mapping

#	Activity	Description	Dependencies	Uniqueness/Customizations
				occurs through the Medicare program) • If the retiree is the primary spouse in the spouse program and the other spouse is not retiring, then health insurance elections are moved to the active employee spouse as family coverage. The retired spouse is attached as a dependent under the family coverage • If secondary spouse in spouse program, then primary spouse record is updated to remove spouse program indicator and to change the coverage to family coverage
10.29	COBRA Process	Generate notifications for involuntary loss of coverage, for loss of coverage due to end of employment and when a dependent loses eligibility for coverage (e.g., divorce (former spouse and step child(ren)), child ages out, death of active employee under family coverage etc.)	Must be enrolled in either health, dental and/or vision insurance to be offered COBRA coverage when the loss of coverage eligibility occurs	Participant has 60 days from receipt of the COBRA packet to elect COBRA health and insurance benefits. If participant does not elect within 60 days, the participant’s COBRA eligibility is forfeited. If a participant has a secondary event during the COBRA period, additional eligibility can be triggered to allow the participant to elect COBRA health and insurance benefits The following are the scenarios where COBRA eligibility is currently triggered: • Dependent child/stepchild/adopted child (not disabled) ages out (health and insurance benefits are removed during Open Enrollment preparation process for the dependent in this case) of the standard insurance plan at the end of year in which the dependent turns 26 and of the over-aged dependent plan at the end of year in which dependent turns 30 • Divorce – A packet is mailed to the ex-spouse using the address on file, if no address for the dependent, a packet is mailed to the participant • Death – If participant had family coverage, the packet is mailed to the surviving spouse. If no surviving spouse, the packet is mailed to the oldest covered child. If single coverage, then no packet is generated. • Termination/Retirement - If reason is other than “move within state government,” and the employee does not

#	Activity	Description	Dependencies	Uniqueness/Customizations
				have an active employee ID (PERNR) to move health and insurance benefits to, the packet is generated and mailed • OPS Measurement -- Loss of Eligibility – packet is mailed the first of the month prior to the health and insurance benefits termination date COBRA packets are not generated for the following: • Gross Misconduct – If participant terminates employment for gross misconduct (if this situation occurs the COBRA packet is manually stopped by Information Technology staff) • Early Termination of Employment – if a participant terminates employment prior to the effective date of their health and insurance benefit elections, a COBRA packet is not generated • Early Termination of Coverage – if a participant terminates employment and chooses to end coverage the end of the last month of employment, no COBRA package is generated
10.30	Double Deduction Process for the Florida School for the Deaf and the Blind (FSDB)	The double deduction process for FSDB is used to trigger double deductions for supplemental insurance plans (not used for health and life) for FSDB employees	Participant must be a nine or ten month employee at FSDB	For FSDB participants with a contract length of nine or ten months, the custom table zbi_fis_univ_dd is updated to reflect the participant is subject to double deductions. Based on the annual payroll calendar, the bno_029 (PTB authorization file) program calls this table to determine which warrant dates should have single, double, or no deductions for participants at FSDB Double deductions for health and life insurance are processed by mass load (text file)
10.31	Expected Premium Recalculation Program	The Expected Premium Recalculation Program is a custom program that evaluates the employee's work and health and insurance related events to	Employee must have a change to trigger an update	The program is run prior to each major payroll (biweekly, supplemental and monthly) for all participants and for each on-demand payroll for all participants who had a payroll deduction on that on-demand run. The program recalculates expected premiums for 23-months back, current coverage month and the next coverage month. The following are some examples of the types of events that require a recalculation of the expected

#	Activity	Description	Dependencies	Uniqueness/Customizations
		determine if the expected health and insurance premiums need to be updated to adjust the employee and employer contributions/premiums due for one or more coverage months		premiums due: • Enrollment was deleted • Participant's coverage level was changed (e.g., from single to family) • Participant's age was updated (applies if enrolled in a plan that has different rates based on the employee's age) • Participant had a retroactive personnel action request (PAR)processed that either and/or both changed the participant's salary or the status for participation (e.g., change in premiums due to leave without pay, removal of leave without pay, change in employment type that result in a change in premiums due) in the health and insurance plans • When a premium payment is submitted to the lockbox, the individual is automatically re-calculated for 23 coverage months back, the current coverage month and three months forward On the 2nd, 15th, and 27th of the month, the system calculates 23 months back and the current coverage month as a part of the underpayment recalculation For all recalculation types, records are only updated if a change in the participant's expected deduction occurs
10.32	Underpayment Process	Underpayment letters are mailed on the 2nd, 15th and 27th of the current coverage month to all participants who have a $4 or greater underpayment in any plan for the current coverage month	Must be underpaid by at least $4 for at least one plan for the current coverage month	• On 2nd day of month, expected deductions are recalculated for all covered participants for the current coverage month and 23 months back to identify underpayments. The process creates underpayment letters for all participants who are underpaid by at least $4.00 for at least one plan for the current coverage month. The underpayment notice includes the total underpayment amount for the current coverage month and the prior 23 coverage months. The underpayment notice is sent to the participants through the USPS standard mail process • On 15th day of month, expected deductions are

#	Activity	Description	Dependencies	Uniqueness/Customizations
				recalculated for all covered participants for the current coverage month and 23 months back to identify underpayments. The process creates underpayment letters for all participants who are underpaid by at least $4.00 for at least one plan for the current coverage month. The underpayment notice includes the total underpayment amount for the current coverage month and the prior 23 coverage months. The underpayment notice is sent to the participants through the USPS certified mail process • On 27th day of the month, expected deductions are recalculated for all covered participants for the current coverage month and 23 months back to identify underpayments. The process then compares the underpayment amount to the amounts generated on the 15th. If the amount is the same, an additional notice is not generated. If the amount is different, a notification is generated and mailed. The underpayment notice includes the total underpayment amount for the current coverage month and the prior 23 coverage months. The underpayment notice is sent to the participants through the USPS standard mail process
10.33	Batch Cancellation Due to Non-Payment	The batch cancellation process cancels coverage for retirees, survivors and COBRA participants who have not paid their premiums for the prior month's coverage (must be 100% underpaid)	Must be a non-active employee. Participant must be 100% underpaid for the prior coverage month	On the 2nd of each month, the batch cancellation process cancels coverage (looks at infotypes PA0167 (health plans), PA0168 (insurance plans) and PA0212 (COBRA health plans)) for all non-active participants who are completely underpaid for the prior coverage month. *Note: Payment types of MNE and MNR must have the MANUAL_APPROVE = 'X' or they are not considered paid* If there was no payment applied for the plan, the program reads backwards to find the earliest coverage month for which a payment was made for the plan and the termination date is set to the last day of the month in which the payment was applied
10.34	Payroll Posting	Payroll deductions occur	Receipt of a payroll posting	• The payroll files are initially loaded to a staging table

#	Activity	Description	Dependencies	Uniqueness/Customizations
		from multiple sources (e.g., BENO entities, BOSP (active employee, other than BENO employees) and the Division of Retirement (retirees)). Multiple custom processes exist to load the payroll premiums from these sources into the People First System (BENO process is defined above in the BNI_123 process)	file from BOSP, BENO entity or the Division of Retirement or receipt of a cancellation and adjustment file from BOSP	in the DW. A separate custom program is run to extract the data out of the DW staging table and load the premiums into People First. Part of the custom program includes converting the BOSP unique payroll deduction codes to the SAP benefit plan codes based on the participants current enrollments (looks at enrollments for next coverage month) • Once the data extract is created out of the DW, a separate custom program runs to post the premiums to the participant's record. The premiums are posted based on the oldest past due month for each plan type (supplemental plans are rolled together). If the participant has an underpayment for the same plan type within the past 23 months, or current month, the payroll deduction is posted first to the underpaid month(s). If all payroll deduction amounts are not exhausted on retro months, any balance is applied to the next coverage month premiums that are due. By applying premiums to the oldest underpayment, the underpayment is effectively moved to the current coverage month to ensure participant is not using coverage they have not paid • If the participant does not have any past due premiums for the plan type for the current or prior 23 coverage months, the payroll deductions are posted to the next coverage month (except for the tax-favored accounts for which payroll deductions are processed a month in advance) • For cancellations and adjustments, the negative entry is applied to the corresponding positive payments for the warrant date • If errors occur in the posting process and the payroll deduction or cancellation/adjustment record cannot be processed, the detail is posted to an error table for the People First Service Center operations team to manually handle (review and post to the correct plan and coverage month(s))

#	Activity	Description	Dependencies	Uniqueness/Customizations
10.35	Lockbox Posting	The lockbox posting process is used to load payments that were paid by participants via a personal check or money order. In various situations, participants must write a check to cover part or all of the premium for one or more health and insurance plans. For example, while employees are on leave without pay they submit a personal check to cover the cost of their insurance plans. In the first month after retirement, all retirees must pay via personal check. Additionally, some retirees do not have sufficient funds in their state retiree (pension) pay check to cover the cost of health insurance and must pay by personal check. COBRA and Layoff participant pay for the health and insurance plans they are enrolled in by personal check for the duration of their coverage	Payment must have been sent to the lockbox for the participant and the payment must be sent on the interface file from the lockbox provider to People First for processing Participant must be enrolled in the insurance plan	• A separate custom process is used to load payments from the lockbox. Prior to loading the payments the expected premiums for each participant included on the file is recalculated for the current coverage month and 23 months back • This process is run daily, Monday – Friday. The current volume is approximately 10,000/month. Approximately, 5,000 of these are being manually reviewed and posted each month • Once the recalculation is completed, the payments are posted to the oldest past due coverage month. Similar to the payroll posting process, the payments are posted to the oldest past due month prior to posting to the current or next coverage month. However, while the payroll posting process post within the plan type, the lockbox process post to the oldest past due month, based on an approved payment posting hierarchy (historical unpaid NSF fees, current NSF fees, historical health insurance underpayments, current health insurance underpayments, historical health insurance over-aged dependent underpayments, current health insurance over-aged dependent underpayments, etc.) Priority posting logic includes 65 priority levels. Each prior level must be completed prior to moving onto the next posting level • Two types of errors can occur in the load process. Both situations are handled by the People First Service Center operations team ○ The first type of posting error is a payment that requires service center review (e.g., questionable amount, participant directed payment posting). These payments are posted, but not approved. The service center must either approve or manually redistribute these payments

#	Activity	Description	Dependencies	Uniqueness/Customizations
				◦ The second type of error results in no posting occurring. These are posted to an error table and require the service center to manually review and determine how to handle (manually post, refund to the participant, etc.)
10.36	Daily Deposit Report	Daily deposit report is used to provide posting details to DSGI for all off-payroll transactions received and processed for that business day	Off-payroll transactions must have been received	• All payments received through the lockbox are deposited into the Health Insurance Trust Fund, even though the payment could be for a different trust fund (life, supplemental, disability) • A daily report is provided to DSGI summarizing the total lockbox, Journal Transfer (JT)s and SUS Spreadsheet (SS) and NSF payment amounts processed by People First for that business day • The report also includes an adjustment section reflecting Move Money transactions processed daily. The purpose of the daily report is to enable DSGI to perform trust fund adjustments to reduce/increase the Health Trust Fund and reduce/increase the Health Trust Fund balance for which the lockbox payment, SS, JT or NSF was made
10.37	Online Decisioning Tool	An online decisioning tool is provided by the lockbox servicing bank. The tool is used by the service center to review payment(s) that are not auto posted through the lockbox posting process to determine how the payment(s) should be posted	Payment must have been received through the lockbox process and not distributed as part of the auto distribution process	Items the service center must review through the online decisioning tool include: • Post Dated Checks • Stale Dated Checks • Legal/Numeric Amount Differences • Unacceptable Payee • Missing Signature from Check • Missing Date from Check • Missing Payee from Check • Payments with missing Value Added Keying (VAK) data People First Service Center staff can input the following information into the online decisioning tool in order to make the payment information complete and processable:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Employee ID Number • Agency Number (OLO) • Sub agency ID Number The following two reports are available to DSGI and the service center for tracking online decisioning tool activity: • Transaction Audit Report • Data Entry Report
10.38	Medicare update program	The Medicare update program is a custom program used to determine eligibility for Medicare for state retirees (process only applies to retirees, survivors and vested legislators who enrolled in health insurance)	Participant must be a state retiree, surviving spouse or vested legislator and must be enrolled in health insurance Participant or one of the participant's dependents must become Medicare eligible due to age	Three months prior to the retiree or their spouse turning age 65, the system changes the retiree's health insurance plan to the appropriate Medicare coverage tier, sends notice to the retiree instructing the retiree what action should be taken, assigns an alert on the retiree's People First home page and assigns the premium amount due for the Medicare tier assigned. The retiree sweeper program also calls the Medicare update program to determine if a new retiree should be mapped to a Medicare plan, if so, the mapping happens as part of the retiree sweeper program The custom program evaluates the retiree's eligibility and places the retiree in the applicable Medicare level. The program updates coverage as follows: • Medicare I (Single coverage) – effective the first day of the month the retiree turns 65 (unless the retiree was born on the first day of the month, then the retiree is moved to the Medicare plan the first day of the month before turning 65), the retiree is moved to the Medicare plan, with the same provider at the same coverage level (individual) • Medicare II (Family coverage for two or more and at least one covered participant is eligible for Medicare) – effective the first day of the month the retiree or their dependent turns 65 (unless the retiree or their dependent that is turning age 65 was born on the first day of the month, then the retiree is moved to the

#	Activity	Description	Dependencies	Uniqueness/Customizations

				Medicare plan the first day of the month before turning 65), the retiree is moved to the Medicare plan, with the same provider at the same coverage level (family)
				• Medicare III (Retiree with only one dependent and both the retiree and the dependent are eligible for Medicare) – effective the first day of the month the second eligible member (retiree or their dependent turns 65; - unless the retiree or their dependent that is turning age 65 was born on the first day of the month, then the retiree is moved to the Medicare plan the first day of the month before turning 65), the retiree is moved to the Medicare plan, with the same provider at the same coverage level (family)
				
				The program generates multiple Medicare notices and creates a QSC event to allow the retiree to change their coverage tier (single versus family)
				
				If a retiree or one or more of their dependents becomes eligible for Medicare before age 65 due to a disability, the retiree must contact the service center to manually process
				
				The program will only select participants in the following Benefit Groups and Benefit Status:
				• Benefit Groups:
				  ○ 0002 = Retiree (excluding teachers)
				  ○ 0003 = Survivors (excluding Law Enforcement)
				  ○ 0007 = Vested Legislature
				• Benefit Status:
				  ○ 0001 = Eligible
				  ○ 0002 = Medicare Eligible
				• Selects retiree records where date of birth (DOB) + 65 years is within the 90-day date evaluation window and are enrolled in health insurance
				• Selects retirees where the spouse's DOB + 65 years

#	Activity	Description	Dependencies	Uniqueness/Customizations

				is within the 90-day evaluation window and are enrolled as a dependent in the retiree's health insurance plan
				• Determines the number of Medicare Eligible participants based upon age or Medicare flag
				• Creates a new infotype PA0171 (Health & Insurance benefits eligibility) record with a Medicare eligibility grouping
				• Calculates new carrier for health insurance plan on infotype PA0167 (health plans)
				    ○ If currently enrolled in a HMO Medicare plan and eligibility for the HMO still exists, HMO plan is maintained
				    ○ If currently enrolled in existing non-Medicare HMO plan, and eligibility for the HMO still exists, converts plan to applicable HMO plan
				    ○ If currently enrolled in an existing HMO and no longer eligible for the HMO Medicare plan (or if no corresponding HMO Medicare plan exists), defaults to PPO plan
				    ○ If currently enrolled in the PPO plan, retiree is mapped to the PPO Medicare plan
				• Calculates and creates the new coverage level for the health insurance plan on infotype PA0167 (health plans)
				    ○ If retiree is Medicare eligible and no dependents, assigns Medicare I tier
				    ○ If retiree is Medicare eligible and only one dependent and that dependent is also Medicare eligible, assigns Medicare III tier
				    ○ If retiree is Medicare eligible, more than one dependent exists, assigned Medicare II tier
				    ○ If retiree is Medicare eligible, but has only one dependent and the dependent is NOT Medicare eligible, assigns Medicare II tier

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ If retiree is not Medicare eligible, but at least one dependent is Medicare eligible, assigned Medicare II tier
10.39	Semi-Annual Coupons	The semi-annual coupons process is used to generate and mail coupons to non-active participants who pay their premiums by direct bill	For all non-active participants that are marked as direct bill; semi-annual coupons are mailed	The custom program identifies the enrolled plans and the associated premiums for each month. Coupons are generated for six months reflecting the premium amount due for each month. Coupons are mailed in November (for January – June coverage) and May (for July – December coverage). Coupons are also included in COBRA notices for newly eligible COBRA participants. At the end of a COBRA participant’s COBRA period, coupons are only printed for the remaining coverage months (e.g., if only four months of coverage eligibility remains, only four months of coupons are printed)
10.40	QSC Generation Program	The QSC generation program is used to identify QSC eligibility for work and life events. The program creates the QSC for the participant to make applicable changes	A QSC trigger (work or life event) must have occurred	This program detects changes to the following: ▪ Personnel Action e.g., termination (other than transfer within state government), new hire, retirement, FTE change, was processed ▪ Employee group or employee sub-group changed and new employee group or employee sub-group results in a change in cost grouping ▪ Employees class code changes resulting in a different cost grouping ▪ Employee’s FTE changes and the employee cost significantly increase ($20 or more) ▪ Home county code changes and participant is no longer eligible for the currently enrolled HMO ▪ Work county code changes and participant is no longer eligible for the currently enrolled HMO ▪ OPS measurement results in the participant gaining eligibility ▪ Participant gains or loses eligibility for full-time state contribution toward premiums
10.41	PPO/Medical Prescription (Rx) Interface Program	The PPO/Rx interface program is used to create the carrier files for the PPO health insurance and the	PPO interface file – participant must be enrolled in the PPO plan Rx (pharmacy) interface file –	• The same program is used to create a participant, dependent and premium files for the PPO and pharmacy administrators. However, the participant on each file (PPO and Rx) are different. The PPO file only pulls participant who are enrolled in the PPO plan

#	Activity	Description	Dependencies	Uniqueness/Customizations
		pharmacy plan providers' files. The same program is used to create the files; however, there are some differences between the files created for each carrier	participant must be enrolled in the PPO or one of the HMO plans (Medicare Advantage plan participants are not sent on the file)	for the coverage month for which the file is being generated. The pharmacy file pulls all PPO plan participants and all HMO participants except those in Medicare Advantage plans. For the pharmacy files, additional fields are populated (though the custom file layouts for the PPO and Rx files are the same, some fields are only populated on the Rx files), and include Medicare coordination of health and insurance benefit dates and an indicator of which health insurance plan the participant is enrolled • The files are generated and sent to each respective carrier on a monthly basis, approximately three to five business days prior to the start of the month and each weekend during the month up to the point the monthly file is generated and sent to the carriers for the next coverage month (weekly files are typically sent three to four times each month) • The monthly files include all participants who are enrolled in one of the applicable plans and who have paid their premium for the coverage month. If the participant is enrolled, but has not paid, the participant is sent on the file with a termination date of the last day of the last month the participant paid the full premium. To determine whether or not to send the participant with a termination date, the program checks the current coverage month to determine if the premium is underpaid by $4.00 or more. If not underpaid by $4.00 or more the termination date is not sent on the file and the participant is sent as paid and eligible for coverage • The weekly file process includes the capability to create a drop (termination) file, add file, a change file and a full file
10.42	HMO Interface Program	The HMO interface program is used to create the carrier files for the HMO vendors	Member must be enrolled in the HMO to go on the respective HMO's file	• The same program is used to create the files for each HMO. The only difference is the variable used to determine which vendor is on each file. Each HMO vendor receives an enrollment file (participants and

#	Activity	Description	Dependencies	Uniqueness/Customizations
				dependents are on one file) and a premium file using a custom file layout • The files are generated and sent to each respective vendor on a monthly basis approximately three to five business days prior to the start of the month and each weekend during the month up until the point the monthly file is generated and sent to the carriers for the next coverage month (weekly files are typically sent three to four times each month) • The monthly files include all participants who are enrolled in the respective HMO plan and who have paid their premium for the coverage month. If the participant is enrolled, but has not paid, the participant is sent on the file with a termination date of the last day of the last month the participant paid the full premium. To determine whether or not to send the participant with a termination date, the program checks the current coverage month to determine if the premium is underpaid by $4.00 or more. If not underpaid by $4.00 or more the termination date is not sent on the file and the participant is sent as paid and eligible for coverage • The weekly file process includes the capability to create a drop (termination) file, add file, a change file and a full file
10.43	FSA Interface Program	The FSA interface program is used to generate files that are provided to the tax-favored (MRA, LPMRA, DCRA or a HSA) account administrator. Separate files are generated for enrollments and for payroll deductions	participant must be enrolled in a tax-favored account to be sent on the enrollment file Either payroll deductions or an adjustment must have been processed for the participant to go on the payroll deductions file	The enrollment is sent twice a week and includes anyone who is enrolled in the current coverage month. The file also includes termination dates for participants who have terminated employment or end dated their tax-favored account and leave of absence dates for participants who are on an extended leave of absence The payroll deduction file is sent once a week and includes all payroll deductions and adjustments received since the last file was sent
10.44	Supplemental Interface	The supplemental	Participant must be enrolled	• Each supplemental vendor interface file includes all

#	Activity	Description	Dependencies	Uniqueness/Customizations
	Program	interface program is used to create the carrier files for the supplemental vendors	in the applicable supplemental plan to be sent on the file	participants who are enrolled in coverage for the upcoming coverage month, regardless of whether the participant has paid the premium for the coverage month or not • The file includes both an expected premium field and a premium paid field • The interface files are provided once per month, approximately three to five business days prior to the start of the coverage month • The files are not sent on a weekly basis during the coverage month
10.45	Life Insurance Interface Program	The life insurance interface program is used to create the carrier files for the life insurance plan vendor	Participant must be enrolled in one of the life insurance plans to be included on the file	• Sends all participants who are enrolled in basic, optional, retiree and/or vested legislator life insurance for the coverage month • The interface files are provided once per month, approximately three to five business days prior to the start of the coverage month. The files are not sent on a weekly basis during the coverage month
10.46	Pretax Benefits (PTB) Authorization Program	The PTB authorization program is used to create the payroll deduction file for the health and insurance plans. The file is generated and sent to BOSP for each monthly, biweekly and supplemental payroll and includes all participant elections for the health and insurance plans	Participant must be enrolled in at least one insurance plan to be on the file and must be employed by an agency for which the payroll preparation process in People First is used	The file to BOSP includes the following customizations: • Supplemental plan enrollments are combined by plan type, by participant; if an participant is enrolled in multiple plans for the same plan type, one combined deduction amount is sent • For the tax-favored accounts, the amount included on the file is recalculated each payroll to determine the applicable amount that should be deducted [(annual amount elected minus the amount paid in) divided by the remaining payrolls in the year] • Separate insurance codes are sent for health insurance and for the supplemental plans based on the participant's employment type (e.g., OPS, Salaried); for health insurance separate codes also exist for the standard plans and HIHP plans, as well as separate cost grouping codes • The file is used by BOSP in conjunction with the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				F0001; for both health and basic life insurance, the participant must have the indicators populated on both files for the deductions to occur • For optional life insurance, the number of elections (1-7) are provided to BOSP and they calculate the correct premium deductions (premium amount is not sent on the file)
10.47	FRS Pension Payroll Interface Program	The pension payroll interface program is used to send retiree payroll deductions for the health and life insurance plans to the pension plan provider for payroll deduction	The participant must be retired from the State pension plan, must have sufficient retirement gross income to pay the premiums and must be enrolled in either a health and/or life insurance plan as a retiree	• Process only pulls retirees who are enrolled in health and/or life insurance and who do not submit their payments through direct bill. The file is used by the pension plan provider to payroll deduct retiree health and life insurance premiums • Separate files are sent for health and life insurance. The health insurance premium includes the premium for the health insurance plan and the amount for any over-aged dependent plans. The life insurance amount includes the retiree and vested legislator life insurance premiums • The payroll deductions are transmitted back to People First and is loaded using the payroll premium posting process
10.48	HSA Reversal File	HSA reversal process is used to process a reversal of HSA payroll deductions that can't be deposited into an HSA bank account due to the participant not having a qualified HSA account	Participant must be enrolled in the HIHP plan with an HSA and must not have a qualified HSA bank account Reversals can occur when an participant has not yet established a qualified HSA bank account or if a qualified HSA bank account is for any reason	Process includes multiple files that are used to complete the process. The process includes the following: • Interface file is received from the HSA plan provider identifying payments that could not be processed • Pulling data for the payments that could not be processed out of the DW to create an HSA reversal file • HSA reversal file is sent to BOSP for processing (employer contributions are converted from HSA contributions to health insurance contributions; employee contributions are processed through withholding tax calculations and the net is deposited into the participant's account) • HSA reversal payroll posting file is created by BOSP and sent back to the vendor for processing

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• The HSA reversal payroll posting file is loaded back into People First using the premium posting process to complete the HSA reversal process • Rejection records (records NOT processed through the reversal) are sent back to the HSA plan provider
10.49	OPS Batch Termination Program	The OPS batch termination program is used to delimit health and insurance plans for OPS employees who were eligible to participate in the health and insurance plans, but based on being measured (either initial or Open Enrollment) the employee is no longer eligible to participate in the health and insurance plans	Employee must have been a eligible for Health and Insurance benefits and enrolled OPS employee, who is no longer eligible for coverage	Based on the measurement process, if an OPS employee (not employed in any salaried position) was determined to be no longer eligible for Health and Insurance benefits, the OPS batch termination program is used to terminate Health and Insurance benefits at the end of the OPS employee's stability period. As part of the process, the program: • Determines the employee's coverage end date based on the employee's stability period • Updates the employee's infotype PA0171 (Health & Insurance benefits eligibility) to not eligible • End dates all health and insurance plans • Creates a COBRA offer
10.50	Health & Insurance Landing Page	The health & insurance landing page provides Users with a landing page that contains links to separate health and insurance screens, as well as to other sites (e.g., myBenefits site)	Participant must be eligible for Health and Insurance benefits to access the health & insurance landing page	The links include: • General Benefits Information • Change My Benefits • My Benefits • Benefit Premium History • Insurance Companies • Benefits Materials • Confirmation Statement • My Dependent Information • Medicare Information
10.51	Health & Insurance Screens Structure	The insurance screens are structured differently than the rest of the People First screens. Within each health & insurance page, there	Participant must be eligible for Health and Insurance benefits to access any of the health & insurance pages	The health and insurance screens are highly customized, including these three additional areas (areas are in addition to the normal page structure used within the rest of the People First System) • Instructions and Messages section - directed at guiding participants on what steps they need to take

#	Activity	Description	Dependencies	Uniqueness/Customizations
		are three additional areas that are used to guide participants in the enrollment process and help the participants understand their responsibilities		on the screen. This section is maintained by the provider, based on business requirements from the state. This section is customized to the type of participant and the step in the process the participant is processing • Helpful Links section - directed at providing participants key documents, websites, etc. that are tied to the screen/process the participant is accessing. This section is maintained by the state (links to external documents and websites) and the provider (links that are directed at documents stored within SAP) in SAP GUI based on business requirements from the state • Important Information section - directed at providing participants key information on what next to complete after processing a change, where to go to complete follow-up activities and their overall responsibilities. This section is maintained by the state in SAP GUI; however if additional User groups are needed, those must first be established by the provider and made available for use in these screens
10.52	Benefit Premium History Screens	The Benefit Premium History screens display the premium payments submitted for the participant for the past 23 coverage months, current coverage month and next coverage month (if at least one payroll has processed)	Premiums must have been received and posted to accurately reflect within the premium history screens	There are three different ways to look at the health and insurance benefits premium history. Each view is custom and provides different aspects of the premiums for the employee's coverage. All three views only look at the premium history for the past 23 coverage months, current coverage month and next coverage month (total of 25 months) • Two years of under/overpayments – this view only provides data if either the employee or the employer premium for at least one plan is either overpaid or underpaid by at least three cents within the 25-month range. The tax-favored accounts do not display in this view as they are recalculated each payroll (are technically never over or underpaid until the plan year ends) • Two years premium history by plan type – this view presents the full premium history for the participant for

#	Activity	Description	Dependencies	Uniqueness/Customizations
				the full 25 month period and limited to viewing premiums history for one plan type at a time • Premium history by coverage month – this view shows the Benefit Plan, Coverage Month (as month and year), User Premium Amount Due, User Premium Amount Paid, User Variance (which shows if the User is underpaid, overpaid or correctly paid for the coverage month), Employer Premium Amount Due, Employer Premium Amount Paid, Employer Variance (which shows if the employer is underpaid, overpaid or correctly paid for the coverage month) for a single coverage month
10.53	My Benefits Screens	The My Benefits screens display the participant's enrollment history (current, historical and future dated) for health & insurance plans	Participant must be or have been enrolled in at least one plan	There are two different ways to look at the health and insurance benefits enrollment history. Each view is custom and provides different aspects of the participant's enrollments • Benefits Details As Of Date – allows the entry of an effective date to display health & insurance benefits as of a specific date (past, current or future) • Benefits Details by Plan Type – provides complete enrollment history of all enrollments that reside for the participant in People First. Within the My Benefits screens, the following fields have additional custom logic applied: • Plan Participation Date - custom date field that displays the date the User enrolled in the health and insurance benefit plan type. This goes across Employee IDs • Coverage Level Date - date the User started at the coverage level for that health and insurance benefit plan type. This goes across Employee IDs • End Date - date the coverage terminated for the coverage level and health and insurance benefits plan type • Pre Tax Flag - indicates if the health and insurance benefit plan type is deducted on a pretax or post-tax

#	Activity	Description	Dependencies	Uniqueness/Customizations
				basis • Medical Underwriting - displays the status (N/A – not required, Pending Approval, Approved or Denied) of the medical underwriting process for the applicable plan • Coverage level – includes the coverage level (family, individual, employee plus spouse or employee plus child(ren)), the multiple (optional life insurance only) or the annual dollar amount (tax-favored accounts). If the coverage level is family, or employee plus, the plan type includes a hyperlink to view the dependents that were covered and the period for which they were covered
10.54	My Dependent Information Screen	The My Dependent Information screen displays a list of all registered dependents for the participant. The screen does not indicate if the dependent has been certified or is enrolled in any plan	To display on the screen, the dependent must have been registered under the participant	Only the dependent's SSN and address information can be updated by the participant. New dependents cannot be added directly within this screen. To add a new dependent, the User must add through the dependent registration process (included as part of the dependent certification process)
10.55	Change My Benefits Screens	When the participant has a QSC event or Open Enrollment event and has an infotype PA0171(Health & Insurance benefits eligibility) record marked as eligible, The Change My Benefits screens are used to process election changes when the participant has a QSC event or Open Enrollment event and has an infotype PA0171	Participant must be eligible for health and insurance benefits and must complete the dependent certification process prior to being able to complete health and insurance plan enrollments and changes Participant must have had a new hire, birth, marriage or Open Enrollment event to make updates online. All others must are completed by the service center (employee	• A custom process is used to create the applicable event (QSC event or Open Enrollment). Work events (appointments, gains eligibility (OPS), separations, promotions, increase or decrease in FTE, etc.) are system generated based on the participant meeting the applicable event trigger. For a life event (birth, marriage, adoption, etc.), the participant creates the event as part of the Change My Benefits process. For the Open Enrollment event, a separate program is run to trigger the event for all participants who are eligible to participate in the health and insurance plans on 01/01/NY (next plan year). If both a work or life event and an Open Enrollment event are available for a participant at the same time, the participant is provided a pop-up message advising the participant to

#	Activity	Description	Dependencies	Uniqueness/Customizations
		(Health & Insurance benefits eligibility)record marked as eligible. The participant is presented a custom enrollment summary screen that shows all plan types in which the participant is eligible to enroll and their current elections, if any	must call)	complete their life/work event prior to completing the Open Enrollment event. If the events are processed out of order, the participant’s coverage may be affected • A custom process is used to guide the participant through the enrollment process. As part of the custom process, the address verification (if not already completed) and the dependent certification processes are presented to the participant and must be completed before the participant can enroll or make health and insurance benefit changes • Once the participant completes the address verification and dependent certification processes, the participant is presented with an enrollment summary screen. The enrollment summary screen is a custom screen that is used to manage the enrollment process based on the event being processed. The summary screen contains the following: ○ Separate sections for health insurance plans, supplemental plans, tax-favored plans, eligible dependents (includes an indicator for each plan showing whether the dependent is enrolled in the plan) and a certification section (including requiring the participant to enter their password to certify and complete their enrollment changes) ○ Provides the participant with an estimate of their monthly premium amounts ○ Provides quick links that display a definition for each plan type ○ Provides the ability to cancel plans, enroll in new plans or to update plans (if enrolling in a new plan or updating an enrollment in a plan, the participant is taken to a separate screen to select the appropriate plan, coverage level, dependents and provider) ○ For work and life events, provides a custom

#	Activity	Description	Dependencies	Uniqueness/Customizations
				process that allows the participant to select an early effective date for the health insurance enrollment/coverage change. The participant is walked through a separate process to elect either an early effective date or to keep the defaulted coverage effective date. If the participant selects the early effective date, they are provided a custom message that advises them to immediately send the employee contribution/premium to the lockbox. The early effective date process is only presented to the participant if at least one regular payroll (e.g., biweekly or monthly) has been processed for the participant's payroll area for the coverage month. Based on the payroll schedule, it's possible the participant could have two different early effective date options (next calendar month or the second calendar month after the month of hire)
10.56	Confirmation Statements	The Confirmation Statements screen allows the participant to access their health and insurance confirmation statements for prior election changes. The screen contains all confirmation statements starting with calendar year 2011 and will house up to 7 years per participant (starting with 2011)	Participant must have completed at least one health and insurance enrollment change since 2011 to have a record in the screen	Separate confirmation statements are presented for each QSC event and each User that completes the event (e.g., if the participant completes an election and the service center completes an election for the participant, two separate confirmation statements are presented). Additionally, one confirmation statement is presented (last confirmation statement) for the participant's annual Open Enrollment elections, even if the participant makes changes on several different occasions during Open Enrollment. A separate confirmation statement is presented for the Open Enrollment correction period if changes are completed on the participant's behalf during that period Screen includes the ability to select which year the participant wants to view (dropdown box selection). The participant can select the confirmation statement to view (after selecting year) and view the details in PDF for that confirmation statement
10.57	Correspondence History	The Correspondence	User must have been eligible	The screen is used to capture the Document Order Number

#	Activity	Description	Dependencies	Uniqueness/Customizations
		History (located under the Personal Information) screen shows all system generated letters and emails that have been sent to the participant	for health and insurance benefits during part of their employment (from 2004 forward) period/non-active employee period	(spool number), Document ID (type), Description (title), Date Created, Date Sent (fulfilled date), and Order Status (in process or completed). If Document Type starts with an "E" then it was sent by email. If Document Type starts with something besides "E" then it was send by postal mail
10.58	Open Enrollment Daily Report	This report is sent during the Open Enrollment period to provide updates to call volumes, service level and enrollment statistics.	The Daily OE Report is made up of Call Data Roll up reports pulled from Business Objects, some other minor reports in business objects (voice of the customer and top 10 reasons why people, a spreadsheet of return mail data is compiled by OPS, the OE stat reports (Sub-agency, Benefit Plan, Election, and Participant Plan Totals) are generated each night out of SAP during OE.	ZBR_POPULATE_OE_STATS_TABLE (must run before the report program) ZBR_OE_ENROLLMENT_STATISTICS Four different reports are created by Subagency, Benefit Plan, Plan Elections, and Participant Plan Totals. These are formatted into PDF documents and emailed to the operational team for inclusion in the daily report provided to the Department. These jobs are scheduled to run nightly at midnight during OE and the correction period.
10.59	Open Enrollment Rollup Report	This report is sent after the OE correction period to provide a rollup of information from Open Enrollment that includes call volumes, service level and enrollment statistics.	The Open Enrollment Final Rollup Report is made up of the Call Data Roll up reports pulled from Business Objects, some other minor reports in business objects (voice of the customer and top 10 reasons why people, a spreadsheet of return mail data is compiled by OPS, the OE stat reports (Sub-agency, Benefit Plan, Election, and Participant Plan Totals) generated each night during OE and the two movement reports.	ZBR_POPULATE_OE_STATS_TABLE (must run before the report program) ZBR_OE_ENROLLMENT_STATISTICS Four different reports are created Subagency, Benefit Plan, Election, and Participant Plan Totals. These are formatted into PDF documents and emailed to the operational team. These jobs are scheduled to run nightly at midnight during OE and the correction period.
10.60	Open Enrollment	This report is created	It is run after the OE period	ZBR_OE_MOVEMENT_REPORT

#	Activity	Description	Dependencies	Uniqueness/Customizations
	Movement Report	from SAP and details the changes per plan from the current plan year to the next plan year. This report is provided after the open enrollment period is completed and also after the correction period is completed.	ends and after OE correction period ends.	The reports are run for OPS, non-OPS, and COBRA participants by Plan Type. Then the reports are combined together and provided to the Department by Plan Type (10 separate csv files are provided).
10.61	Open Enrollment Stats Sub Agency Report	This report is provided to show the movement "by agency" during the Open Enrollment period. This allows the state to monitor movement within the various agencies during OE.	Report is processed daily during OE.	ZBR_POPULATE_OE_STATS_TABLE (must run before the report program) ZBR_OE_ENROLLMENT_STATISTICS Four different reports are created by Subagency, Benefit Plan, Plan Elections, and Participant Plan Totals. These are formatted into PDF documents and emailed to the operational team for inclusion in the daily report provided to the Department. These jobs are scheduled to run nightly at midnight during OE and the correction period.
10.62	General Benefits Information	The general benefits information link on the health & insurance landing page takes the employee to a separate state website (http://www.myflorida.com/mybenefits/) that contains key health and insurance benefits information for all of the state offered insurance plans	Participant must be eligible for health and insurance benefits to access the health & insurance landing page	N/A
10.63	Insurance Companies	The insurance companies' link on the health & insurance landing page takes the employee to a separate state website	Participant must be eligible for health and insurance benefits to access the health & insurance landing page	N/A

#	Activity	Description	Dependencies	Uniqueness/Customizations
		(http://www.myflorida.com/mybenefits/) that contains the insurance contact information for the state offered insurance plans		

10.64	Benefits Eligibility Key Information Screen	The benefits eligibility key information screen is used to present the infotype PA9302 (Benefits Eligibility Key) core information to the state Users in the People First portal	Participant must have at least one PA9302 (Benefits Eligibility Key) record for the screen to be populated	The benefits eligibility key information screen includes the following core elements from the employee's PA9302(Benefits Eligibility Key) infotype records:
				• Screen combines history for the employee based on the employee's central ID (CP), showing all PA9302 (Benefits Eligibility Key) records under each employee ID (PERNR)
				• Overview section includes the employee ID (PERNR), effective date, end date, continuous employment date for health and insurance benefits, measurement date (start date) and measurement type
				• Details section includes the employee ID (PERNR), effective date, end date, continuous employment date for benefits, measurement date (start date) and measurement type, benefits eligibility, ineligibility reason, estimated weekly hours, measured hours, measured weekly hours and measured weekly total hours (all employee IDs)
				  ○ Custom People First portal coding is used to transpose the measurement type into plain language text:
				    ▪ IN – Initial
				    ▪ NB and NO – New Hire
				    ▪ OB and OO – Open Enrollment
				  ○ Custom People First portal coding is used to transpose the ineligibility reason codes into plain language text:
				    ▪ EE – Elig on Diff OPS
				    ▪ EF – Elig Salaried ID
				    ▪ IF – Elig Salaried PT ID
				    ▪ IH or MO – Insufficient Hours

#	Activity	Description	Dependencies	Uniqueness/Customizations
				▪ SE – Seasonal ▪ ST – Short-term Apt (short-term was removed with the 10/2/15 release and is only available in the back-end GUI screens on records created prior to this date) ▪ TE – Employee is Inactive • Screen is view only, all updates are performed by the various PA9302 build programs based on a PAR being processed or an appointment action being received on the BNI_001 interface file; service center staff can update the PA9302 directly in SAP GUI; once updated, the changes are displayed in the benefits eligibility key information screen
Human Resource Administration – Personal Information				
11.1	Personal Information (infotype PA0002)	The Personal Information record is used to store key personal information for the employee (SSN, date of birth, gender, security indicator, etc.)	Employee must have either existed in the legacy HRIS and have been converted over into People First, or the employee must have been hired into People First subsequent to conversion	Majority of fields are created when an initial appointment PAR is completed for the employee. The screen is mainly view only and contains the following fields: • Effective Date (calendar selection functionality) • End Date (calendar selection functionality) • Last Name (read only, free form field can only be updated during the initial appointment PAR or by completing a name change PAR) • Middle Name (read only, free form field can only be updated during the initial appointment PAR or by completing a name change PAR) • First Name (read only, free form field can only be updated during the initial appointment PAR or by completing a name change PAR) • Title (read only, drop down menu selection can only be updated during the initial appointment PAR or by completing a name change PAR) • Nickname (free form, can be edited with direct entry) • Publish Nickname (check-box, once selected, information from this field is sent in place of first name through interfaces such as 411)

#	Activity	Description	Dependencies	Uniqueness/Customizations

				• Suffix (read only, free form field can only be updated during the initial appointment PAR or by completing a name change PAR)
				• Full Name (populated based off of entries in the other name fields)
				• Gender (entered during initial appointment PAR for employee and is not editable from any point forward; updates can only be made by the service center)
				• Social Security (entered during initial appointment PAR and can only be updated if an PAR action of "SSN Correction" is completed)
				  ○ Access to the SSN is limited to security role codes A, C, E, G, H, K, N, S, U, V, X and Y only
				• Date of Birth (entered during initial appointment PAR for employee and is not editable from any point forward; updates can only be made by the service center)
				• Personal Indicators are custom fields and include the following:
				  ○ Sworn/Certified (driven from the employee's position)
				  ○ Restricted Employee (driven from the employee's position)
				  ○ Restricted Relative
				  ○ Protected Identity
				• Access to update personal indicators is assigned to selected security role codes (service center does not have access to update)
				  ○ HR security role codes (A, C, H, K, U, X, Y) are restricted to own agency, with the ability to add all privacy indicators to the employee's record; access is restricted to only being able to remove Restricted Relative and Protected Identity indicators
				  ○ Admin access (Users with S security role code) is statewide for all privacy indicators, but restricted to direct entry only; (service center does not have

#	Activity	Description	Dependencies	Uniqueness/Customizations
				update access) can remove Sworn/Certified and Restricted Employee indicators • Sworn/Certified and Restricted Employee indicators – indicates that the employee actively holds, or has held in the past, a position that protects certain personal information of the employee from disclosure; when either indicator is marked on the employee's current position, the employee's record is systematically marked with the same indicator using a custom nightly batch program; indicators can be added to an employee's record through direct entry with proper authorization (HR and S security role codes), an employee/appointment action or custom nightly batch program. Only super Users (S role code) can remove the indicators • Restricted Relative and Protected Identity indicators – indicates that certain personal and work information of the employee is protected from disclosure and can be added or removed through direct entry (HR and S security role codes) or an employee/appointment action with proper authorization When name fields are created, the system updates the characters to be uppercase for Last, First, Middle and Nickname The screen allows for multiple Personal Information records, but only one active record. If a record is created with a date prior to the initial record entered, the new record will overlay the previous record The initial record is created with DOB as the effective date. When updating a record through edit mode, a new begin date can be specified. When an appointment PAR action is created, a new effective date is created with the same effective date as the PAR action with an end date of 12/31/9999. Changes made are copied to all employee IDs

#	Activity	Description	Dependencies	Uniqueness/Customizations
				the employee has

11.2	Contact Information (infotype PA0006 (Addresses), subtypes 01, 03, 10 and NOTF)	The Contact Information screen captures employee home, mailing and notification email. Updates can either be completed through direct entry, or by completing the address verification process	Employee must have either existed in the legacy HRIS and have been converted over into People First, or the employee must have been hired into People First subsequent to conversion	• The Contact Information screen combines the following all the subtypes for infotype PA0006 (Addresses) into one screen:
				  ○ Home Address (subtype 01)
				  ○ Mailing Address (subtype 03)
				  ○ Notification Email (custom subtype NOTF)
				  ○ Benefit Address (custom subtype 10) – not visible on the contact screen
				• Changes made to any address types are copied to all IDs the employee has
				• The overview section shows the active records for the employee. The employee can select to view or update the applicable record. When an active record is updated, a new record is created using the system date and the previous record is saved as an historical record
				• The effective date for all address types is populated with the system date and cannot be edited
				• The end date for all address types is populated and cannot be edited; for an active record, the end date populates with 12/31/9999; for a historical record, the end date populates with the day before the end date of the new record
				• Custom error messages are presented to the User if invalid values are entered or any of the business rules are not met for the address type being entered
				• In addition to updating the home and mailing address records as part of direct entry and the address verification process, these addresses are updated (formatted, changed or created) through the address scrubbing process
				
				Historical records:
				• can be viewed by selecting the record type and selecting the history option

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• when the active record is updated, a new record is created and the old record is end dated the day before the effective date of the new record Required Fields for Home Address: • Effective Date – the system date is populated as the effective date; the only way to enter an earlier address is by completing an appointment PAR. During an appointment PAR the home address can be backdated • End Date – auto populates as 12/31/9999 for active record • Address Line 1 – free form field; limited to 30 characters; when record is saved, the system updates the characters to be uppercase • Zip Code – based on the Zip Code entered, a custom process pulls the city, state, and county choices that are valid for that Zip Code. Employee can only select these values based on the Zip Code entered ○ the city, state and county choices come from data that is received from the USPS (data is loaded monthly into a custom look-up table) • City – dropdown selection based on the Zip Code entered • State – dropdown selection based on the Zip Code entered • Home County – dropdown choices based on Zip Code entered • Work County – pre-populated based off information on employee's position in Org Management for all agencies, except 4900 (universities) and 9999 (BENO entities) where the county is either pulled from the BNI_001 interface file or is manually added/updated by the vendor on behalf of the agency; value is not editable on the home address screen • Country – pre-populated with US and cannot be

#	Activity	Description	Dependencies	Uniqueness/Customizations

				changed; to capture a foreign address, the employee must contact the service center and the address must be entered directly into SAP
				
				Optional Fields for Home Address:
				• Address Line 2 – free form field; limited to 30 characters; when record is saved, the system updates the characters to uppercase
				• Primary Phone – area code and phone number fields, must be in 555 555-5555 format; must be numeric values only
				  ○ Area Code field requires three numeric characters. Characters can't be 111, 211, 311, 411, 511, 611, 711, 811 or 911
				  ○ Main phone field requires seven numeric characters. Characters can't be 555-0101 through 555-0199, 555-5555, 488-1234 or 555-1212
				  ○ System edit prevents User from entering less than the required number of characters
				• Alternate Phone – free form field; limited to 20 characters
				• Checkbox to indicate mailing address is the same as the home address; when selected, a mailing address record is created using the Home Address information; if there was an active mailing address record, that record is end dated and moved to the history section of the screen
				
				Required Fields for Mailing Address:
				• Effective Date – the system date is populated as the effective date; only way to enter an earlier address is by completing an appointment PAR. During an appointment PAR the home address can be backdated
				• End Date – auto populates as 12/31/9999 for active record
				• Address Line 1 – free form field; limited to 30

#	Activity	Description	Dependencies	Uniqueness/Customizations
				characters; when record is saved, the system updates the characters to uppercase • Zip Code – based on the Zip Code entered, a custom process pulls the city, state, and county choices that are available for that Zip Code. Employee can only select these values based on the Zip Code entered. System edit prevents User from entering an invalid Zip Code • City – dropdown selection based on the Zip Code entered • State – dropdown selection based on the Zip Code entered • Country – pre-populated with US and cannot be changed; to capture a foreign address, the employee must contact the service center and the address must be entered directly into SAP Optional Fields for Mailing Address: • Address Line 2 – free form field; limited to 30 characters; when record is saved, the system updates the characters to be uppercase Notification Email address is not a required address type but if created, the following fields are required: • Effective Date – the system date is populated as the effective date and is not editable • End Date – auto populates as 12/31/9999 for the active record • Notification Email – free-form must be entered twice and must match or the system will present an error message requiring the User to correct before saving. When record is saved, the system updates the characters to be uppercase Optional Fields for Email Address: • Check box which requests correspondence that is

#	Activity	Description	Dependencies	Uniqueness/Customizations
				sent to the notification email to also be mailed to the mailing address ○ When there is an existing Email address, User can select the Stop Email button to delimit the record. The record will become a historical record only and no Email will be shown in the overview. After selecting the Stop Email button, the User is presented with a warning message and must select the Save button in order to complete the process
11.3	Driver's License (infotype PA9000)	Driver's License screen is used to track an employee's Driver's License active status. If the employee's position requires the employee hold an active Driver's License alerts are sent to the employee's manager to ensure this information is captured	Individual must be an active employee to have an active record	• If the employee's position is coded as requiring a Driver's License in Org Management, the manager will receive alerts until the record is updated with a valid license expiration date • If the employee's Driver's License type that is entered does not match the type entered on the employee's position, the manager will receive alerts until the record is updated Required Fields: • Lic. Issue Date (calendar selection functionality) • Lic. Exp. Date (calendar selection functionality) • License Number • Licensing Country (codes selected with lookup list) • Issuing State (codes selected with lookup list) • License Class (State must first be selected, codes selected with lookup list dependent on State selected) Optional Fields: • The following fields are view only and were designed to be used with an interface with the Florida Department of Highway Safety and Motor Vehicles; the interface was not implemented • Florida Required Class • Status Code • Status Date

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• The screen allows for multiple license records to be entered with effective date limitations. If a record is created with a date prior to the initial record entered, the new record will overlay the previous record. If the effective date of the new record is after the initial date, a new record will be created, end dating the previous record the day before the effective date of the new record • Changes made are copied to all employee IDs the employee has. When creating an initial Driver's License record, the effective date is pre-populated with the current date and end date is not pre-populated. Both can be updated with no limitations except the end date must be after the effective date
11.4	EEO-Veteran (infotype PA0077)	The EEO-Veteran screen is used to track the employee's EEO elections (e.g., race, ethnicity) and the employee's military status (veterans 100A and current)	Individual must be an active employee to have an active record	Allows Users to maintain EEO/Veteran information. Information is used when completing federal reporting requirements using the following fields Required Fields: • Effective Date – calendar selection functionality; if editing, maintains existing date; if creating, new defaults in the current system date • End Date – calendar selection functionality; defaults to 12/31/9999 • Ethnicity – selected from dropdown list ○ Hispanic or Latino ○ Not Hispanic or Latino • Race – selected from dropdown list, edits are in place to prevent a selection of anything other than blank if "Hispanic or Latino" is selected for Ethnicity, otherwise field is required ○ White ○ Black or African American ○ Asian ○ American Indian or Native American ○ Native Hawaiian or Other Pacific Islander

#	Activity	Description	Dependencies	Uniqueness/Customizations
				◦ Some Other Race or Two or More Races • Vets 100A Reporting – allows for multiple selection, edits in place to prevent not applicable and another selection at the same time ◦ Not Applicable ◦ Disabled Veteran ◦ Armed Forces Service Medal Veteran ◦ Recently Separated Veteran ◦ Other Protected Veteran • Military Status – when creating a new record, not applicable is defaulted and allows for multiple selection, edits in place to prevent not applicable and another selection at the same time ◦ Not Applicable ◦ Veteran/Retired Military ◦ Current Member of the Reserves ◦ Current Member of the National Guard The screen allows for multiple EEO/Veteran records to be entered with effective date limitations. If a record is created with a date prior to the initial record entered, the new record will overlay the previous record. If the effective date of the new record is after the initial date, a new record will be created, end dating the previous record as the day before the effective date of the new record. Changes made are copied to all employee IDs the employee has
11.5	Emergency Contact (infotype PA0006, subtype 05)	The Emergency Contact screen is an optional screen that is used to identify a contact(s) for the employee that can be notified in the event of an emergency	Individual must be an active employee to have an active record	The Emergency Contact information is stored as a part of the addresses (infotype PA0006, subtype 05) Required Fields: • Effective Date – calendar selection functionality; if editing, maintains existing date; if creating new, defaults in the current system date • End Date – calendar selection functionality; defaults to 12/31/9999 • Name – free form direct entry; when record is saved,

#	Activity	Description	Dependencies	Uniqueness/Customizations
				the system updates the characters to be uppercase • Phone 1 – free form direct entry • Relationship – free form direct entry Optional Fields: • Street Address 1 – free form direct entry • Street Address 2 – free form direct entry • City – free form direct entry • State – states selected with predetermined drop-down list • County – county selected with predetermined drop-down list of Florida counties, if state selected outside of FL, then only "county in XX" is available. "XX" is the selected state. • Zip – free form but requires length to be exactly a 5 or 10 digit zip code • Country – codes selected with lookup list • Phone 2 – free form fields with separate fields for area code and phone number • Pager – free form fields with separate fields for area code and phone number • Pager ID – free form field Changes made are copied to all employee IDs the employee has The screen allows for multiple emergency contact records to be entered with no effective date limitations

11.6	Employee Education (infotype PA9009)	The Employee Education screen is used to capture the employee's level and field of education	Individual must be an active employee to have an active record. Inactive employees can be updated as well	• Custom screen that captures employee education using the following required fields:
				    ○ Effective Date – calendar selection functionality; if editing, maintains existing date; if creating new, defaults in the current system date
				    ○ End Date – calendar selection functionality; defaults to 12/31/9999

#	Activity	Description	Dependencies	Uniqueness/Customizations
				◦ Educational Level Type – codes selected with lookup list ◦ Major Type – codes selected with lookup list • The screen allows for multiple education records to be entered with no effective date limitations • Educational Leave type is determined by a number of different levels (32 total) from one year of grammar school to doctorate and is stored in a SAP standard table • Major types are defined by 130 separate college major selections from a SAP standard table including "not specified" which is used when there is no major to select • All fields are required and the User will receive an error message if a field is not completed when attempting to save
11.7	Employee Languages (infotype PA0024)	The Employee Languages screen is used to capture the languages the employee fluently speaks	Individual must be an active employee to have an active record. Inactive employees can be updated as well	Allows information to be entered for an employee in relation to any language qualifications and proficiencies using the following fields: Required Fields: • Effective Date – calendar selection functionality; if editing, maintains existing date; if creating new, defaults in the current system date • End Date – calendar selection functionality; defaults to 12/31/9999 • Language Qualification (drop-down list with standard SAP selection of 41 pre-defined languages) • Proficiency Level (drop-down list with standard SAP selections of pre-defined levels, e.g. read, speak, read/speak, etc.) The screen allows for multiple employee languages records to be entered with no effective date limitations
11.8	Outside Employment (infotype PA9002)	The Outside Employment screen is	Individual must be an active employee to have an active	Custom screen that captures outside employment using the following fields:

#	Activity	Description	Dependencies	Uniqueness/Customizations
		used to capture any additional employment the employee holds outside of state government	record	Required Fields: • Effective Date – calendar selection functionality; if editing, maintains existing date; if creating new, defaults in the current system date • End Date – calendar selection functionality; defaults to 12/31/9999 • Name of Employer – free form direct entry • Employment Location – free form direct entry • Name of Manager – free form direct entry • Manager's Telephone Number – direct entry but must be numbers • Name of Position – free form direct entry • Approval Date – calendar selection functionality • Approved By – contains name dropdown lookup and populates the approvers' ID. Lookup features include last name, first name, and employee ID • Start Time – lookup with hour format of hours and minutes • End Time – lookup with hour format of hours and minutes • Check box for each day of the week – at least one day must be indicated Optional Fields: • Description (allows User to input summary of outside employment) The screen allows for multiple outside employment records to be entered with no effective date limitations Both the effective date and end date can be updated with no limitations except the end date must be after the effective date
11.9	Professional Licenses & Certifications (infotype PA9001)	The Professional Licenses and Certifications screen is	Individual must be an active employee to have an active record	Custom screen that captures professional licenses and certifications using the following fields:

#	Activity	Description	Dependencies	Uniqueness/Customizations
		used to capture any license (other than Driver's License) and certifications the employee holds		Required Fields: • Effective Date – calendar selection functionality; if editing, maintains existing date; if creating new, defaults in the current system date • End Date – calendar selection functionality; defaults to 12/31/9999 • License/Certification Type – codes selected with predetermined drop-down list • License Number – free form direct entry • Licensing Country – codes selected with lookup list • Issuing Body – free form direct entry Optional Fields: • Description – free form direct entry • Licensing State – codes selected with lookup list If the employee's position is marked as requiring a license or certification on the License/Cert & State Prop screen (infotype HRP9130) in Org Management, the manager will receive notifications until a record is created or until the record is updated with a current effective date The screen allows for multiple license and certification records to be entered with no effective date limitations
Human Resource Administration – Personnel Action Request (PAR)				
12.1	PAR Overview	The PAR is a custom process used by managers and HR personnel to complete appointment, separation and employee actions The custom process includes selecting the type of action	N/A	The PAR is a custom process used to streamline and document the creation and completion of HR actions. The process is built in a step-by-step fashion that guides Users through completion ***PAR Step 1 (PAR Menu):*** The PAR Menu is the initial PAR screen used to select the type of action (appointment, employee action or separation) to begin the PAR process. The PAR Menu also includes all PARs that the User created or has a pending action. Each PAR is shown separately in the

#	Activity	Description	Dependencies	Uniqueness/Customizations
		(appointment, separation or employee action), completing a series of questions that drive the available actions and action reason codes, selecting the action (and when applicable the action reason code), completing a PAR form (employee and salary information), routing the PAR for approval, approving the PAR and acting upon the PAR		different subsections. See the PAR Menu section below for additional details ***PAR Step 2 (Pre-PAR Form Decision Process):*** The Pre-PAR Form Decision Process is a two-step process used to collect key data elements used to drive what actions and action reason codes are presented when completing an action on an employee The process includes: • Custom coding that drives the validity of appointment types, employee actions and separations based on the employee's current employment status (employed, previously employed, never employed), current employee group/subgroup and the employee group/subgroup of the position being appointed to, and if the action will result in the employee being dually employed in two positions (results in multiple employee ID assignments) • Smart action/reason customization that display action and reasons based on eight different eligibility rules that have been defined and are table driven Based on the answers provided (effective date, position number being appointed to, employee ID/SSN and whether or not the dual hire check box is selected), the following occurs: • User is provided the valid actions for the selected transaction type (appointment, dual hire appointment, employee action or separation) or • For OPS appointments, the User answers a series of questions and then is provided the valid OPS action • The two-step process ends by selecting the action See the Pre-PAR Form Decision Process section below for additional information ***Step 3 (PAR Form):*** Once the User selects the applicable action and reason code, the User is taken to the PAR Form to

#	Activity	Description	Dependencies	Uniqueness/Customizations
				continue the process of creating the PAR. Required entry on the PAR Form is based on the action type (appointment, separation or employee action). Once the User completes the PAR Form, the User submits the form for routing and approval. See the PAR Form section below for additional information ***Step 4 (PAR Liaison Process):*** Once the PAR is submitted, the PAR liaison is presented a PAR Approval Task on their Home Page to approve the PAR. After navigating to the PAR page, the PAR liaison can approve the PAR and send it back to the PAR creator (User who submitted the PAR Form) to complete, can assign a PAR Interceptor, can reject the PAR, can assign PAR approvers who route the PAR form through the approval process. If the PAR liaison needs to be updated following the creation of the PAR (but prior to the PAR being approved and routed by the liaison), applicable HR Users have the ability to update the PAR liaison. See the PAR Liaison Process below for additional information ***Step 5 (Approval Process):*** Once the PAR liaison routes the PAR Form for approval, the first approver in the process is presented a PAR Approval Task on their Home Page to approve the PAR. Once approved, the approval is moved to the next approver in line and the PAR Approval Task is assigned to the next approver on their Home Page. The process is continued until all approvals have been completed. Each approver has the ability to either approve or reject the PAR. If an approver rejects the PAR, they must enter a reason and the rejection is sent back to the PAR creator and the PAR process is stopped (PAR is not sent to additional approvers). When a PAR is rejected, the PAR creator must acknowledge the rejection and re-initiate a new PAR with the correct information (if necessary). Process steps 1 – 4 above must be completed to re-initiate a new PAR ***Step 6 (Act Upon Process):*** Once the PAR approval process

#	Activity	Description	Dependencies	Uniqueness/Customizations
				has been completed, the PAR Form is routed back to the PAR creator (unless an interceptor had been assigned) to act upon. At this stage, the PAR can be intercepted by other HR role Users who have access to the position for the PAR. The User completing the PAR selects the Act Upon button and completes each infotype that is presented during the PAR flow. The infotypes presented during the Act Upon process are driven off the type of action and action reason being completed. Once the User completes all screens in the Act Upon process, they are taken back to the PAR Form where they select the Complete button to finish the process
12.2	PAR Menu	The PAR menu is the main PAR page that allows Users with the appropriate security role code to: • Select a PAR type to create a PAR request • Access the PAR search screen • Navigate to a PAR form that is ready for approval or they have view access to as the PAR liaison or creator	Access to the PAR tab is dependent on the User's People First security role code and their role based access to initiate a PAR on behalf of both the position and the employee	The PAR menu is a custom screen that provides the ability for a User to initiate a PAR, view the status of PARs in progress, view PARs that are pending their action and to take action on PARs (create, act upon, approve, reject, etc.) The PAR menu screen is broken down into the following sections: • Action buttons – four separate buttons are presented to allow Users with appropriate security (manager, HR or HR liaison) to create an appointment, employee action, separation action or to search PARs within the User's authorization structure • The remainder of the screen is used to present the different PAR statuses for PARs that are in the process of being completed. The PARs in this section are dynamically populated based on the status of the PAR and the PAR stage owner. This section includes the following subsections: o Approved PARs – shows PARs that have been approved and are ready to be acted upon o Pending PARs – shows PARs that are pending an action by either the PAR liaison or an assigned approver o For Your Approval- shows PARs that are pending the User's approval o Liaison PARs – shows PARs where the User is

#	Activity	Description	Dependencies	Uniqueness/Customizations
				the PAR liaison. PARs remain in this section until they have been completed ○ Rejected PARs – shows PARs that were rejected and are ready to have refection acknowledged. Rejected PARs must be acknowledged prior to being removed from this section
12.3	Pre-PAR Decision Process	In an effort to streamline the PAR process and assist managers and HR staff, a custom process was created that collects key data elements that are used to present Users with only valid options for the action based on the effective date, the employee ID and the position entered. The User must complete a custom two-step decision PAR (additional steps for OPS benefits eligibility) process which ends with the selection of the appropriate action and if applicable, action reason	Access to the PAR tab is dependent on the User's People First security role code and their role based access in order to initiate a PAR on behalf of both the position and the employee A PAR liaison must be assigned for the organization in which the User belongs to prior to being able to create a PAR	The decision process is supported by a customized screen that is used to gather the key information required to present only valid selections for the PAR action and action reason The first step within the screen is used to capture the following information: • Appointment Actions – the effective date of the action, the position ID being filled (for appointment actions), either the employee ID or SSN of the User the action is being completed on and if applicable, the dual hire indicator • Employee Actions – the effective date of the action and the employee ID the action is being completed on • Separation Actions – the last day employed and the employee ID the action is being completed on • Within this step the User can perform the following searches: ○ Appointment – search for position number and employee ID ○ Employee and Separation Actions – search for employee ID The second step within the screen is used to capture the action/action reason. For OPS appointments (employee group 4 and 5), it is also used to capture the key OPS information required for health insurance eligibility determination: • Action Type – required selection for appointments, employee and separation actions; values available for selection are systematically filtered based on the data entered in the first step • Action Reason – required selection for employee and

#	Activity	Description	Dependencies	Uniqueness/Customizations

				separation actions, not available for appointment actions
				• OPS Questions – the following are presented for OPS appointment actions (does not apply for employee or separation actions)
				  ○ *Estimated Hours* – required entry for OPS appointments for OPS employees who are either original appointments (not currently an employee) or currently in the new hire (initial) measurement period
				  ○ *Is this a Seasonal Appointment* – required selection; must select either Yes or No. Answer is validated against the positions to validate correct response (see edits below for OPS actions)
				    ○ *Is the employee expected to work more than 90 days* – required selection; must select either Yes or No
				      ▪ If No is selected, the process is completed and the employee’s record for this employee ID is set as not eligible for benefits (infotype PA0171 (Health and Insurance Eligibility) is set to 9999)
				      ▪ If Yes is selected and this is the initial appointment or an appointment after a qualified break in service and the appointment is not seasonal and the estimated hours are at least 30 hours, the benefits eligibility is set to eligible
				      ▪ If Yes is selected and this is a dual appointment and all other appointments are OPS and the employee is in the new hire measurement period as not eligible and this appointment is at least 30 hours, benefits eligibility is set to eligible on this employee ID; If Yes, dual employment, in the new hire measurement period and less than 30 hours for this appointment,

#	Activity	Description	Dependencies	Uniqueness/Customizations
				then an a separate question is presented asking if when considering all employment, the OPS is eligible for benefits. This additional question includes a link that presents a condensed version of the OPS benefits eligibility report for this employee. User must select Yes/No to continue. Response of Yes triggers benefits eligibility while a response of No triggers benefits eligibility to be set to not eligible System edits prevents the User from: • Processing employee and separation actions outside the User's authorization structure • Processing appointment actions for positions outside the User's authorization structure • Using an SSN to create the appointment action (in place of an employee ID) with less than 9-numeric characters • Creating a PAR for their own employee ID or SSN • Continuing to step 2 in the create appointment PAR process without selecting the appropriate employee ID (if the employee has more than one employee ID to reuse) • Entering an effective date that is two pay periods prior to the current pay period • Entering an effective date that is prior to the employee existing in the system • Entering an effective date prior to an existing future dated action effective date • Processing employee or separation actions on an employee ID with a withdrawn status • Processing an appointment where the effective date is prior to the employee being separated • Creating a PAR for a position that is not valid (does

#	Activity	Description	Dependencies	Uniqueness/Customizations
				not contain all infotypes) • Creating a PAR for an employee with a future dated action, leave payout or time entry. Custom OPS specific edits that support the Affordable Care Act prevents the User from: • Creating an OPS appointment PAR when there is an existing PAR in progress for the employee • Not entering estimated hours • Creating a seasonal appointment if the position is not properly coded as seasonal (or appointing an employee as non-seasonal if position is coded as seasonal)
12.4	PAR Form	The PAR form is a custom screen used to capture key information for the completion of HR actions	User must have proper security authorization to the position or employee ID to complete an action To begin creating the PAR form, the User must complete the pre-PAR decision process	The PAR form is a custom screen used to capture data and approval flow for the HR action. Once created and submitted for approval, each PAR is assigned an individual PAR number which is displayed and can be used as a reference for future search • The form is pre-populated with select information based on the pre-PAR decision process (from and to position information, employee information (varies by action type), from salary (if employee is active). No effective date limit for future dated actions • The selected action and action reason code drives what data can be updated on the PAR form. For example, the employee name and SSN are only editable for an initial appointment action or by processing a specific name change or SSN correction PAR. Only appointment and pay change actions allow for salary and pay additive updates. Only appointment and pay change (FTE Increase or FTE Decrease reason codes) allow a change in employee FTE. If increasing or assigning a pay additive through a pay change PAR, a separate PAR for each pay additive is required (refer to the Org Management section for information on pay additives). Each pay additive has its own pay change reason code

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• On all PAR forms, a justification section is available for update during the PAR creation. A comments/notes field is also available and can be updated at any time (even after the PAR is in a completed status) • Once the User populates all the information on the PAR form, it can be validated by selecting the check entries button. If areas need to be corrected, warning and/or error messages are provided • Once all information is complete, the User enters their password and selects the submit button; when the submit button is selected, the same edits are applied as when check entries is selected • At any point after the PAR has been submitted, but before it has been acted upon, the creator, liaison, approvers, or anyone able to intercept the PAR has the ability to cancel the PAR by entering their password and choosing the cancel button ○ A note is systematically entered in the notes section indicating the PAR has been canceled • All information on the PAR form is static and cannot be updated once the PAR form is created and submitted for approval. The only exception to this is the effective date which can be updated for all actions except OPS appointment actions, when selecting act upon. Once the PAR is acted upon, the effective date can no longer be updated without contacting the service center; the Notes/Comments field can be updated regardless of the PAR status (draft, pending approval, completed, etc.) • The PAR form contains a print feature which exports the PAR form to an Adobe file that is formatted to fit to one page horizontally, with the majority of PARs printing to one page (unless there is a large amount of comments/justification). • For OPS appointment actions, all information is static and cannot be updated. If updates are required, the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				User must cancel the PAR request and re-initiate with the correct information
12.5	PAR Liaison – Assignment of the PAR Liaison Process	The assignment of the PAR liaison process is used to assign access to perform the PAR liaison routing process (defined below)	Assigned PAR liaison must have a security role code other than "E" prior to being assigned as a PAR liaison Position assigned as the PAR liaison must be an active position within the agency for the Organizational Code/range assigned	• A custom screen allows Users with the appropriate security role code to assign and remove liaison rights • The PAR liaison process includes the ability to assign separate PAR liaisons per organizational unit and/or organizational range(s). HR role code Users of A, H and X can assign the PAR Liaison by searching for and selecting the applicable employee (must be within the same agency) for each organizational unit or range. The assignment of the PAR liaison is by employee ID. The position holder is assigned the applicable liaison rights. Liaison assignments cannot overlap organizational ranges. The same liaison can be assigned to multiple ranges • Once the organizational range is assigned to a position, the holder (employee) of the position is established as the PAR liaison for that organizational range. Any User creating a PAR with that organizational range assigned to the position will be routed to the assigned PAR liaison
12.6	PAR Liaison Routing Process	The PAR liaison process is a custom process that is used to route the PAR through the approval process	PAR form must have been submitted for routing	• The assigned PAR liaisons are responsible for assigning the approvers to each PAR (0 minimum (PAR Liaison can act as ONLY approver), 10 maximum). The PAR is submitted to the next approver in the process • Approvers can be assigned to any User that has a security role code other than "E" • The PAR liaison has the ability to replace the PAR approvers once the PAR is in the approval process. If other updates are needed, the PAR must either be cancelled by the requestor or rejected by the liaison or approver, and a new PAR request created. If a PAR is rejected by an approver, a reason must be provided • HR Users have the ability to take over the PAR liaison process in the event the assigned PAR liaison is not available

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• HR users have the ability to reassign the designated PAR liaison for individual PAR forms. This gives the newly assigned PAR liaison access to this PAR form only to assign approvers. All associated PAR liaison tasks associated with the PAR are reassigned to the new PAR liaison for this PAR only
12.7	PAR Approval Process	The PAR approval process is used to obtain all appropriate approvals prior to the PAR being acted upon and completed. The PAR approval process is routed sequentially to each approver based on the sequence assigned by the PAR liaison for that PAR	The User must be assigned as a PAR approver	• At each approval, the PAR form is systematically date and time stamped and presented on the PAR form showing when each approval occurred • At each step in the process the responsible party (either liaison or approver) has the ability to either reject or approve the PAR (which is notated on the form), but does not have access to change the data contained on the PAR form. Once the PAR is approved (in order as assigned by the PAR liaison), it is returned to the creator or assigned interceptor to act upon and complete • If the final approver has intercept access, they can select the act upon button which completes the approval and navigates them to the act upon process
12.8	PAR Interceptor Process	The PAR interceptor process is used to allow Users to complete a PAR on behalf of the original creator	PAR must have been created, approved by all assigned approvers and not acted upon. The Interceptor must have HR security authorization for the position or been previously assigned as the interceptor on the PAR	This feature allows an HR User to act upon approved PAR within their security access that they did not create. Once intercepted, the PAR act upon process applies. The PAR form is notated with the interceptor’s name, position, and time stamped once intercepted Interceptors can also be assigned during the PAR liaison routing process (as part of assigning approvers) or during any step of the PAR process, except during the create and approval steps (HR users can make the update during the approval process). Once the Interceptor is assigned, the interceptor’s name and position information will appear at the bottom of the approvers list. The original PAR creator will no longer have any additional actions in their PAR menu or tasks assigned to their People First home page as these will be reassigned to the interceptor
12.9	PAR Act Upon Process	The PAR act upon	PAR must be in approved	• Once the act upon button is selected, the User is

#	Activity	Description	Dependencies	Uniqueness/Customizations
	(Combined infotypes PA0000 (Action History, PA0001 (Organizational Assignment), PA0002 (Personal Information))	process is used to apply the requested changes to the employee's record. The PAR action type determines what screens are presented and what infotypes are saved during the act upon process	status	presented with a custom work flow of infotype screens to apply the updates requested from the PAR action. All data contained on the PAR form is locked down and cannot be edited. However, depending on the action, some additional data (e.g., personal information (e.g., name, date of birth), employee home address, W-4, retirement code, appointment status, key service dates, work email address) can be updated and/or are required fields when acting upon the PAR • While the work flow is driven by the type of action selected, all actions begin on a custom summary screen that is a combined presentation of the infotype PA0000 (Action History, PA0001 (Organizational Assignment), PA0002 (Personal Information). For all actions, once the save button is selected on the summary screen, all required infotypes are created, delimited, or displayed for the User to complete. The number of screens presented in the work flow is driven by the action type. For example, appointment actions include 8 screens, while most employee actions only include the summary screen • Additional customization is in place to automatically save all screens after the initial summary screen is saved. If the PAR is abandoned and not completed entirely, all defaults are saved based off of selecting save on the initial summary screen. Otherwise any updates completed during the act upon process are saved in place of the defaulted data. Any errors encountered during the saves are captured in a custom table • Once the User completes all screens by either making the appropriate updates and saving or by selecting the next button (does not save any updates), they will then be taken back to the PAR form where they will select the complete button. This will move the PAR to a complete status

#	Activity	Description	Dependencies	Uniqueness/Customizations
12.10	Appointment PARs	Appointment PARs are used to hire employees and to move existing employees between positions within the current agency or between agencies	For appointments, the "to position" must have been created with all infotypes and be active on the requested start date to infinity (12/31/9999) User must have proper security authorization for the to position to complete an action	Custom appointment types (standard SAP appointment types are not used) based off of Florida statute, DMS rule and non-State Personnel System agency business needs are used to complete appointment actions on state employees Appointment Actions (12 total) consist of the following front-end actions. These actions are converted in SAP based on the employee and position criteria, however, the front-end actions and reason codes are displayed in the front-end portal and in the DW (not the backend SAP actions): • Original Appointment (reason codes 58, 61, 64, depending on agency and employee group) • Promotion (reason code 03) • Demotion (reason code 04) • Lateral (reason code 60) • Reassignment (reason code 05) • Reinstatement (reason code 02) • OPS Appointment (hourly employees) • Dual Employment (reason codes 34, 35, depending on employee group) • Legislative Directed Transfer (reason code of blank) For promotion, demotion and reassignment actions, the individual must be an active employee or active within 31 days of separation in employee sub groups 01, 04, 06, 07, or 81-88. For lateral appointments, the employee must be in employee subgroup 01 and must be moving to another employee subgroup 01, 04, 06, 07, or 81-88 position in the same agency Appointment actions are processed using a customized process that is based off of the employee ID and position number entered. Below are the specific breakdowns allowed based off of the employee ID/position: • **Orig Appt – CS & CS Comparable** The system allows selection of this appointment in the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				following conditions: ○ Agency is appointing an employee to a position in employee subgroup 01 (CS), 04 (Contract FTE (Ben El)), 06 (Exempt From CS Florida National Guard (FNG)), or 07 (CS Exempt (Executive Office of the Governor (EOG))) and the employee does not hold a position that has the same employee subgroup as the position being appointed into, on the effective date of the appointment or in the last 31 days before the effective date. This means that it will not be possible to use this action to move an employee from one position to another position with the same employee subgroup (e.g. 01 to 01) • **Promotion, Demotion, Reassignment** The system allows selection of these appointments in the following conditions: ○ Agency is appointing an employee to a position in employee subgroup 01 (CS), 04 (Contract FTE (Ben El)), 06 (Exempt From CS FNG), or 07 (CS Exempt (EOG)) and the employee is holding another position in that same employee subgroup (within or outside their agency) on the effective date of the appointment or the employee has an ID within the last 31 days before the effective date for which the last active position was in the same employee subgroup • **Lateral** The system allows selection of this appointment in the following condition: ○ Agency is appointing an employee to a position in employee subgroup 01 (CS), 04 (Contract FTE (Ben El)), 06 (Exempt From CS FNG), or 07 (CS Exempt (EOG)) and the employee is holding another position in that same employee subgroup (within their agency only) on the effective date of the appointment or the employee has an ID within

#	Activity	Description	Dependencies	Uniqueness/Customizations
				the last 31 days before the effective date for which the last active position was in the same subgroup • **Orig Appt – SES/SMS/Elect/Appt** The system allows selection of this appointment in the following condition: ○ Agency is appointing an employee to a position in SES employee subgroup 08, SMS employee subgroup 09, or an Elected/Appointed Officials employee subgroups (05, 15 or 16) • **Legislative Directed Transfer** The system allows selection of this appointment in the following condition: ○ Agency is appointing an employee to a position in employee group 1 or 2, employee subgroup 04 (Contract FTE (Ben El)), 06 (Exempt From CS FNG), or 07 (CS Exempt (EOG)) and the employee is holding another position in that same employee subgroup (within or outside their agency) on the effective date of the appointment or has a withdrawn status from the same employee subgroup within the last 31 days. The dual hire checkbox has not also been selected • **Appt JAC/SCS/Lottery…** The system allows selection of this appointment in the following condition: ○ Agency is appointing an employee to a position in agency 2100, 2200 or 3600. This only applies to the employee subgroups 31, 33, and 81 - 88 • **OPS Appointment** The system allows selection of this appointment in the following condition: ○ Agency is appointing an employee to an OPS position, employee group 4 (included OPS) or 5 (excluded OPS) • **Dual Employment – FTE Employee** The system allows selection of this appointment in the following condition:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ Agency is appointing to a position in employee group 1 (Included) or 2 (Excluded) and employee has an active employee ID in the system on the effective date of the appointment • **Dual Employment – OPS Employee** The system allows selection of this appointment in the following condition: ○ Agency is appointing an employee to a position in employee group 4 (included OPS) or 5 (Excluded OPS) and employee has an active employee ID in the system on the effective date of the appointment • **Reinstatement** The system allows selection of this appointment in the following condition: ○ Position is in employee subgroup 01, 04, 06, 07, 31, 33 or 81-88 and the employee is returning to the exact same position and pay cycle that the employee last held, as long as it is within 31 days from the last day the employee held the position, the employee has not held another position since and the employee does not currently hold a position on the effective date of the appointment or in the future If the employee has never been issued a user/employee ID for the hiring agency, the appointment is to the same agency but a different payroll area, or the appointment is a dual hire, a new user/employee ID will be issued to the employee. If an employee ID is available for the employee at the agency, for the same payroll area, the ID is re-used Appointment PARs include the following screens during the act upon process: • Summary Screen –updates to personal indicators are allowed. Employee ID is assigned to Users that have never been issued a User ID, name (populated from the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				PAR from), date of birth, and gender are required • Home Address – editable and required if an active record does not exist. The User acting upon the PAR can create an address or update the home address and select to copy the home address to the mailing address for the employee • Appointment Status Screen ○ Overlap Indicator – check box populated from the PAR form. Required field if the new appointment, when combined with the existing appointment for the same position (different employee), exceeds the total FTE for the position ○ Overlap Date –- when completing a PAR, the date pre-populates based off of appointment date on the PAR. Date is required and is editable during the PAR process (calendar functionality) when the Overlap Indicator is selected ○ Standard appointment status defaults are present depending on the appointment type, employee group and employee subgroup: ▪ When employees are appointed to positions in employee subgroups 01, 04, 06 and 07 (CS and CS equivalents), with an appointment action of Orig Appt – CS & CS Comparable, promotion, demotion, or reassignment, the appointment status defaults to probationary, but updates can be made during the PAR process or through direct entry ▪ When lateral or legislative directed transfer actions are processed, the appointment status is not changed ▪ When employees are appointed to positions in employee subgroups 05, 08, 09, 15, 16, 31, 33 and 81-88 (SES/SMS Elected Appointed and JAC/SCS/Lottery), the appointment status defaults to Exempt

#	Activity	Description	Dependencies	Uniqueness/Customizations
				and cannot be updated to anything other than Exempt ▪ When employees are hired in an OPS position, the appointment status defaults to the status that matches the position's employee subgroup information, but updates can be made during the PAR process or through direct entry ○ Probationary Start Date – populated with the effective date of appointment when the appointment results in an appointment status of 02 (probation), otherwise blank ○ Probationary Extension Date – no default but editable ○ Effective Date – populated based off of the PAR effective date ○ End Date – populates with infinity date except when appointment status is 02 (probation). When appointment status is 02 (probation), the date populates with the applicable expiration date ○ Appointment Expiration Date – if appointment status is 02 (probation), field populates with probation start date plus the number of probationary months on the position minus one day. Otherwise 12/31/9999 ○ Once the appointment status screen is saved with an appointment status of 02 (probation), a second record will automatically be saved for the permanent record effective the day following the appointment expiration date • Dual Employment Screen (only presented for dual employment appointment actions) – no defaults during PAR process • Key Service Dates – only valid for employee groups 1 and 2 ○ State Hire Date – for new hires, the effective date of the appointment. For employees with multiple

#	Activity	Description	Dependencies	Uniqueness/Customizations
				employee IDs, the oldest state hire date for all key service dates records on the effective date of the appointment date ○ Agency Hire Date – first day the employee is hired into an agency or the effective date of the appointment, after a 31 day gap in employment within that agency ○ Continuous Service Date – the date the employee has been continuously employed in a salaried position without a 31 day break in service, otherwise the effective date of the appointment ○ Creditable Service Months (disabled at all times) - calculated based off of leave accrual service date ○ SES/SMS Leave Accrual Date (applies to SES/SMS (employee subgroups 08, 09, and 16) and Lottery Executive (employee subgroup 33) service positions only) – defaults to the date the employee is appointed to a SES or SMS position without a break in SES/SMS service (does not include CS positions) or to a Lottery Executive service position without a break in Lottery Executive service. The following edits are in place: ▪ The date is not changed if the employee moves within SES/SMS or within Lottery Executive service without a 31 day break in service ▪ If the employee moves outside of SES/SMS or Lottery Executive service, a new SES/SMS leave accrual date is assigned when employee is appointed back to SES/SMS or Lottery Executive service, unless the move is within 31 days ▪ If the employee moves from SES/SMS to Lottery Executive service or from Lottery Executive to SES/SMS, a new SES/SMS leave accrual date is assigned

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ CS Continuous Service Date (applies to CS positions only) – defaults to the date of the appointment unless the employee has been continuously employed in a CS position without a 31 day break in service ○ Leave Accrual Service Date – the first day an employee is originally appointed to a leave accruing position or an adjusted date if the employee has a break in service ▪ The date is used to reflect the total months that corresponds with the leave accrual rate for which the employee is eligible ▪ The leave accrual service date drives the creditable service months ▪ The date would need to be adjusted by an HR User (A, H, U, X or Y) for any break in service. For example, if an employee was originally employed with the state from January 1, 1980 through December 31, 2000, had a break in service from January 1, 2001 through December 31, 2010 and was re-employed with the state on January 1, 2011, the employees leave accrual service date should be adjusted from January 1, 1980, to January 1, 1990, to account for the ten year break in service ▪ Changing the date will cause a re-evaluation of leave accruals for the employee ▪ If the date is changed, the system updates the leave accrual service date on all key service date records for that agency, where the employee is continuously employed (no break in service)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				▪ This field is not visible to the employee ▪ For an existing employee (currently employed), the date is pulled from the employee's current key service date record ▪ For a terminated employee (returning to active status) the date is pulled from the employee's last key service date record ▪ The leave accrual service date must be after or equal to the state hire date o Other Anniversary Date - this date is agency specific and is used for internal agency reporting purposes only o Special Recognition Date - this date is agency specific and is used for internal agency reporting purposes only • EEO/Veteran - no defaults during the appointment PAR unless the employee had a previous record saved. Screen is required • Work Contact Information – work information that contains a view only of the position's work mailing and location information. Work Email is editable but not a required field. Work Email is not defaulted unless the employee has a preexisting Email address for the employee ID being used. If saving the record, effective date (populates as PAR effective date) and end date are editable along with "Don't Publish Email in 411", which eliminates the employee's Email from the file that is sent to 411 • Form W-4 – no defaults during the appointment PAR unless the employee had a previous record saved. Screen is not required • DROP/Retirement – custom defaults based off of position and/or previous retirement code entries: o For new salaried employees (SSN not in system) or dual hired salaried employees, the retirement logic will default based off of the position attributes and employee subgroup the employee is being

#	Activity	Description	Dependencies	Uniqueness/Customizations
				appointed to: ▪ Position is assigned as special risk, retirement code populates as HB ▪ Position is assigned as judge (agency 2200, employee subgroup 05), retirement code populates as HC ▪ Elected Officials (employee subgroup 15 and 16), retirement code populates as HC ▪ Elected State Attorneys (agency 2100, employee subgroup 05), retirement code populates as HH ▪ Senior Managers (employee subgroup 09, 33, 05 (other than agency 2100 and 2200) and employee subgroup 1 for class codes 9675 and 9681), retirement code populates as HM ▪ The retirement code default = HM on the effective date of the action for: • Employee subgroup 84 with an HRP9121.class_code equal to 8819 or 9819 • Employee subgroup 85 with an HRP9121.class_code equal to 4801 or 4803 or 4805 or 4806 or 4809 or 4811 or 4900 • Employee subgroup 87 with an HRP9121.class_code equal to 6900 or 6901 • Employee subgroup 88 with an HRP9121.class_code equal to 5901 or 5909 ▪ For all others, the retirement code populates as HA ○ Employee groups 4 and 5 (OPS employment) populates as ZA (unless agency 2100 or 2200, then defaults to ZZ) ○ When an employee is appointed to a position in

#	Activity	Description	Dependencies	Uniqueness/Customizations
				employee groups 1 or 2 which results in a new employee ID being issued (or reusing an employee ID inactive for 31 or more days), the following custom logic is applied when creating the new DROP/Retirement record: ▪ If employee has a DROP record (active record end date on or after the effective date of the new appointment action), the employee will keep the DROP record regardless of employee movement ▪ If the employee has a retirement record, and the retirement code begins with P, the new record will have retirement code with P and the second value of the code will be populated from the position default ▪ If employee has a retirement record, and the retirement code begins with Q, the new record will have retirement code with Q and the second value of the code will be populated from the position default ▪ If the employee has a retirement record, and the retirement code begins with R, the new record will have retirement code with R and the second value of the code will be populated from the position default ▪ If the employee has a retirement record, and the retirement code begins with U, the new record will have retirement code with U and the second value of the code will be populated from the position default ▪ Employee subgroup 05 (other than agency 2100), 09 and 33, and employee subgroup 1 (for class codes 9675 and 9681), retirement code populates as HM ▪ All other retirement codes will default based off the position data
12.11	Employee Action PARs	Employee actions are	Employee must be an active	Employee actions consist of both standard SAP actions and

#	Activity	Description	Dependencies	Uniqueness/Customizations
		used for all employee activities requiring a PAR (pay changes, leave of absence with and without pay, SSN corrections, Name Changes, etc.) other than appointment and separation actions	employee at the agency requesting the HR action. Actions and reasons are dependent on several different position factors including employee group/subgroup and agency	custom actions. Employee action/reason combination (59 total) consist of: • Suspension – action results in the employee moving to a nonpaying status • Return from Suspension • Leave of Absence With Pay (five separate reason codes) • Return from Leave of Absence With Pay • Leave of Absence Without Pay (Nine reason codes) – actions result in the employee moving to a nonpaying status except when reason of "Military Leave With Pay Supplement" is used. When Military Leave with Pay Supplement is used, the employee is paid the supplement amount entered during the PAR creation each pay period • Return from Leave of Absence With Pay • Pay Change (37 current (additional are inactive) separate reason codes with employee group, employee subgroup, and agency dependencies) • Name Change – new record is created, the existing record is not updated • SSN Correction – new record is created, the existing record is not updated • Employee Sync – used when certain position actions are processed that require an action to update the employee record Customizations are present to ensure only appropriate actions are created for employees. These customizations have been created to manage the actions allowed for employees and to permit manager self-service, eliminating inappropriate action types per State Personnel System rules and Florida Statutes. Customizations are outlined below: • Suspension – no dependencies

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Return From Suspension – no dependencies • Leave of Absence (LOA) with Pay – no dependencies • Return from LOA with Pay – no dependencies • LOA without Pay – no dependencies • Return from LOA without Pay – no dependencies • Pay Change dependencies are in place based off of combination of agency, employee group and employee subgroup and pay additive as well as dependencies that require base rate of pay to increase or decrease based on the pay change reason selected • Name Change – no dependencies • SSN Correction – no dependencies • Employee Sync – no dependencies

12.12	Separation PARs	Separation PARs are used to terminate an employee from a state agency. In order to effectively allow agencies to manage employee information, terminations are processed by each agency even if the termination results in the employee moving to another state agency	Employee must be an active employee at the agency requesting the HR action. Separation reasons are dependent on several different position factors including employee group/subgroup. Edits are in place to prevent the creation, or acting upon a separation PAR if the employee has a future dated action, time entry or leave payout.	Separation actions are grouped in voluntary and involuntary actions types. All separation types are available for use unless notated below:
				
				Separation actions consist of:
				• Voluntary – action code 06, contains seven separate reason codes
				  ○ Move to Private Sector (reason code 51)
				  ○ Move Within St of Florida Gov (reason code 52)
				  ○ Other (reason code 53)
				  ○ Retirement (reason code 56) available to employee groups 1 and 2 only
				  ○ End of Appointment Period (reason code 58)
				  ○ Abandonment (reason code 62)
				  ○ Move to Non St of Florida Gov (reason code 63)
				
				• Involuntary – action code of 23, contains seven separate reason codes
				  ○ Failed Probationary Period (reason code 55) available to employee subgroups 01, 07, 31, 81-85; only if current status is probationary
				  ○ Layoff (reason code 57) available to employee

#	Activity	Description	Dependencies	Uniqueness/Customizations
				subgroups 01, 07, 31, 81-85; ○ Dismissal (reason code 59) ○ Death of Employee (reason code 60) ○ Death of Employee Line of Duty (reason code 61) ○ Dismissal – Emp Also Retires (reason code 64) available to employee groups 1 and 2 ○ Legislative Directed Transfer (reason code 65) available to employee groups 1 and 2 Voluntary separation actions are initiated by the employee. Involuntary separation actions include actions either initiated by the employer or by a natural event (death). Separation actions trigger various system evaluations and batch processes. Some examples of these processes include: • If action 06 with reason of 56 or action 23 with reason of 64 (reason of retirement) is the identifier for the batch program (retiree sweeper program) to pick-up the record and create a separate retiree ID and complete the retirement action, linking the ID to the agency the employee retired from • If not holding another benefits eligible position, triggers eligibility for the creation and mailing of fulfillment documents (e.g., COBRA) • be completed mid period based off of the last day employed that is entered during the separation action • Automatically ends recurring pay deductions • Availability to transfer leave across employee IDs (refer to leave transfer) • Availability to initiate leave payouts Separation actions contain the following screens: • Summary Screen (no updates available) • Home Address (editable) • Key Service Dates - during a separation PAR action for all employee IDs separating from a position in

#	Activity	Description	Dependencies	Uniqueness/Customizations
				employee group 1 or 2 (Included, Excluded), the system will delimit, as of the last day employed, the key service dates record which is valid as of the last day employed on the PAR. The system will also create a new key service dates record effective the day after the last day employed with an end date of infinity where the fields will be copied from the previous record (the record now delimited) with certain dates pre-populated based on the reason for the separation. The behavior for the fields last day employed, date of death and date of retirement are detailed below: ○ Last Day Employed – the date will always be the day before the effective date of the employee's separation action. If the value for this field needs to be changed, the User will need to contact the service center to change the action history record to reflect the correct date ○ Date of Death – the field will only be displayed and open for entry (with the last day employed from the PAR defaulted in this field) for separation PARs that have a reason code 60 (Death of the Employee) or 61 (Death of Employee Line of Duty). The system is not capable of determining the actual date of death; therefore the date will need to be verified with a death certificate, and it will be up to the User to update ▪ Upon saving the key service dates record; the system conducts the following edits: • Compare the date of death and the last day employed date. If the date of death is later than the last day employed the User will be presented with a warning message: "Please verify both the Last Day Employed and the Date of Death are correct. Click Save to continue."

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Compare the date of death and the last day employed date. If the date of death is earlier then last day employed the User will be presented with an error message: "The employee's Date of Death must be on or after the employee's Last Day Employed." ○ Date of Retirement –- the field is displayed and open for entry for voluntary separations (06), with reason of retirement (56) separation PARs and is driven by the last day employed. The system will set the value to the first day of the month following the last day employed • Assigned Property (editable but not required)
12.13	PAR Search	From the PAR menu, Users may search and view current and previous PAR submissions by using a combination of search features. Searches can be completed for employees or by date range	A PAR must be created before it can be found in a search	PAR searches can be conducted on all PARs and searches can be filtered based off of the following criteria: • Last Name • First Name • Middle Name • PAR Number • User/Employee ID – can search by either User ID or employee ID. Search returns all results for employee based on the searcher access to the employee and the other filter criteria used • SSN • Agency (only for certain security role codes) • From/To position • PAR Status ○ Submitted ○ Partially Approved ○ Approved ○ Acted Upon ○ Completed ○ Rejected

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ Rejected Acknowledged ○ Completed ○ Effective) From ○ Effective To Multiple filters can be applied. Search results are captured in a list and records must be selected individually in order to be viewed. Search results are limited to 500 records; wild card functionality can be used for all fields except agency, SSN and employee ID/User ID
Human Resource Administration – Work Information				
13.1	Action History (Infotype PA0000)	The Action History screen is used to display personnel actions completed for the employee which are processed through either the online PAR, the BNI_001 Employee Data Interface, mass loads or through direct entry into SAP by the vendor	Employee must have either existed in the legacy HRIS and have been converted over into People First, or the employee must have been hired into People First after conversion	All fields are created when the PAR action is completed. For purposes of administering the State's group benefits program, certain employee segments (not part of the HR enterprise) must be loaded (mass load) based on the BNI_001 program for the employee. The screen is view only and contains the following fields: • Effective Date (based off PAR effective date) • End Date (populates as 12/31/9999 until next action is completed, then is updated to the day prior to the next action effective date unless employee receives an appointment action and new employee ID. When this occurs, separation action for previous ID remains with 12/31/9999) • Action (includes numeric and alpha description based off PAR action) • Action Reason (includes numeric and alpha description based off PAR action reason) • LOA Status (displays if employee is in a Leave of Absence status based off of a PAR action including what action type was used) • Employee Status (Active or Withdrawn) • Position (displays employee's position number and description for selected record) • Agency (displays employee's agency number (OLO

#	Activity	Description	Dependencies	Uniqueness/Customizations
				code) and description for selected record) The screen contains multiple records dependent on the number of actions and additional actions completed for the employee. If multiple actions are processed with the same effective date, the subsequent records are also stored on the additional actions infotype (PA0302, Additional Actions) Each new action is created with a 12/31/9999 end date and is specific to employee ID. Once the next action is completed for the employee ID, the new action will contain 12/31/9999 end dating the previous record with the day prior to the effective date of the new action with the exception of when an employee receives a new employee ID. In that case, the previous ID will maintain the 12/31/9999 end date on the separation history. The record stored on the additional actions infotype (PA0302), when multiple actions are processed on the same day for the same employee ID, does not override the employee status changing action on the PA0000 infotype (Action History) The effective date of a termination action is the first day the employee is no longer active, it is not the employee's last day worked
13.2	Appointment Status Details (Infotype PA9006)	The Appointment Status Details screen is a custom screen used to show key appointment status information and history for the employee	Employee must have either existed in the legacy HRIS and have been converted over into People First, or the employee must have been hired into People First after conversion	The Appointment Status Details screen is a custom screen that displays information entered during appointment and status change PARs. Fields include: • Effective Date (based off PAR effective date) Includes calendar selection functionality) • End Date (populates as 12/31/9999 until next action is completed, then is updated to the day prior to the next action effective date unless employee receives an appointment action and new employee ID. When this occurs, separation action for previous ID remains with 12/31/9999). Includes calendar selection functionality • Shared Indicator – check box that is populated based off of position designation and is view only on this

#	Activity	Description	Dependencies	Uniqueness/Customizations

				screen. Shared employment results in an employee using less than the position's FTE. User has no direct entry access on this screen. To update, must remove the shared indicator from the position
				• Overlap Indicator – check box that is populated from the PAR form. Overlap indicates when multiple employees occupy the position at more than the established position FTE. Overlap is a required field if the new appointment, when combined with the existing position appoint, is greater than the position FTE. Checkbox is maintainable at all times, based on the applicable security role code allowance
				• Overlap Date – date is required (calendar selection functionality) when the overlap indicator is selected. If date format of mm/dd/yyyy is not input, User receives an error message. Field and all other edits to the screen are not successfully saved until date format is corrected
				• Appointment Status – shows the employee's appointment status which is created during appointment (except for lateral and legislative directed transfer actions) and status change PARs. Edits can be made during the PAR process as well as through direct entry (once a record is established). Appointment status codes include:
				  ○ 02 – Probationary
				    ▪ Valid for positions in employee subgroups 01, 04, 06, 07, and 31. The period is no less than 12 months and no greater than 18 and is assigned on the Position Attributes screen (infotype HRP9121)
				  ○ 03 – Permanent
				    ▪ Valid for positions in employee subgroups 01, 04, 06, 07, and 31 once probationary period is successfully completed

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ 09 – Exempt ○ 10 – Trainee – Recruitment ○ 11 – Trainee – Co-Op ○ 12 – Trainee – Vocational Rehab ○ 13 – Trainee – Return to Work ○ 14 – Trainee – Blind Services ○ A – OPS Temporary Appointment ○ B – OPS – Seasonal ○ C – OPS Board Members ○ D – OPS Student Or Graduate Asst ○ F – OPS Part-Time Academic Employment ○ G – OPS – Contracted Physicians ○ I – OPS – Institutional Clients ○ J – OPS – Health Care Practitioners ○ K – Americorps • Status Expiration Date – shows the employee's status expiration date (calendar selection functionality). Date is pre-populated based off of employee subgroup/ probationary period months on position attributes screen when the PAR is acted upon but is maintainable through direct entry • Student Type – drop down selection available when status change or appointment PAR is being acted upon or through direct entry. Selections include: ○ 1 – DCT/CBE ○ 2 – Cooperative Education ○ 3 – Intern ○ 4 – Other High School or Vocational School ○ 5 – Other College • Probationary Start Date – date the employee began the probationary period. For probationary appointments, will populate the effective date of the action. If not on probation, no date is entered. • Probation Extension Date – date is populated by an HR User if probation is extended and must be greater than the current appointment expiration date (calendar selection functionality)

#	Activity	Description	Dependencies	Uniqueness/Customizations

				• The screen contains multiple records dependent on the number of appointment and status change PARs completed for the employee
				  ○ When a probationary record is created, a subsequent permanent record will be created with an effective date the day after the status expiration date of the probationary record
				  ○ The new permanent record will contain a 12/31/9999 status expiration date and end date
				  ○ If an extension date is entered, the subsequent record appointment status details screen effective and status expiration date will be updated to begin the day following the probation extension date

13.3	Assigned Property (Infotype PA0040)	Assigned Property screen is used to track work property assigned to the employee	Employee must be in the system in order to have an active record and must have been assigned property	The Assigned Property screen uses the following fields: **Required Fields:** • Date Assigned (calendar selection functionality) • Date Collected (calendar selection functionality) • Object Type (codes selected with predetermined drop-down with over 150 options) • Quantity (numeric value only) **Optional Fields:** • Tracking Number (free-form field, 20 character max) • Comments (free-form field, 99 character max (only custom field on this screen)) The screen allows for multiple property records to be entered with no date limitations. New records can be entered as well as old records updated. Records cannot be deleted via front-end but can be deleted in SAP Date Assigned is pre-populated with the current system date but can be updated with no limitations except the date collected must be after the date assigned

#	Activity	Description	Dependencies	Uniqueness/Customizations
13.4	Background Check (Infotype PA0028, subtype PA9005)	The Background Check screen is used to track the employee's background completion dates as well as their security check level and reason	I Employee must be in the system in order to have an active record	Custom process to track the background information that includes triggering an alert to the manager when the employee's background check has expired or when rescreening is needed, if required on the employee's position. Alerts are generated 30 days prior to the end date and then each day after the end date until updated. Allows managers and HR staff to track employee background completion as well as when rescreening is due **Required Fields:** • Date Submitted (calendar selection functionality with no default) • End Date (calendar selection functionality with no default; date cannot be before date submitted); this date is used to trigger alerts **Optional Fields:** • Date Completed (calendar selection functionality with no default; date cannot be before date submitted) • Security Check Level - codes selected with predetermined drop-down list with the following options: ○ 0 – No Security Screen Required ○ 1 – State of Florida FDLE Background ○ 2 – National FBI Background • Security Check Reason - codes selected with predetermined drop-down list with the following options: ○ A – Access to abuse records ○ C – Caretaker ○ F – Financial ○ L – Law Enforcement ○ M – Management ○ N – Security check not required ○ S – Sensitive ○ Z – Agency Security Check

#	Activity	Description	Dependencies	Uniqueness/Customizations
				The screen allows for multiple background records to be entered with no effective date limitations
13.5	Background Check – Abuse Case (Infotype PA0028 subtype PA9004)	The Background Check –-Abuse screen is used to track the employee’s background –abuse case completion and end dates	Employee must be in the system in order to have an active record	Custom process to track the background information that includes triggering an alert to the manager when the employee’s background check-abuse case has expired or when rescreening is needed if required on the employee’s position. Alerts are generated 30 days prior to the end date and then each day after the end date until updated. Allows managers and HR staff to track employee background check–abuse case completion as well as when rescreening is due **Required Fields:** • Date Submitted (calendar selection functionality with no default) • End Date (calendar selection functionality with no default, date cannot be before date submitted); this date is used to trigger alerts **Optional Fields:** • Date Completed (calendar selection functionality with no default; date cannot be before date submitted) – The screen allows for multiple background check – abuse case records to be entered with no effective date limitations
13.6	Base Work Schedule Assignment (Infotype PA0007)	The Base Work Schedule Assignment screen is a view only screen that shows the employee’ base work schedule	Employee must be in the system in order to have an active record	The base work schedule assignment is a view only screen that contains the employee’s schedule based off of the information entered for the position shift code and Fair Labor Standards Act (FLSA) work period on the Additional Attributes screen (infotype HRP9122) in Org Management using the following fields: • Effective Date (based off of the effective date from the Additional Attributes (infotype HRP9122) screen in org management or when an appointment action occurs) • End Date (system requires a record valid to the end of time at all times. When a new record is created the old record is end dated the day prior to the effective

#	Activity	Description	Dependencies	Uniqueness/Customizations
				date of the new record) • Work Shift (based off of the shift code from the Additional Attributes (infotype HRP9122) screen in org management) • FLSA/OT Period (based off of the FLSA work period from the Additional Attributes (infotype HRP9122) screen in org management) A PAR action is required only if the base work assignment is being updated from/to blank

13.7	Drop/Retirement (Infotype PA9004)	The Drop/Retirement screen displays the employee's current and historical retirement record	Employee must have either existed in the legacy HRIS and have been converted over into People First, or the employee must have been hired into People First after conversion	Custom screen used to track employee's current and historical retirement status. Customization is in place that creates default logic for the retirement code based off of employee's previous retirement records and position default logic
				
				Required Fields:
				• Effective Date – (calendar selection functionality) if editing, maintains existing date; if creating new, defaults to the current system date
				• End Date – (calendar selection functionality) defaults to 12/31/9999
				• Retirement Code Type – codes selected with lookup list with the following options:
				  ○ DROP – Deferred Retirement Option Program
				  ○ RETR – Standard Retirement Program
				• Retirement Code – codes selected with lookup list dependent on retirement code type selection. Error message is presented if code does not match retirement code type
				  ○ Eight selections when DROP is selected
				  ○ 85 selections when RETR is selected
				
				Optional Fields:
				• Pre-Drop Code – functionality not currently being used
				• Instructional Indicator – checkbox functionality not currently being used

#	Activity	Description	Dependencies	Uniqueness/Customizations
				The screen allows for multiple DROP/Retirement records to be entered with effective date limitations. If a record is created with a date prior to the initial record entered, the new record will overlay the previous record. If the effective date of the new record is after the initial date, a new record will be created, end dating the previous 12/31/9999 record Effective date is pre-populated with the current system date and the end date is populated with 12/31/9999. Both can be updated with no limitations except the end date must be after the effective date. If the end date is populated with something other than 12/31/9999, the employee will not receive payment beyond the end date of the retirement record Employee groups 04 and 05 and OLO 2100 do not allow retirement code ZA, retirement code ZZ is only allowed for these groups
13.8	Drug Screening (Infotype PA0028, subtype PA9002)	The Drug Screening screen is used to track the employee's completion and end dates	Employee must be in the system in order to have an active record	Allows information to be entered for an employee in relation to drug screening dates using the following fields: Custom process to track the drug screen information that includes triggering an alert to the manager when the employee's drug screen is needed, if required on the employee's position. Alerts are generated 14 days prior to the rescreen number of months, based on the date submitted **Required Field:** • Date Submitted (calendar selection functionality with no default) **Optional Fields:** • Date Completed (calendar selection functionality with no default, date cannot be before date submitted) • Rescreen Months (number of months after, completed date, the next screening is needed) • Position Required (checkbox where check equals yes,

#	Activity	Description	Dependencies	Uniqueness/Customizations
				blank equals no); if box is checked, a drug screen is required for the position. Checkbox is view only and maintained on the position record (Infotype HRP9122) The screen allows for multiple drug screening records to be entered with no effective date limitations
13.9	Dual Employment (Infotype PA9005)	View only screen based off of information entered during a dual employment PAR	Individual must be an active employee to have an active record	Custom screen used to capture employee information when dually employed in two separate State of Florida positions using the following fields: **Required Fields:** • Effective Date (based off PAR effective date) • End Date (populates as 12/31/9999 until next action is completed, then is updated based off of the next action) • State Type (codes selected with predetermined drop-down with two options) ○ 0001 – Non-State Personnel System ○ 0002 – State Personnel System • Overtime Code (codes selected with predetermined drop-down with six options) ○ 0001 - Weighted Average ○ 0002 - Highest Rate ○ 0003 - Combined Base/Separate OT ○ 0004 - No OT for Excluded Positions ○ 0005 - No OT for Voluntary Activity ○ 0006 - No OT for Outside of State Personnel System • Primary Position – position number entered during PAR • Approved By – ID of approver notated during PAR process • Approval Date – Prepopulates with PAR date but is editable **Optional Fields (pre-populated based off of other data):** • Primary Manager – populates based off of primary

#	Activity	Description	Dependencies	Uniqueness/Customizations
				position entered • Primary Manager Title – populates based off of primary position entered • Dually Employed Positions – shows the following fields based off of the employee's records: ○ Position Number ○ Position Description (title) ○ Start Date ○ End Date ○ Organizational Unit The screen allows for multiple Dual Hire records to be entered with effective date limitations. If a record is created with a date prior to the initial record entered, the new record will overlay the previous record. If the effective date of the new record is after the initial date, a new record will be created, end dating the previous 12/31/9999 record
13.10	Fingerprints (Infotype PA0028, subtype PA9003)	The Fingerprints screen is used to track the employee's completion and end dates	Employee must be in the system in order to have an active record	Custom process to track the employee's fingerprint information that includes triggering an alert to the manager when the employee's security check has expired or when rescreening is needed if required on the employee's position. Alerts are generated 30 days prior to the end date and then each day after the end date until updated Allows information to be entered for an employee in relation to fingerprint dates using the following fields: **Required Fields:** • Date Submitted (calendar selection functionality with no default) • End Date (calendar selection functionality with no default) date cannot be before date submitted; this date is used to trigger alerts **Optional Field:** • Date Completed (calendar selection functionality with no default) date cannot be before date submitted

#	Activity	Description	Dependencies	Uniqueness/Customizations
				The screen allows for multiple fingerprint records to be entered with no effective date limitations
13.11	Fitness Test (Infotype PA0028, subtype PA9001)	The Fitness Test screen is used to track the employee’s fitness information	Employee must be in the system in order to have an active record	Process to track the employee’s fitness test information that includes triggering an alert to the manager when the employee has information entered for a failed fitness test Allows information to be entered for an employee in relation to their fitness test, dates and results using the following fields: **Required Field:** • Scheduled Test Date (calendar selection functionality with no default) **Optional Fields:** • Fitness Test Type (codes selected with predetermined drop-down with three options) Fitness for Duty ○ Pre-Employment ○ Special Teams • Completed Date (calendar selection functionality with no default) date cannot be before scheduled test date • Test Result (codes selected with predetermined drop-down with two options) ○ Pass ○ Fail • Type of TB Test (codes selected with predetermined drop-down with two options) ○ Annual TB Test ○ Pre-Employment TB Test The screen allows for multiple fitness records to be entered with no effective date limitations The screen allows gaps between records
13.12	Key Service Dates (Infotype PA0041)	The Key Service Date screen displays key dates related to the	Employee must be in a salaried position and must have either existed in the	The Key Service Dates are maintained for employees in employee groups 1 and 2 in order to identify significant service dates. Key service dates are only applicable for time worked in

#	Activity	Description	Dependencies	Uniqueness/Customizations

		employee’s state and agency employment	legacy HRIS and have been converted over into People First, or the individual must have been hired into People First after conversion	a salaried position (CS, SES, SMS, Elected/Appointed and equivalent positions) and excludes time in contract and OPS positions
				
				Users are not able to create a new key service date record through direct maintenance due to the accrual of leave, however current records can be edited by HR Users (A, H, U, X and Y role codes)
				
				Key Service Dates are maintained using the following fields:
				
				Required Fields:
				• State Hire Date – the first day the employee was hired with the State of Florida, regardless of any breaks in service that follow
				  ○ System Edit – prevents the User from entering any key service date prior the state hire date
				• Agency Hire Date – the first day the employee is hired into an agency or the effective date after a 31 day gap in employment within that agency
				  ○ System Edit – prevents the User from entering a date prior to the state hire date
				• Continuous Service Date – the date the employee has been continuously employed in a salaried position without a 31 day break in service
				  ○ System Edit – prevents the User from entering a date prior to the state hire date
				• Creditable Service Months (disabled at all times) – the number of months of creditable service for the employee based on the leave accrual service date. A credit of one month is given for each month with at least one day employed in the month. The field automatically updates when the leave accrual service date is updated
				  ○ The creditable service months is calculated based on the leave accrual service date and the current system date. For future dated records, the system

#	Activity	Description	Dependencies	Uniqueness/Customizations
				calculates the months based on the leave accrual service date and the effective date of the record • SES/SMS Leave Accrual Date (applies to SES/SMS and Lottery Executive service positions only) – the date the employee was appointed to a SES or SMS position or a Lottery Executive service position without a break in SES/SMS service (does not include CS positions) or without a break in Lottery Executive service ○ If the employee moves within SES/SMS or within Lottery Executive service without a 31 day break in service, the date is maintained ○ If the employee moves within the SES/SMS or Lottery Executive service with at least a 31 day break in service, a new SES/SMS leave accrual date is assigned when appointed back to SES/SMS or Lottery Executive service. If the employee moves from SES/SMS to Lottery Executive service or from Lottery Executive to SES/SMS, a new SES/SMS leave accrual date is assigned ○ The date is used to determine when an employee will receive their annual lump sum leave accruals ○ Changing the date will cause a re-evaluation of annual leave and sick leave accruals for the employee. Re-evaluation will only occur for the employee's time worked at the agency in a SES/SMS or Lottery Executive service position without a break in service ○ System Edit – the SES/SMS leave accrual date must be after or equal to the state hire date • CS Continuous Service Date (applies to CS positions only) – The date the employee has been continuously employed in a CS position ○ If the employee moves within CS without a 31 day break in service the date is maintained ○ If the employee moves outside of CS, a new CS

#	Activity	Description	Dependencies	Uniqueness/Customizations
				Continuous Service date is assigned when appointed back to CS, unless the move is within 31 days o System Edit- - the CS Continuous Service Date must be after or equal to the state hire date • Last Day Employed (effective date of separation minus one day) – The date the employee separated employment based off of the employee's action history record. The actual date on the Key Service Dates screen is a calculated date and is not stored in SAP. The field is disabled for all Users and can only be manually updated by the vendor. The date is only displayed if the record being viewed is valid during a time when the employee ID is in a separated status • Date of Retirement – The first day of the calendar month following the employee's last day employed (when a retirement PAR action is completed). The field is disabled for all Users and can only be manually updated by the vendor. The date is only displayed if the record being viewed is valid during a time when the employee ID is in a separated status with a reason of retirement • Date of Death – The date the employee becomes deceased. The date is maintainable but can only be entered if the employee is in separated status with a reason code of death or death in the line of duty. The field is disabled for all Users and can only be manually updated by the vendor. The date is only displayed if the record being viewed is valid during a time when the employee ID is in a separated status with a reason code of death or death in line of duty o System Edit – the date must be on or after the last day worked • Leave Accrual Service Date – The first day an employee is originally appointed to a leave accruing position or an adjusted date if the employee has a break in service

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ The date is used to calculate the total months that determine the employee's leave accrual. ○ If the date is changed, the system updates the leave accrual service date on all key service date records for that agency, where the employee is continuously employed (no break in service) ○ This field is not visible to the employee ○ The leave accrual service date drives the creditable service months ○ The date is manually adjusted by the employee's agency for any break in service. For example, if an employee was originally employed with the state from January 1, 1980 through December 31, 2000, had a break in service from January 1, 2001 through December 31, 2010 and was re-employed with the state on January 1, 2011, the employees leave accrual service date should be adjusted from January 1, 1980, to January 1, 1990, to account for the ten year break in service ○ Changing the date will cause a re-evaluation of annual and sick leave accruals for the employee ○ For an existing employee (currently employed), the date is pulled from the employee's current key service date record ○ For a terminated employee (returning to active status) the date is pulled from the employee's last key service date record ▪ the leave accrual service date must be before or equal to the continuous service date and agency hire date ▪ the leave accrual service date must be after or equal to the state hire date **Optional Fields:** • Other Anniversary Date – This date is agency specific and is used for internal agency reporting purposes only

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Special Recognition Date –- This date is agency specific and is used for internal agency reporting purposes only
13.13	Organizational Work Assignment (Infotype PA0001)	The Organizational Work Assignment Screen displays key organizational and position data for an employee	Individual must be in the system in order to have an active record	Standard screen not maintained via direct entry. Updates are made during PAR actions, batch processes, backend SAP actions or changes in position data such as the position to org unit relationship, position funding that results in cost center update (FLAIR account code) and position to broadband/class The Organizational Work Assignment screen (infotype PA0001) is a view only screen that displays organizational and position data for the employee for the effective date range. The screen contains the following fields: • Effective Date • End Date • Agency (numeric and alpha description) • Sub Agency • Employee Group (numeric and alpha description) • Employee Subgroup (numeric and alpha description) • Class/Broadband • Class/Broadband Description • Position Number • Position Name • Org Code • Org Name • FLAIR Account Code • FLAIR Org Code • Payroll Area • Contract Length (only displayed for employees in agency 4890) • Manager/Direct Supervisor • Time Administrator • Requisition Manager • Time Admin/Req Manger

#	Activity	Description	Dependencies	Uniqueness/Customizations
				FLAIR Account Code is displayed based on looking up the cost center in the ZAD_FLAIR _Accnt custom table and displaying the FLAIR Account Code that is associated with it Org Code is displayed based on looking up the Organizational Code stored in the custom HRP9100 infotype (state Organization Object Maintenance) using the Object ID as the key Position Number is displayed based on looking up the SAP OBJID and displaying the Object Abbr from infotype HRP1000 (Position Object Maintenance) Class/Broadband is displayed based on looking up the SAP OBJID and displaying the Object Abbr from infotype HRP1000 (Job Object Maintenance) Contract Length is only used and displayed for agency OLO 4890 (FSDB); value is maintained through a batch process; the contract length that is displayed is determined by looking up the Inter-Department ID assigned on infotype HRP9124 (Position Funding) and matching it to the Contract Length value that it is associated with on a custom SAP table (ZAU_ANSVH_REF custom table) The Time Administrator, Requisition Manager, Time Admin/Req Manager is custom and is displayed by identifying the administrator of the group that the employee's organizational unit (using the position to Org Unit relationship) belongs to
13.14	Telework/Carpool (Infotype PA9008)	The Telework/Carpool screen is used to track if the employee teleworks or carpools	Employee must be in the system in order to have an active record	Custom infotype that allows information to be entered for an employee in relation to their current telework/carpool status using the following fields: Required Fields: • Effective Date – (calendar selection functionality); if editing, maintains existing date; if creating, the new

#	Activity	Description	Dependencies	Uniqueness/Customizations
				record defaults to current system date • End Date – (calendar selection functionality) defaults to 12/31/9999 Optional Fields: • Carpools checkbox (check indicates yes) • Teleworks checkbox (check indicates yes) The screen allows gaps between records
13.15	Tuition Waiver (Infotype PA9010)	The Tuition Waiver screen is used to track if employee participates in the tuition waiver program	Employee must be in the system in order to have an active record	Custom screen that allows information to be entered for an employee in relation to their current tuition waiver status using the following fields: Required Field: • Effective Date – (calendar selection functionality) if editing, maintains existing date; if creating new, defaults to current system date Optional Fields: • End Date – (calendar selection functionality) defaults to 12/31/9999 • Institution Name – free form field • First Day of Class – (calendar selection functionality) • Waiver Requested For (checkbox indicating semester and input field for year) ○ Fall ○ Spring ○ Summer ○ Year • Preferred Course 1 ○ Course ID - free form field ○ Course Title – free form field ○ Credit Hours – free form field (two digit) ○ Degree (codes selected with predetermined drop-down) • Preferred Course

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ Course ID - free form field ○ Course Title – free form field ○ Credit Hours – free form field (two digit) ○ Degree (codes selected with predetermined drop-down) • Alternate Course 1 ○ Course ID - free form field ○ Course Title – free form field ○ Credit Hours – free form field (two digit) ○ Degree (codes selected with predetermined drop-down) • Alternate Course ○ Course ID - free form field ○ Course Title – free form field ○ Credit Hours – free form field (two digit) ○ Degree (codes selected with predetermined drop-down) • Approved On (calendar selection functionality) • Approved By – employee ID (search by first and last name feature) The screen allows for multiple tuition waiver records to be entered with no effective date limitations
13.16	Work Contact Information (Infotype PA0105, subtype 0010, view only for Infotype HRP9126 (Addresses) subtype LOC and MAL)	The Work Contact Information screen allows the employee’s work email address to be updated and shows work contact information (mailing and location address information) from the employee’s position	Employee must be in the system in order to have an active record	Custom screen that allows a User to maintain the employee’s standard work email address and view the employee’s position location and mailing addresses (Infotype HRP9126, Addresses) information in one location Required Fields: • Effective Date – calendar selection functionality; if editing, maintains existing date; if creating, new defaults to current system date • End Date – calendar selection functionality; defaults to 12/31/9999 for new records • Email Address – free form field with no edits Optional Field:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Don't Publish Email in 411 indicator View Only Field: • Position mailing and location address data – pulled from employee's position addresses (infotype HRP9126, Addresses) All values are displayed based off of the system date. No historical or future dated records are displayed

13.17	Groups	Groups are used to provide additional access for a specific function outside of the normal security role code assignment. Groups are used to provide requisition and timekeeper access to established organizations	Groups must be established with a designated administrator and organizational units assigned to it.
			
			Employee must have the appropriate security role code established prior to being assigned as a group administrator
				The Groups functionality is a custom process developed to give employees in non-HR and non-manager positions access to create and update job requisitions (requisition groups), and to enter and approve timesheet (time groups) or both (requisition and time groups), based on the organizational code(s) assigned to the group
				
				Security for Groups:
				• Employee being assigned as an administrator to a Requisition Group must have an "R" role code established first on the Security screen (infotype HR9105, Security) in Org Management
				• Employee being assigned as an administrator to a Time Group must have an "T" role code established first on the Security screen (infotype HR9105, Security) in Org Management
				• Employee being assigned as an administrator to a Requisition and Time Group must have an "B" role code established first on the Security screen (infotype HR9105, Security) in Org Management
				
				Searching and Editing Pre-Existing Groups:
				• Type of Group to Maintain (drop-down menu):
				  ○ Requisition Groups (access to create and edit advertisements for positions within the established organizational ranges)
				  ○ Time Groups (access to create, edit and approve timesheet information for employees within the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				established organizational ranges) ○ Requisition and Time Groups (access to create and edit advertisements for positions within the established organizational ranges as well the ability to create, edit and approve timesheet information for the same organizational ranges established for the group) • Search for Existing Groups by (drop-down menu): ○ Group Number ○ Group Abbreviation ○ Group Description • Criteria for Searching – based off of the previous two selections, the User enters text in free form prior to selecting the "Search for Existing Groups" button Creating a New Group Required Fields: When creating a group, the type of group must first be selected and then the following fields are completed to create the group: • Abbreviation – free form text field • Description - free form text field • Group Effective Date – (calendar selection functionality) date can only be current system date or future date • Group Administrator – position look up feature where position code and position text can be used to find the appropriate position. Position must have the appropriate role code or the User will receive an error message when trying to create • Administrator Effective – (calendar selection functionality) date can only be current system date or future date Once created, an eight digit group number will be assigned (group number is also displayed on User's position in the object relationships screen (infotype HRP1001, Object Maintenance) in org management) and organizations can be

#	Activity	Description	Dependencies	Uniqueness/Customizations
				assigned to the group. Once organizations are assigned, the group administrator will have access to perform requisition and timesheet edits based off of the group established **Organizations for Group:** The following fields are completed to assign Organizational ranges to a group: • Organization – look-up functionality with org code and org text search features • Effective – (calendar selection functionality) date can only be current system date or future date
Leave and Attendance				

14.1	Timesheet Overview	The State of Florida uses a highly customized timesheet process (state requires positive recording of all time and does not use exception reporting) that is built using the WebDynpro portal solution. Each timesheet is built to enforce the State of Florida's business requirements and support applicable rules, statutes and regulations	Employee must be active in an agency that uses the timesheet process within People First or within 30 days of their last day worked in an eligible position	Timesheet screen is highly customized to include the following user-friendly features for employees and managers:
				• Overview section – list timesheet periods for 18 months back, the current month (timesheet period selected when accessing the screen defaults to the oldest past due timesheet) and at least six months forward (presented by timesheet period – either biweekly, monthly or the extended work schedule); includes both color coding as well as a text description to allow Users to identify the status of each timesheet. The following logic is applied to the color scheme and status:
				  ○ Yellow – timesheet has been submitted for approval
				  ○ Green – timesheet has been approved
				  ○ Orange – timesheet has been unapproved and must be reentered, submitted and approved
				  ○ Red – timesheet has been rejected and must be reentered, submitted and approved
				  ○ Blue – in progress (applies if timesheet entries have been saved, but not submitted; also applies if part of the period has been submitted or approved, but other parts have only been saved)
				• Helpful Links section – includes links to other websites that include useful information for state employees

#	Activity	Description	Dependencies	Uniqueness/Customizations
				(links are maintained in SAP, content is maintained by the State of Florida) • Details section includes: ○ Important information section – includes static language that is presented on all timesheets ○ Error messaging section (titled Employee Timesheet Message Area) – errors are described in the timesheet edits section below ○ Both a timesheet period summary section that presents the total hours recorded (includes time worked and leave used, does not include on call hours) and the total hours scheduled to work and an FLSA hours summary section are presented. The FLSA hours shows the total hours per FLSA period (e.g., 40-hour period or extended work schedule) within the timesheet reporting period (biweekly or monthly) ○ Quick links sub-section – allows Users to quickly navigate to view their leave balances, update their timesheet template, run a report of all timesheet entries for a date range (Timesheet Summary Report) or for leave used for a date range (Leave Audit Report) ○ The following fields are presented per timesheet row: three levels of cost accounting codes (charge objects), hours type, FMLA/FSWP indicator (used when employee is on FMLA or FSWP), separate hours and total fields per day ○ Separate columns are presented for each day in the timesheet period and for total hours ○ Non-Scheduled work days are greyed out (remains editable) to drive the employee to accurate time entry (scheduled work days are shown in white) ○ Comments and Comments History are available; once comments are saved, they are date and time stamped and moved to the comments history field

#	Activity	Description	Dependencies	Uniqueness/Customizations
				and are no longer editable ○ The timesheet defaults in edit mode for the employee; is defaulted in view only mode for all other Users; if the User accessing is not the employee, but has authorizations to maintain the employee’s timesheet, the User must select the edit button to update the timesheet ○ The employee’s scheduled hours are defaulted in the Details section as time worked (hours type 1000). Only exception is for observed state holidays. For state holidays, custom hours type 1005 is defaulted on the employee’s timesheet using the following logic: ▪ Full-time employees – the greater of 8 hours and the employee’s scheduled hours for the day are defaulted ▪ Part-time employees – the hours defaulted are calculated based on the employee’s FTE as follows: 8 hours multiplied by the employee’s FTE (e.g., for a 0.50 FTE employee, 4 hours is defaulted) ▪ If employee is on a 28-day, 168-hour schedule, the hours are defaulted based on the shift assigned to the employee’s position; the shift codes for these employees represent the applicable rotating 12-hour shifts • Action section includes the following: ○ Edit button – available if the timesheet is accessed by the manager or HR User or if timesheet has been submitted (employees can edit a submitted timesheet by selecting the edit button; if the employee edits a submitted timesheet, the timesheet is removed from the manager’s approval queue and must be resubmitted by the employee; once approved, the employee can add time but cannot update the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				hours that were approved) ○ Save button – available when the timesheet is in edit mode; when selected, performs validation edits, prompts the User to correct errors and saves the timesheet ○ Cancel button – available when the timesheet is in edit mode; when selected takes the employee to the previous saved record for the period and deletes any unsaved entries ○ Apply Template button – applies the saved timesheet template to the employee’s timesheet for the selected timesheet period ○ Select Period dropdown – allows for submission or approval (manager or HR staff only) of either the entire pay period or a single FLSA period ○ Check Timesheet button – reapplies all validation edits and applies additional edits to ensure timesheet meets all business rules. If errors exist, User is prompted to fix prior to proceeding ○ Enter Password field – employee is required to enter their password to submit their timesheet; manager/HR is required to enter their password if either submitting or submitting and approving the timesheet for an employee; password serves as a certification that the entry is true and accurate ○ Submit for Approval button – allows the employee to submit their timesheet for approval. Reapplies all validation edits and applies additional edits to ensure the timesheet meets all business rules. Additionally, validates that the employee’s prior timesheet period is approved. If errors exist, User is prompted to fix prior to proceeding ○ Submit and Approve button – allows the manager and HR staff to submit and approve the timesheet in one step. Reapplies all validation edits and applies additional edits to ensure timesheet meets all business rules. Additionally, validates that the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				employee's prior timesheet period is approved. If the prior timesheet is not approved, a warning message is presented to approve the prior timesheet periods before proceeding. However, approvers can select to approve the timesheet. If any other errors exist (other than warning and informational), User is prompted to fix prior to proceeding ○ Approve button – allows the manager and HR staff to approve a submitted timesheet (does not require entry of the approver's password) ○ Reject button – allows the manager and HR staff to reject a submitted timesheet. When selected, the timesheet entries are rejected. The rejected entries are presented on the timesheet screen in a rejected status until the timesheet is resubmitted and approved ○ Unapprove button – allows HR staff to unapprove a previously approved timesheet; button is used when the timesheet requires correction. When selected, the timesheet entries are cancelled. The cancelled entries are presented on the timesheet screen in a cancelled status until the timesheet is resubmitted and approved. Once the timesheet is re-approved, the cancelled entries are no longer displayed on the timesheet (are retained in the database) ○ Within the timesheet, each row that is at least submitted (color does not change if in saved status) is color coded to show the status. The following colors apply: ▪ Yellow – Submitted ▪ Green – Approved ▪ Orange – Unapproved ▪ Red – Rejected
14.2	Timesheet Periods	There are several different timesheet	Employee must be active in an agency that uses the	Separate custom timesheet periods exist as follows: • Standard biweekly timesheet period – 14-day

#	Activity	Description	Dependencies	Uniqueness/Customizations
		periods that are supported within the People First System. Each timesheet period is used to drive specific leave rules (accrual and use), calculate overtime and ensure accurate payments to employees	timesheet process within People First or within 30 days of their last day worked in an eligible position	timesheet used by all biweekly employees who are not on one of the extended schedules listed below; 40-hour included employees can submit their timesheet based on the 7-day FLSA period • Monthly timesheet period – timesheet period consist of the first day to the last day of the calendar month; timesheet is used by all monthly employees who are not on one of the extended schedules listed below; for 40-hour included employees, the timesheet includes the days in the FLSA period that cross from the prior month into the current month and the following month, when the FLSA period crosses months; 40-hour included employees can submit their timesheet based on the 7-day FLSA period • The following extended timesheet periods exist for certain law enforcement and firefighter employees. These schedules are used in place of the standard 7-day, 40-hour FLSA period and are used for overtime eligible employees to offset extra time worked (e.g., double shift) during the FLSA period. Time reporting, overtime and leave accruals are based on the extended work schedule, regardless of how frequently the employee is paid: o 14-day, 80-hour FLSA Schedule o 28-day, 160-hour FLSA Schedule o 28-day, 168-hour FLSA Schedule o 28-day, 192-hour FLSA Schedule Additionally, if an employee changes between FLSA periods or between overtime and non-overtime eligible positions in the middle of the FLSA/timesheet period, the timesheet is split based on each unique FLSA period or overtime eligibility. Edits are applied to each split timesheet separately based on the FLSA period and employee group for each split
14.3	Timesheet Edits	Numerous validation edits exist within the timesheet process to	Employee must be active in an agency that uses the timesheet process within	Validation edits exist at the hours type level (separate edits for accrued leave, administrative leave, time worked, etc.), timesheet day and FLSA/timesheet period level. These

#	Activity	Description	Dependencies	Uniqueness/Customizations
		enforce state business rules	People First or within 30 days of their last day worked in an eligible position	validation edits are applied at various steps within the timesheet process (save, check entries, submit, submit and approve and approve) Edits include the following: • Hours type edits – validates eligibility for use of accrued leave (for example, checks existing balance to ensure sufficient leave); validates eligibility for use of administrative leave (for example, checks employee type and in some cases recent use of that leave type to determine eligibility); only hard stop for administrative leave is the employee type, all other edits present warning and or informational messages; validates eligibility for additional payment types (e.g., on call, call-back, SES Disaster Pay, Regular Comp payable) based on the employee group and sub-group and/or additive flag set on infotype HRP9120 (pay additives) • Daily edits – validates employee does not exceed 24-hours worked in a single day; validates employee does not exceed scheduled hours when using leave; enforces correct use of holiday hours and workers compensation hours • FLSA/timesheet period edits – validates employee does not exceed scheduled hours when using leave in the period (forces offset); checks for duplicate entries (same hours type, with no distinguishing attributes) • Previous timesheet status edit – validates employee's immediate proceeding timesheet is approved prior to allowing submission of the current timesheet period (timesheet must be submitted sequentially; manager and HR staff can override) o Edit is not applied to Department of Lottery • Custom edits are used to force all CS (employee subgroup 01) employees (except employees in the Police Benevolence Association unions) to use all special comp leave (all six leave types) prior to using

#	Activity	Description	Dependencies	Uniqueness/Customizations
				annual leave or regular comp leave. These edits exist to reduce the state's liability and ensure adherence to state leave rules and policies. These edits check the employee's subgroup (e.g., CS, SES), CBU and available leave balances to determine if the employee is required to exhaust their special comp leave(s) prior to using annual leave. As part of the check, the employee's subgroup and CBU are compared to the custom table to determine if the employee is required to use their special comp balances prior to using annual leave. The custom table is configurable for all employee subgroups and CBU combinations (all that could potentially have special comp). Updates to the table do not require a transport to production, but rather is effective upon being updated and is date effective • Additional edits exist to force use of code 0091 (Leave –Special Comp (SC) Holiday) for all timesheet entries for both leave types 0091 vs 0092 (Holiday Special Comp). Use of leave type 0091 on the timesheet deducts the leave from the applicable leave type (0091 or 0092) based on the timesheet date the leave is used
14.4	Timesheet Template	The timesheet template is custom coding that allows employees to create a template of commonly used cost accounting codes and hours types. Once created, the template is applied to the timesheet in a single step, instead of requiring separate entry on each timesheet row	Employee must be active in an agency that uses the timesheet process within People First or within 30 days of their last day worked in an eligible position	Template consists of up to 10 rows and can be applied to a timesheet when in edit mode. When applied, inserts (does not override existing timesheet rows) new rows in the timesheet based on the predefined template. Once applied, employees can edit (change charge objects, hours type, hours) each row accordingly. The template is only created for a 7- day period. When creating the template, the employee does not have to account for hours, only for hours type. When the Apply Template button is selected, the template is applied to all days within the period
14.5	Hours Types	Numerous hours types	Employee must be active in	Review the Timesheet FAQs for additional descriptions for

#	Activity	Description	Dependencies	Uniqueness/Customizations
		exist within the timesheet. Each hours type has separate business rules built into the timesheet. Separate hours type exists for time worked, accrued leave, administrative leave and other leave of absences	an agency that uses the timesheet process within People First or within 30 days of their last day worked in an eligible position	each hours type and the related business rules: http://www.dms.myflorida.com/content/download/65520/280825/
14.6	Mid-Period Changes (PAR, Org Changes)	Changes made mid-period that affects an employee's FLSA period/timesheet period or between overtime and non-overtime eligible positions	Employee moves between FLSA periods or between overtime and non-overtime eligible positions in the middle of the FLSA/timesheet period, the timesheet is split based on each unique FLSA period or overtime eligibility. Edits are applied to each split timesheet separately (refer to Timesheet Periods above)	A PAR action is required to change the Base Work Schedule Assignment via an "Employee Sync" PAR once the position is updated or modified • If the Base Work Schedule Assignment is modified in a way that has an effective date during a pay period (mid-period change), the timesheet will split in order to accommodate the different work schedules • A timesheet split ensures an employee's leave and pay is calculated correctly during the FLSA period • If the employee changes managers in the middle of the period, but does not move from one FLSA period to another FLSA period, both managers can approve the timesheet for the transition period. However, only the previous manager can approve the periods prior to the transition period and only the new manager can approve the periods after the transition period
14.7	Employee Timesheet Approval Screen (infotypes PA2001 (leave) and PA2002 (time worked))	Screen is used to approve employee's submitted time	Employee's timesheet must have been submitted for approval To approve the timesheet, the User must be the employee's manager, upper level manager, an assigned timekeeper or be an HR User in the employee's agency	Overview section – approval period is defaulted based on the employee's pay period, unless the employee is on an extended FLSA period, in which case the employee timesheet is shown by FLSA period for approval. If a manager has employees on multiple pay cycles and or extended FLSA periods, the manager must access each respective timesheet period to approve the applicable employee timesheets Within the Details section, the manager is presented with all employees that reported to the manager for the selected period (period selected in the Overview section). The following

#	Activity	Description	Dependencies	Uniqueness/Customizations
				fields are included in the section: App, Emp ID, Employee Name, FLSA Schedule, Scheduled Hours, Submitted Hrs Worked, Submitted Leave Hrs, Approved Hrs Worked, Approved Hrs Leave, Rejected Hours, Overtime Hours, Hours Missing Each employee record is color coded to show the status of the timesheet. The statuses are: • Blue outline around each hours field – pending employee action (time has not been submitted for approval) • Yellow outline around each hours field – pending approval (time has been submitted for approval) • Blue shaded boxes for each hours field – timesheet is in an approved status Below the list of employees a static message is presented that advises the User if the employee name is in red font the employee had an additional, Extra Pay, approval required by HR If the employee moves from one manager to another manager within the same agency, in the middle of the FLSA period but does not change FLSA periods, both managers have access to approve the timesheet for the period of the move. Only the previous manager can approve time for periods prior to the move and only the new manager can approve time for periods after the move Manager can approve the employee timesheet by checking all employees and selecting the Save button or by checking one employee (or multiple) and selecting the Save button, or by clicking the employee's employee ID and approving from the timesheet details screen The Employee Timesheet Approval screen has specific edits to ensure applicable timesheet rules are met (e.g., employee

#	Activity	Description	Dependencies	Uniqueness/Customizations
				must meet contract hours for the period being approved, or the check box is not opened for approval) Timesheets can be approved by the manager, upper level manager, HR staff or assigned timekeeper When the manager position is vacant, employee timesheets are rolled up to the next level supervisor for approval
14.8	Flexible Work Schedule (infotype PA9470)	A flexible work schedule is required when the employee does not work the standard 8-hours a day (or 6 hours per day if FTE 0.75, 4 hours per day if FTE 0.50 or 2 hours per day if FTE 0.25), Monday – Friday. When created and approved, the flexible work schedule serves as the employee's work schedule for the period	Employee is not working the standard Monday – Friday work schedule	For monthly employees, the flexible work schedule is used in place of the standard payroll contract hours to calculate the employee's contract hours for the monthly payroll. If the employee is part-time, the contract hours are summed during the F0001 program In order to create a flexible work schedule for a mid-period appointment or separation, the PAR action must be completed prior to creating the flexible work schedule The default values in the Flexible Work Schedule screen are populated based on the shift code on the Additional Attributes (infotype HRP9122) screen. Default values are DAY, EVE, NGT, ROT, 8 or 12 (12 is only defaulted if the position is on a shift code that starts with 168_Rel or 168_STD). DAY, EVE, NGT and ROT equal 8 hours for days populated The employee uses the Flexible Work Schedule screen to create a flexible work schedule request. A flexible work schedule request can be created for a single period or for up to 13 months. Once the request is created, the request is sent to the employee's manager for approval. The manager receives an alert advising them of the request pending approval. The schedule is not applied to the employee timesheet until the request is approved The employee's manager, human resource staff and assigned time keeper can create the flexible work schedule request on behalf of the employee. If the request is created on behalf of

#	Activity	Description	Dependencies	Uniqueness/Customizations
				the employee, the request is immediately placed in an approved status (no separate approval is required) Once a flexible work schedule is approved, a reset button is presented to change the employee's schedule back to the Monday – Friday default schedule. The reset button is available to the manager and HR staff. Once selected, the employee's schedule is changed back to the default schedule based on the employee's Position Attributes (approval is not triggered for this request) Specific edits exist within the Flexible Work Schedule screen when creating a request to drive accuracy in scheduled work hours and ensure consistency with timesheet rules: • Edits exist to force the employee to account for all hours in the FLSA period (e.g., 40, 80, 160, 168 or 192) • Monthly employees who are on the standard work schedule are forced to account for 40-hours per week (if part-time, are forced to account for the equivalent hours) • Biweekly excluded employees who are on the standard work schedule are forced to the two week biweekly period when creating a flexible work schedule and not to a single week • For the period of a mid-period hire and termination, the employee can create a flexible work schedule ranging from one hour to the maximum hours for the full FLSA period • Hours for each day in the period are selected from a dropdown to prevent the employee from selecting more than 24 hours for a single day; hours are presented in quarter hour increments • Prevent a flexible work schedule from being created or reset (Reset button) if the employee already has time on the timesheet (saved, submitted or approved) for the period(s)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				Once approved, the flexible work schedule: • Updates the employee's scheduled work hours on their timesheet for the period(s) • Drives the timesheet submission rules for the employee, for the period(s) • Triggers an alert to the employee advising the status of the request (applies if the request is rejected as well)
14.9	Base Work Schedule Assignment (infotype PA0007)	Screen is used to present the employee's work schedule and FLSA period on the employee record	Work schedule must have been assigned to the employee's position	Screen is view only. The base work schedule assignment is pulled from infotype PA0007 (this infotype is updated based on the entries in the Additional Attributes screen on the employee's position (infotype HRP9122)). All updates to the base work schedule assignment must be made on the Additional Attributes screen

14.10	FMLA/FSWP Leave Request (infotype PA0672)	Screen is used to create continuous or intermittent FMLA, FSWP or FMLA/FSWP requests	Employee must be in employee groups 1 or 2 and not in agency 2100 or 2200 and must meet the requirements for the specific administrative leave type to be eligible to use	The employee can initiate an FMLA/FSWP leave request, but the request must be approved by either the employee's manager, HR staff or assigned timekeeper. Once the request is approved, the FMLA/FSWP check box opens up for use on the employee's timesheet for the approved period(s). The absence codes which are identified for tracking the FMLA/FSWP will be counted towards the FMLA/FSWP hours and balances will be calculated accordingly. Alerts are sent to the employee once the manager either approves or rejects the request
				• Details section:
				  ○ FMLA Reason – required field, must select one of the following:
				    ▪ 01 – FMLA- birth or adoption of child
				    ▪ 02 – FMLA- care for a family member
				    ▪ 03 – FMLA-employee with serious health condition
				    ▪ 04 – FMLA/FSWP-birth or adoption of a child
				    ▪ 05 – FMLA/FSWP-care for a family member
				    ▪ 07 – FSWP- birth or adoption of a

#	Activity	Description	Dependencies	Uniqueness/Customizations
				child ▪ 08 – FSWP- employee with serious health condition ▪ 09 – FSWP- non-medical family responsibilities ▪ 10 – FMLA- military caregiver ▪ 11 – FMLA- qualifying exigency ○ Effective Date – (calendar selection functionality) required field; serves as the start date of the FMLA/FSWP period when approved ○ End Date – (calendar selection functionality)required field; serves as the end date of the FMLA/FSWP period when approved ○ Absence Type – required field, must select one of the following ▪ C – Continuous ▪ I – Intermittent ○ Remaining Balance – view only field that is populated once the request it saved and is updated when hours are approved on the employee's timesheet ○ Deduction Period (from and to dates) – view only field that is populated once request is saved ○ Approval Status – view only field that is populated once request is saved, approved or rejected ○ Requester Comments ○ Approver Comments (dynamically displays after the request is approved or rejected)
14.11	Leave Accrual Overview	Rules for leave accruals generally vary based off the type of employee (e.g., CS, SES, SMS, etc.) and the type of	Employee must be in employee groups 1 or 2 and not in agency 2100 or 2200. For employee subgroups 31 and 33, employee must be in	The following general leave processes apply. Additional leave type specific processes are covered under the applicable leave type below: • In all cases, for employees to accrue leave, the employee must be in employee groups 1 or 2

#	Activity	Description	Dependencies	Uniqueness/Customizations
		leave	agency 3100	• For CS (employee groups 1 or 2, employee subgroup 01) and CS equivalent employees (employee groups 1 or 2, employee subgroups 06, 07 and 31), leave is accrued upon approval of the employee's timesheet(s) for the pay period (or FLSA period if the employee is on an extended FLSA period). If the employee's timesheet is approved before the end of the pay period/extended FLSA period, the accrual will not be credited until the last day of the pay period/extended FLSA period. This accrual will not be available for use until the following pay period/extended FLSA period • If timesheets are unapproved and subsequently reapproved, the leave will be reevaluated to generate the correct accrual • For SES (employee groups 1 or 2, with employee subgroup 08), SMS (employee groups 1 or 2, with employee subgroup 09) and SES/SMS (employee groups 1 or 2, with employee subgroups 16 or 33) equivalent employees, accruals for annual and sick leave are accrued in lump sum on the employee's anniversary date
14.12	Time Evaluation	Time evaluation is a custom process used to update the employee's leave balances in near real time to ensure employees have accurate and timely access to their leave balances	Employee must be in employee groups 1 or 2 and not in agency 2100 or 2200 and must meet the requirements for the specific administrative leave type to be eligible to use	The time evaluation process is used to update leave balances in People First and is a completely custom process. The process was customized to trigger as close to real-time updates as possible for negative leave entries. The following apply for this process: • The time evaluation program is broken into several jobs (approximately 15) that run continuously to update employee balances based on time related events (use of leave on a timesheet, creation of a leave adjustment, creation of a leave payout, creation of a leave transfer, etc.) • Negative leave entries and positive leave balance adjustments with a current or retro effective date trigger time evaluation near real time, while positive leave events for accruals and leave transfers) are credited in a nightly batch process (exception -- if the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				employee uses an accrued leave in a timesheet period, the leave accrual for that period is credited near real time and does not require nightly processing) • If the employee is hired back into a leave accruing position, into the same employee ID after a break in service of at least 61 days, the nightly time eval batch process wipes out the employee's previous leave balance upon reappointment • For SES/SMS employees, if an employee transfers between employee subgroups 08, 09 and 16, without experiencing a break in service of more than 31 days and the employee's anniversary date falls within the break in service period or on the day of reappointment, the employee is granted the annual and sick leave accruals upon reappointment (SES/SMS leave accrual date does not start over) • The rules applied for each leave type during the time evaluation process are defined below for each leave type

14.13	Annual Leave	Annual leave is personal leave the employee can use as desired (requires manager approval)	Employee must be in employee groups 1 or 2 and not in agency 2100 or 2200. For employee subgroups 31 and 33, employee must be in agency 3100	Separate rules apply to the number of hours an employee may accrue and the amount of hours eligible for carryover depending on the employee type, as shown below:
				• CS and equivalent employees (employee subgroups 01, 06, 07 and 31) accrue Annual Leave as follows:
				  ○ Leave is accrued upon approval of the employee's timesheet(s) for that pay period/extended FLSA period. If the employee's timesheet is approved before the end of the pay period/extended FLSA period, the accrual will not be credited until the last day of the pay period/extended FLSA period. This accrual will not be available for use until the next timesheet day
				    ▪ If timesheets are unapproved and subsequently reapproved the leave will be reevaluated to give the correct

#	Activity	Description	Dependencies	Uniqueness/Customizations
				accrual ○ <u>Service levels</u> – annual leave accrual varies based on employee's service level (leave accrual service date on the employee's key service dates record) and the hours worked and compensable leave used during the pay period/extended FLSA period ○ <u>Hours worked</u> – in addition to the creditable service months, the number of hour's worked/compensable leave used in the pay period/extended FLSA period drive the number of hours. The leave accruals are prorated based on the number of hour's worked/compensable leave used in the pay period/extended FLSA period ○ The following charts show the accruals based on the employee type and the hours worked and leave used in the pay period/extended FLSA period: ▪ <u>Monthly (employee subgroups 01 and 07)</u>:

Number of Hours Worked plus compensable leave used	0 to 5 Years of Service	5 to 10 Years of Service	Over 10 Years of Service
Less than 36	0	0	0
36 through 70.99	2.17	2.71	3.25
71 through 103.99	4.33	5.42	6.5

#	Activity	Description	Dependencies	Uniqueness/Customizations
				(table continued below)

104 through 138.99	6.5	8.13	9.75
139 or more	8.67	10.83	13

- Biweekly (employee subgroups 01 and 07):

Number of Hours Worked plus compensable leave used	0 to 5 Years of Service	5 to 10 Years of Service	Over 10 Years of Service
Less than 17	0	0	0
17 through 32.99	1	1.25	1.5
33 through 47.99	2	2.5	3
48 through 63.99	3	3.75	4.5
64 or more	4	5	6

- Monthly (employee subgroup 31):

Number of Hours Worked plus compensab	0 to 5 Years of Service	5 to 10 Years of Service	Over 10 Years of Service	Over 15 Years of Service

#	Activity	Description	Dependencies	Uniqueness/Customizations
				(continued below)

le leave used				
Less than 36	0	0	0	0
36 through 70.99	2.58	3.13	3.67	4
71 through 103.99	5.17	6.25	7.33	8
104 through 138.99	7.75	9.38	11.0	12
139 or more	10.33	12.5	14.67	16

- <u>28-day Extended Work Periods</u> – accruals are earned at twice the biweekly rates

- Roll-over – 360 hours maximum per calendar year.
    - All hours in excess of 360 are rolled over into sick leave on an hour-for-hour basis at midnight on December 31
    - FSDB CBU 40 is rolled at 240, CBU 41 is rolled at 480 and CBU 42 is rolled at 352
    - If the employee submits (and has approved) a timesheet for scheduled

#	Activity	Description	Dependencies	Uniqueness/Customizations
				work days prior to the roll-over date, after the initial roll-over has occurred, the roll-over is reprocessed to adjust the hours (if applicable) that were rolled from annual leave to sick leave • SES/SMS and SMS equivalent for elected/appointed officials (employee subgroups 08, 09 and 16) ○ Leave is accrued upon the first appointment to one of the employee subgroups and on the annual anniversary date (date can change if the employee has a break in service of more than 31 days, in which case the date starts over based on the new appointment) ▪ 176 hours annual leave per calendar year ○ Roll-over – 480 hours maximum per calendar year ▪ All annual leave hours in excess of 480 are rolled over into sick leave on an hour-for-hour basis at midnight on the day before the employee's leave accrual anniversary date ▪ If the employee submits (and has approved) a timesheet for scheduled work days prior to the roll-over date, after the initial roll-over has occurred, the roll-over is reprocessed to adjust the hours (if applicable) that were rolled from annual leave to sick leave ○ Proration – proration of annual leave is triggered for SES/SMS and SMS equivalent for elected/appointed officials, if the employee does not work the full 12 month period, starting with the month of the lump sum accrual. The proration is triggered by either a separation action or by an appointment outside of the SES/SMS employee subgroups

#	Activity	Description	Dependencies	Uniqueness/Customizations
				(outside of employee subgroups 08, 09 and 16). The employee is entitled to the greater of the leave earned based on the number of months worked and the leave used. Hours that are both unearned and unused are prorated and taken from the employee's leave balance (shown as prorated annual leave on the employee's Leave Balance Overview screen) ▪ The proration is calculated as follows: • Step 1: Accrual –14.67 hours multiplied by the number of months (up to 12) the employee was employed at least one day in an SES/SMS position, starting with the month of the last lump-sum accrual • Step 2: (Determine portion not earned) subtract the result of step 1, from the accrual (this is the maximum potential proration amount) • Step 3: Summarize the number of hours of annual leave the employee used starting with the date of the lump-sum accrual; if the employee used more than 176 hours, then step 3 result is 176 • Step 4: Subtract the result of step 3, from the accrual • Step 5: If the result of step 4 is greater than the result of step 2, then the result of step 2 is the prorated value; if the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				result of step 2 is greater than the result of step 4, then subtract step 3 from 176 to determine the prorated value (if any) • Lottery Executive Management (employee groups 1 or 2, with employee subgroup 33) ○ Leave is accrued upon the first appointment into the employee subgroup and on the annual anniversary date (date can change if the employee has a break in service of more than 31 days, in which case the date starts over based on the new appointment) ▪ 240 hours annual leave per calendar year ○ Roll-over – 480 hours maximum per calendar year • All annual leave hours in excess of 480 are rolled over into sick leave on an hour-for-hour basis on the day before the employee's leave accrual anniversary date • FSDB Unique Accruals (employee subgroup 04, CBUs 40, 41 and 42) ○ CBU 40, 12-month staff only (9, 10 and 11 month staff in CBU 40 do not receive annual leave accruals) ▪ 0 – 16.75 hours = 0 hours ▪ 17 – 32.75 hours = 1.5 hours ▪ 33 – 47.75 hours = 3 hours ▪ 48 – 63.75 hours = 4.5 hours ▪ 64+ hours = 6.15 hours ○ CBU 41, 11 or 12 month staff only (9 & 10 month staff in CBU 41 do not receive annual leave accruals) ▪ 0 – 16.75 hours = 0 hours

#	Activity	Description	Dependencies	Uniqueness/Customizations
				▪ 17 – 32.75 hours = 2 hours ▪ 33 – 47.75 hours = 4 hours ▪ 48 – 63.75 hours = 6 hours ▪ 64+ hours = 8.15 hours ○ CBU 42, 12 month staff only (9, 10 & 11 month staff in CBU 42 do not receive annual leave accruals) ▪ 0 – 16.75 hours = 0 hours ▪ 17 – 32.75 hours = 2 hours ▪ 33 – 47.75 hours = 4 hours ▪ 48 – 63.75 hours = 6 hours ▪ 64+ hours = 8.15 hours
14.14	Sick Leave	Sick leave is an accrued leave the employee can use for a personal sickness or to take care of a sick family member	Employee must be in employee groups 1 or 2 and not in agency 2100 or 2200. For employee subgroups 31 and 33, employee must be in agency 3100	• CS and equivalent employees (employee subgroups 01, 06, 07 and 31) accrue as follows: ○ Leave is accrued upon approval of the employee's timesheet(s) for that pay period/extended FLSA period. If the employee's timesheet is approved before of the end of the pay period/extended FLSA period, the accrual will not be credited until the last day of the pay period/extended FLSA period. This accrual will not be available for use until the next timesheet day ▪ If timesheets are unapproved and subsequently reapproved the leave will be reevaluated to give the correct accrual ○ Hours worked – the number of hours worked/compensable leave used in the accrual period will drive the number of hours. The leave accruals are prorated based on the number of hours worked/compensable leave used in the period ○ The following charts show the accruals based on the employee type and the hours worked and leave used in the period: ▪ Biweekly (employee subgroups 01

#	Activity	Description	Dependencies	Uniqueness/Customizations
				and 07):

Number of Hours Worked plus compensable leave used	Hours of Sick Leave Credit
Less than 17	0
17 through 32.99	1
33 through 47.99	2
48 through 63.99	3
64 or more	4

- Monthly (employee subgroups 01 and 07):

Number of Hours Worked plus compensable leave used	Hours of Sick Leave Credit
Less than 36	0
36 through 70.99	2.17
71 through 103.99	4.33
104 through 138.99	6.50
139 or more	8.67

- Monthly (employee subgroup 31):

Number of Hours Worked plus compensable leave used	Hours of Sick Leave Credit

#	Activity	Description	Dependencies	Uniqueness/Customizations

				Less than 36 — 0
				36 through 70.99 — 2.5
				71 through 103.99 — 5
				104 through 138.99 — 7.5
				139 or more — 10
				
				• Monthly (employee subgroups 01 and 07): SES/SMS and SMS equivalent employees elected/appointed officials (employee subgroups 08, 09 and 16)
				  ○ Sick leave is treated the same as annual leave in that leave is accrued upon the first appointment to either of the employee subgroups and upon the annual anniversary date of the first appointment (date can change if the employee has a break in service of more than 31 days, in which case the date starts over based on the new appointment)
				    ▪ 104 hours sick leave per calendar year
				    ▪ Sick leave is not prorated if the employee terminates
				• Lottery Executive Management employees (employee subgroup 33) receive 120 hours per calendar year
				• FSDB Unique Accruals (employee subgroups 04, CBUs 40, 41 and 42)
				  ○ 9-month staff do not receive sick leave; 10-month staff within CBU 41 do not receive sick leave
				  ○ CBU 40 & 42, 10 & 11 month staff
				    ▪ Initial lump sum accrual at the end of the first biweekly period in the school

#	Activity	Description	Dependencies	Uniqueness/Customizations
				year ▪ No accruals for biweekly periods 2 - 8 ▪ Refer to FSDB requirements below for additional detail ▪ The following accruals apply for biweekly periods 9-22 for 10-month staff and 9-23 & 26 for 11-month staff • 0 – 16.75 hours = 0 hours • 17 – 32.75 hours = 1 hour • 33 – 47.75 hours = 2 hours • 48 – 63.75 hours = 3 hours • 64+ hours = 4 hours ▪ No accruals for 10-month staff for biweekly periods 23-26 and no accruals for 11-month staff for the biweekly periods 24 & 25 o CBU 40, 12-month faculty – standard sick leave accrual rules apply (same rules as listed above for period 9-22 for 10-month staff) o CBU 41, 11 and 12 month faculty – the following accruals apply for all biweekly pay periods in the school year • 0 – 16.75 hours = 0 hours • 17 – 32.75 hours = 0.5 hour • 33 – 47.75 hours = 1 hours • 48 – 63.75 hours = 1.5 hours • 64+ hours = 2.0 hours
14.15	Special Comp	Special Comp leave is an accrued leave based on additional time worked during a holiday period (holiday special comp) or time worked by eligible essential staff during an office closure (office closure special	Employee must be in a position that is eligible to earn special comp (e.g., CS or CS equivalent)	The following special comp rules apply to CS (employee subgroup 01) and CS equivalent - EOG (employee subgroup 07) employees: • Holiday special comp is calculated for eligible included employees based on the employees FLSA period (40-hour, 80-hour, 160-hour, 168-hour or 192-hour). For eligible excluded employees, special comp is accrued based on the employee's pay period (biweekly or monthly), unless the employee is on an extended work

#	Activity	Description	Dependencies	Uniqueness/Customizations
		comp) at the employee's normal place of business		schedule (80-hour, 160-hour, 168-hour or 192-hour). If on an extended work schedule, holiday special comp is calculated based on the extended work schedule • Holiday special comp (leave types 0055, 0091 and 0092) is accrued during periods with an observed state holiday. Special comp is granted for eligible employees for all time worked between scheduled hours (i.e., 40, 80, 160, 168 and 192) and required hours (schedule hours minus holiday credit in period). For example (assume a biweekly, excluded employee) if one holiday (8- holiday hours) occurs in the pay period, special comp is accrued for time worked in excess of 72 hours up to 80 hours (total of 8-hours special comp can be earned in this example) • Special comp is broken out over six different leave types that are intended to control accruals, reduce liability and ensure compliance with state rules and collective bargaining agreements. The six special comp leave types and their associated leave system logic are listed below: ○ Pre-July 2012 Special Comp (leave type 0055) – the majority of the leave in this category was accrued prior to July 2012, for additional hours worked during either a holiday period or during an office closure. However, for certain employees (e.g., qualified SES employees who work during an office closure) leave is accrued into this category. Additionally, based on specific collective bargaining agreements, adjustments for special comp earned after July 1, 2012, can be performed to move leave to this category from one of the 90 series categories (defined below) ○ Holiday Special Comp (leave type 0091) – holiday special comp is accrued under this leave type for additional hours worked during

#	Activity	Description	Dependencies	Uniqueness/Customizations
				a state holiday for the period of 11/30/Y1 to 04/30/Y2. Leave in this category must be used during the six month period it was accrued. At the end of the six month period the leave is forfeited (leave is systematically wiped out as of 04/30/Y2). This leave type has a grace period for timesheet submission and approval that allows the timesheets for periods including 04/30/Y2 to be submitted and approved using this leave type for timesheet days within the six month period up to 5/31/Y2 ○ Holiday Special Comp (leave type 0092) – holiday special comp is accrued under this leave type for additional hours worked during a state holiday for the period of 05/01/Y1 to 10/31/Y1. Leave in this category must be used during the six month period it was accrued. At the end of the six month period, the leave is forfeited (leave is systematically wiped out as of 10/31/Y1). This leave type has a grace period for timesheet submission and approval that allows the timesheets for periods including 10/31/Y1 to be submitted and approved using this leave type for timesheet days within the six month period up to 11/30/Y1 ○ Holiday Special Comp Carry-Over (leave type 0093) – special comp is not accrued under this leave type, rather is placed in this leave type by processing a leave balance adjustment to move unused leave type 0091 and 0092 special comp into this leave type. The adjustment must either be manually processed by HR staff or by a mass load. Agencies are responsible for determining if the employee is eligible to carry the unused

#	Activity	Description	Dependencies	Uniqueness/Customizations
				leave types 0091 and 0092 forward. Leave in this category is wiped out twice a year (10/28 and 4/29) ○ Office Closure Special Comp (leave type 0094) – leave is accrued in this category based on an approved timesheet that included hours type (wage type) 1006 on an hour-for-hour basis. Leave in this category is not systematically wiped out. Agencies are responsible for managing the leave in this category ○ Office Closure Special Comp Carry-Over (leave type 0095) – special comp is not accrued under this leave type, rather is placed in this leave type by processing a leave balance adjustment to move unused leave type 0094 into this leave type. The adjustment must either be manually processed by HR staff or by a mass load. Agencies are responsible for determining if the employee is eligible to carry the unused leave type 0094 forward For FSDB employees in employee group 04, CBU 41, who are on a 12-month contract (CBU 40 and 42, as well as CBU 41 less than 12-month contract employees do not earn special comp) special comp is accrued during periods with an observed state holiday. Special comp is granted for all time required between scheduled hours (e.g., 40 or 80) and required hours (scheduled hours minus the holiday credit for the employee in the period). For example, if one holiday (8-holiday hours) occurs in the pay period, special comp is accrued for time worked in excess of 72 hours up to 80 hours (total of 8-hours special comp can be earned in this example) Lottery exempt employees (employee subgroup 31) accrue special comp in the pre-July 2012 category (leave type 0055)

#	Activity	Description	Dependencies	Uniqueness/Customizations
14.16	Regular Comp	Regular comp leave is accrued by excluded (employee group 2) CS (employee subgroup 01) and CS equivalent - Executive Office of the Governor (employee subgroup 07) employees who work additional hours during the pay period in excess of contract hours. Leave is accrued on an hour-for-hour basis for hours physically worked above the employee's scheduled hours	Employee must be in a CS (employee subgroup 01) or CS equivalent - EOG (employee subgroup 07) position and the employee must be excluded (employee group 2) from overtime eligibility	Leave type (54) is accrued for eligible CS (employee subgroup 01) and CS equivalent - EOG (employee subgroup 07) excluded (employee group 2) employees for pay periods where the employee works more than their scheduled hours in the period (for part-time employees, the accrual occurs after the employee works more than the full-time equivalent scheduled hours; considers hours types 1000, 1004, 1006, 1014, 1024, 1034 and 1044, but does not include 1016). Leave is earned on an hour-for-hour basis and is capped at 240 hours. Once the employee reaches the 240 hour cap, any additional hours over the scheduled hours are not accrued and considered to be donated time. Additional accruals only occur when the employee has used leave, reducing their available balance below 240 hours Lottery exempt (employee subgroup 31) excluded (employee group 2) employees accrue up to 120 hours. Once the employee reaches the 120 hour cap, any additional hours over the scheduled hours are donated time. Additional accruals only occur when the employee has used leave, reducing their available balance below 120 hours
14.17	FLSA Comp	FLSA comp is accrued by included (eligible for overtime – employee group 1) employees who have elected to earn FLSA comp in place of being paid overtime	Employee must be an included employee (employee group 1) and the employee must make the election to accrue in place of being paid overtime	Leave type (85) is accrued for overtime eligible (employee group 1) CS (employee subgroup 01), CS equivalent - Executive Office of the Governor (employee subgroup 07) and SES (employee subgroup 08) employees who have elected to earn FLSA comp in place of being paid overtime for time physically worked in excess of their FLSA period hours. The following applies: • Not all state agencies allow included employees (employee group 1) to elect to accrue FLSA comp. The agency elections (which agencies allow employees to accrue FLSA comp) are stored in table ZPE_OT_ELECT_OPT. Only included employees (employee group 1) within participating agencies can elect to accrue FLSA comp • FLSA compensatory leave is only accrued for included employees (employee group 1) who have elected to

#	Activity	Description	Dependencies	Uniqueness/Customizations
				accrue FLSA compensatory leave instead of receiving overtime pay (employee must elect, manager cannot make the election for the employee) • The employee's election is stored in the infotype PA2012 (Time Transfer) and is called in the time evaluation process and is used to determine if the employee should receive an FLSA leave accruals for the period • Leave is accrued based on the employee physically working hours in excess of their FLSA period hours • Leave is accrued at a rate of 1.5 (each hour of overtime is accrued at 1.5 hours) • FLSA comp accruals are based on the effective date of the accrual election. The election to either receive FLSA accruals or to receive pay is date effective as of the date the employee makes the election. This date is tied to the timesheet day. If the employee changes their election in the middle of the FLSA period, the system evaluates whether to accrue FLSA comp or pay the employee for overtime based on each day the employee has exceeded the FLSA hours. Based on this treatment it is possible for an employee to be paid overtime for a portion of the excess hours and to accrue FLSA comp hours for the other portion of the excess hours in the same FLSA period • FLSA comp leave is capped at 80-hours for most employees. The following variations apply: ○ Law enforcement and state troopers collective bargaining units have a 100 hour FLSA cap ○ Employees in a trainee status (appointment status 10) do not have a cap for accruals ○ The Department of Agriculture and Consumer Services: ▪ Division of Fruits and Vegetables (organizational codes that start with 4207) are eligible to accrue up to 480 hours of FLSA comp

#	Activity	Description	Dependencies	Uniqueness/Customizations
				▪ Division of Forestry (organizational codes that start with 4211) are eligible to accrue up to 160 hours of FLSA comp • Once the employee reaches the FLSA cap, any additional hours worked above their FLSA period hours are paid as overtime
14.18	Personal Holiday	A personal holiday is granted to all leave accruing employees on July 1 each year	Employee must be in employee groups 1 or 2 and not in agency 2100 or 2200	The personal holiday is accrued as a day, not as a number of hours. Employees may only use the personal holiday between 7/1/Y1 and 6/30/Y2**.** The personal holiday may be used in part or in total to meet the hours for a given day. However, whether used in part or in total, the personal holiday is used for the fiscal year. The personal holiday cannot be split over multiple days If dually employed in two leave eligible positions, the employee receives a separate personal holiday for each employment For FSDB, employee subgroup 04, CBUs 40, 41 and 42, only 12-month employees receive the personal holiday. The 9, 10 and 11-month contract employees are not granted or entitled to a personal holiday
14.19	Military Training	Military training leave is available for all employees to use based on the federal fiscal year (10/1/Y1 to 9/30/Y2). Agencies are responsible for ensuring that only eligible employees use military training	Employee must be in employee groups 1 or 2 and not in agency 2100 or 2200	240 hours of military training leave is credited to employees on Oct. 1 each year (granted based on the federal government fiscal year and runs from 10/1/Y1 to 9/30/Y2) for all leave eligible employees. Leave is use it or lose it and is reset at the start of each federal fiscal year
14.20	Administrative Leave Types	Administrative leave is available to employees based on specific authority in Florida	Employee must be in employee groups 1 or 2 and not in agency 2100 or 2200 and must meet the	Employees are granted various administrative leave that can be used based on the specific administrative leave type. The Timesheet FAQs document (link below) includes the description for each administrative leave type and its related

Comment [MV1]: Editted/added based in 06/27/15 release

#	Activity	Description	Dependencies	Uniqueness/Customizations
		Statutes	requirements for the specific administrative leave type to be eligible to use	business rules: http://www.dms.myflorida.com/content/download/65520/280825/

14.21	Leave Balance Adjustments (infotype PA9410, subtype 0003)	Screen provides agencies the ability to adjust an employee's leave balance outside of the normal leave accrual and use processes	Employee must be in employee groups 1 or 2 and not in agency 2100 or 2200 and must meet the requirements for the specific leave type to be eligible to use	All accrued leave types can be adjusted, accept for personal holiday. Infotype PA2013 (Quota Corrections) is used to store the leave balance adjustments in SAP; a separate custom infotype PA9410 (Leave Payouts/Transfers/Adjustments) is used to pull the display values for the BSP page (Leave Balance Adjustment screen)
				• Only one pending adjustment is allowed per leave type
				• If a future dated adjustment is created, it will remain viewable and editable until Time Evaluation runs on that future date
				• Adjustments can be processed using up to three decimal places
				• Negative adjustments can only be processed with a date in the current pay period or future pay periods (cannot be dated prior to the current pay period)
				• Overview section –displays available leave types and remaining balances. This reflects the remaining balance available which accounts for the following: saved or submitted timesheet hours, pending payout hours, pending negative leave balance adjustments and pending transfer hours
				• Details Section – displays the following required fields:
				  ○ Adjustment Date (calendar selection functionality)
				  ○ Leave Type – drop down selection
				  ○ Number of adjustment hours; use negative entry to decrease balance
				  ○ Comments
				  ○ History –available when changes have been made for the selected leave type (selected in the overview section)
				  ○ Separate buttons are presented based on the Users role code that allow the creation of an

#	Activity	Description	Dependencies	Uniqueness/Customizations
				adjustment (New button) and the ability to update a future dated adjustment (Edit button)
14.22	Leave and OT Request (and Request on Behalf of the Employee) (stored in infotype PA9460)	Screen allows employees to request to work overtime or request to use accrued leave	Employee must be in employee groups 1 or 2 and not in agency 2100 or 2200 and must meet the requirements for the specific leave type to be eligible to use	The Leave and OT Request screen is used by employees to request time off or to request to work overtime (is primarily used to request time off). The screen includes the following: • Overview section – shows past requests and their status, and pending requests (stored in infotype PA9460). This section includes the type of request, the dates for the request, number of hours, status, and requestor and approver comments • Details section – includes the employee's current leave balances for accrued leave and the ability to create a new request. Employees can create a leave request for any accrued or administrative leave (or to work overtime) by selecting the applicable leave type from a pop-up menu that includes all leave types. Employee must select the leave type, and must enter the start and end date (calendar selection functionality) for the request and hours. Employee may also enter comments explaining the need for the request • Once the record is created, it is placed in a pending approval status until either the manager or second level manager approves or rejects the record (may also be approved by HR staff or an assigned timekeeper). The employee may update the leave request until it is approved or rejected, but cannot delete the request • Requests in this screen are NOT tied to the employee's available leave balances. This screen is only used to track leave requests and is not integrated with the employee timesheet in any manner • Once a request is created, an alert is sent to the employee's manager to review and/or approve the request. Once approved or rejected, an alert is sent to employee. Managers, assigned timekeepers and HR

#	Activity	Description	Dependencies	Uniqueness/Customizations
				staff may create the request on behalf of the employee

14.23	Leave, OT and Other Approvals (infotype PA9460)	Screen is used by the manager to approve or reject request to take time off (leave request), work overtime or work a flexible work schedule	Request must have been submitted for approval	The following applies for this screen:
				• The Leave, OT and Other Approvals screen is used to approve:
				  ○ Request to use Leave (request entered in the Leave and OT Request screen)
				  ○ Request to work overtime (request entered in the Leave and OT Request screen)
				  ○ Request to work a flexible work schedule (request entered in the Flexible Work Schedule screen)
				  ○ Request to use FMLA, FSWP or FMLA/FSWP (request entered in the FMLA/FSWP Leave Request screen)
				• Request can be approved by either the employee's manager, HR staff or assigned timekeeper
				• When the manager position is vacant the request and associated alerts are rolled up to the next level supervisor for approval
				• Overview section –displays available the Employee ID, Employee Name, Total Approvals Needed (total number of requests), Flexible Work Schedule (total number of requests), Leave and OT Request (total number) and FMLA/FSWP (total number of requests)
				• Details Section – To approve a request; check on the box under column "App." and press the "Save" button. To reject a request; check on the box under column "Rej." and press the "Save" button. To approve all pending requests check the box under "Approve All" and press the "Save" button
				• The following fields are displayed for each record: the following required fields:
				  ○ App (check box to approve request)
				  ○ Rej (checkbox to reject request)
				  ○ Employee ID#

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ Employee Name ○ Request Category ○ Request Type ○ Start Date ○ End Date ○ Hours ○ Requester Comments ○ Approver Comments
14.24	OT Election (stored in infotype PA2012)	Screen is used by included (overtime eligible, employee group 1) employees to elect to accrue FLSA comp or to be paid overtime	Employee must be overtime eligible (employee group 1) Employee must be in an agency that allows accrual of FLSA comp (agencies that allow accruals of FLSA comp are stored in the table ZPE_OT_ELECT_OPT)	The following applies for this screen: • The OT (overtime) Election screen is defaulted to overtime • Specific edits exist within the screen to ensure only employees who are included for overtime (employee group 1) are able to make an election. All other Users receive a message that the screen is not valid for their use ○ While employees in employee group 4 (OPS included) are overtime eligible, they are not eligible to earn FLSA comp and therefore cannot use this screen • Edits within the screen also validate the employee is in an agency that allows employees to accrue FLSA comp (checks against table ZPE_OT_ELECT_OPT) • Only the employee and HR staff have access to maintain the election for an employee. Managers do not have access to change an employee's election (view only access) • All elections are date effective as of the day the employee makes the requested change (dated as of system date) and cannot be future dated or retro actively dated, regardless of the timesheet status • Election does not require an additional approval and is effective immediately when the request is saved • Overview section –displays available the effective date, end date and OT election) • Details section – provides a check box is used to change the election to comp time. The change is

#	Activity	Description	Dependencies	Uniqueness/Customizations
				effective immediately upon saving the screen
14.25	Leave Balance Overview (LBO) (infotype PA2006)	Screen is a custom screen used to display the employee’s accrued leave balances (annual, sick, personal holiday, regular, special and FLSA comp leave, etc.) and related transactions (adjustments, used hours, accruals, etc.)	Employee must be in employee groups 1 or 2 and not in agency 2100 or 2200 and must meet the requirements for the specific leave type to be eligible to use	The Leave Balance Overview screen displays all accrued leave balances on one screen. This screen includes the following sections: • Overview section – includes each pay period the employee was employed in a leave accruing position (up to 18 months back) and if still active in a leave accruing position, presents at least the next six months of pay periods. Users select the applicable pay period in this section to view details for a specific pay period ○ Users are defaulted to the current pay period, unless accessing the screen from the employee timesheet screen. If accessing from the timesheet, the User is defaulted to the period that was selected on the timesheet • Current Balances section – includes the current available hours, hours pending (hours in a saved or submitted status on a timesheet that are pending approval, leave adjustments that are pending processing through the nightly batch time evaluation process, leave payout pending payment or leave transfer hours pending the nightly batch time evaluation process); hours shown as pending are locked to prevent negative balances and the total net hours available (current balance minus pending hours) for each leave type the employee has a current balance in • Pay Period Overview section – provides the details for the selected pay period; includes the beginning and ending balance and dynamically presents leave used, accrued, rolled-over, adjusted, paid, transferred in/out and the hours pending approval for that pay period • Screen is view only and cannot be directly updated by any User. All updates occur through other leave and

#	Activity	Description	Dependencies	Uniqueness/Customizations
				attendance processes (timesheet, leave payouts, adjustments and transfers) and are fed into the Leave Balance Overview screen based on the entries from these other processes into time evaluation • Screen includes a quick link (titled Return to Timesheet) to allow the employee to navigate between the timesheet and Leave Balance Overview screen • Negative balances are not displayed in the Pay Period Overview section. If the employee has a negative balance, the ending balance is presented as zero • Future dated actions are not shown in the Pay Period Overview section until that future date is the current system date • Annual, sick, regular, special and FLSA comp balances are all presented as hours. Personal holiday is presented as a day • Special comp is broken out into five separate columns: Pre-July 2012, Holiday (leave types 0091 or 0092, depending on the period), Holiday Carry-Over, Office Closure, Office Closure Carry-Over • Only leave types that the employee either had a balance or had a transaction for during the period show in the Pay Period Overview section. If the employee did not have a leave balance or a transaction processed for a given leave type, for a given pay period, the leave type is not displayed in the Pay Period Overview section

14.26	Leave Balance Transfer (LBT)
	(infotype PA9410, subtype 0002)
		Screen provides agencies the ability to transfer an employee’s leave balances across agencies using a custom process	Employee must have an employee ID available to transfer leave from and must have an employee ID eligible to receive the leave. The transfer from employee ID must be in an inactive status and the receiving employee ID must have been created	The following is included in the Leave Balance Transfer screen:
				• Overview section:
				  ○ Record Type:
				    ▪ Available Balance – employee’s available balance that can be transferred for the selected leave type
				    ▪ Balance Transferred – employee’s balance that was transferred for the

#	Activity	Description	Dependencies	Uniqueness/Customizations
			with an effective date of at least one day after the last day worked of the transferring employee ID	selected leave type ○ Leave Type – the following leave types that can be transferred: ▪ Annual Leave ▪ Sick Leave ▪ Personal Holiday ○ Date – system date for "Available Balance" records and the date the transfer is to be/was completed for "Balance Transferred" records ○ Hours – hours are presented as follows: ▪ For Available Balance records, this is displayed as the remaining balances as of the last day the individual was employed in the agency. If the employee is still active (termination is future dated), this will show the current balance as of the system date ▪ For Balance Transferred records, this is displayed as the hours that were transferred ▪ For personal holiday records, this is displayed as the number of days (always 1 or 0), not hours • Details section: ○ Transfer Date – field is view only and defaults to the employee's last date employed ○ Leave Type – field is view only and defaults to the leave type selected in the Overview section ○ Number of Hours – field can only be edited when creating a new balance transfer ▪ Annual and Sick Leave – all or part of the hours can be transferred, but not more; multiple transfers are allowed, but may not exceed the overall balance for the leave type ▪ Personal Holiday – the number of

#	Activity	Description	Dependencies	Uniqueness/Customizations
				days available can be transferred ○ Receiving ID – field is view only and defaults to the leave eligible employee ID that will receive the transfer ▪ To transfer the leave, the other leave-eligible ID must have an effective date of at least one day after the last day employed for the transferring employee ID ▪ Leave cannot be transferred across employee IDs if the employee is dually employed ○ Receiving Agency – field is view only and defaults to the agency of the leave eligible employee ID that will receive the transfer ○ Comments – field stores up to 255 characters and is editable when a new transfer record is being created ○ Date Entered (transaction date) – field is view only and defaults to the date the transfer record was created ○ Created By – field is view only and displays the employee ID of the HR User that created the transfer record • Edits exist to ensure: ○ Employee has terminated employment at the agency that is transferring the leave. If the employee has not terminated employment, the agency will not be able to initiate the transfer ○ Employee must have started at the receiving agency at least one day after the last day worked at the exiting agency and within 31 days of the last day worked at the exiting agency ○ Employee must have transferred to a position in employee groups 1 or 2 in an agency other

#	Activity	Description	Dependencies	Uniqueness/Customizations
				than 2100 and 2200 that uses the leave and attendance processes in People First o The transfer must occur within 60 days of the last day employed at the exiting agency • Leave transfer records are stored in infotype PA9410 (Leave Payouts/Transfers/Adjustments) • After completing the leave balance transfer, the transferred hours are shown on the Leave Balance Overview screen as transferred out for the employee ID at the exiting agency and as transferred in for the employee ID at the receiving agency. The hours transferred out show with an adjustment date of the employee’s last day employed at the agency and the hours transferred in show with an adjustment date of the employee’s hire date at the new agency • Hours transferred out are immediately reduced from the employee’s available leave balance at the exiting agency to prevent use on any outstanding timesheets • Hours transferred in are immediately presented on the receiving employee ID, but must process through the nightly batch time evaluation process before they can be used by the employee • Hours transferred in for CS (employee subgroup 01) and equivalent positions (employee subgroups 06, 07 and 31) are not available on the first day worked at the new agency
14.27	FSBD Unique Leave Process -School Calendar	Custom process used to load specific dates that drive leave accruals and use (refer to annual and sick leave accruals definitions for specific accrual rates above)	Must be an employee at FSDB and in employee subgroup 04 and in CBU 40, 41 or 42	School dates are loaded through a custom process using a spreadsheet with the school year dates. The dates are loaded prior to the beginning of each school year and drive custom processes for FSDB. Dates drive: • When leave accruals are allotted • When the personal leave type is reset (see below) • One-time leave allotments (CBU 40 and /42) are allotted
14.28	FSDB Personal Leave	FSDB personal leave (hours type 0076) is only	Must be active in FSDB, and in employee subgroup 04 and	FSDB personal leave is capped at 48 hours per year. Hours recorded as FSDB personal leave reduce the employee’s sick

#	Activity	Description	Dependencies	Uniqueness/Customizations
		available for the FSDB. This leave is a separate leave type that allows FSDB to track use of sick leave as personal leave in accordance with the teacher's CBU agreement	in CBU 40 or 42 and either on a 10 or 11 month contract	leave balance on an hour-for-hour basis (personal leave is not a separate leave type; personal leave is deducted from sick leave)
Organizational Management				
15.1	Organizational (Org) Management - My Default View	A view that is displayed when a User first accesses a position or organizational screen	User must have security access that allows them to access Org Management	Position Maintenance and Actions: • Data is displayed in a table grid format that allows a User to select a record (row) that they want to view or maintain • My Default View is the default view that is displayed when a User first accesses the screen • Positions reporting to the User (i.e., direct reports) are displayed in the view and are identified with a "DR" indicator • Positions that do not report to a supervisor (e.g., top of agency and orphaned positions) are displayed in the view for Users with an agency-wide security role code (i.e., A, C, G, H and X) and are identified with a "Top" indicator • For Users with an agency structural security role code (i.e., K, U and Y), only direct reports ("DR" indicator) are displayed in the Position Maintenance view; positions with no reporting relationship ("Top" indicator) and positions assigned to the organization(s) tied to their role code are not displayed in the view; for the agency structural role code that only has view access (i.e., K), the Actions tab is not available • For Users with an agency group structural security role code (i.e., B, R and T), employees assigned to the organization(s) tied to their security role code are displayed in the view; these positions are identified with a "Grp" indicator; for these Users, the Actions tab

#	Activity	Description	Dependencies	Uniqueness/Customizations
				is not available • For Users that do not have security access that triggers the display conditions (i.e., DR, Top, Grp), positions are not displayed in the view • Security role codes with statewide, agency or manager access can navigate down the reporting structure from positions presented in view; structural role codes (e.g., B, K, R, T, U and Y) can only navigate down the reporting structure for their direct reports • When the Reset button is selected, the default view is restored Org Maintenance: • My Structure View is the default view that is displayed when a User first accesses the screen • Organization Units displayed are based on the User's security role • For Users with an agency structural security role code (i.e., K, U and Y), no organizations are displayed in the view Broadband Maintenance • The default view displays no broadband data; data is not displayed until a search is performed • When data in the search fields is deleted and the Go button is selected, the default view is restored Class Maintenance • The default view displays no class data; data is not displayed until a search is performed • When data in the search fields is deleted and the Go button is selected, the default view is restored
15.2	Search – Position Maintenance/Position Actions	Allows Users to search by employee name, User ID, employee ID, position number or position title	Position being searched must exist in SAP Position search results are based on the date/date range selected	• Search access and results are defined using SAP structural authorizations, standard SAP role definition and custom security tables • Either the User ID or employee ID can be used when searching for an employee; the results returned are for the employee ID record that is for the position the

#	Activity	Description	Dependencies	Uniqueness/Customizations
			User must have security access that allows them to search for the entered parameters Employee being searched must be active in a position as of the system date Position must belong to an Org Unit (infotype HRP1001); if Org Unit is not assigned, then a position will not be returned in search	employee holds as of the system date • Wildcard (asterisk) can be used in all position search fields and all employee search fields, except the User ID/employee ID field; when using an asterisk, User must include at least one identifier (e.g., first number of the position, first letter of the name, etc.) in conjunction with the asterisk • Both active and inactive positions can be searched; results returned will be based on the date/date range selected; date fields (both from and to date) default to system date if no date is entered • Search results can be sorted by selecting the column headings presented in the search results table • If more than 500 records meet the search criteria, a standard message is presented notifying the User to refine the search to return results • When the Reset button is selected, the search results are removed and the User's default view is restored • Records returned in the search results can be viewed or maintained by selecting the record (row); access to maintain the data elements is defined by User's security role code
15.3	Search – Organization Maintenance/Organization Actions	Allows for search of an Organizational Unit using the Organizational Code, Organizational Description or FLAIR Org Code assigned to the Organizational unit	Organizational unit being searched must exist in SAP User must have security access that allows them to search results and that allows them to search for the entered parameters Search results are based on the date/date range selected	• Search access and results are defined using SAP structural authorizations, standard SAP role definition and custom security tables • Wildcard (asterisk) can be used in all search fields; when using an asterisk, User must include at least one identifier (e.g., first number of the organization code, first letter of the organization name, etc.) in conjunction with the asterisk • Both active and inactive Organizational Units can be searched; results returned will be based on the date/date range selected; date fields (both from and to date) default to system date if no date is entered • Search results can be sorted by selecting the column headings presented in the search results table

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• If more than 500 records meet the search criteria, a standard message is presented notifying the User to refine the search to return results • When the My Structure View Go button is selected, the search results are removed and the User's default view is restored (works as a reset) • Records returned in the search results can be viewed or maintained by selecting the record (row); access to maintain the data elements is defined by User's security role code
15.4	Search – Broadband Maintenance/Broadband Actions	Allows for search of broadband (job) using the Broadband ID (Broadband Code) or Broadband Description	Custom broadband (job) being searched must exist in SAP Search results are based on the date/date range selected User must have security access that allows them to search results and that allows them to search for the entered parameters	• Search access and results are defined using SAP structural authorizations, standard SAP role definition and custom security tables • Wildcard (asterisk) can be used in all the search fields; when using an asterisk, User must include at least one identifier (i.e., first number of the broadband ID or first letter of the broadband description) in conjunction with the asterisk • Both an active and inactive broadband can be searched; results returned will be based on the date/date range selected**;** date fields (both from and to date) default to system date if no date is entered • Records returned in the search results can be viewed or maintained by selecting the record (row); access to maintain the data elements are defined by User's security role code
15.5	Search – Class Maintenance/Class Actions	Allows for search of a class (job) using the Class ID (Pay Plan and Class Code combination) or Class Description	Custom non-broadband class (job) being searched must exist in SAP Search results are based on the date/date range selected User must have security access that allows them to search results and that allows them to search for the	• Search access and results are defined using SAP structural authorizations, standard SAP role definition and custom security tables • Wildcard (asterisk) can be used in all the search fields; when using an asterisk, User must include at least one identifier (i.e., first number of the class ID or first letter of the class description) in conjunction with the asterisk • Both active and inactive records can be searched; results returned will be based on the date/date range

#	Activity	Description	Dependencies	Uniqueness/Customizations
			entered parameters	selected; date fields (both from and to date) default to system date if no date is entered • Records returned in the search results can be viewed or maintained by selecting the record (row); access to maintain the data elements are defined by User's security role code
15.6	Validity Period	The system does not allow a User to create or maintain a position or Organizational Unit where the effective date is more than two pay periods in the past, based on the system date	The two pay period restriction is determined by the payroll area (e.g., bi-weekly, monthly) assigned to the position being maintained Once payroll is processed, a new pay period begins for the purpose of restricting the effective date	• The payroll area is stored in State Org Data (infotype HRP9100) on the Organizational Unit; the two pay period restriction is determined based on the Organizational Unit Code (Object Relationships – infotype HRP1001) assigned to the position • infotypes can only have one active record, except for the infotypes that have multiple subtypes (e.g., infotypes HRP1001 (Object Relationships), HRP9126 (Addresses) and HRP9130 (License/Cert & State Property) • Future dated records can be created (i.e., effective date is after system date)
15.7	Organizational Management Actions	A custom process that allows Users to execute various actions to create, maintain and delimit organizational objects (e.g., position, Org Unit, broadband, class)	User must have security access to actions in Organization Management	Custom process is used to create an organizational unit; infotypes are presented in a logical order, requiring completion of dependencies in sequential order
15.8	Organizational Management - Maintenance	Once a record (object) has been created, each infotype can be updated directly without using an action	Record (object) must have infotype HRP1000 (for a position, infotype HRP1001 (Object Relationships) must have position to Organizational Unit relationship) Record (object) must be accessible using the search feature	All infotypes used by the state can be maintained through direct entry

#	Activity	Description	Dependencies	Uniqueness/Customizations
15.9	Organizational Management Change Logging	Custom process that logs changes made to Org Management OM) objects (e.g., position, Org Unit, broadband, class) into a custom table	None	Custom table (ZAU_OM_LOGGING) captures audit trail of changes made to OM objects
15.10	Organizational Management – Position Integration	A custom process that updates the employee's Organizational Work Assignment (infotype PA0001) record based on specific changes (e.g., Organizational Unit, broadband/class) made on infotype HRP1001 (Object Relationships)	Process has to be scheduled to run	The custom process is scheduled to run as a nightly batch program
15.11	Organizational Management – Top Position Load	A custom process that identifies all positions at the top of the reporting structure (no position to position reporting relationship on infotype HRP1001, Object Relationships) and displays those positions on the My Direct Reports screen for specific security role codes (e.g., HR roles)	Process has to be scheduled to run	The custom process is set to run hourly
15.12	Organizational Management – Personal Indicators Synchronization	A custom process that updates employee's personal indicators when their position is marked as sworn/certified or restricted employee	Process has to be scheduled to run	• The custom process is scheduled to run as a nightly batch program • Custom process evaluates the change date of infotypes HRP9121 (Position Attributes) and HRP9122 (Additional Attributes) and if changed today or yesterday, the position holder's (employee)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				Personal Info screen (infotype PA0002) is updated to mark the applicable indicator
15.13	Organizational Management – Facility Location	A custom process that loads state owned and leased facility location information using an interface file received from the state's facility database (FL-SOLARIS)	File sent to vendor by the state	State owned and leased (facility type) facility table is loaded nightly (complete load) into People First and is referenced by the Location Address screen (infotype HRP9126, Addresses) to ensure the facility exists and to display facility address information
15.14	Organizational Management – Facility Location and Position Information	A custom process that sends positon counts and telework percentages associated with each state owned and leased facility by agency	File sent to state's facility database (FL-SOLARIS) by the vendor	Position counts and telework percentages by agency, for each state owned and leased (facility type) facility assigned on the Location Address screen (infotype HRP9126, Addresses) is sent nightly
15.15	Human Resource – Contract Length	A custom process that updates the contract length field A custom process that updates the FSDB agency 4890) employee's Contract Length based on the Inter-Department ID assigned to the employee's position	Process has to be scheduled to run	• The custom process is scheduled to run as a nightly batch program • Custom process updates the contract length field on the position holder's (employee) Organizational Work Assignment record (infotype PA0001), based on the last character of the Inter-Department ID field assigned on the Position Funding screen (infotype HRP9124) • Custom process only applies to employees at the FSDB (agency 4890)
15.16	Organizational Management – OCA Codes	A custom process that loads financial and budgeting data for the Department of Children and Families (DCF), Department of Health (DOH) and Agency for	File sent to vendor by the agencies	• Custom OCA table is loaded by a weekly batch interface into People First and is referenced by the Position Funding screen (infotype HRP9124) for DCF, APD and DOH • The OCA table captures the allowable funding codes and their distribution of percentages based on Budget Entity, IBI Code, Level 2 FLAIR Organizational Code,

#	Activity	Description	Dependencies	Uniqueness/Customizations
		Persons with Disabilities (APD) positions using an interface file received from each agency		Category, Grant Fund Code, State Fund Code and Funding Identifier (FID) that are saved on the Position Funding screen (infotype HRP9124); only DCF and APD use the Level 2 FLAIR Organization Code field and the IBI Code field is only used by DOH
15.17	Organizational Management – FLAIR Account Codes	A custom process that loads FLAIR Account Codes information using an interface file received from DFS	File sent to vendor by the DFS	• FLAIR Account Code table (ZAD_FLAIR_ACCNT) is loaded twice daily (additions, deletions and changes are loaded) into People First and is referenced by the Position Funding (infotype HRP9124) and Alternate FLAIR Account Code (infotype HRP9128) screens to ensure the FLAIR Account code exists • Each time a new FLAIR Account Code is received via the interface, a Cost Center Object is assigned to it on the FLAIR Account Code table (ZAD_FLAIR_ACCNT); when the FLAIR Account Code is assigned to a position, an S to K relationship (position to Cost Center Object) is created in infotype HRP1001 (Object Relationships); the FLAIR Account Code displayed on the Organizational Work Assignment (infotype PA0001) screen is based on the S to K relationship
15.18	Position Actions - Position Locked	Functionality is used to systematically lock a position when the position update/creation is not fully executed (completed) during any of the position actions	Action is not fully executed (completed) while performing a position action	• If a position action (e.g., reclassification) is not fully executed (completed) during the position action process, the position will be locked until the User completes the entire action • If infotype HRP9126 (location address) is not created or if an invalid record is not corrected during certain position actions, the position will be locked until the issue with the location address is resolved. When a position has been locked, an alert is displayed on the People First Home Page for all Users assigned an HR security role code; the alert identifies the locked positon number along with the employee ID of the User who caused the position to be locked; the alert is systematically removed once the action is fully processed • Until the position action is completed, no other updates can be performed on the position through the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				system • Once a position is locked, when the edit button is selected on any infotype the User is presented with a message that the position is locked; if the User accessing the record is the one that locked the record, they are given the option to "restart" the action; once the action is restarted, all the infotypes for the applicable action are presented for the User to complete; if not completed, the position will remain locked
15.19	Establish Position/Create OPS Position	Actions used to create a position in SAP; process flow presents the applicable infotypes that should be completed when creating positions	Position number must not already exist All objects (e.g., Organizational Code, supervisor position, broadband/class) being assigned a relationship to the position must be active in SAP on the effective date of the action and must have an infinity end date (i.e., 12/31/9999) FLAIR Account Code (specific funding source) being assigned must have been created in FLAIR, marked for payroll use and loaded into the custom funding table in SAP (daily interface file is provided from FLAIR containing all available active payroll account codes) Other funding sources (Budget Entity, FLAIR Org,	• Process must be used to create a position, positions cannot be created by accessing each infotype directly • Custom and standard dependencies are built into the process, based on the type of action, that drives valid values for key fields • Establish Position action is only used for employee groups 1 and 2 • Create OPS Position action is only used for employee groups 4 and 5 • The following infotypes are presented: ○ Required: infotypes HRP1000 (Object Maintenance), HRP1001 (Object Relationships), HRP1013 (Employee Group/Subgroup), HRP9105 (Security), HRP9121 (Position Attributes), HRP9122 (Additional Attributes),HRP9124 (Position Funding) and HRP9126 (Addresses) ○ Optional: infotypes HRP1002 (Description not used) and HRP9120 (Pay Additives) ○ infotypes HRP9105 (Security), HRP9120 (Pay Additives), HRP9121 (Position Attributes), HRP9122 (Additional Attributes), HRP9124 (Position Funding) and HRP9126 (Addresses) are custom • Custom position number is entered by the User which is stored in the Object Abbr field and is used and displayed throughout the system as the position

#	Activity	Description	Dependencies	Uniqueness/Customizations

			State Program Component, State/Federal Funding Codes, OCA) being assigned must exist in custom funding tables in SAP
			
			State Program Component and Budget Entity relationship must exist in the custom table in SAP
				number in place of the standard SAP position number (SAP OBJID); edits in place to prevent User from entering the first two characters different than agency code (i.e., OLO)
				• Employee Groups 4 and 5
				    ○ Broadband (Object Relationships infotype 1001 – S to C relationship) is the only class attribute that is assigned
				    ○ Fields that are not valid for these employee groups are not displayed on the applicable infotype
				    ○ Driver License (DL) Class field is presented blank and the field is not required (required indicator is removed)
				• BENO Entity (employee group 8, agencies 4900 and 9999) positions are created in the backend by the vendor
				• During the action, if infotype HRP9126 (location address) is not created, the position will be locked and no further changes can be made until the issue with the location address is resolved

15.20	Reclassify Position	Action is used to reclassify a position in SAP; process flow presents the applicable infotypes that can be updated and that should be reviewed when reclassifying a position	Position must be active on the effective date of the action All other dependencies as listed for "Establish Position/Create OPS Position" apply	• This action should be processed when certain attributes of a position are changed (e.g., broadband, class, pay plan) • The following infotypes are presented: ○ infotypes HRP1000 (Object Maintenance), HRP1001 (Object Relationships), HRP1013 (Employee Group/Subgroup), HRP9105 (Security), HRP9120 (Pay Additives), HRP9121 (Position Attributes), HRP9122 (Additional Attributes), HRP9124 (Position Funding), HRP9126 (Addresses) and HRP9130 (License/Cert and State Property) • During the action, infotype HRP9130 (License/Cert and State Property) is end dated one day before the effective date of the action • If the Organizational Unit is changed during the action,

#	Activity	Description	Dependencies	Uniqueness/Customizations
				infotype 9124 (Position Funding) is systematically populated with the default funding codes (infotype 9101, State Org Financial Data) of the Organizational Unit that is assigned to the position, based on the effective date of the position action; User has the ability to change the default funding • During the action, the location address (infotype HRP9126 - Addresses) is validated to ensure a valid location address record exists (i.e., record is active and the facility assigned is on the facilities table); if a location address record is not created or if an invalid record is not corrected during the action, the position will be locked and no further changes can be made until the issue with the location address is resolved • Positions can be reclassified by accessing the applicable infotypes directly • Custom position number is retained during the action, maintaining a full history (before and after) of all updates processed • The action requires an employee action (PAR) be processed in order for the employee record to be updated to reflect the reclassification of the position
15.21	Org Change/Position Move	Action is used to change a position's Organizational Unit and/or supervisor reporting relationship; process flow presents the applicable SAP into types that can be updated and should be reviewed when moving a position to a new Organizational Unit or changing the supervisor	Position must be active in SAP on the effective date of the action All other dependencies as listed for "Establish Position/Create OPS Position" apply	• This action should be processed when the Organizational Unit is being changed • The following infotypes are presented: o infotypes HRP1001 (Object Relationships), HRP9105 (Security), HRP9120(Pay Additives), HRP9124 (Position Funding) and HRP9126 (Addresses) • Positions can be updated by accessing the applicable infotypes directly • Custom position number is retained during the action, maintaining a full history (before and after) of all updates processed • During the action, the location address (infotype HRP9126 - Addresses) is validated to ensure a valid

#	Activity	Description	Dependencies	Uniqueness/Customizations
				location address record exists (i.e., record is active and the facility assigned is on the facilities table); if a location address record is not created or if an invalid record is not corrected during the action, the position will be locked and no further changes can be made until the issue with the location address is resolved • The action requires an employee action (PAR) be processed in order for the employee record to be updated to reflect the Organization Unit change
15.22	Abolish Position/Delete OPS Position	Action is used to end date a position	Position must be active in SAP on the effective date of the action	• Process is required when abolishing/end dating a position • Only the Object Maintenance (infotype HRP1000, Object Maintenance) is presented during action • The effective date entered for the action is what is used for the end date for the position • Position cannot be abolished if it is occupied • Once the Object Maintenance (infotype HRP1000, Object Maintenance) is end dated, all infotypes for the position are end dated • Delete OPS Position action is only used for employee groups 4 and 5 • Abolish Position action is only used for employee groups 1 and 2 • Positions cannot be abolished by accessing the position infotypes directly
15.23	Re-Activate Abolished Position	Action is used to reactivate a position; process flow presents the same infotypes as the "Establish Position" action User is required to update information that is no longer valid (e.g., the organization code	Position must have been abolished in the People First System and not be active on or after the effective date of the action All other dependencies as listed for "Establish Position / Create OPS Position" apply	• The following infotypes are presented: ○ Required: infotypes HRP1000 (Object Maintenance, HRP1001 (Object Relationships), HRP1013 (Employee Group/Subgroup), HRP9105 (Security), HRP9121 (Position Attributes), HRP9122 (Additional Attributes), HRP9124 (Position Funding) and HRP9126 (Addresses) ○ Optional: infotypes HRP1002 (Description, not used) and HRP9120 (Pay Additives) • When the action is processed, the position end date is

#	Activity	Description	Dependencies	Uniqueness/Customizations
		may have been abolished, funding source may have changed)		systematically changed to the day before the effective date of the action (infotype does not allow a gap) • Action presents previously saved information (based on last historical record) for review and update • The system uses the existing SAP OBJID • During the action, if infotype HRP9126 (location address) is not created, the position will be locked and no further changes can be made until the issue with the location address is resolved
15.24	Position Maintenance - Object Maintenance (infotype HRP1000) Direct Entry	Captures the custom position number and the position's working title or official class title	Position must be active in SAP on the effective date of the action	• Custom position number is displayed in ID#/Abbr field Description field is used to capture the position working or class title; the official class title is captured on infotype HRP9121 (Position Attributes) and is not updated based on a change to this infotype • Title in description field is displayed throughout the People First System

15.25	Object Relationships (infotype HRP1001) Direct Entry	Captures the following relationships assigned to a position:
		• Holder (Person)
		• Described by (Broadband/Class - job)
		• Belongs to (Organizational Unit)
		• Reports to (Supervisor)
		• Line Supervisor of (Subordinate)
		• Administrator for (Time/Requisition Group)
			Position must be active exist in SAP on the effective date of the action
			
			All objects being assigned as a relationship to the position must have a infotype HRP1000(Object Maintenance) record valid until the end of time (i.e., infinity end date - 12/31/9999)
				• Infotype HRP1001(Object Relationships) allows for multiple types of relationships
				  ○ Holder (Person) relationship is not entered on the position; it is dynamically assigned when an appointment action is completed to appoint the employee into the position
				  ○ Reports to (Supervisor) relationship can be assigned manually or dynamically (e.g., when subordinate position is assigned a supervisor, the supervisor position updates automatically to show the subordinate)
				  ○ Line Supervisor of (Subordinate) relationship can be assigned manually or dynamically (e.g., when supervisor position is assigned a subordinate, the subordinate position updates automatically to show the supervisor relationship and supervisor's working title)
				  ○ Administrator for Time/Requisition Group relationship is not entered on the position; it is dynamically populated on the position for the assigned administrator, based on the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				assignment through the groups process • Customization has been made to allow for the following: ○ Use the custom 24-digit Organizational Code for creating a position to Organizational Unit relationship ○ Use the custom position number to create the position to position (supervisor/subordinate) relationship ○ Use the custom broadband/class to create the position to job relationship
15.26	Description (infotype HRP1002) Direct Entry	Screen is not currently being utilized by most agencies; infotype is available to capture generic job descriptions or knowledge, skills and abilities needed for a position	N/A	N/A
15.27	Vacancy (infotype HRP1007) Direct Entry	Screen is used to "trigger" the start of recruitment process when a position is vacant and needs to be advertised	Position must be active in SAP on the effective date of the action	When the vacancy status is changed from filled to open, the recruitment process is triggered to begin (via interface) in the Performance & Talent Management (recruiting) module
15.28	Employee Group/Subgroup (infotype HRP1013) Direct Entry	Captures the type of position (i.e., authorized position, temporary position (i.e., OPS), benefits only position), including overtime designation (i.e., included or excluded from overtime), and pay plan assigned to the position • Employee	Position must be active in SAP on the effective date of the action	• Included subgroup designation makes position eligible for overtime • Employee Subgroup options are restricted based on selection made in Employee Group field • Employee Subgroup is used to determine: ○ the Pay Plan assigned on the Position Attributes screen (infotype HRP9121) ○ if a position can be assigned certain Pay Additives (infotype HRP9120) ○ Competitive Area Differential (CAD) eligibility • System edit to prevent a User from assigning an employee group to a position where the security role

#	Activity	Description	Dependencies	Uniqueness/Customizations
		Group - type of position • Employee Subgroup - pay plan		code assigned on infotype HRP9105 (Security) is not allowed for the employee group and role code combination based on rules provided in the Security requirements
15.29	Security Direct Entry (infotype HRP9105)	Captures the custom security role code assigned to the position that is used to allow access in the People First System	Position must be active in SAP on the effective date of the action Custom security role code being assigned must exist in SAP on the effective date of the record and must have an infinity end date (i.e., 12/31/9999)	• Security role codes can only be assigned as of the current system date or with a future date; security role codes cannot be assigned a retroactive start date; if a future date is assigned, the future dated access for the position holder starts at 12:00 a.m. on the effective date of the access • The security role code assigned to the position drives the security profile for the position holder (position to person relationship – infotype HRP1001, Object Relationships) • An Organizational Range or agency access can be specified on the security screen (infotype HRP9105), depending on the security role code being assigned to the position; eligible security role codes can be found in the Security requirements • Refer to the Security Role Code Definitions instructional guide for a list of security role codes available, role code descriptions, access levels (i.e., agency or statewide),the type of employee or agency that can be assigned specific role codes and which role codes can only be assigned by Users with specific role codes
15.30	Pay Additives (infotype HRP9120) Direct Entry	Captures additives that a position may be eligible for	Position must be active in SAP on the effective date of the action	• There are nine different pay additives available for assignment to a position ○ On Call ○ Legislative Approved ○ Hazardous Duties ○ Competitive Area Differential ○ Temporary Special Duty – Absent Coworker ○ Lead-Worker Duties ○ Critical Market Pay ○ Trainer Duties

#	Activity	Description	Dependencies	Uniqueness/Customizations
				◦ Temporary Special Duties - General • Pay additives are not part of the employee's base salary • Pay additive selection is restricted based on Employee Subgroup (infotype HRP1013); all employee subgroups, except 05, 08, 09, 15 and 16, are eligible for pay additives • Eight of the pay additives can only be given to the holder (employee) of the position by completing an employee pay action (PAR); the applicable additive must be selected on the position in order for employee action to be processed ◦ Competitive Area Differential (CAD) additive assignment is a custom process; CAD is not manually maintained on the position, it is systematically assigned to a position when the position attributes are an exact match to the CAD attributes (i.e., pay plan, class code, pay grade and physical county) on the CAD record (CAD is systematically removed when position attributes no longer match criteria); additive amount populates systematically (and cannot be changed) when creating the employee pay action • Shift additive is systematically given to the holder (employee) of the position once the shift category (i.e., fixed amount or percentage) is assigned to the position and is systematically removed from the employee when the additive is no longer selected ◦ Shift is added and removed from the employee based on the effective/end date of the shift assignment or effective date of the employee pay action ◦ If the effective date of giving the additive is not the first day of the pay period or the last day of the pay period when removing the additive, an employee pay action must be processed to

#	Activity	Description	Dependencies	Uniqueness/Customizations
				prorate the additive for the mid-period change; if effective for the entire pay period, an employee pay action is not required (agencies can process a pay action to record in the employee's action history) • Pay Additives can only be marked for positions in employee groups 1 and 2 • An employee action must be processed to remove a pay additive from the employee (except the shift additive; refer to the Shift additive requirements above), once the position is no longer eligible • In addition to pay additives, there are three other types of incentives available for assignment to a position: ○ Uniform Allowance – all employee subgroups are eligible; these payments are processed through either the One-Time Regular Pay or Supplemental Pay screen (generally loaded using a mass load) ○ CJIP – all employee subgroups, except 09, 15, 16 and 33 are eligible ○ On Call – only employee subgroups 01, 04, 06, 07, 31 and 81-85 are eligible • Uniform Allowance, CJIP and On Call indicators when any of these options are selected, it allows for specific employee activities or actions to be completed/processed (i.e., allows a CJIP incentive record to be created; allows the employee to record on call hours on their timesheet (except for employee subgroups 81 – 85) or allows the employee be paid for uniform allowance through either the One-Time Regular Pay or Supplemental Pay screens).
15.31	Position Attributes (infotype HRP9121) Direct Entry	Captures position attributes and requirements (e.g., financial disclosure, telework required)	Position must be active in SAP on the effective date of the action Pay Plan determines which	• Custom infotype that captures attributes for the position • Custom and standard dependencies are built into the process for key fields such as: ○ Pay plan (not editable) - populated based on

#	Activity	Description	Dependencies	Uniqueness/Customizations
		assigned as part of the position classification	fields are restricted and/or required	employee subgroup (infotype HRP1013) ○ Class code ▪ Non-broadband position - systematically populated (not editable) based on class assigned on infotype HRP1001 (Object Relationships ▪ Broadband position - selection restricted to a list of class codes from the Broadband Crosswalk table; values are determined based on the broadband code (infotype HRP1001, Object Relationships) and pay plan (infotype HRP9121, Position Attributes) assigned ○ Collective bargaining unit – selection restricted to a list of CBUs from a configurable table based on pay plan (infotype HRP9121, Position Attributes) assigned ○ Pay grade and pay band (not editable) ▪ Non-broadband position – pay grade is systematically populated from the non-broadband class (job) object attributes (infotypes HRP1000, Object Maintenance, HRP1005, Compensation and HRP9110, Class Attributes); pay band is not displayed ▪ Broadband position – both fields are systematically populated from the Broadband Crosswalk using the broadband code (infotype HRP1001, Object Relationships), pay plan (infotype HRP9121, Position Attributes) and class code (infotype HRP9121, Position Attributes) assigned • Non-broadband positions - certain fields

#	Activity	Description	Dependencies	Uniqueness/Customizations
				systematically populate from the non-broadband class (job) object attributes (infotypes HRP1000,(Object Maintenance, HRP1005, Compensation and HRP9110, Class Attributes) • Probationary Period – determines date that is defaulted in Status Expiration Date field (Appointment Status screen) when an original appointment CS, promotion, demotion or reassignment appointment action is processed; probationary period must be greater than or equal to 12 months or greater than or equal to 18 months for positions assigned to employee subgroup 01 (infotype HRP9121, Position Attributes) • FTE is the maximum occupancy allowed for the position; maximum FTE allowed for a position is 1.00, ability to exceed the FTE by processing an employee appointment action and identifying position as being overlapped • Shared Indicator - allows multiple employees to be appointed to a single position; the combined FTE for all employees assigned to a single position must not exceed the total FTE for the position • Certain fields are restricted (e.g., SES Criteria) or required (e.g., Probationary Period) based on pay plan (infotype HRP9121, Position Attributes) assigned • Financial Disclosure – indicates if the position holder (employee) is required to complete a financial and gift disclosure form; if indicator is selected, an annual alert is triggered to the position holder (employee) and the employee's manager • Telework Eligible – indicates if the position holder (employee) is eligible to telework; system edits to require Telework Eligible selected if Telework Required is selected and Telework Eligible Percentage if Telework Eligible is selected • Telework Required – indicates if the position holder

#	Activity	Description	Dependencies	Uniqueness/Customizations
				(employee) is required to telework; system edits to require Telework Required Percentage if Telework Required is selected. Physical county assignment is one part of determining CAD eligibility and the benefits insurance carriers available for selection by the employee; physical county displays on the position holder's (employee) Home Address record (is only editable from the Positon Attributes screen, not the employee's Home Address screen)
15.32	Additional Attributes (infotype HRP9122) Direct Entry	Captures additional position attributes and requirements assigned as part of the position classification	Position must be active in SAP on the effective date of the action Attributes assigned to the position must be active in SAP on the effective date of the record and must have an infinity end date (i.e., 12/31/9999)	• Security Level Check field –indicates if a security check is required (and type of security check) for the position; if required: ○ Custom process to track the position holder's (employee) background check and/or fingerprint information, that includes triggering an alert to the manager when the employee's security check has expired or when rescreening is needed ○ Rescreen Nbr (number) of Months field must be completed if Security Level Check is not equal to 0 (zero) • Abuse Screen indicator - indicates if an abuse background check is required for the position; if required, there is custom process to track the position holder's (employee) abuse background check information, that includes triggering an alert to the manager when the employee's abuse background check has expired or when rescreening is needed • Drug Screen indicator - indicates if a drug screen is required for the position; if required, there is a custom process to track the position holder's (employee) drug screen information, that includes triggering an alert to the manager for the initial drug screen or when rescreening is needed • DL Class field – indicates if a driver license is required for the position; if required, there is a custom process to capture the position holders' (employee) driver

#	Activity	Description	Dependencies	Uniqueness/Customizations

				license information, that includes triggering an alert to the manager when the employee’s license has expired
				• Shift Code – separate codes to indicate if the employee works the default work schedule (Monday-Friday daytime), evening, night, rotating, part-time (0.25, 0.50 and 0.75) 168 hour standard or 168 hour relief schedule
				  ○ For all positions, except those assigned to the 28-day 168 hour FLSA period and part-time selections, the shift data is used for reporting purposes and does not impact the position holder’s (employee) timesheet schedule
				  ○ Positions assigned to the 28-day 168 hour FLSA period, must have one of the 168 hour shifts assigned; the work schedule populated on the position holder’s (employee) timesheet is based on the 168 hour shift selected; the separate 168 shift codes are used to default 12-hour shifts on the employee’s schedule and timesheet
				  ○ If any of the part-time codes are selected, the timesheet and flexible work schedule screens are defaulted with the equivalent part-time hours (2, 4 or 6) Monday – Friday, instead of 8 hours per day

15.33	Additional Attributes – FLSA Work Period (infotype HRP9122) Direct Entry	Captures the FLSA period assigned to a position	FLSA eligibility is determined based on the type of work performed	• Defaults (with the User having the ability to change) based on employee group (infotype HRP1013, Employee Group/Subgroup) • Determines what period of time (i.e., 7, 14 or 28-day period) is considered for overtime purposes for employees that are eligible for overtime (i.e., included employee) • There are six different FLSA work periods that can be assigned to a position, in addition to having the option to select “blank” ○ The 28-day (two 160 hour FLSA periods, a 168 hour FLSA period and a 192 hour FLSA

#	Activity	Description	Dependencies	Uniqueness/Customizations
				period) and 14-day (80 hour FLSA period) work periods are custom, while the 40 hour FLSA work period is standard SAP functionality ○ Positions assigned to the 168 hour FLSA period, must have one of the 168 hour shifts assigned (Shift Code field) and the Default Work Schedule field must be blank ○ Field must have a value other than blank for included positions (positions eligible for overtime); for excluded positions (positions not eligible for overtime), the field must be blank ○ If value is changed from blank to another value or from another value to blank, an employee action (PAR) must be completed to sync the change on the position to the employee's timesheet schedule • A change to the FLSA Work Period systematically updates the employees Base Work Schedule Assignment; if changed in the middle of the employees current FLSA period, it creates a split on the employees timesheet for the period of the change
15.34	Additional Attributes – Default Work Schedule (infotype HRP9122) Direct Entry	Captures default work schedule assigned to a position	N/A	• Determines the number of hours per day that are populated as scheduled hours on the employee timesheet • There are four different work schedules that can be assigned to a position, in addition to having the option to select "blank". All schedules are standard SAP schedules ○ Positions assigned to the 168 hour FLSA period, must have one of the 168 hour shifts assigned (Shift Code field) and the Default Work Schedule field must be blank • Overrides the position work schedule on the employee timesheet
15.35	Job Roles (infotype	Screen is not currently	N/A	N/A

#	Activity	Description	Dependencies	Uniqueness/Customizations
	HRP9123) Direct Entry	being utilized infotype captures historical data that was used to identify functional roles (i.e., information technology and human resources) as part of the state's planning for outsourcing		

15.36	Position Funding (infotype HRP9124) Direct Entry	Captures accounting information (e.g., funding source) assigned to a position. The information is primarily used for the F0001 sent to DFS payroll and other accounting and reporting processes	Funding dependencies for “Establish Position / Create OPS Position” apply
			
			OCA relationships must have been created and loaded into custom funding table in SAP; OCA data is maintained by the agencies and is sent to the People First System using a custom interface process
			
			OCA being assigned to the position must be active in SAP on the effective date of the record and must have an infinity end date (i.e., 12/31/9999)
			
			Other than State Program Component, all funding sources are agency specific and cannot be assigned outside the applicable agency
				• Custom infotype
				• When the new button is selected, the funding fields are systematically populated with the default funding codes (infotype HRP9101, State Org Financial Data) of the Organization Unit that is assigned to the position, based on the effective date
				• All positions (except positions in agency code 6000, 6400 and 6700) have State and Federal Funding Percentages assigned; positions in OLO 6000, 6400 and 6700 use custom OCA Funding Percentages
				• System edits prevent the User from:
				  ○ Saving FLAIR Account Code that does not match an active FLAIR Account Code in the custom FLAIR Account table
				  ○ OCA Code - saving an OCA code that is not valid in the custom OCA table; using an OCA code where the values in the position funding fields (Budget Entity, IBI Code, Level 2 FLAIR Org Code, Category, Grant Fund Code, State Fund Code and FID) do not match the values for that OCA and using an OCA code where the value in the field does not match the third and fourth characters of the Flair Org Code
				  ○ Saving a State Program Component that does not exist in the custom State Program Component table and is not linked to the Budget Entity being saved
				  ○ Saving a FLAIR Org Code that does not exist in the custom FLAIR Org Code table

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ Saving a secondary program component that does not exist in the custom State Program Component table ○ Saving a Budget Entity in the DOE Budget Entity field that does not exist and preventing all agencies, except DOE (i.e., agency 4800), from saving data in the field ○ Saving a Position Funding record for a DCF or APD position (i.e., agency 6000 and 6700) when the Warrant Distribution Number field is blank ○ Saving a Position Funding record where the state funding (all codes combined) exceed 100% or federal funding percentage exceeds the state general funding percentage (State Funding Code 1000) • Certain data (i.e., FLAIR Account Code, FLAIR Org Code, Inter-Departmental ID and Warrant Distribution Number) is used in the F0001 build program • The last digit of the Inter-Department ID is used for the FSDB to identify the contract length for employees • When a change is made to the FLAIR Account Code, a new S to K (position to cost center) relationship (infotype HRP1001, Object Relationship) is created (not displayed in portal), which triggers a new Organizational Work Assignment (infotype PA0001) record to be systematically created
15.37	Address (infotype HRP9126) Direct Entry	Captures the position's work mailing and work location addresses	State owned and leased facility data is sent to the People First System using a nightly interface process Position counts and telework percentages by agency, for each state owned and leased (facility type) facility assigned on the Location Address	• Infotype allows for two types of addresses (i.e., Work Mailing and Work Location) • Work Mailing Address – county options are restricted based on the state selected • • Work Location Address – facility selection is restricted based on the agency and county selected; buildings are referenced from the custom facilities table (ZCC_Facilities) ○ The county and facility number fields are the

#	Activity	Description	Dependencies	Uniqueness/Customizations
			screen is sent to the state's facility database (FL-SOLARIS) using a nightly interface process	only facility fields open for editing; once the county is selected, only valid facilities for that county and agency are available for selection ○ Once a facility is selected, the remaining facility address fields (i.e., address, city, state, zip code, campus name) are systematically populated ○ End date is not editable; when a new record is created, the current record is systematically end dated the day before the effective date of the new record
15.38	Alternate FLAIR Account Code (infotype HRP9128) Direct Entry	Captures FLAIR Account code overrides for overtime and/or on call payments (separate overrides for each)	FLAIR Account Code must have been created in FLAIR marked for payroll and loaded into custom funding table in SAP (daily interface file is provided from FLAIR containing all available active payroll account codes) FLAIR Account Code must be valid for the type of position being maintained (e.g., category cannot be 03 or 04 for salaried position)	• There are separate Alternate FLAIR Account Code fields for overtime and on call • The alternate FLAIR account code overrides the FLAIR Account code on the Position Funding (infotype HRP9124) record for overtime and/or on call payments; it does not impact any other payments (e.g., regular salary payments) • Once an alternate FLAIR account code is assigned to a position, all payments processed on or after the effective date are paid from the account entered into the applicable field (i.e., overtime and on call)
15.39	License/Certification & State Property (infotype HRP9130) Direct Entry	Captures state property (e.g., uniform, cell phone) assigned to a position and identifies license or certifications required for holders of a position	State property and licensure/certification types must exist in SAP on the effective date of the record and must have an infinity end date (i.e., 12/31/9999)	• Infotype includes two subtypes to separately track property assigned and licensure/certifications required for the position • Data must be selected from dropdown menu; no manual entry allowed
15.40	Organization Actions - Create Organizational Unit	Action is used to create an Organizational Unit; process flow presents the applicable infotypes that must be completed	First two digits of Organizational Unit code must match the first two digits of agency code (i.e., OLO), except in some cases where	• The following infotypes are required and are presented on a single screen in order to account for the custom 24-digit Organization Code: ○ Required: HRP1000 (Object Maintenance), HRP1001 (Object Relationships),, HRP1008

#	Activity	Description	Dependencies	Uniqueness/Customizations
		when creating an Organizational Unit	the first four digits must match the first four of agency code Organizational Unit code being created must have never existed Funding dependencies for "Establish Position / Create OPS Position" apply Organizational Unit assigned as the reporting relationship (i.e., parent/child relationship) must exist in SAP on the effective date of the action and must have an infinity end date (i.e., 12/31/9999) Payroll area being assigned must exist in SAP on the effective date of the action and must have an infinity end date (i.e., 12/31/9999)	(State Agency Data), HRP9100 (State Org Data), HRP9101 (State Org Financial Data) and HRP9102 (Contact) ○ infotypes HRP9100 (State Org Data), HRP9101 (State Org Financial Data) and HRP9102 (Contact) are custom • Process must be used to create Organizational Unit; Organizational units cannot be created by accessing each infotype directly • Custom 24-digit Organizational Code is entered by the User and is stored in the Organizational Code field on infotype HRP9100 (State Org Data); the custom code is displayed throughout the system in place of the standard SAP OBJID • Payroll area is defined at the organizational level instead of using the standard ABKRS feature in SAP • The funding source assigned to a position is pulled (defaulted) from the State Org Financial Data screen (infotype HRP9101) through a custom process • Under certain circumstances, it is necessary to create Organizational Units that are assigned to a non-paying payroll area (e.g., ZB for biweekly agency and ZM for monthly agency); this type of Organizational Unit is referred to as a Non-Paying Organizational Unit ○ Non-Paying Organizational Units are created to allow Users to have access to view or maintain information within the agency without being paid; assigning an Organizational Unit to a non-paying payroll area prevents Users assigned to the Organizational Unit from being paid (i.e., not included on the F0001), but only for the position assigned to the Organizational Unit; if applicable, the employee is still paid for their other regular position ○ Users assigned to a Non-Paying Organizational Unit are either provided the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				access for a historical agency (i.e., agency that has been abolished by law), the individual is a federal employee who has purview over a population of state employees or the individual is a contractor of the assigned agency and is provided the access to maintain post-tax wage deductions ○ Creating Non-Paying Organizational Units and the hiring of employees being assigned to the Organizational Unit must be completed by the vendor
15.41	Delete Organizational Unit	Action is used to end date the Organizational Unit	Organizational Unit must not have any positions or Organizational Units on the day after the effective date being used	• Process is required when abolishing/end dating an Organizational Unit • The effective date entered for the action is what is used for the end date on the Organizational Unit • Only the Object Maintenance (infotype HRP1000) is presented during action • Once the Object Maintenance (infotype HRP1000) is end dated, all infotypes for the Organizational Unit are end dated; this action does not delete the Organization Unit
15.42	Re-Activate Organizational Unit	Action is used to reactivate an abolished Organizational Unit	Organizational Unit must have been abolished in the People First System	• Process is used to reactivate an Organizational Unit; the process flow presents same infotypes as Create Organizational Unit • Action presents previously saved information for review and update; User is required to update information that is no longer valid (e.g., funding source may have changed) • When the action is processed, the Organizational Unit end date is systematically changed to the day before the effective date of the action (infotype does not allow a gap) • The system uses the existing SAP OBJID
15.43	Organizational Maintenance – Object Maintenance (infotype	Captures the Organizational Unit name (description) and	None	• Custom 24-digit Organizational Code is displayed in State Org Code field and cannot be edited • The ID# / Abbr and Description fields can be edited

#	Activity	Description	Dependencies	Uniqueness/Customizations
	HRP1000) Direct Entry	abbreviation for the Organizational Unit		• The Organizational Unit title captured in the description field is displayed throughout the People First System
15.44	Object Relationships (infotype HRP1001) Direct Entry	Captures the following relationships (both active and historical) assigned to the Organization Unit: • Incorporates (Positions) • Reports to (Organization – Child) • Line Supervisor of (Organization - Parent) • Belongs to (Time/Requisition Group)	All objects being assigned as a relationship to the position must have a infotype HRP1000 (Object Maintenance) record valid until the end of time (i.e., infinity end date - 12/31/9999)	• infotype HRP1001 (Object Relationships) allows for multiple types of relationships ○ Incorporates (Positions) relationship that is not manually entered; it is dynamically assigned when a position is assigned to the Organizational Unit through a position action or direct entry into infotype HRP1001 (Object Relationships) ○ Reports to (Organization - Child) relationship can be assigned manually or dynamically (i.e., when Organizational Unit is assigned as the parent on another Organizational Unit, the child relationship updates automatically) ○ Line Supervisor of (Organization - Parent) can be assigned manually or dynamically (i.e., when Organizational Unit is assigned as the child on another Organizational Unit, the parent relationship updates automatically) • Customization has been made to allow for the following: ○ Use the custom position number for creating an Organizational Unit to position relationship ○ Use the custom 24-digit Organizational Code for creating an Organizational Unit to Organizational Unit relationship
15.45	State Agency Data (infotype HRP1008) Direct Entry	Captures the agency (personnel area) and sub-agency (personnel subarea) for the Organizational Unit	Agency assigned is based on the first two digits of the Organizational Unit code Options for Sub-agency selection is based on agency code (i.e., OLO) assigned; BENO Agencies (4900 and 9999) have numerous sub-	• Only active record is displayed; no historical records shown • Screen is view only • For BENO entities, the agency and sub-agency assignment is completed in the back-end SAP tables and not through the front-end process • The agency and sub-agency values are referenced during the PAR process to populate on the employee’s Organizational Work Assignment (infotype

#	Activity	Description	Dependencies	Uniqueness/Customizations
			agency codes; no options are presented for all other agency codes	PA0001)
15.46	State Org Data (infotype HRP9100) Direct Entry	Captures the payroll area assigned to the Organizational Unit	Payroll area being assigned must exist in SAP on the effective date of the record and must have an infinity end date (i.e., 12/31/9999)	• Only active record is displayed; no historical records shown • This is a custom infotype • There are separate fields to assign a payroll area (e.g., biweekly, monthly) to salaried and temporary positions (i.e., OPS) ○ Some of the payroll areas available for selection are non-paying (e.g. ZB for biweekly agency and ZM for monthly agency); these types of payroll areas are only used under certain circumstances (refer to the Create Organizational Unit section for additional information) • The payroll area is systematically assigned to the holder (employee) of the position that is assigned to the Organizational Unit during the appointment process • The custom 24-digit Organizational Code is stored in the Organizational Code field on this infotype and is displayed throughout the system in place of the standard SAP OBJID
15.47	State Org Financial Data (infotype HRP9101) Direct Entry	Captures the funding sources assigned to the Organizational Unit	Funding dependencies for "Establish Position / Create OPS Position" apply	• This is a custom infotype • The funding sources assigned on this infotype are defaulted to positions (infotype HRP9124, Position Funding) assigned to the Organizational Unit, when a position action is completed or new position record created
15.48	Contact (infotype HRP9102) Direct Entry	Captures contact telephone number for the Organization Unit	N/A	This is a custom infotype
15.49	Broadband Actions - Create Broadband	Action is used to create a broadband (code) in SAP that can then be	Broadband must not already exist in SAP	• The following infotypes are required: ○ Infotypes HRP1000 (Object Maintenance) and HRP1005 (Compensation)

#	Activity	Description	Dependencies	Uniqueness/Customizations
		assigned to broadband classes and positions	Pay band must exist in SAP on the effective date of the action and must have an infinity end date (i.e., 12/31/9999); pay band is created in a separate standard SAP financial table	• Process must be used to create broadband; a broadband cannot be created by accessing each infotype directly • Custom Broadband Code is entered by the User which is stored in the ID #/Abbr field (infotype HRP1000, Object Maintenance) and displayed throughout the system as the broadband in place of the standard SAP Job OBJID • Infotype HRP1001 (Object Relationships) is not presented when completing the action; the infotype is systematically populated when positions are assigned to the broadband • Action only creates a broadband; creating a broadband class and assigning it to a specific broadband is handled through a separate custom Broadband Crosswalk table in SAP • Only a pay band is assigned to the broadband; no pay grade is assigned
15.50	Delete Broadband	Action is used to end date a broadband	Broadband must be active	• Process is required when abolishing/end dating a broadband • The effective date entered for the action is what is used for the end date on the Broadband • Only the Object Maintenance (infotype HRP1000, Object Maintenance) is presented during action and when end dated, all infotypes for the Broadband are end dated
15.51	Broadband Maintenance Direct Entry - Object Maintenance (infotype HRP1000)	Captures the broadband title (description) for the broadband	N/A	• Custom broadband number is displayed in ID#/Abbr field and should not be edited • Description field is used to capture the broadband occupation title • Occupation title in description field is displayed on the Broadband Crosswalk
15.52	Broadband Maintenance - Object Relationships (infotype HRP1001)	Captures positions that are assigned to the broadband (both active and historical	N/A	• Infotype is view only and is systematically populated when a position is assigned to the broadband; position relationship is end dated when a position is no longer assigned to the broadband

#	Activity	Description	Dependencies	Uniqueness/Customizations
		relationships)		
15.53	Broadband Maintenance - Compensation (infotype HRP1005)	Captures the pay band assigned to the broadband and the annual minimum and maximum salary for the pay band	Pay Band must exist in SAP on the effective date of the action and must have an infinity end date (i.e., 12/31/9999); pay band is created in a separate standard table in SAP	• Pay band is systematically assigned to position when the broadband to position relationship is created (infotype HRP1001, Object Relationships) • Minimum and maximum annual salary is systematically populated based on pay band; field is not editable • The pay band minimum and maximum are referenced during the PAR process to validate if the salary entered on the PAR is within the range • The infotype determines the values that are displayed on the employee's Pay Info screen (infotype PA0008)

15.54	Class Actions - Create Class	Action is used to create a non-broadband class in SAP that can then be assigned to positions	Non-broadband class must not already exist in SAP
			
			Attributes (e.g., EEO 4, occupation group) assigned to a non-broadband class must exist in SAP on the effective date of the action and must have an infinity end date (i.e., 12/31/9999)
			
			Pay grade must exist in SAP on the effective date of the action and must have an infinity end date (i.e., 12/31/9999); pay grade is created in a separate standard SAP financial table
			
			Pay grade and pay plan combination assigned to a non-broadband class must have a relationship created; relationship is created in separate standard SAP
				• The following infotypes are required and are presented on a single screen:
				  ○ Infotypes HRP1000 (Object Maintenance), HRP1005 (Compensation) and HRP9110 (Class Attributes); infotype HRP9110 (Class Attributes) is custom
				  ○ Infotypes HRP1001 (Object Maintenance) and HRP1002 (Description) are not presented when completing the action; infotype HRP1001 (Object Maintenance) is systematically populated when positions are assigned to the class
				• Process must be used to create non-broadband class; a non-broadband class cannot be created by accessing each infotype directly
				• Custom non-broadband class code is entered by the User which is stored in the ID #/Abbr field (infotype HRP1000, Object Maintenance) and displayed throughout the system as the non-broadband class in place of the standard SAP Job OBJID non-broadband class code is six digits, with the first two digits representing the pay plan and the last four digits representing the class
				• Only a pay grade is assigned to non-broadband

#	Activity	Description	Dependencies	Uniqueness/Customizations
			financial table	classes; these type of classes are not assigned a pay band
15.55	Class Actions -Delete Class	Action is used to abolish (end date) a non-broadband class	Non-broadband class must be active in SAP User must have security access that allows them to access Table Maintenance	• Process is required when abolishing/end dating a non-broadband class; non-broadband class cannot be abolished by accessing each infotype directly • The effective date entered for the action is what is used for the end date on the non-broadband class • Only the Object Maintenance (infotype HRP1000) is presented during action • Once the non-broadband class is end dated, all positions associated to the non-broadband class are end dated • Once the Object Maintenance (infotype HRP1000) is end dated, all infotypes for the non-broadband class are end dated; this action does not delete the non-broadband class
15.56	Class Maintenance Direct Entry - Object Maintenance (infotype HRP1000)	Captures the non-broadband class title (description)	N/A	• Custom position number is displayed in ID#/Abbr field and should not be edited • Description field is used to capture the class title • Class title in description field is displayed on the position Object Relationships (infotype 1001) and Position Attributes (infotype 9121) screen
15.57	Class Maintenance Direct Entry -Object Relationships (infotype HRP1001)	Captures positions that are assigned to the non-broadband class (both active and historical relationships)	N/A	• Infotype is view only and is systematically populated when a position is assigned to the non-broadband class; position relationship is end dated when a position is no longer assigned to the non-broadband class
15.58	Class Maintenance Direct Entry -Description (infotype HRP1002)	Screen is not currently being utilized; screen is available to capture generic job descriptions or knowledge, skills and abilities needed for a non-broadband class	N/A	N/A
15.59	Class Maintenance Direct Entry -	Captures the pay grade assigned to non-	Pay grade and pay plan must exist in SAP on the effective	• Pay grade is systematically assigned to position when the non-broadband class to position relationship is

#	Activity	Description	Dependencies	Uniqueness/Customizations
	Compensation (infotype HRP1005)	broadband class and the annual minimum and maximum salary for the pay grade	date of the action and must have an infinity end date (i.e., 12/31/9999); pay grade is created in separate standard table in SAP Pay grade and pay plan combination assigned to the non-broadband class must have a relationship created; relationship is created in separate standard SAP financial table	created (infotype HRP1001, Object Relationships) • Minimum and maximum annual salary is systematically populated based on pay grade assigned (minimum/maximum amounts are stored in the custom Pay Grade Minimum and Maximum table); field is not editable • The infotype determines the values that are displayed on the employee's Pay Info screen (infotype PA0008)
15.60	Class Maintenance Direct Entry -Class Attributes (infotype HRP9110)	Captures attributes assigned to the non-broadband class	Attributes (e.g., EEO 4, occupation group) assigned to the non-broadband class must exist in SAP on the effective date of the action and must have an infinity end date (i.e., 12/31/9999)	Certain attributes (i.e., EEO 4, occupation group) systematically populate on the position when the non-broadband class is assigned; these attributes are not editable
15.61	Table Maintenance - Search	Allows for search on custom tables in SAP (FLAIR Org, Budget Entity, State Program Component, State/Federal Funding Codes, Pay CAD, Broadband Crosswalk) using filter options	Data being searched for must exist in SAP User must have security access that allows them to access Table Maintenance	• Filter options presented are based on the table being searched • Search for FLAIR Org and Budget Entity is restricted to the User's own agency, Admin Users have statewide access • Search for State Program Component, State/Federal Funding Codes, Pay CAD and Broadband Crosswalk is statewide • Both active and inactive records are shown when searching on the funding (FLAIR Org, Budget Entity, State Program Component, State/Federal Funding Codes) and Pay CAD tables • Only the active record is shown when searching on the Broadband Crosswalk table • Wildcard (asterisk) can be used in all search fields; when using an asterisk, User must include at least one identifier (e.g., first digit of the funding code, first

#	Activity	Description	Dependencies	Uniqueness/Customizations
				digit of the broadband code, etc.) in conjunction with the asterisk
15.62	Table Maintenance - Budget Entity (BE) Table	Custom table in SAP used to create and maintain BE codes that can be assigned to Organizational Units and positions	N/A	• Custom process to create or modify entries in the BE table • Budget Entity is agency specific; when record is created, code is assigned to a specific agency; first two digits of code must match the first two digits of agency (i.e., OLO) selected • When a record is created in the custom table that is an exact match to an active BE code, the old record is systematically end dated the day before the effective date of the new record
15.63	Table Maintenance - FLAIR Org Table	Custom table in SAP used to create and maintain FLAIR Org codes that can be assigned to Organizational Unit and positions	N/A	• Custom process to create or modify entries in the FLAIR Org table • Code is agency specific; when record is created, code is assigned to a specific agency; first two digits of code must match the first two digits of agency (i.e., OLO) selected • When a record is created in the custom table that is an exact match to an active FLAIR Org code, the old record is systematically end dated the day before the effective date of the new record
15.64	Table Maintenance - State and Federal Funding Codes Table	Custom table in SAP used to create and maintain State and Federal Funding codes that can be assigned to positions	N/A	• Custom process to create or modify entries in the State and Federal Funding Codes table • Codes are not agency specific; an agency is not assigned to record in custom table • State Funding Codes are identified with STA in the custom table • Federal Funding Codes are identified with FED in the custom table • When a record is created in the custom table that is an exact match to an active funding code, the old record is systematically end dated the day before the effective date of the new record
15.65	Table Maintenance - SPC Table	Custom table in SAP used to create and	N/A	• Custom process to create or modify entries in the SPC table

#	Activity	Description	Dependencies	Uniqueness/Customizations
		maintain SPC codes that can be assigned to Organization Units and positions		• When a record is created in the custom table that is an exact match to an active SPC code, the old record is systematically end dated the day before the effective date of the new record • Code is not agency specific; an agency is not assigned to SPC record in custom table

15.66	Table Maintenance -Pay CAD Table	Custom table in SAP used to create and maintain individual unique CAD additives that will be systematically assigned to positions based on matching criteria that is on the CAD record	Attributes (i.e., Pay Plan, Pay Grade and Physical County) assigned to a CAD must exist in SAP on the effective date of the record and must have an infinity end date (i.e., 12/31/9999)	• Custom process to create or modify entries in the Pay CAD table
				• Class Code assigned to the CAD must be valid
				• CAD is not agency specific; an agency is not assigned to CAD record in custom table; CAD can be assigned to positions in any agency
				• A position is CAD eligible when the position attributes are an exact match to the specific criteria (i.e., pay plan, class code, pay grade and physical county) on the CAD record
				• When a record is created in the custom table that is an exact match to an active CAD record, the old record is systematically end dated the day before the effective date of the new record
				• When a CAD record is delimited, it does not automatically remove the CAD additive from an employee record; a PAR must be processed to remove the CAD
				• System edits to prevent:
				  ○ invalid county code from being entered
				  ○ decimals from being entered in the CAD amount fields

15.67	Table Maintenance - Broadband Crosswalk Table	Custom table in SAP used to create and maintain broadband classes (jobs) that can be assigned to positions	Pay grade and pay band must exist in SAP (created in separate custom table in SAP) on the effective date of the record and must have an infinity end date (i.e., 12/31/9999)	• Access is assigned to super Users only (HR and Admin), with HR Users only having view access • Custom process to create or modify entries in the Broadband Crosswalk table • Broadband class is not agency specific; an agency is not assigned to the broadband class in custom table • Effective date must be a date within the last two months, based on the system date

#	Activity	Description	Dependencies	Uniqueness/Customizations
			Attributes (e.g., broadband code, pay grade, pay band, pay plan) assigned to broadband class must exist in SAP on the effective date of the record and must have an infinity end date (i.e., 12/31/9999)	• Pay band minimum/maximum salary is systematically populated, based on broadband code assigned • Once a broadband class is created, only certain fields can be edited; if changes are needed to fields that cannot be edited, a new record (entry) has to be created ○ Only the Class Title, Job Family, Occupation Group Text, Occupation and Broadband Level fields are editable once the record is saved • Ability to delete a record in the custom table if created in error; otherwise changes are made through the edit or creation (new button) process • When a record is created in the custom table that is an exact match to an active broadband class, the old record is systematically end dated the day before the effective date of the new record • Broadband crosswalk record cannot be end dated if there are position assigned that have the same broadband code, pay plan and class
15.68	Other Tables -Process Handled Outside of People First - SPC to BE Relationship Table	Custom table in SAP used to create and maintain SPC to BE relationships	SPC and BE must exist in SAP on the effective date of the record and must have an infinity end date (i.e., 12/31/9999)	• Custom process to create and maintain SPC to BE relationships • Custom table can only be accessed and viewed through SAP GUI and not the People First System • Access to maintain SPC to BE relationships is allowed by state SAP GUI Users (license for SAP GUI is needed)
15.69	Other Tables - Process Handled Outside of People First - Pay Grade/Pay Plan Relationship Table	Custom table in SAP used to create and maintain pay grade and pay plan relationships that can then be assigned to non-broadband classes	Pay grade and pay plan must exit in SAP; pay grade is created in a separate custom table in SAP	• Custom process to create and maintain pay grade and pay plan relationships; process is handled by the current vendor through a custom mass load process • Custom table can only be accessed and viewed through SAP GUI and not the People First System • Pay grade and pay plan relationships are only created for non-broadband classes • Pay grade and pay plan are systematically populated on applicable non-broadband class infotypes in the People First System

#	Activity	Description	Dependencies	Uniqueness/Customizations
15.70	Other Tables - Process Handled Outside of People First - Pay Grade Minimum and Maximum Table	Custom table in SAP used to create and maintain the minimum and maximum salary assigned to a pay grade	Pay grade must exist in SAP(created in a separate custom table in SAP) on the effective date of the record and must have an infinity end date (i.e., 12/31/9999)	• Custom process to create and maintain pay grade minimum and maximum salary; process is handled by the current vendor through a custom mass load process • Custom table can only be accessed and viewed through SAP GUI and not the People First System • Pay grade minimum and maximum salary is systematically populated on applicable class infotypes (both non-broadband and broadband classes) in the People First System
Payroll Preparation				

16.1	Key Payroll Calculations and Definitions	This section includes the various terms and calculations the State of Florida uses as part of the payroll process. These definitions and calculations apply to payroll processes used to support the People First solution, including the generation of the F0001 file sent to the BOSP for each regular (biweekly and monthly) and supplemental payroll	N/A	The key payroll calculations/definitions are:
				• SAP Payroll Module – the state does not use the SAP Payroll module to calculate net payments, for tax calculations or reporting or to generate payments (warrants or direct deposit transactions); a custom process was built within SAP to perform the state's calculations (as defined below) and to create a F0001 file from SAP (People First) to the DFS, BOSP, for payroll calculations and deposits
				• Payroll Area – Payroll area is the frequency the employee is paid their regular salary. The following are the payroll areas that are currently used by the state:
				  ○ Biweekly (UB) – 14-day pay period. Employees receive a pay warrant every 14-days. Employee's biweekly salary is multiplied by 26 (except for FSDB; see the calculation below for FSDB) to determine the employee's annual salary. UB can be applied to employees in employee groups 1, 2, 4 and 5 (1 and 2 are salaried employees, 4 and 5 are temporary (OPS) employees)
				  ○ Biweekly 7-days Back (U7) – 14-day pay period. Employees receive a pay warrant on same frequency (and same payment date) as

#	Activity	Description	Dependencies	Uniqueness/Customizations
				UB employees, but for a different pay period (starts 7-days prior to the start of the UB pay period). U7 is currently only used for employees in employee groups 4 and 5, however it can be used for employee groups 1 and 2 ○ Monthly (UM) – pay period consist of the first day of the month to the last day of the month. Employees receive a pay warrant on the last weekday of the month (if last weekday is an observed holiday, employees are paid on the previous weekday). UM applies to employees in employee groups 1 and 2 only ○ Monthly 15-14 (UR) – pay period consist of the 15th day of one month to the 14th day of the next month. Employees receive a pay warrant on the last day of the month following the end of the pay period. UR applies to employees in employee groups 4 and 5 only ○ Non-Paying Payroll Area (ZB and ZM) – organization units assigned ZB or ZM are not considered for payroll or budgetary purposes. These payroll areas are assigned to non-paying organization units that are created to provide access to specific Users, outside of their normal authorizations ○ For benefits only (BENO) entities (State Universities, Legislature, etc.) non-paying payroll areas of 98 (nonpaying Biweekly) or 99 (nonpaying monthly) are assigned. These entities only use the People First System for benefits, no part of payroll is processed in People First. The 98 and 99 are used to drive when benefit deductions are due ○ For non-active employees, DB (direct bill) and PP (pension payroll) payroll areas are used. DB is used for state retirees, COBRA

#	Activity	Description	Dependencies	Uniqueness/Customizations
				participants, layoff participants and other non-active employee populations. PP is used for state retirees whose health and/or life insurance are deducted from the retiree's pension payroll • Base Rate of Pay (stored on infotype PA0008) – An employee's core salary, which excludes pay additives, incentive payments, fringe benefits payments (uniform allowance, vehicle allowance, etc.) and non-recurring payments o Biweekly Hourly Base Rate of Pay: (Biweekly Base Rate of Pay x 26) / (2080 x employee's FTE) o Monthly Hourly Base Rate of Pay: (Monthly Base Rate of Pay x 12) / (2080 x employee's FTE) • Pay Additive (infotype PA0014, except for Shift Differential and CAD – CAD is stored on infotype PA0008 (Base Rate of Pay) and shift is generated based on the entry on the employee's position on infotype HRP9120, Pay Additives) – Temporary increases in pay in addition to the base rate of pay. Each pay additive type is defined below in the Employee Gross Salary screen section • Shift Differential (technically a pay additive, but is assigned differently) (defined on infotype HRP9120, Pay Additives, but is calculated in payroll) – additional pay to employees who work a rotating, evening or night shift based on the collective bargaining unit the employee is assigned to. Shift Differential is assigned to the employee's position (infotype HRP9120, Pay Additives) and is assumed by the position holder. Shift Differential can be assigned as either a fixed dollar or a percentage of (must select the percentage amount): o the minimum of the pay grade (driven by class assignment); o the minimum of the pay band (driven by

#	Activity	Description	Dependencies	Uniqueness/Customizations
				broadband assignment); or ◦ the employee's base salary ◦ If percentage is selected, the percentage amount must be designated. User has the ability to select from 1% to 15% (selection includes quarter percentage increments – e.g., 1.25%, 1.50%, etc.) • Period Rate of Pay – An employee's base rate of pay plus approved (and active for the pay period) pay additives (except on call, which is always paid separately). The period rate of pay is the amount the employee is paid for the payroll and is used to calculate partial salary payments during mid period hires and terminations and periods where the employee is on partial leave without pay ◦ Biweekly Hourly Period Rate of Pay: Biweekly Period Rate of Pay / (80 hours x employee's FTE) ◦ Monthly Hourly Period Rate of Pay: Monthly Period Rate of Pay / (employee's contract hours for the month (calculated by summing the employee's scheduled hours during the month – first day to the last day of the month)) • Regular Rate of Pay – An employee's base rate of pay plus approved pay additives (except for on call), CJIP and Firefighter Supplemental Compensation (FSCP). ◦ Biweekly Hourly Regular Rate of Pay: (Biweekly Regular Rate of Pay x 26) / (2080 x employee's FTE) ◦ Monthly Hourly Regular Rate of Pay: (Monthly Regular Rate of Pay x 12) / (2080 x employee's FTE) • Default Workweek – The State of Florida's standard 40-hour workweek is Friday – Thursday • Contract Hours – The contract hours are the full-time equivalent hours for the pay period. Contract hours are calculated as follows:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				◦ Biweekly – Contract hours are always 80 hours except for mid period hires and terminations. For mid period hires and terminations, the contract hours are calculated as 8-hours per day for weekdays (Monday-Friday) in the period prior to the hire or after the last day worked, plus the employee's scheduled hours for the days employed in the pay period (if part-time employee, scheduled hours divided by the employee's FTE) ◦ Monthly – Contract hours are calculated by summing the employee's scheduled hours of work from the first to the last day of the month and dividing the total scheduled hours by the employee's FTE ▪ For JAC/SCS contract hours are always pulled from the custom standard monthly contract hours table ▪ For mid period hires and terminations, the contract hours are calculated by assuming 8-hours for days during the pay period prior to the hire and adding those hours to the employee's scheduled hours for the days the employee is active (if part-time, scheduled hours are divided by the employee's FTE) ▪ Contract hours are used when calculating partial payments resulting from mid period hires and terminations and for pay periods where the employee is on partial leave without pay (LWOP) • LWOP Hours Calculation – Leave without pay hours are determined based on multiple aspects ◦ LWOP PAR – If employee is placed in a LWOP status based on a LWOP PAR being

#	Activity	Description	Dependencies	Uniqueness/Customizations
				completed, and the employee's timesheet is not approved for the LWOP period, the scheduled hours for the LWOP days are deducted from the employee's contract hours for the pay period (for part-time employees, scheduled hours are divided by the employee's FTE) ▪ LWOP for workers compensation places the employee in a LWOP status for 2/3 of the scheduled hours; employee is only paid for the remaining 1/3 hours if there is a scheduled holiday or the timesheet is completed with a payable leave type equal to 1/3 of the scheduled hours ○ LWOP Timesheet Hours – If the employee's timesheet is approved at the point the payroll processes, LWOP is based on the employee's approved timesheet ▪ If the employee is in a LWOP status (based on a LWOP PAR) and the timesheet is approved, but time is not recorded on a scheduled work day, that scheduled work day is treated as full LWOP (employee must change their schedule to show the non-scheduled work day as a scheduled work day) ○ Military LWOP – If employee is placed in a military LWOP status (either with or without supplement), separate calculations are used in the payroll subschema to calculate the gross salary for the payment. The employee MUST be placed in the military LWOP status via a PAR for this process to apply. If the time is purely entered on the timesheet (no military PAR is processed), the following calculations

#	Activity	Description	Dependencies	Uniqueness/Customizations
				do not apply and time is treated as normal LWOP ▪ For the beginning rate of pay, the employee is paid the greater of the state holiday(s) in the period and the military supplement amount, but is not paid for both for the state holiday(s) and the military supplement amount. The amount included in the beginning rate of pay on the F0001 file for military supplement or state holiday is paid at the rate presented and is not adjusted based on the number of days in the period (the amount is prorated in the F0001 program and the final amount due at the beginning rate is presented; this only applies if the employee is on military leave without pay with a supplement). For example, if the employee is entitled to be paid for two holidays, the amount owed for the two holidays is sent on the F0001 file at the beginning rate of pay instead of the employee's normal rate of pay. If no holiday, but the employee is receiving a military supplement amount, the military supplement amount is contained in this field ▪ For employees in a military LWOP status, all other non-state holiday and non LWOP hours (time worked and leave used in the period before the effective date of the military leave and leave used in the period from the effective date of the military leave) are paid in the ending rate of pay field on

#	Activity	Description	Dependencies	Uniqueness/Customizations
				the F0001 file based on the number of hours to be compensated ▪ Edits exist in the payroll process to limit the employee's total compensation from the state to the employee's regular rate of pay to prevent employees from using leave in combination with their military supplement to receive an excessive salary payment ▪ If the employee starts, ends or changes the military supplement amount in middle of the pay period, the amount is prorated to calculate the military supplement amount that is included in the beginning rate of pay field on the F0001 file • Gross Salary – gross salary is the gross amount due to the employee for the pay period o The gross salary is calculated as follows for employees in employee groups 1 and 2: [(Employee's Period Rate of Pay/contract hours) x (scheduled hours – LWOP hours for the pay period)] ▪ If employee is on Military LWOP, the calculations defined above for Military LWOP are used to calculate the gross salary for the employee o The gross salary is calculated as follows for employees in employee groups 4 and 5: Employees hourly rate of pay x hours approved for the pay period • Payroll by Exception – Employees in employee groups 1 and 2 are paid by exception. If no exceptions exist, the employee is paid their full salary, whether or not the employee's timesheet is approved (unless the employee is in a LWOP status, in which case the

#	Activity	Description	Dependencies	Uniqueness/Customizations

				LWOP status overrides)
				• Positive Payroll – Employees in employee groups 4 and 5 are paid on a positive payroll basis. These employees are only paid if their timesheet has been approved for the pay period and are only paid for the hours approved
				• On Call – Hours employees are required to be available to return to work if called in by the agency. On Call is calculated as follows:
				  ○ Except for Lottery (agency 3100), weekday on call hours are paid at a rate of $1 per hour. For Lottery exempt employees (pay plan 33), weekday on-call hours are paid at a rate of $2 per hour
				  ○ Weekend and holiday on-call hours are paid at one-quarter of the minimum of the pay grade for the employee's position. For example, if the minimum of pay grade hourly rate of pay is $24, the employee would receive $6 for each hour they are on call on a weekend or holiday
				• Overtime – Hours of work suffered, permitted or required, in excess of 40 hours during the established workweek or in excess of the number of hours in the assigned extended FLSA work period, for which included employees are paid at the rate of time and one half, in accordance with FLSA. Overtime is dynamically calculated in the time schema based on time worked (based on approved hours types 1000, 1004, 1014, 1024, 1034 and 1044 during the FLSA period)
				  ○ For Lottery exempt employees (pay plan 33), overtime is calculated for all hours worked on the actual and observed state holidays. If the time forces the employee to overtime, the time is paid at time and one half. If the time is used to bring the employee up to contract hours for

#	Activity	Description	Dependencies	Uniqueness/Customizations
				the period, an additional 0.50 hour is paid to the employee for each hour physically worked on the actual and observed state holiday • Overtime Hourly Rate of Pay (calculated separately for each FLSA period the employee works at least a quarter of an hour of overtime) - (Employee's Hourly Regular Rate of Pay plus ((total On Call amount paid multiplied by (number of FLSA periods in the year (either 13, 26 or 52) divided by the number of pay periods in the year (either 12 or 26)) multiplied by the number of pay periods in the year divided by 2080) for the FLSA period the overtime was worked, divided by 40 the standard FLSA hours (40, 80, 160, 168 or 192)) plus (total Florida Nurses Association (FNA) shift amount paid for the FLSA period the overtime was worked multiplied by (number of FLSA periods in the year (either 13, 26 or 52) divided by the number of pay periods in the year (either 12 or 26)) multiplied by the number of pay periods in the year divided by 2080)) • For FSDB, the hourly rate of pay for overtime and LWOP is calculated based on the employee's contract length and the number of payments the employee receives. The contract length and number of payments are derived based on the last character of the interdepartmental ID stored on the employee's Position Funding screen (infotype HRP9124). If the last character is: o A then Hourly Rate = (Base Rate of Pay multiplied by 20.7)/1656 o B then Hourly Rate = (Base Rate of Pay multiplied by 21.5)/1720 o C then Hourly Rate = (Base Rate of Pay multiplied by 24.0)/1920 o E then Hourly Rate = (Base Rate of Pay multiplied by 24.0)/1520 (not overtime eligible) o F then Hourly Rate = (Base Rate of Pay multiplied by 26.0)/1520 (not overtime eligible)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ G then Hourly Rate = (Base Rate of Pay multiplied by 26.0)/1840 (not overtime eligible) ○ J then Hourly Rate = (Base Rate of Pay multiplied by 26.0)/1656 ○ K then Hourly Rate = (Base Rate of Pay multiplied by 26.0)/1720 ○ L then Hourly Rate = (Base Rate of Pay multiplied by 21.0)/1520 (not overtime eligible) ○ M then Hourly Rate = (Base Rate of Pay multiplied by 26.0)/1680 (not overtime eligible) ○ N then Hourly Rate = (Base Rate of Pay multiplied by 26.0)/1920 • For FSDB, if the LWOP calculation results in negative cash gross, the negative cash gross is written to an offline report and is provided to DMS by FTP. DMS provides the report to FSDB to take the appropriate corrective action • Within the payroll schema numerous calculations are date effective. The effective date of each separate calculation drives the validity of the changes and when the calculation is applied (the triggers for these changes are either by pay period number or by constant defined date)
16.2	Extraordinary/Disaster Pay(SES Extraordinary Pay & Regular Comp Payable)	Employees who are designated as essential and who work during an approved extraordinary or disaster situation may be entitled to additional compensation for the work conducted during the extraordinary or disaster time period	Regular Comp Payable – employee must be in employee group 2, employee subgroup 01 (CS excluded from overtime) SES Extraordinary Pay – employee must be in employee group 2, employee subgroup 08 (SES excluded from overtime)	Hours owed for either Regular Comp Payable or SES Extraordinary Pay are recorded on the employee's timesheet. The payment process includes the following custom edits: • Timesheet – ○ Separate edits exist to only allow entry based on the employee group and employee subgroup ○ Separate edits exist to only allow hours to be recorded after the employee has met contract hours for the pay period using time worked (hours type 1000, 1004, 1014, 1024, 1034 and 1044 combined) ○ Once submitted, the time must be approved by the manager. Once the time is approved by

#	Activity	Description	Dependencies	Uniqueness/Customizations
				the manager, the time is sent to an additional custom approval queue (Extra Pay Approval Screen, infotype PA2012) • Extra Pay Approval Screen – only time worked as either Regular Comp Payable or SES Extraordinary Pay require an additional approval by HR. Within the Extra Pay Approval screen, HR can reject the hours, update the hours for payment and approve the hours for payment. Once HR approves the payment, the hours are paid to the employee on the next available supplemental or regular payroll (biweekly or monthly, depending on the employee payroll area)

16.3	Extended FLSA Schedules (14-day and 28-day)	Extended FLSA work periods are used for certain law enforcement and firefighter employees in place of the standard 7-day, 40-hour work periods. Extended FLSA schedule is used for overtime eligible employees to offset extra time worked (e.g., double shift) during the extended period. Overtime and leave accruals are based on the extended work schedule, regardless of the employee's payroll area (employee is still paid based on their payroll area)	Employee's position must be assigned to the extended FLSA period	Unique calculations for each of the extended FLSA schedules are listed below:
				• With the following exceptions, the standard payroll calculations apply to employees on an extended work schedule. For example., employees are still paid on the monthly and biweekly payroll (based on their assigned payroll area), using the standard calculations (e.g., contract hours, gross salary, LWOP, etc.), except as listed below
				• 28-Day Extended Work Periods (applies to 160, 168 and 192 schedules):
				  ○ LWOP is calculated based on the standard biweekly and monthly contract hours
				  ○ For biweekly employees, LWOP triggered from an approved timesheet is carried from the first biweekly payroll to the second biweekly payroll to reduce the risk of overpayment as the timesheet is not approved until after the first biweekly payroll has been processed. If there is insufficient hours to offset all LWOP in the second biweekly (i.e., employee has more than 80 hours LWOP between both pay periods) or if the timesheet is approved after the second biweekly payroll is processed, the overpayment is written to

#	Activity	Description	Dependencies	Uniqueness/Customizations

				the Payroll Overpayment Report for agencies to manually handle
				• 28-day, 168-hour – the following additional unique calculations apply to this schedule
				  ○ 28-day, 168-hour schedule is only valid for employees with a biweekly payroll area (UB); schedule has not been configured or customized for any other payroll area
				  ○ Gross Salary is calculated using 84 scheduled hours as the base for hours to pay for the pay period instead of 80; however, contract hours are still 80 hours and the employee's salary is still based on 80 hours; during the F0001 program, the employee's period rate of pay is divided by 80 and multiplied by 84 (assuming no LWOP in the period) to determine the amount owed the employee for the period
				• 14-day, 80-hour FLSA Schedule:
				  ○ Overtime Hourly Rate of Pay – Total on-call amount paid during the extended FLSA period is multiplied by 26 and divided by 2080 to determine the additional hourly rate of pay for overtime worked during the FLSA period
				  ○ LWOP is calculated based on the standard biweekly and monthly contract hours

16.4	Over/Under Calculations	The People First System uses the default SAP logic to generate and pay underpayments. However, custom logic exists to prevent certain underpayments from being processed. Additional custom logic exists to prevent overpayments from being offset on future	Employee must have experienced either a retroactive salary change or status change (e.g., employee was in a pay status and is now in a LWOP status or vice versa)	A custom process was developed to calculate payroll underpayments and to hold the underpayments for the applicable payroll. The state does not use the standard SAP underpayment process. Salary underpayments are triggered and calculated as follows: • Underpayment calculation – [(new salary is ran through the gross salary calculation (see gross salary above)) minus(original salary paid)] = if greater than zero, amount results in a retroactive payment (wage type 9130) being generated • Each time the employee salary is changed for a payroll period the employee has already been paid for,

#	Activity	Description	Dependencies	Uniqueness/Customizations
		payments to the employee		the employee is recalculated to determine if the employee is owed additional funds • Each time the employees status (active, terminated, LWOP, additional timesheet hours (time worked or on-call hours) are approved) is updated for a period the employee has already been paid for, the employee is recalculated to determine if the employee is owed additional funds • Payments/claims are generated in SAP payroll; however, the F0001 program has additional logic to prevent claims from being sent for payroll and to prevent payments owed for more than two pay periods back from being sent on the F0001. If for the immediate two proceeding periods, the payments are paid on the next available supplemental or regular payroll (either biweekly or monthly based on the employee's payroll area). If the payment owed is for a pay period prior to the immediate two proceeding pay periods, the payments are written to the Retroactive Payments Not Sent for Processing Report. Agencies are responsible for using this report to process the underpayment. Special processing is required to ensure retirement contributions are accurately credited ○ If retroactive on call is approved for a period the employee was previously paid overtime for, an additional retroactive payment is generated based on the increase in the employee's overtime rate pay (increase is based on the additional on call amount paid) • Salary overpayments – custom coding exists to prevent use of the standard SAP overpayment calculations. Overpayments are not offset from future payments; agencies are responsible for using the Payroll Overpayment Report to identify and correct salary overpayments

#	Activity	Description	Dependencies	Uniqueness/Customizations
16.5	Mid-Period Changes (PAR, Org Changes)	Mid-period changes impact how payroll is calculated for employees, including the employee's gross salary paid, benefits premium due and the funding stream the employee is paid from	Action was completed in the middle of the pay period to either: • Hire (new hire or when employee changes funding sources) or terminate the employee • Change the employee's rate of pay (base pay or additive), FTE or employee group or employee subgroup • Change the funding source (e.g., change in agency, change in division, re-org, etc.) the employee is paid from (FLAIR Account Code) or the employee's work schedule, shift or FLSA period	Pay impacting actions (the following are all calculated in the payroll schema): • For mid period hires and terminations, the employee is compensated as follows: ○ CS and equivalent employees are paid for the greater of the employee's scheduled hours for the pay period and the hours worked up to the full-time contract hours for the pay period. For example, if an employee starts on the third day of the biweekly pay period (employee is scheduled for 64 hours), but the employee works 70 hours, the employee is paid for 70 hours ○ Selected Exempt Service and Senior Management Service and equivalent employees are paid for their scheduled hours for the period (continuing with the example above, the employee would be paid 64 hours, not 70) ○ Overtime is still calculated based on the employee's FLSA period. The employee must exceed the FLSA period hours (not the scheduled hours) to be paid overtime at time and one half. As the state does not use concurrent employment, hours are not combined when employee has a mid-period change that results in a split of the FLSA period or the employee has employee multiple IDs for the same period • Based on employee's work schedule, the salary is prorated based on the number of hours scheduled at each rate of pay [e.g., if employee has two salary rates during the period, but nothing else changed, then gross salary = (beginning rate of pay/contract hours multiplied by scheduled hours at beginning rate of pay) plus (ending rate of pay/contract hours multiplied by scheduled hours at ending rate of pay)];

#	Activity	Description	Dependencies	Uniqueness/Customizations
				if only two separate rates, employee's salary is paid under one payroll warrant (or direct deposit); if more than two rates of pay during the pay period, the employee will be paid over multiple warrants (only two rates of pay and hours at each rate are rolled into a single warrant) • If the funding source is changed, regardless of the rate of pay and/or other changes, separate warrants are generated for the employee based on the hours under each funding source • For overtime, retroactive payments, on call and all other pay period based payments; the payment is based on the funding source for the period and not the current funding source. Specifically, the F0001 program checks the pay period beginning and ending dates and pulls the funding source from the Position Funding record (infotype HRP9124) that was active for that period. If multiple funding sources are applied during the same pay period, separate warrants are created for each applicable funding source
16.6	Precalc/F0001 Process (Preliminary) - Payroll Input Process (F0001)	As the State of Florida does not use the Payroll process in SAP, a custom program was developed to generate a payroll preparation file that is sent to the DFS BOSP for each regular (biweekly and monthly) and supplemental payroll. The file is a full-file, not a change file. All employees who are to be paid for a given payroll are included on the file with the applicable payment	The payroll input preliminary and final runs are only processed if the applicable payroll schedules have been established in SAP For the regular payroll runs, only employees who are assigned to the applicable payroll area are evaluated for payment For the supplemental payroll runs, only employees who are owed additional compensation (e.g., overtime, on call, retroactive payment,	The custom F0001 program uses the payroll calculations described in the Key Payroll Calculations and Definitions section to identify employees that are owed a payment for that payroll run Additionally, custom logic exists in the payroll evaluation and F0001 programs to prevent payments owed for additional compensation for additional time during the pay period from being paid on the regular payroll run. These payments are held for the first payroll to process after the payment eligibility is determined and after the regular payroll for that period has been processed (typically falls to the supplemental payroll) In addition to performing the payroll calculations, the F0001 program has custom logic built in to determine whether to pull the values for the non-calculated fields (e.g., personal information, accounting information, health and insurance

#	Activity	Description	Dependencies	Uniqueness/Customizations
		details	leave payout, etc.) are evaluated for payment	information, etc.) based on the pay period beginning date, pay period ending date or warrant date. Additional customizations exist to perform agency specific logic for some of the financial fields (e.g., Warrant Distribution Number is used in place of the FLAIR Org code for two agencies) The F0001 is processed on both a preliminary basis and a final payroll basis. The preliminary file is used by the state agencies to perform preliminary payroll audits to identify anomalies that should be corrected before the final payroll file is processed. The preliminary process allows agencies both the ability to correct a payment and to stop a payment from processing The BOSP takes the values from the F0001 and performs employer gross charge and net pay for the employee. The BOSP is responsible for distributing all payments to employees and vendors and for performing the related accounting entries (automated)

16.7	Payroll Process	Process used to calculate payroll and generate the F0001	N/A	• State only runs preliminary and final payrolls (does not use simulation payroll)
				• Time evaluation runs on a daily basis and before each major payroll (biweekly, monthly and supplemental)
				    ○ For the biweekly payroll, time evaluation is only processed for biweekly employees for the current period and for any period where the employee had a change since the last payroll
				    ○ For the monthly payroll, time evaluation is only processed for monthly employees for the current period and for any period where the employee had a change since the last payroll
				    ○ For the supplemental payroll (payroll type B – corrections), time evaluation is processed for both biweekly and monthly employees for the immediate proceeding period and for any proceeding period where the employee had a change since the last payroll

#	Activity	Description	Dependencies	Uniqueness/Customizations

				• A custom program is run to update "run payroll up to date" on infotype PA0003 (Payroll Status) to pay pending payments to terminated employees
				• For monthly employees, at least one FLSA period each month crosses multiple months. When this occurs, the standard overtime calculation of hours (employee must physically work more than FLSA period hours to be eligible for overtime) applies, the payment of the overtime hours may be split. The overtime hours are paid on the first available payroll that processes after the monthly payroll has been processed. If the employee reaches overtime hours during the week, in the month the FLSA period begins, those hours are paid on the first payroll to process after that monthly payroll process. However, the overtime hours the employee works in the second month (month the FLSA period ends) are not paid until the first payroll that processes after the monthly payroll for the second month has been processed. When this situation occurs the employee is paid overtime for the same FLSA period on two separate payrolls
				• Call-Back Guaranteed hours –
				  ○ Employees who are called back to work (hours types 1004, 1014, 1024, 1034 and 1044) are guaranteed a minimum of two hours per call-back (law enforcement and state trooper union employees are guaranteed four hours per call-back). If the employee works less than the guaranteed hours for any single call-back occurrence, the employee is paid the additional guaranteed hours as a separate payment. The difference between actual hours worked and the guaranteed hours is not included in overtime calculations (is not actual time worked)
				  ○ For Lottery exempt employees (pay plan 33),

#	Activity	Description	Dependencies	Uniqueness/Customizations
				the minimum call-back rules do not apply if called back on a holiday • Awards payroll (payroll type A) is a highly customized process and is only ran for employees with payments entered into infotype PA0267, Award Payments (payments are entered using the Award Payment payroll screen in the portal) • The following are the typical run times for each major payroll run (note the system is not locked to process the CJIP or Awards Payroll, therefore run times have no impact for these payrolls): o Biweekly payroll - F0001 typically runs for four to five hours o Monthly payroll – F0001 typically runs for two hours o Supplemental payroll – F0001 typically runs for six to eight hours
16.8	CJIP Screen (infotype PA9014)	The CJIP screen is a completely customized screen that is used to create CJIP payment records for eligible law enforcement employees	In order to create a CJIP record for an employee, the employee's position must be marked as CJIP eligible on the position pay additives screen (infotype HRP9120) Employee must be employed for one full calendar month (in full pay status for the month) before the employee is eligible to receive the CJIP incentive payment	Screen was built to meet the statutory requirements for CJIP. The screen is completely custom and includes the following custom fields, edits and calculations • Effective Date – drop down that allows selection of up to 13 months back, and 13 months forward; date selection includes the first day of each month that is available for selection for the employee; date selected must be the first day of the month after the date entered in the CJIP Approval Date field and no sooner than the first day of the month following the employee's start date at the agency • End Date – defaults to 12/31/9999 when creating a new record; is updated based on the following changes: o CJIP Indicator is removed from employee's position (infotype HRP9120, Pay Additives); CJIP is end dated based on the last day the position is eligible to receive CJIP o Employee is moved from one position to another and the receiving position is not CJIP

#	Activity	Description	Dependencies	Uniqueness/Customizations
				eligible (flag is not marked on infotype HRP9120, Pay Additives); CJIP is end dated based on the last day in the exiting position ○ Employee's position is reclassified to SMS; CJIP is end dated based on the last day the position is eligible to receive CJIP (SMS and OPS employees are not entitled to receive CJIP) ○ Agency updates active CJIP record to terminate the CJIP for the employee ○ Employee separates employment at the agency; CJIP is end dated based on the last day employed at the exiting agency • Basic Incentive – Yes/No selection; if yes, $25 is added to the employee's total CJIP amount • Course Hours – numeric values only; direct entry field; ¼ of the total hours are compensable at $1 per hour, up to $120 (480 hours) • Education Incentive – Associate's Degree, Bachelor's Degree, No Education Pay selection; if Associate's Degree is selected, up to $30 is added to the employee's total CJIP amount; if Bachelor's Degree is selected up to $80 pay to the employee's total CJIP amount • Total Amount – System calculated when the User selects either Save or Calculate Amount. Populates the lesser of $130 and the dollar value of Basic Incentive plus Course Hours plus Education Incentive • FLAIR Account Code – Numeric values only; direct entry field; entry is validated against custom FLAIR Account Code table to validate eligibility for use • FLAIR Org Code – Numeric values only; direct entry field; entry is validated against the FLAIR Org Code table to validate eligibility for use • Interdepartmental ID – Alpha/Numeric values only; direct entry field • CJIP Approval Date – Direct entry/calendar selection

#	Activity	Description	Dependencies	Uniqueness/Customizations
				functionality field • Required Password – Requires the User creating or updating an employee's CJIP record to certify the changes; includes certification language • Compute Amount Button – When selected, calculates the Total Amount
16.9	CJIP Payroll File	A separate custom file process is used to generate payment details for CJIP payments. The CJIP payroll process is a change order based process (only changes from the previous CJIP run are sent to the BOSP)	CJIP record was added or updated for an employee	The CJIP process includes a custom change order process. For CJIP ONLY, changes are sent to the BOSP for processing. Each change since the last file was processed is picked up and sent for processing. By default the CJIP payroll is processed retroactively (changes are for past 13-months and not current or future months). If no change is sent, the BOSP processes payroll by exception (for CJIP they maintain the master record, not People First) Each CJIP field is assigned its own row on the CJIP change order file (except for the new records where the full record is included on one row). Most fields pull directly from the data in the CJIP screen. However, the following fields include additional custom logic: • Position Number – Pulled based on the employee's current position on the last day of the CJIP period. Field is only populated if the employee moves positions within the agency • Days Available for Pay – Calculated based on the employee's scheduled work days from the first to the last day of the month. This field is only populated if the days to pay do not match • Days to Pay – Based on the employee's scheduled hours of work in the month, minus leave without pay hours, divided by either 8 or 10, depending on the employee's work schedule. Days are always rounded up (e.g., 17.1 rounds up to 18)
16.10	CJIP Position Change File	The CJIP Position Change file is used to send updated position numbers to the BOSP	Employee must have moved positions	This file is used to provide BOSP a list of positions that are CJIP eligible. Employees included on this file have changed positions during the CJIP look back period (prior 13-months). Each change since the last file was processed is picked up

#	Activity	Description	Dependencies	Uniqueness/Customizations
		for eligible CJIP members. This file is a change order based process (only changes from the previous CJIP run are sent to the BOSP)		and sent for processing

16.11	Other Payroll Screens - Pay Info (infotype PA0008)	Other Payroll Screens - Screen is used to present the employee's base rate of pay (hourly for OPS) and CAD amounts	Employee must have either been loaded at the initial conversion or hired after the initial conversion into People First	• Screen updates are tied to the PAR process (PAR must be processed to change the base pay or to update the CAD amount). Once the action is completed, a new entry is made in the Pay Info screen
				• Each time an appointment, employee sync or pay change PAR is completed for an employee, the employee's position is evaluated against the custom CAD table to determine if the employee is eligible to receive a CAD. If eligible, the CAD is shown below the base pay row within the screen
				• Both base pay and CAD are pulled from infotype PA0008 (Pay Info) and are the only pay components shown on this screen for the employee
				• In addition to the base pay and CAD amounts, the screen includes the following fields:
				  ○ Pay Scale Type – Either Broadband or Class
				  ○ Pay Scale Area – Either Broadband or Class/Pay Plan combination
				  ○ Pay Scale Group – Either Pay Grade or Pay Band
				  ○ Valid Range – Displays either the annual Pay Band Salary Range or the annual Pay Grade Salary Range
				  ○ Period Amount – Displays the amount the employee is paid for each pay period for base pay and CAD (if applicable)
				• Hourly Rate – calculated as follows:
				  ○ Biweekly – Period Amount multiplied by 26 divided by (2080 multiplied by employee's FTE)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ Monthly – Period Amount multiplied by 12 divided by (2080 multiplied by employee’s FTE) ○ OPS – Amount hired at (OPS are hired at an hourly rate of pay, not at a base rate of pay) • FTE – Employee’s FTE is the Capital Utilization divided by 100
16.12	Other Payroll Screens - Gross Pay History (Pre-Tax)	Screen contains all payments sent for processing to BOSP for the employee	A payment must have been generated in People First and sent on the F0001 to the BOSP	This custom screen displays key details for payments sent to the BOSP using the F0001 interface process • Overview Section includes: ○ Run Date – Displays the date the employee’s record was processed for the payroll file that was provided to the BOSP for processing; date is either the day the file is provided to BOSP or the day before (payroll starts late the night before the file is provided) ○ Run Type ▪ A = Awards Payroll ▪ B = Biweekly ▪ M = Monthly ▪ S = Supplemental ○ Period Begin – defaults to the pay period begin date the payment is for; if payment was entered on awards or supplemental payroll screens, the date is the BOSP payroll processing date ○ Period End – defaults to the pay period end date the payment is for; if payment was entered on awards or supplemental payroll screens, the date is the BOSP payroll processing date ○ Position Number – displays the employee’s position number for the specific payment ○ Agency – presents the agency for the specific payment • Detail Section includes: (fields are pulled from F0001 history table)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ Wage Type – displays the SAP wage type for the payment ○ Description – displays the wage type (type of payment) ○ Begin Rate – displays the period rate of pay ○ Begin Hours – displays the hours to pay at the beginning rate of pay ○ End Rate – only populated if the employee had more than one period rate of pay within the same funding source for the pay period ○ End Hours – displays the hours to pay at the ending rate of pay ○ Total Gross – presents the gross salary for the payment ○ FTE –percentage of FTE ○ Period Begin – defaults to the pay period begin date the payment is for; if payment was entered on awards or supplemental payroll screens, the date is the BOSP payroll processing date ○ Period End – defaults to the pay period end date the payment is for; if payment was entered on awards or supplemental payroll screens, the date is the BOSP payroll processing date
16.13	Other Payroll Screens - One-Time Regular Payroll Pay (infotype PA0015)	Screen is used to process additional payments to employees that are not tied to PAR or timesheet changes	Employee must either be in an active employee status or within 60 days of the last day worked at the requesting agency	This screen (infotype PA0015, source of input is 02) allows agencies to make salary and/or non-recurring payments to employees on the regular payroll run (biweekly or monthly, depending on the employee's pay cycle) • Detail Section includes: ○ Wage Type – required field; agency must select from a wage type menu (pop-up screen). Values presented in the wage type menu are based on the values authorized for selection in the custom wage type permissibility table ○ Pay Period Date – required field; drop down

#	Activity	Description	Dependencies	Uniqueness/Customizations
				selection ▪ If biweekly agency, only biweekly pay period dates are displayed for selection ▪ If monthly agency, only monthly pay period dates are displayed for selection ○ Amount – conditional; defaults to 0.00; field is required to be greater than 0.00 for non-recurring, gross payment amounts ○ Number/Unit – conditional fields; ▪ Number – if hours is selected for the unit, must be greater than 0.00 and less than or equal to 480 hours ▪ Unit – Drop down box (Hours, Percent or Multiple; only hours is currently available); if the payment type selected is a per hour basis, selection of hours is required ○ FLAIR Account (field is added directly to infotype PA0015 Additional Payments) – defaults to the FLAIR Account listed on the Position Funding screen (infotype HRP9124, Position Funding) for the employee. Agency can update to any FLAIR Account Code within the agency that is active on the FLAIR account code table. Field is edited against custom FLAIR account code table to ensure only a valid FLAIR account code is entered ○ FLAIR Organization Code (field is added directly to infotype PA0015 Additional Payments – optional field; pulls from the employee's position as of the payroll processing date if left blank ○ Comments (field is added directly to infotype PA0015 Additional Payments – optional field; can be used to capture any comments to

#	Activity	Description	Dependencies	Uniqueness/Customizations
				maintain history ○ OT Reason Code (field is added directly to infotype PA0015 Additional Payments – optional field; drop down box; only valid for overtime related payments ○ Pay cycle – defaults to 1, 2, 3 or 4, depending on the type of payment and the employee's pay cycle. If regular salary, defaults to 1 for biweekly employees and 2 for monthly employees. For all other payments, defaults to 3 for biweekly and 4 for monthly. For regular salary payments, once save is selected, the User is presented with a custom screen to verify and select the correct pay cycle ▪ Biweekly agencies are provided a drop down that includes 1 – Biweekly Regular Salary Payments and 3 – Biweekly Supplemental Wage Payments ▪ Monthly agencies are provided a drop down that includes 2 – Monthly Regular Salary Payments and 4 – Monthly Supplemental Wage Payments ▪ User must select the correct pay cycle then select continue to finalize the creation of the payment. Values are used to drive how taxes are computed by BOSP ○ Charge Object/Project (field is added directly to infotype 0015 Additional Payments) – optional field; drop down box; values are presented based on the available charge objects for the position ○ Activity (field is added directly to infotype 0015 Additional Payments) – optional field; tied to the selected value in the charge object/project

#	Activity	Description	Dependencies	Uniqueness/Customizations

				field
				  ○ Sub Activity (field is added directly to infotype 0015 Additional Payments) – optional field; tied to the selected value in the charge object/project field
				• The following static notes are presented on the screen:
				  ○ Leave Payout Note: "If making a leave payout through this screen, please verify the corresponding balances and make any necessary adjustments."
				  ○ Amount of Hours Note: "If an amount and hours are entered, the amount paid is effectively the hours multiplied by the amount (Rate)."
				• A delete button is available for payments that have not been sent to BOSP on the F0001 for processing. No deductions for health, basic or optional life insurance premiums for payments are processed when using this screen. However, if the payment is for regular salary and pay cycle 1 or 2 is selected, supplemental insurance plan deductions will be processed
				• For overtime payments, an additional edit is applied at Save that validates the employee's position is in employee groups 1 or 4 (included or included OPS). If the employee's position is not overtime eligible, system does not allow the creation of this payment type

16.14	Other Payroll Screens - Supplemental Pay (infotype PA0015)	Hours worked more than contracted (overtime) hours and On Call hours observed during a pay-period are withheld from paying as part of regular period payroll run. Instead the hours are paid as a supplemental	Employee must either be in an active employee status or within 60 days of the last day worked Employee must work/have worked (in case of terminated employees) in an agency that uses the Payroll Preparation	This screen (infotype PA0015, source of input is 01) allows agencies to make salary and/or non-recurring payments to employees. • Detail Section includes: ○ Wage Type – required field; agency must select from a wage type menu (pop-up screen); values presented in the wage type menu are based on the values authorized for selection in the custom Wage Type

#	Activity	Description	Dependencies	Uniqueness/Customizations
		payment after the regular payroll. These payments are created before the regular period payroll is run Pay Cycles 03 and 04 are processed by way of supplemental payroll and can be entered directly into the Supplemental Pay screen	processes in People First	Permissibility table ○ Date – required field; drop down selection that presents the supplemental payroll run dates ○ Amount – conditional; defaults to 0.00; field is required to be greater than 0.00 for non-recurring, gross payment amounts ○ Number/Unit – conditional fields; ▪ Number – if hours is selected for the unit, must be greater than 0.00 and less than or equal to 480 hours ▪ Unit – drop down box (Hours, Percent or Multiple; only hours is currently available); if the payment type selected is a per hour basis, selection of hours is required ○ FLAIR Account (field is added directly to infotype PA0015 Additional Payments) – defaults to the FLAIR Account listed on the Position Funding screen (infotype HRP9124) for the employee. Agency can update to any FLAIR Account Code within the agency that is active on the FLAIR Account Code table. Field is edited against custom FLAIR Account Code table to ensure only a valid FLAIR Account Code is entered ○ FLAIR Organization Code (field is added directly to infotype PA0015 Additional Payments) – optional field; pulls from the employee's position (infotype HRP9124) as of the payroll processing date if left blank ○ Comments (field is added directly to infotype PA0015 Additional Payments) – optional field; can be used to capture any comments to maintain history ○ OT Reason Code (field is added directly to infotype PA0015 Additional Payments) – optional field; drop down box; only valid for

#	Activity	Description	Dependencies	Uniqueness/Customizations
				overtime related payments ◦ Pay cycle – defaults to 1, 2, 3 or 4, depending on the type of payment and the employee's pay cycle. If regular salary, defaults to 1 for biweekly employees and 2 for monthly employees. For all other payments, defaults to 3 for biweekly employees and 4 for monthly employees. For regular salary payments, once save is selected, the User is presented with a custom screen to verify/select the correct pay cycle ▪ Biweekly agencies are provided a drop down that includes 1 – Biweekly Regular Salary Payments and 3 – Biweekly Supplemental Wage Payments ▪ Monthly agencies are presented a drop down that includes 2 – Monthly Regular Salary Payments and 4 – Monthly Supplemental Wage Payments ▪ User must select the correct pay cycle then select continue to finalize the creation of the payment. Values are used to drive how taxes are computed by BOSP ◦ Charge Object/Project (field is added directly to infotype PA0015 Additional Payments) – optional field; drop down box; values are presented based on the available charge objects for the position ◦ Activity (field is added directly to infotype PA0015 Additional Payments) – optional field; tied to the selected value in the charge object/project field ◦ Sub Activity (field is added directly to infotype PA0015 Additional Payments) – optional field;

#	Activity	Description	Dependencies	Uniqueness/Customizations
				tied to the selected value in the charge object/project field • The following static notes are presented on the screen: ◦ Leave Payout Note: "If making a leave payout through this screen, please verify the corresponding balances and make any necessary adjustments." ◦ Amount of Hours Note: "If an amount and hours are entered, the amount paid is effectively the hours multiplied by the amount (Rate)." • A delete button is available for payments that have not been sent to BOSP on the F0001 for processing. No deductions for health, basic or optional life insurance premiums for payments are processed when using this screen. However, if the payment is for regular salary and pay cycle 1 or 2 is selected, supplemental insurance plan deductions will be processed • For overtime payments, an additional edit is applied at Save that validates the employee's position is in employee groups 1 or 4 (included or included OPS). If the employee's position is not overtime eligible, system does not allow the creation of this payment type
16.15	Other Payroll Screens - Award Payments (infotype PA0267)	Screen that allows agencies to add award (bonus) payments for their employees. These payments are only paid out to the employees during Awards payroll processing	Employee must be in an active status (not available for terminated employees) Only authorized Users can create award payments for their employees	The following is included in the Award Payments screen (infotype PA0267, Award Payments): • Detail Section includes: ◦ Wage Type – required field; agency must select from a wage type menu (pop-up screen); values presented in the wage type menu are based on the values authorized for selection in the custom Wage Type Permissibility table ◦ Payment Date – required field; drop down selection that presents the awards payroll run

#	Activity	Description	Dependencies	Uniqueness/Customizations
				dates ○ Amount – conditional; defaults to 0.00; field is required to be greater than 0.00 for non-recurring, gross payment amounts ○ FLAIR Account (field is added directly to infotype PA0267, Award Payments) – defaults to the FLAIR Account listed on the Position Funding screen (infotype HRP9124, Position Funding) for the employee. Agency can update to any FLAIR Account Code within the agency that is active on the FLAIR Account Code table. Field is edited against custom FLAIR Account Code table to ensure only a valid FLAIR Account Code is entered ○ FLAIR Organization Code (field is added directly to infotype PA0267, Award Payments) – optional field; pulls from the employee's position (infotype HRP9124, Position Funding) as of the payroll processing date if left blank ○ Comments (field is added directly to infotype PA0267, Award Payments) – optional field; can be used to capture any comments to maintain history ○ Charge Object/Project (field is added directly to infotype PA0267, Award Payments) – optional field; drop down box; values are presented based on the available charge objects for the position ○ Activity (field is added directly to infotype PA0267, Award Payment) – optional field; tied to the selected value in the charge object/project field ○ Sub Activity (field is added directly to infotype PA0267, Award Payment) – optional field; tied to the selected value in the charge object/project field • Once the payment is saved, the payment cannot be

#	Activity	Description	Dependencies	Uniqueness/Customizations
				deleted by the agency

16.16	Other Payroll Screens - Alternate Time Entry Screen (stored on infotype PA2010, Employee Remuneration Info)	Employees from Justice Administration Commission (JAC) and State Courts System (SCS) agencies do not monitor leave and attendance within People First. This screen was created to override the payroll by exception process for salaried employees and to enter the number of hours to pay OPS employees (positive payroll)
		
		Additionally, BENO entities use this screen to record time worked and time missed due to jury duty for OPS employees (payments are not generated for these employee out of People First; the hours are captured for measuring OPS employees eligibility for benefits)
			Employee must be in an active status within either agency JAC or SCS or be an active OPS employee in a BENO entity	There are specific custom wage types and supporting edits for each wage type to ensure the wage types are used correctly:
				• 2020 – LWOP Hours – edits ensure the code can only be used by JAC and SCS; hours entered reduce the number of hours the employee is paid for the pay period (creates a payroll exception)
				• 2021 – OPS Hours – edits ensure the code can only be used by JAC and SCS; hours entered are paid to the employee on an hour for hour basis using the employee's hourly rate of pay on the Pay Info screen (infotype PA0008 Pay Info)
				• 2023 – OPS Non-Payable Hours – edits ensure the employee is an OPS employee (employee group 4 or 5, or employee group 8, with employee subgroup of either 25 or 96); hours are not considered for payroll
				• 2024 – OPS Jury Duty Hours – edits ensure the employee is an OPS employee (employee groups 4 or 5, or employee group 8, with employee subgroup of either 25 or 96); hours are not considered for payroll
				
				The following is included in the Alternate Time Entry screen (infotype PA2010 Employee Remuneration Info):
				• Details Section:
				  ○ Effective Date – required field; defaults to system date
				    ▪ JAC/SCS – for wage types 2020 and 2021, the date entered must be a day in the month the monthly payroll is processing
				    ▪ For wage types 2023 and 2024, the date entered must be a day in the month the employee worked the OPS hours; date must also be a date the employee was active in the OPS

#	Activity	Description	Dependencies	Uniqueness/Customizations
				position ○ Pay Code – required field; presents the list of wage types based on the employee's agency and the employee type (salaried or OPS) ○ Rate – defaults to 0.00; field should not be changed from the default value ○ Number of Hours – required field; defaults to 0.00.; agency must change hours to either a positive or negative value to save the record ○ Amount – defaults to 0.00; field should not be changed from the default value ○ Comments – optional field; can be used to capture any agency comments regarding the record created
16.17	Other Payroll Screens - Direct Deposit (infotype PA0009)	Screen where direct deposit information is displayed and maintained by the employee. The screen is updated by either direct entry by the employee (ONLY the employee) or by an updated direct deposit status record provided by DFS	In order to view and make updates to the Direct Deposit screen, an employee must have been in an active status within 30 days Bank routing number must exist within the active bank table (bnka)	Using SAP infotype PA0009 (Direct Deposit), the following customized process applies: Only the employee has access to create (managers, human resource staff, auditors, service center staff, etc. do not have access), update and/or view the direct deposit records through the portal. Additionally, through SAP GUI, selective data (e.g., status of the record) is available based on the User's security role code (either DMS staff or service provider staff), but the bank routing and checking account numbers are NOT available for viewing by any User, except the employee Through employee self-service access, employees can either update an existing record (e.g., change bank account number), stop current direct deposit authorization or create a brand new direct deposit (employees are limited to one direct deposit record and the record is copied across all IDs for the employee) record. When making any update, the employee must enter their People First password to certify the accuracy of the change Various static messages are presented on the Direct Deposit screen when employees are updating, adding, stopping or

#	Activity	Description	Dependencies	Uniqueness/Customizations
				simply viewing their direct deposit record. The messages that are presented are driven by the action the employee is taking. Additional error and warning messages are triggered based on incorrect entries (e.g., invalid bank routing number) or incomplete fields A custom process exists to stop an active Direct Deposit authorization. To stop their Direct Deposit authorization the employee must enter their People First password and select the "Stop Direct Deposit" button Using a custom interface process, the values (bank routing and account numbers) entered by the employee in this screen are transmitted to DFS for bank validation. Once the bank information is validated or rejected, DFS sends a separate custom interface back to People First containing the status of the request (pending bank verification, verified, rejected, etc.). Additionally, if status changes are received by DFS (either directly from the employee or the financial institution) the status change is also sent back to People First on the nightly file. The file is loaded into People First on a nightly basis, updating the direct deposit status of the employee. The status of the employee's direct deposit record is presented within the Direct Deposit screen. If the record is rejected, an alert is sent to the employee's People First home page advising that the requested change was rejected. If the record is rejected or is otherwise stopped, a direct deposit task is triggered and presented on the employee's People First home page (task is only provided for active employees in agencies that use People First for payroll preparation). This same task is also triggered for new employees (and employees who never created a direct deposit record) until a direct deposit record is created In addition to changes entered in the Direct Deposit screen, a change to the employee's personal information (name, SSN) or change in agency trigger changes to be sent on the direct

#	Activity	Description	Dependencies	Uniqueness/Customizations
				deposit file. All data provided on the direct deposit interface is compared to the last values sent for the employee on the interface to DFS to determine if an updated record should be sent. If changes are identified, an updated record is sent, if the last data sent matches the current data, no record is sent (file is a changes only file) In addition to the normal nightly processes of exchanging data with DFS, once a month DFS provides a purge file. This purge file is in addition to the nightly file and includes stops for employees who have not received a payment in an extended time period (extended time period is determined by DFS). The monthly purge file is provided in the same file format as the nightly file from DFS and runs through the same program as the nightly file
16.18	Other Payroll Screens - Form W-4 (infotype PA0210)	Screen where IRS form W-4 information is displayed and maintained for employees	In order to view and make updates using employee self-service, an employee must have been in an active status within 30 days Only Users with an 'F' security role code (BOSP) can update the field 'IRS Directed' flag The following are dependencies for sending a W-4 change on the W-4 interface file to DFS: • Home Address record must be active • W-4 record must have been created • Either the employee's address, agency or W-4 record must	The Form W-4 screen allows employees to create their tax status for payroll calculations. The standard W-4 form fields and W-4 Filing Status (i.e., Marital Status) are included in the screen. For example, Number of Allowances, Additional Tax Amount and Exempt Tax Status are included. The following customizations exist within the Form W-4 screen and process: • Active record cannot be updated; employees must create a new W-4 record in order to update their status • A separate question is presented asking if the employee is a nonresident alien; this field is a checkbox and is used to meet notification requirements for nonresident aliens • Static messages are presented to all employees that explain the requirements for selecting an exemption from withholding • To save a new W-4 record, the employee must enter their People First password, certifying the record is accurate and is in compliance with Internal Revenue Service standards

#	Activity	Description	Dependencies	Uniqueness/Customizations

			have been changed	• IRS Directed indicator is used to prevent employees from making changes to their Form W-4. When marked, the employee's Form W-4 is maintained by BOSP, based on guidance from the IRS. Infotype PA0210, Form W-4 (no customizations exist within infotype PA0210, Form W-4, the logic below is triggered at the BSP page level)
				• In December of each year, the following custom logic applies within the screen. Separate backend fields are used to control each set of logic:
				  ○ Next Calendar Year is available for selection on December 1 each year; this field is available to allow employees to start selecting filing status for the new year (e.g., claim exemption from withholding)
				  ○ Next Calendar Year is defaulted (instead of the current year) on December 26 (default from old year to the new year; date is configurable and may change from year to year based on end of year activities) each year
				  ○ Only the Next Calendar Year is available starting on December 27 (new year defaulted only; date is configurable and may change from year to year based on end of year activities)
				• Each year the prior year's exempt W-4s expire on February 15; a separate date control exist to end date all exempt W-4s that have not been renewed for the new calendar year; date is configurable and may change from year to year based on the payroll schedule; date is provided by BOSP
				• For new employees and employees who have not created their W-4 record, a W-4 task is presented on the employee's People First home page until a W-4 record is created. Once created, the task is systematically removed. Additionally, once created the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				employee can create a new record, which systematically end dates the previous record, but cannot update or manually end date the active record • In addition to updating through the portal, the employee can also update the W-4 using the Interactive Voice Response (IVR) solution • Changes entered in both the Form W-4 screen (or through the IVR) and the Contact Information screen (infotype PA0006, Address/Emergency Contact) trigger changes to be sent on the W-4 file to DFS. The following process applies to determine when to send a change: ○ For all employees that have a change to personal information (name, SSN, date of birth or gender), mailing address (if no mailing address exists, then home address), W-4 or that change agencies, all data provided on the W-4 interface is compared to the last values sent for the employee on the W-4 interface to determine if an updated W-4 record should be sent to DFS. If changes are identified, an updated W-4 record is sent to BOSP for processing. If the last data sent matches the current data, no record is sent (file is a changes only file) ○ In December of each year, changes for the new year are included on the W-4 file based on the date in the Next Year Only field (date is configurable and may change from year to year based on end of year activities) ○ The Change Indicator field is populated with a one character code; the valid codes related to the address scrubbing process that could be displayed in the Change Indicator field are: ▪ F – address was updated as a result of the Address Matching (formatting) process

#	Activity	Description	Dependencies	Uniqueness/Customizations
				▪ V – address was updated as a result of the USPS National Change of Address (NCOA) process
16.19	Other Payroll Screens - Recurring Payments/Deductions (infotype PA0014)	Custom screen built to display the military supplemental, recurring pay additive amounts (other than CAD, On Call and Shift Differential) and FSCP due to employees with these additives assigned to them Except for FSCP, the amounts contained within this screen are included in the gross salary payment to the employee	Additive must have been assigned to the employee's position and a PAR must have been completed to give the additive to the employee Military Supplemental pay must have been created by completing a Military Leave with Supplement PAR FSCP payment must have been created in advance of payment Screen is not applicable for certain employee groups (e.g., OPS)	Screen (generated using infotype PA0014, Recurring Payments/Deductions) is view only, and with the exception of FSCP, is only updated by completing the applicable PAR action. Screen shows both active and historical records for the employee FSCP payments are processed on the first supplemental payroll to process in the month. These payments must exist for the regular payroll that processed immediately prior to the first Supplemental Payroll, for the payments to pay. If the payments are created with the incorrect starting pay period date, the payments will not start being generated until the next month. Retroactive payments are NOT calculated for this payment type • Detail Section includes: ○ Type (wage type) – required field; through direct entry, only FSCP (wage type 9138) can be selected. For all other types, a PAR must be completed. When completed through a PAR, the PAR type drives the wage type (defaults) ○ Start Date – required field; drop down that presents the standard payroll dates (biweekly or monthly, depending on the employee's pay cycle); only the current payroll and future payroll dates are available for selection ○ Amount – required field; if creating or updating a FSCP payment, the amount must be entered. For all other types, the amount is defaulted from the PAR form ○ FLAIR Account (field is added directly to infotype PA0014 Recurring Payments/Deductions) – defaults to the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				FLAIR Account listed on the Position Funding (infotype HRP9124) screen for the employee. For FSCP payments only, the agency can update to any FLAIR Account Code within the agency that is active on the FLAIR account code table. Field is edited against custom FLAIR account code table to ensure only a valid FLAIR account code is entered. For all other payment types, the FLAIR account code is pulled from the employee’s Position Funding screen (infotype HRP9124, Position Funding) ○ FLAIR Organization Code (field is added directly to infotype PA0014, Recurring Payments/Deductions) – Can only be updated for FSCP payments. For all other payments, pulls from the employee’s Position Funding screen (infotype HRP9124) as of the payroll processing date ○ Interdepartmental ID - Can only be updated for FSCP payments. For all other payments, pulls from the employee’s Position Funding screen (infotype HRP9124) as of the payroll processing date ○ Charge Object/Project (field is added directly to infotype PA0014, Recurring Payments/Deductions) – can only be added for FSCP payments. For all other payments, must be left blank; drop down box; values are presented based on the available charge objects for the position ○ Activity (field is added directly to infotype PA0014, Recurring Payments/Deductions) – can only be added for FSCP payments. For all other payments, must be left blank; tied to the selected value in the charge object/project field

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ Sub Activity (field is added directly to infotype PA0014, Recurring Payments/Deductions) – can only be added for FSCP payments. For all other payments, must be left blank; tied to the selected value in the charge object/project field
16.20	Other Payroll Screens - Recurring Pay Deductions (infotype PA0014 Recurring Pay Additives & Military Pay)	Screen is used to capture recurring payroll deductions (other than health & insurance deductions) for employees (except BENO employees)	Deduction must be active for the pay period processed	Screen is generated using infotype PA0014 Recurring Pay Additives & Military Pay. Screen is used to allow the entry of recurring deductions. Once added, the deduction can be updated or end dated, but cannot be deleted • Each time a new record is added for a specific wage type, the previous record is automatically end dated (one date prior to the new record effective date) and a new row is added in the Overview section. Some examples of recurring pay deductions include: union dues, charitable contributions, bank deductions, etc. • While most deductions (wage types) allow direct entry of the deduction amount, some have fixed percentage amounts (post-tax insurance deductions – amounts are stored in a custom table (ZAE_LGART_VALUES) which is called when the wage type is added or edited) and do not allow entry of an amount (amounts are calculated in the payroll schema), while others (i.e., union dues) only allow entry of specific amounts • In addition to creating recurring payroll deductions, agencies can also create a recurring deduction multiple (e.g., double deduction) for employee health and/or life insurance • All recurring deductions are systematically end dated when the employee terminates employment (based on the employee ID being terminated). This occurs based on either a voluntary or involuntary separation PAR being processed • Detail Section includes: ○ Type (wage type) - required field; agency must select from a wage type menu (pop-up screen); values presented in the wage type

#	Activity	Description	Dependencies	Uniqueness/Customizations
				menu are based on the values authorized for selection in the custom Wage Type Permissibility table ○ Start date – required field; drop down that presents the standard pay period dates based on the employee’s pay cycle; can only select the current and future pay periods ○ End date – required field; defaults to 12/31/9999; dropdown allows the deduction to be end dated based on a particular pay period ○ Amount – required field; notates the deduction dollar amount ○ Number/Unit – conditional fields; only required if creating a deduction multiple for either health or life insurance ▪ Number – if creating a deduction multiple for health or life, must enter an amount between 0 and 9; for all other deductions, must be left blank; field is only valid for select deductions ▪ Unit – drop down box (Hours, Percent or Multiple); only percentage and multiple are available in this screen); if the wage type selected is percentage based (calculated in payroll), then must select percentage; if creating a deduction multiple for health or life, must select multiple; for all other wage types, must be left blank
16.21	Other Payroll Screens - One-Time Pay Deductions (infotype PA0015 Additional Payments)	Screen is used to capture one-time payroll deductions (other than health & insurance deductions) for employees (except BENO employees)	Deduction must be active for the pay period processed	Screen is generated using infotype PA0015 Additional Payments. Deductions entered in this screen are only valid for one payroll. If the same deduction code (wage type) is active for an employee in both the One-Time and Recurring Deduction screens, the amounts are combined during the F0001 process to deduct the total of the two deductions

#	Activity	Description	Dependencies	Uniqueness/Customizations

				While most deductions (wage types) allow direct entry of the deduction amount, some have fixed percentage amounts (post-tax insurance deductions – amounts are stored in a custom table (ZAE_LGART_VALUES) which is called when the wage type is added or edited) and do not allow entry of an amount (amounts are calculated in the payroll schema), while others (i.e., union dues) only allow entry of specific amounts
				
				In addition to creating one-time payroll deductions, agencies can also create a one-time deduction multiple for employee health and/or life insurance
				
				• Detail Section includes:
				  ○ Type (wage type) - required field; agency must select from a wage type menu (pop-up screen); values presented in the wage type menu are based on the values authorized for selection in the custom Wage Type Permissibility table
				  ○ Start date – required field; drop down that presents the standard pay period dates based on the employee's pay cycle; can only select the current and future pay periods
				  ○ Amount – required field; notates the deduction dollar amount
				  ○ Number/Unit – conditional fields; only required if creating a deduct multiple for either health or life insurance
				    ▪ Number – if creating a deduction multiple for health or life, must enter an amount between 0 and 9; for all other deduction must be left blank
				    ▪ Unit – drop down box (Hours, Percent or Multiple); only percentage and multiple are available in this screen); if the wage type selected is percentage based (calculated in

#	Activity	Description	Dependencies	Uniqueness/Customizations
				payroll), then must select percentage; if creating a deduct multiple for health or life, must select multiple; for all other payment types, must be left blank
16.22	Other Payroll Screens - Stop/Cancel Payment (infotype PA9200)	Screen is used to stop payments from being sent on the F0001 to BOSP. This screen is only available once the preliminary payroll has been processed and prior to the final F0001 being processed	A payment must have been created during the preliminary payroll process for the employee	• When the preliminary payroll is run, the results are available in infotype PA9200 (Stop/Cancel Payment) for cancellation. The payments in this screen can be cancelled by wage type, pay period date and payroll run date. If the employee has multiple wage types that need to be cancelled, each wage type must be cancelled individually. Additionally, if the wage type is changed during the final payroll calculation, the cancellation is no longer applied • Payments that are cancelled using this screen (infotype PA9200, Stop/Cancel Payment) are not sent on the final F0001 to BOSP for processing. For each payroll, the screen is only available to cancel a payment for one business day prior to the due date of the F0001 to BOSP • The details section of this screen shows the pay period dates, the payroll run date, the wage type and amount. Only editable field is a drop down box that allows the User to change the status from pay to cancel. If no action is taken, the payment is included in the F0001, unless some other action (e.g., termination PAR, LWOP PAR, timesheet with LWOP hours, etc.) was completed on the employee
16.23	Other Payroll Screens - Wage Type Permissibility Table	The Wage Type Permissibility table is a custom table that is used to control what payment types and deduction types can be entered, and who can enter the wage types. The values in the table are used to	Wage type permissibility table is only available for agencies that use People First for payroll preparation	• Access to maintain the values in the Wage Type Permissibility screen is limited to F and S security role codes • All wage types used for the People First solution are available for editing within the screen. Additional edits exist within the screen to limit the wage types that can be selected for each screen. Only compensable wage types can be made available for use in the One-Time Regular Payroll Pay, Supplemental Pay and Award

#	Activity	Description	Dependencies	Uniqueness/Customizations
		drive the available wage types for the One-Time Regular Payroll Pay, Supplemental Pay, Award Payments, One-Time Pay Deductions and Recurring Pay Deductions screens. Table is in addition to the SAP default Wage Type Permissibility table and includes numerous additional edits		Payments payroll screens, while only deductible wage types can be made available for the One-Time Pay Deductions and Recurring Pay Deductions screens • Separate rows exist for each agency, wage type and security role code (A, H, X, U, Y, E and M). For the User to be able to maintain a deduction for themselves or one of their agency employees, the wage type must be made available for use for the User's agency and security role code. User must have a HR role code (A, H, X, U or Y) to maintain for other employees
16.24	Other Payroll Screens - Wage Type Permissibility Table Updates in SAP GUI	This table allows the state to maintain the deduction code descriptions and whether or not the deductions are viewable in the portal Wage Type Permissibility table	N/A	• This table is only available to DMS Users with SAP GUI access. Access is limited to changing the title of the deduction and changing the general availability of the wage type. Once the wage type is made generally available, separate updates must be completed in the portal to make the wage type available for an individual (or multiple) agency use • Changes to this table in SAP GUI do not require a transport to apply the change to the applicable deduction and are immediately available in the portal
16.25	Other Payroll Screens - Charge Object Screens	Charge object screens are used to maintain cost accounting codes that are used by agencies to break out employee time based on work performed and leave time while assigned to a specific project(s). The charge object screens are used to create, update, end date, and link charge objects for use	To link charge object components (project, activity and subactivity), each component must be created. Additionally, to assign a charge object to an organization unit, the applicable charge object components must have been linked and the organizational unit must have been created and active	• Charge objects are maintained by each agency. If the same charge object is applicable at more than one agency (e.g., codes for tracking time worked during a disaster or extraordinary situation), the charge object must be created separately at each individual agency. There are multiple steps and screens that are required to create a charge object and make the charge object available for use. The following steps must be completed in the order presented below (i.e., must complete Step 1 in its entirety prior to moving to Step 2) ○ Step 1: Maintain Projs/Acts/SubActs screen – used to create the project, activity and subactivity codes and associated titles and to

#	Activity	Description	Dependencies	Uniqueness/Customizations
				assign the validity period for each (start date and end date) ◦ Step 2: Charge Objects screen – screen is used to link the individual charge object components (project, activity, subactivity) together and to assign the validity period for the charge object. Date range cannot start before the start date of each individual component or extend beyond the end date of each individual component ◦ Step 3: Assign Org Range to a Charge Object screen – used to make the charge objects available for use. Charge objects can be restricted to one or more organizational ranges in an agency or can be applied to the entire agency. If restricting to multiple organizational ranges, the charge object organization relationship must be established for each range • An additional option exists to allow a charge object to be assigned to a single or a group of positions. However, this screen is not currently utilized by the State of Florida • In order for an employee to use a charge object on their timesheet, steps 1 – 3 above must be completed. Once these steps have been completed, the employees who fall in the Organizational Code(s)/Range(s) assigned in step 3 can use the charge object on their timesheet. The ability to use charge objects on the timesheet is restricted to the effective dates of the charge object (i.e., can only be assigned to timesheet days that fall within the effective date range • Charge objects for the State of Florida are not considered in either the Time Evaluation or Payroll processes in SAP. Charge objects are only used on the timesheet to allocate time and then are

#	Activity	Description	Dependencies	Uniqueness/Customizations
				subsequently used by each individual agency to create their departmental posting entries posted by the agency to the FLAIR • Additionally, there is a separate interface file (PRI_097) that can be used by agencies to either create charge object components and relationships, or to delimit charge objects and relationships. Refer to the PRI_097 file specifications for additional details on the interface file • For Department of Transportation (DOT), the charge object components and relationships are ONLY created and delimited through the interface file. The interface file for DOT uses the PRI_097 format, but is processed using a separate file (ZPI_Charge_Object_Inbound_DOT), while all other agencies are processed using the same file (ZPI_Charge_Object_Inbound_All). The difference is that the DOT file: o Has a different trailer record than the All File o Is not loaded into the ZTE_Time_Charge table (prevents records from being seen by statewide Users in the Charge Object screen within the portal) o Uses action codes of 1 (delimit), 2 (new), or 3 (change) instead of 'A '(Add), ''C' (Change), 'D'(Delimit), 'S'(Scratch) o Does not have the Aspire indicator o Additionally, DOT custom coding exists in the portal to restrict access to view the charge objects for DOT only to DOT HR and Accounting staff (based off of security role assignment)
16.26	Employee Gross Salary	Screen is used to provide agency HR and payroll staff with a single snapshot of all pay components for an	Employee must be employed in any agency other than a BENO entity History in this screen is only	The Employee Gross Salary screen is completely customized and includes the following information • The salary rates and types of salary components are displayed based on the dates of the record selected in the Overview section and are not tied to a specific pay

#	Activity	Description	Dependencies	Uniqueness/Customizations

		employee. The screen is view only and is updated each time one of an employee's salary components is changed (decreased or increased)	available from its initial implementation (October 2011). Employees who terminated prior to the initial implementation of this screen do not have any information available for review	period. Only salary components that are applicable for the selected record are displayed in the screen
				• Overview Section – lists effective date and end date for each record for the employee; all history is available for records starting from implementation date (October 2011) of the screen. Each entry in the Overview section represents a salary change for the employee
				• Details section includes the following:
				  • Period Rate of Pay Section:
				    ○ The gross amount is shown for base pay and additives. The hourly equivalent for each of these salary components is presented within this section to the right of the applicable gross amount. For all gross amounts in this section, the hourly rate is calculated based on the employee pay cycle (biweekly – gross amount multiplied by 26, the result is divided by 2080; monthly – gross amount multiplied by 12, the result is divided by 2080) (separate calculations for FSDB apply and are defined in the payroll calculations section above)
				    ○ Base Rate of Pay – Amount of wage type 2000 from the Pay Info (infotype PA0008)
				    ○ Competitive Area Differential (CAD) – Amount of wage type 2014 from Pay Info (infotype PA0008)
				    ○ Critical Market Pay Additive – Amount of wage type 2016 from Recurring Deductions/Payments (infotype PA0014)
				    ○ Hazardous Duty Additive – Amount of wage type 2011 from Recurring Pay Additives and Military Pay (infotype PA0014)
				    ○ Leadworker Additive – Amount of wage

#	Activity	Description	Dependencies	Uniqueness/Customizations
				type 9174 from Recurring Pay Additives and Military Pay (infotype PA0014) ○ Legislative Approved Additive – Amount of wage type 2015 from Recurring Pay Additives and Military Pay (infotype PA0014) ○ Temporary Special Duty (TSD) General Additive – Amount of wage type 2012 from Recurring Pay Additives and Military Pay (infotype PA0014) ○ TSD – Absent Coworker Additive – Amount of wage type 2019 from Recurring Pay Additives and Military Pay (infotype PA0014) ○ Trainer Additive – Amount of wage type 2010 from Recurring Pay Additives and Military Pay (infotype PA0014) ○ Shift Differential – Amount is calculated within the employee gross salary display program based on the value selected/entered on the custom infotype HRP9120 Pay Additives, fields SHIFT_DIFF, EVE_PERCENT and EVE_DOLLAR, for the position the employee holds as follows: ▪ If SHIFT_DIFF = 1, then (Amount of wage type 2000 from Pay Info (infotype PA0008) table) multiplied by percentage value in EVE_DOLLAR ▪ If SHIFT_DIFF = 2, then (Amount in field PAYGRADEMIN from table ZAE_BRDBND_CLASS) multiplied by percentage value in EVE_DOLLAR. The value of PAYGRADEMIN is determined from table

#	Activity	Description	Dependencies	Uniqueness/Customizations
				ZAE_BRDBND_CLASS for a combination of the SHORT value from table HRP1000 of Object Type “C” related to the position with relationship type as B007, the class code and CBU of the position that the employee holds for the record period selected in the overview ▪ If SHIFT_DIFF = 3, then value of amount in field EVE_DOLLAR ▪ If SHIFT_DIFF = 4, then (Amount in field PAYBANDMIN from table ZAE_BRDBND_CLASS) multiplied by percentage value in EVE_DOLLAR. The value of PAYBANDMIN is determined from table ZAE_BRDBND_CLASS for a combination of the SHORT value from table BRP1000 of Object Type “C” related to the position with relationship as B007, the class code and CBU of the position that the employee holds for the record period selected in the overview ○ At the end of all the regular salary components (Period Rate of Pay section), a separate row (titled Period Rate of Pay) is presented that totals the gross and the hourly rate of pay amounts for the regular salary components. This represents the employee’s regular rate of pay for the regular payroll (biweekly or monthly, depending on the employee’s pay cycle) • Monthly Incentive Pay Section – presented only if

#	Activity	Description	Dependencies	Uniqueness/Customizations
				the employee has at least one of the following incentive payment types for the period selected ○ For all gross amounts in this section, the hourly rate is displayed to the right of the gross amount. The hourly rate is calculated by multiplying the gross amount by 12 and then dividing the result by 2080 ○ Criminal Justice Incentive Pay (CJIP) – Amount of wage type 9172 from the custom CJIP screen (infotype PA9014). ○ Fire Fighter Supplemental Compensation(FSCP) – Amount of wage type 9138 from Recurring Pay Additives and Military Pay (infotype PA0014) • After the Period Rate of Pay and Incentive Pay sections, the employee’s hourly regular rate of pay is presented. The hourly regular rate of pay is the hourly amounts for both sections summed together. This amount is used for Call-Back and Call-Back make-up payments, SES extraordinary and regular comp payable payments and for leave payouts processed using the Leave Payout screen. Unless the employee is on call in the period, this amount also represents the employee’s overtime hourly rate of pay • At the bottom of the Employee Gross Salary screen, a Notes Section is presented. This section is intended to provide additional information related to the salary components presented on the screen. Notes are only presented if the employee has the salary component that the note is generated for. The following notes are presented: ○ Leave Payout Note: displayed only for employees in employee groups 1 (included) and 2 (excluded) ▪ Note reads: “Leave Payouts are

#	Activity	Description	Dependencies	Uniqueness/Customizations
				paid at the Hourly Regular Rate of Pay per Rule 60L-34, F.A.C." ○ On Call Note: displayed only for employees who are eligible for On Call for the period of the record selected in the Overview section ▪ On Call indicator must be marked on the Pay Additives screen (infotype HRP9120, Pay Additives) for the position the employee holds ▪ Within the note, the weekday and weekend on call rates are displayed based on the following calculations: • Weekday on call rate is displayed as $1 • Weekend day or holiday on call rate is displayed as equal to one-fourth of the statewide minimum for the employee's pay grade (based on the pay grade stored on infotype HRP9121 (Position Attributes) on the employee's position) ▪ Note reads: "Please note that if you are required to be On Call, you will be paid $___ per hour for weekday On Call hours and $___ per hour for weekend and/or holiday On Call hours." ○ Paid on Separate Payroll Note: displayed only for employees who have CJIP and/or FSCP payment types ▪ Notes reads: "This payment type

#	Activity	Description	Dependencies	Uniqueness/Customizations
				is paid on a separate payroll from the Period Rate of Pay." ○ Overtime Rate of Pay Note: displayed only for employees in employee group 1 (included) when the On Call indicator on the position Pay Additives screen (infotype HRP9120) is marked ▪ Note reads: "The Overtime Rate of Pay includes these amounts, plus the actual amount of On Call paid during the Overtime (FLSA) period. This screen reflects the employee's rates of pay and may not be the actual amounts paid." ○ Monthly Employee Note: displayed only for employees who are assigned to payroll area UM (monthly) and are in employee groups 1 or 2 ▪ Note reads: "For monthly employees, the Hourly Rate of Pay is based on your contract hours for the month and will vary from pay period to pay period. The amount reflected here is your annualized hourly rate of pay."
16.27	Leave Payout Overview (infotype PA9410)	Screen is used to process payouts for eligible leave types based on a change in the employee's work status (except for FLSA comp which is also paid based on the agency payout schedule as provided by state rules) The Leave Payout	To be eligible for a payout, the employee must meet the specific payout criteria (leave type and the type of payout being processed drive the payout criteria and are further described below for each leave type) Employee must have a compensable leave balance in the payable leave type	This process is used in place of the standard SAP leave payout process, as the standard process does not accommodate most of the state's unique business needs The leave payout Overview section includes the following: • Separate record for each combination of leave and payout statuses. For example, if the employee received an annual leave payout, but still has a balance in annual leave, two separate rows are presented. The first row will include the current balance and the second row will indicate a status of paid and reflect the details of the payout. If multiple

#	Activity	Description	Dependencies	Uniqueness/Customizations

		screen is highly customized to ensure leave payouts are processed in accordance with State of Florida laws and rules		payouts are processed for the same leave type, a separate row is displayed for each payment
				• The following fields are displayed in the Overview section:
				  ○ Record Type (status) – indicates available balance, pending payment (payment created, but waiting to be processed) or paid
				  ○ Leave Type – indicates which payable leave type is displayed for that record
				  ○ Balance – only valid for available balance records and indicates the available leave (does not indicate that the full available balance is payable)
				  ○ Hours – only valid for pending payment and paid records. Indicates the hours to be paid
				  ○ Payroll Type – only valid for pending payments and paid records. Indicates the type of payroll the payment will be/was processed on
				  ○ Processing Date – only valid for pending payments and paid records. Indicates the date the payment will be/was processed

16.28	Leave Payout Details Section	Used to create payouts or to delete or edit a pending payout request	Must select the applicable current balance record in the Overview section to create a record To be eligible for a payout, the employee must meet the specific payout criteria (leave type and the type of payout being processed drive the payout criteria and are further described below for each leave type) Employee must have a	To create a payment, the HR User must select the leave type in the overview section, and then edit the Details section to create the pending payment. Custom edits controlling the validity of payments are included in the Details section and are specific to the leave type and the type of payout being processed The leave payout Details section includes the following fields and edits: • Leave Type – defaults based on the current balance record selected in the Overview section; field is not editable • Payout Type – separate values are presented based on the Leave Type selected in the Overview section. Values for each leave type are defined below for each

#	Activity	Description	Dependencies	Uniqueness/Customizations
			compensable leave balance in the payable leave type	leave type • Hours Available for Payout – hours available for payout are calculated based off of a combination of hours available and other criteria for specific leave types (e.g., for annual leave, may factor in hours previously paid out or the employee's tenure; for sick leave the system considers the employee's tenure and calculates hours available as ¼ of the employee's available leave up to a max of 480 hours). Additional details are defined below for each leave type. When viewing a pending payout or paid record, this field is set to blank • Hours to Payout – required field when creating a leave payout. Hours to payout can be up to the Hours Available for Payout, but cannot be greater than the Hours Available for Payout. If the User enters either an invalid hour's format (format must be either whole hours or quarter hour increments) or more hours than are available for payout, the User is presented with custom error messages that describe what must be corrected to proceed. When viewing a pending payout or paid record, this field reflects the hours being paid or to be paid • Hourly Rate of Pay – hourly rate of pay is calculated using the same hourly rate of pay calculation as the Employee Gross Salary screen (refer to that section for specific calculations). The Hourly Rate of Pay is pre-populated based on this calculation, but can be edited by the User creating the record. When viewing a pending payout or paid record, this field reflects the hourly rate of pay used for the payment • Payroll to Payout – allows the User to select to either pay on the next available supplemental payroll or next available regular salary payroll (regular salary payroll is based on the employee's payroll area and defaults to either biweekly or monthly based on the payroll area). When viewing a pending payout or paid record,

#	Activity	Description	Dependencies	Uniqueness/Customizations
				this field reflects payroll type that was selected for the payout • Processing Date – defaults to the processing date for the selected Payroll to Payout value. When viewing a pending payout or paid record, this field reflects the processing date of the selected payout. For terminated payouts, the payment processing date must be within 60-days of the employee's last day employed • Payroll Account Code – defaults to the 29-digit FLAIR Account Code from the employee's current position (pulled from infotype HRP9124, Position Funding). For payouts to terminated employees, pulls from the employee's last position held. User creating the payout can change to another valid FLAIR Account Code (if changing, the entered FLAIR Account Code is validated against the custom FLAIR Account Code table to ensure the value exists and is available for use). When viewing a pending payout or paid record, this field reflects the FLAIR Account Code to be/used for the payout • Payroll Organization Code – defaults to the 11-digit FLAIR Org Code from the employee's current position (pulled from infotype HRP9124). For payouts to terminated employees, pulls from the employee's last position held. User creating the payout can change to another valid FLAIR Org Code (if changing, the entered FLAIR Org Code is validated against the FLAIR Org Code table to ensure the value exists and is available for use). When viewing a pending payout or paid record, this field reflects the FLAIR Org Code to be/used for the payout • For Annual Leave Payouts, if the employee has received a previous annual leave payout as either a CS employee or as a DROP employee, a separate CS Previously Paid Out and/or DROP Previously Paid Out field is presented to the right of the details field. These

#	Activity	Description	Dependencies	Uniqueness/Customizations
				values are used if the agency attempts to process an equivalent payout type (CS or DROP) to determine the hours available for payout
16.29	Leave Payout – Additional Functions within the Details section	Within the Leave Payout screen/process, additional custom processes are built into the payout process to ensure accurate data for the employee is maintained	Leave payout must have been created (either pending payment or paid)	For Pending Payouts (hours are created in infotype PA2012 (Time Transfer Specifications) in a locked status as the last day employed (for termination payouts) and the payment is created in infotype PA0015 Additional Payments), the following custom processes exist: • When a pending payment is created, a custom program creates a pending leave balance adjustment to freeze the payout hours and prevent the hours from being used on timesheets. The pending payout hours are reflected as pending payout in the Leave Balance Overview screen • Delete Payout functionality – If selected, allows the User to delete the pending payout and if appropriate create a new payout; when selected, removes the pending payment from the Overview section; removes the pending hours from the Leave Balance Overview screen; releases the hours stored in infotype PA2012 (Time Transfer Specifications) and removes the payout created in infotype PA0015 (Additional Payments) • As part of the final payment process, the infotype PA2012 (Time Transfer Specifications) record is unlocked to reduce the leave balance • Once the payout is sent to the BOSP on the F0001, the payment is changed from Pending to Paid. Once the payout is changed to a paid status, the record cannot be edited or deleted
16.30	Annual Leave	Eligibility to receive an annual leave payout is based on various criteria (which criteria applies, depends on the type payout), including the type of employee (e.g.,	To be eligible for a payout, the employee must meet the specific payout criteria (leave type and the type of payout being processed drive the payout criteria and are further described within each leave	Employee must have a balance available for payout. For CS employees: 1) employee must be continuously employed for 12 consecutive months (based on Continuous Service Date on the employees' key service date record) and the last day employed must be at least 365 days greater than their "Continuous Service Date"; and 2) employee must not have been paid the life time cap of 240 hours (the Hours Available

#	Activity	Description	Dependencies	Uniqueness/Customizations

		CS, CS Equivalent, SES, SES Equivalent, SMS and SMS Equivalent), the tenure of the employee, the employee's current employment status (active, terminated, transferred or retired) and the hours previously paid out	type)
			
			Employee must have a compensable leave balance in the payable leave type
				for Payout field calculates the hours available for payout as the lesser of the current balance and 240 hours minus hours previously paid out)
				
				For payout types that are based on an employment action (DROP Exit, Employee Terminated, Non-Transferable Hours because employee transferred agencies or pay plans and the receiving agency/pay plan will not accept the maximum hours for the current agency/pay plan) the personnel action (PAR) must be completed prior to creating the payout. If the personnel action has not been completed, an error message is presented advising the User the PAR must be completed prior to creating the payout
				
				Validation edits exist at the Payout Type level. These validation edits are applied in the Details section when creating a leave payout record. The custom edits are as follows:
				• DROP Exit, Employee Term and Layoff –
				    ○ System checks for a Separation PAR (for Layoff looks specifically for a Layoff PAR for the employee)
				    ○ Payout must occur within 60 days of the employee's last day employed
				• Non Transferable Hours – system checks for either a Separation PAR or a change in pay plans (e.g., CS to SES)
				• December 24 Hour Leave Payout – payout type will only show when the processing date is for a warrant date in the month of December and will only be available for CS employees (must be an active employee and must be in employee groups 1 or 2 and employee subgroup 01)
				
				Hours available for payout are calculated as follows:
				• CS Employees – lesser of 240 hours minus previously paid out CS hours across all employees IDs and the

#	Activity	Description	Dependencies	Uniqueness/Customizations

				employee's available balance
				• SES/SMS Employees – lesser of 480 hours and the employee's available balance
				• Lottery Employees:
				  ○ Pay Plan 31 – lesser of 360 hours and employee's available balance
				  ○ Pay Plan 33 – lesser of 480 hours and employee's available balance
				• FSDB Employees:
				  ○ Pay Plan 04 (CBU 40) – lesser of 240 hours and employee's available balance
				  ○ Pay Plan 04 (CBU 41) – lesser of 480 hours and employee's available balance
				  ○ Pay Plan 04 (CBU 42) – lesser of 352 hours and employee's available balance
				• DROP Exit Payouts – an additional check is performed for all employees exiting DROP that checks against the DROP Entry hours paid out. Employees are entitled to the lesser of the pay plan cap (240, 352, 360 or 480 hours) and the pay plan cap minus previously paid out hours (for CS, CS Previously Paid out hours are also subtracted when determining the hours available for payout)

16.31	Sick Leave	Eligibility to receive a sick leave payout is based on the tenure of the employee, the employee's current employment status (must be terminated) and the hours available for payout	To be eligible for a payout the employee must meet the specific payout criteria (leave type and the type of payout being processed drive the payout criteria and are further described within each leave type) Employee must have a compensable leave balance in the payable leave type	The same business rules are applied to all employees for sick leave payout. To be eligible for a payout the personnel action (PAR) must be completed to terminate the employee prior to creating the payout (employee must be terminated to be eligible to receive a sick leave payout) For sick leave, the same validation edits exist for each Payout Type (DROP Exit, Employee Termination and Layoff). ○ Validates the employee has been terminated from all State of Florida employment (not active in any agency) ○ Validates the employee was employed for 10 years (system checks against the Credible Service Months field for 120 months on the Key Service Dates screen

#	Activity	Description	Dependencies	Uniqueness/Customizations
				(infotype PA0041)) ○ If the personnel action (PAR) has not been completed to terminate the employee, an error message is presented advising the User the PAR must be completed prior to creating the payout ○ Payout must occur within 60 days of the employee’s last day employed Hours Available for Payout is calculated as follows: Lesser of 480 hours and one quarter (1/4) of the employee’s available hours (rounded to the nearest quarter hour)
16.32	FLSA Comp	Eligibility to receive a FLSA Comp leave payout is based primarily on the employee’s available balance for payout	To be eligible for a payout the employee must meet the specific payout criteria (leave type and the type of payout being processed drive the payout criteria and are further described within each leave type) Employee must have a compensable leave balance in the payable leave type	For payout types that are based on an employment action (Employee Terminated, Transfer Agency and Transfer to Excluded Position) the personnel action (PAR) must be completed prior to creating the payout Validation edits exist at the Payout Type level. These validation edits are applied in the Details section when creating a leave payout record. The custom edits are as follows: • Employee Term and Transfer Agency – system checks for a Separation PAR at the exiting agency • Transferring to Excluded Position – system checks to validate the employee is no longer holding an overtime included position (employee group 1) and is still an active employee • Interval Payout – system checks to validate available balance and employee type is eligible for payout (e.g., does not allow payout if employee is OPS) • If the personnel action (PAR) has not been completed, an error message is presented advising the User the PAR must be completed prior to creating the payout • Payout must occur within 60 days of the employee’s last day employed Hours Available for Payout is limited to the lesser of the employee’s balance and:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• 100 hours (CBU 06 and 12 employees) • 80 hours for all other eligible employees
16.33	Special Comp	Eligibility to receive a Special Comp leave payout is based primarily on the employee's available balance for payout	To be eligible for a payout, the employee must meet the specific payout criteria (leave type and the type of payout being processed drive the payout criteria and are further described within each leave type) Employee must have a compensable leave balance in the payable leave type	Validation edits exist at the Payout Type level. These validation edits are applied in the Details section when creating a leave payout record. The custom edits are as follows: • DROP Entry/Last 11 Months – system treats the payment as retirement contributor (triggers a different wage type on the F0001); all other special comp payouts are not eligible for payout • Employee Term, Employee Exit DROP, Layoff and Transfer Agency – system checks for a Separation PAR at the exiting agency • Move to Ineligible Position – system checks to validate the employee was moved from a CS position to another Pay Plan (SES, SMS or OPS) within the agency • If the personnel action (PAR) has not been completed, an error message is presented advising the User the PAR must be completed prior to creating the payout • Payout must occur within 60 days of the employees last day employed Hours Available for Payout is limited to the lesser of the employee's balance and 999.75 hours. • If employee has more than 999.75 hours, two separate payouts will have to be processed on two separate payroll runs
Reports – DW				
17.1	DW Report Filter screen	There is a standard report filter screen for each DW report accessed in the DW Reports Module of the People First System	The core HRIS is available The DW web portal is available The DW is available	Each report filter page is set up as follows: • People First logo is displayed in the top left hand corner of the page • The User-id of the individual running the report is displayed on a separate line directly under the People First logo • Below the User-id and a bold line going across the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				entire page is where the web page navigation is located. The first link with the title 'Home' is displayed. This link connects the User to DW Reports Module of the People First System • After the 'Home' link, an arrow pointing to the right is displayed and then the title of the report group the User navigated to is displayed • The next line down the display is: Report Selection Criteria – left justified • A search filter is available to search the report group to find a specific report when only a portion of the report title is known. • Statement below: Select or enter values for report parameters – italicized • Report Title: - bold, left aligned below previous statement • <Actual Report Title>: - one tab to the right of the Report Title field • Listing of required and optional filters – required filter field titles are bolded in red font and marked with an asterisk • If a filter's options are selected from a table, there is a drop down menu located to the right of the filter title. OLO is a required filter on all reports with the exception of Average Salary By Class Code, Average Salary By Pay Grade and DW Stage Error reports • Values presented in drop down are based upon security role code • Org Code, Budget Entity, and FLAIR Org are based on the selected OLO code • Certain filters are based on a previously selected filter. (cascading) • If a filter is a date field, calendar selection functionality is located to the right of the filter • The last filter listed on the filter page is the Report Format Filter and the options are PDF and XLS

#	Activity	Description	Dependencies	Uniqueness/Customizations
				At the bottom of the filter page the following statement is displayed: • For assistance, please call the Service Center at (866) 663 –4735
17.2	DW Report Format	There are standard report formatting requirements and general standards for filtering all DW reports accessed in the DW Reports Module of the People First System	The core HRIS is available The DW web portal is available The DW is available	All report headers contain the following items: • Run Date: MM/DD/YYYY – left justified on top line of the header • Page: <number> – left justified below run date • Report Title – centered on top line of the header • Agency Name – is presented based on the OLO used in the report filter; centered below report title. (If OLO 4900 or 9999 is selected, the sub agency name is displayed) • People First logo – right justified All report footers contain the following statement: "This report may contain information that is confidential under state or federal law. Improper access or release of such information may be a violation of such laws." The last page of each report contains the following in the body of the page: • Report Selection Criteria: – left aligned, bolded and underlined • List of the report filters (required and optional) with the filter value entered or selected; left blank if filters are not selected For PDF, the report opens in a new window. The new window remains blank until the report results display. Depending on the report and the selected filters, the results may take a few minutes before the data is displayed. The User has the option to print or save the PDF file once the report displays. A blank report displays if no data is available for the report selection criteria For Excel, the report selection criteria screen remains on the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				screen until the report results display. Depending on the report and the selected filters, the results may take a few minutes before the data is displayed. The User must click the "Download to Excel" link to export to Excel once the results display. While the PDF reports are formatted for printing, the Excel reports are unformatted so the User can work with the data as needed. If no data is available for the selected report criteria, the User is presented a message indicating "No records found for selection. Please verify selection criteria." If the User skips a required filter, the User is presented the following error message at the top of the Report Selection Criteria screen: "Errors have occurred" and a red X displays next to the filter that the User need to correct. Correct the filters and select the Run Report button
17.3	Agency Leave Liability Report	The Agency Leave Liability Report displays detail records for each employee and the liability costs associated with annual, sick, FLSA compensatory, and special compensatory (pre 07/2012) leave balances. Data in the report becomes static as of the last day of the fiscal year (June 30 each year, but a grace period is included to allow agencies time to complete outstanding activities for the fiscal year). This report is intended to assist agencies in the leave liability reporting	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Data for populating this report is updated monthly and is based on balances for annual, sick, FLSA compensatory, and special compensatory leave The report includes the following filters: • Required filter(s): OLO Code; Start Date (must equal 0701YYYY; the year must equal the first day of the fiscal year to be reported on); Report Format (defaults to PDF, can change to Excel) • Optional filter(s): Org Code (from – to); FLAIR Org (from – to); CBU (can select from list) The report includes the following fields: • Group heading (<leave type> Liability) • Org Code (numeric value) • Emp ID (PERNR) • Beg Bal (leave beginning balance as of the first day of the fiscal year) • Used Bal (leave used balance as of the last data update) • Accrued Bal (leave accrued balance as of the last data update)

#	Activity	Description	Dependencies	Uniqueness/Customizations
		required of them for each fiscal year. Only employees in employee groups1 and 2 are included in the report; (i.e., OPS, benefits only and non-state workers (i.e. contractors) are excluded)		• Adjusted Bal (leave adjusted balance as of the last data update) • End Bal (leave ending balance as of the last data update) • Class Code • Pay Plan • Employee Name (full name) • Creditable Service Months • Interdept (Interdepartmental number) • Warrant Distribution Number • Pay Rate (employee's pay period rate of pay). • Adjusted Rate (employee's pay period rate of pay plus pay period portion for Social Security and Medicare taxes and retirement contribution if line is for annual leave or FLSA comp) • HR Rate (adjusted hourly rate of pay; calculated as adjusted rate multiplied by the number of pay periods in the year (12 or 26) divided by 2080). The hourly rate for employees at FSDB is calculated as defined in the Key Payroll Calculations and Definitions section above • RET Contrib Rate (retirement contribution rate – displayed for annual leave and FLSA Comp only) • Social Security Rate (capped based on the annual maximum set by the Social Security Administration) • Medicare Rate • Begin Liability Rate (beginning hours multiplied by the hourly rate) • Accrued Liability Rate(accrued hours multiplied by the hourly rate) • Used Liability Rate (used hours multiplied by the hourly rate) • Ending Liability Rate (ending hours multiplied by the hourly rate) • Pos Num (position number) • RET Code (retirement code)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• FLAIR Acct Code (FLAIR account code) • Fund Id (concatenated value that includes (in the following order) the first two digits of the agency code, 0000, grant fund code, state fund code and the six digit fund ID) • Pay Area (UB for biweekly or UM for monthly) • CBU Code/ Description The report is sorted in the following order: • Leave Type • Org Code • Emp ID The report provides the following totals/summaries: • Org code • Leave Type • Hours • Liability • Number of employees For annual leave, only the first 500 hours are subject to retirement contribution. For calculating the liability fields, hours over 500 are multiplied by the adjusted rate without the retirement contribution included (rate used for sick leave) For sick leave, employee is only included in the report if the employee has at least 103 months of creditable service as of the last day of the fiscal year For annual and sick leave types additional edits are applied for FSDB and Lottery Report ONLY includes employees that were employed in a leave eligible position on the last day of the fiscal year For employees hired in the middle of the year from another

#	Activity	Description	Dependencies	Uniqueness/Customizations
				agency, hours transferred in from the other agency are reflected in the adjusted hours columns (as are actual adjustments processed by the agency)
17.4	Agency Leave Liability by Funding ID Report	The Agency Leave Liability by Funding ID Report summarizes the liability costs for annual, sick, FLSA compensatory, and special compensatory (pre 07/2012) by fund ID. The data in the report becomes static at the end of each fiscal year (June 30 each year, but a grace period is included to allow agencies time to complete outstanding activities for the fiscal year). This report is intended to assist agencies in the leave liability reporting required of them for each fiscal year Only employees in employee groups1 and 2 are included in the report; (i.e., OPS, benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Data for populating this report is updated monthly and is based on balances for annual, sick, FLSA compensatory, and special compensatory leave The report includes the following filters: • Required filter(s): OLO Code Start Date (must equal 0701YYYY; the year must equal the first day of the fiscal year to be reported on); Report Format (defaults to PDF, can change to Excel) The report includes the following fields: • Fund Id (concatenated value that includes (in the following order) the first two digits of the agency code, 0000, grant fund code, state fund code and the six digit fund ID) • Leave Type • Begin Liability • Accrued Liability • Used Liability • Adjusted Liability • Ending Liability The report is sorted in the following order: • Fund ID • Leave Type The report provides the following totals/summaries: • Begin Liability by Fund ID • Accrued Liability by Fund ID • Used Liability by Fund ID • Adjusted Liability by Fund ID • Ending Liability by Fund ID • Overall Agency Total for Begin Liability

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Overall Agency Total for Accrued Liability • Overall Agency Total for Used Liability • Overall Agency Total for Adjusted Liability • Overall Agency Total for Ending Liability The same pay calculations and leave balance edits used in the Agency Leave Liability Report are applied to the report
17.5	Agency Leave Liability by Leave Type Report	The Agency Leave Liability by Leave Type Report summarizes the liability costs associated for all fund IDs by leave type. The data in the report becomes static at the end of each fiscal year (June 30 each year, but a grace period is included to allow agencies time to complete outstanding activities for the fiscal year). This report is intended to assist agencies in the leave liability reporting required of them for each fiscal year. Only employees of employee groups1 and 2 are included in the report; (i.e., OPS, benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Data for populating this report is updated monthly and is based on balances for annual, sick, FLSA compensatory, and special compensatory leave The report includes the following filters: • Required filter(s): OLO Code (agency Identifier); Start Date (must equal 0701YYYY; the year must equal the first day of the fiscal year to be reported on); Report Format (defaults to PDF, can change to Excel) The report includes the following fields: • Leave Type • Funding Id • Begin Balance • Accrued Balance • Used Balance • Adjusted Balance • End Balance • Begin Liability • Accrued Liability • Used Liability • Adjusted Liability • Ending Liability The report is sorted in the following order: • Leave Type • Fund ID The report provides the following totals/summaries:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Begin Balance by Leave Type • Accrued Balance by Leave Type • Used Balance by Leave Type • Adjusted Balance by Leave Type • End Balance by Leave Type • Begin Liability by Leave Type • Accrued Liability by Leave Type • Used Liability by Leave Type • Adjusted Liability by Leave Type • Ending Liability by Leave Type The same pay calculations and leave balance edits used in the Agency Leave Liability Report are applied to the report
17.6	Appointment Status Expiration Report	The Appointment Status Expiration Report allows agency HR staff to pull data on expired employee appointments as well as upcoming expirations to determine if an action needs to be taken in People First to update the appointment record. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from People First System must have been executed and the data must be loaded into the DW	The report includes the following filters: • Required Filters: OLO Code, Begin Date, End Date, Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), Appointment Status The report includes the following data fields: • Org Code • Appointment Status • Emp ID (PERNR) • Last Name • First Name • Middle Initial • Position number • Base Pay • Class Code • Pay Grade • Appointment Status Effective Date • Status Expiration Date • Interdepartmental Number The report is sorted in the following order:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Org Code • Position number • Appointment status • Employee last name

17.7	Average Salary by Class Code Report	The Average Salary by Class Code Report provides the average salary by class code. Only employees of employee groups1, and 2 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from the People First System must have been executed and the data must have been loaded into the DW	The report includes the following filters:
				• Required filters: OLO Code, Statewide (check box – check to have the report run statewide by class code), Report Format (defaults to PDF, can change to Excel)
				• Optional Filters: Org Code (from – to), FLAIR Org (from – to), Budget Entity (from – to), Pay Grade (from – to), Pay Plan (from – to), Class Code and CBU
				
				The report includes the following fields:
				• Class Code
				• Class Title
				• Pay Plan
				• Pay Grade
				• Number of Employees
				• Number of Filled FTE
				• Average Annual Base Pay
				
				The report is sorted in the following order:
				• Pay Plan
				• Class Code
				
				The report provides the following totals/summaries:
				• Agency Totals
				  o Number of Employees
				  o Number of FTE
				  o Average Annual Base Pay
				• Report Totals (if report is run statewide)
				  o Number of Employees
				  o Number of FTE
				  o Average Annual Base Pay

17.8	Average Salary by Pay Grade Report	The Average Salary by Pay Grade Report	The data extract from the People First System must	The report includes the following filters: • Required filters: OLO Code, Statewide (check box –

#	Activity	Description	Dependencies	Uniqueness/Customizations
		provides the average salary by pay grade. Only employees of employee groups1 and 2 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	have been executed and the data must have been loaded into the DW	check to have the report run statewide by class code), Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), FLAIR Org (from – to), Budget Entity (from – to), Pay Grade (from – to), Pay Plan (from – to), Class Code and CBU The report includes the following fields: • Pay Grade • Pay Plan • Number of Employees • Number of Filled FTE • Average Annual Base Pay The report is sorted in the following order: • Pay Grade • Pay Plan The report provides the following totals/summaries: • Agency Totals o Number of Employees o Number of FTE o Average Annual Base Pay • Report Totals (if report is run statewide) o Number of Employees o Number of FTE o Average Annual Base Pay
17.9	Benefits Cancellation Report	The Benefits Cancellation Report identifies employees whose state group health and insurance enrollments are not paid in full and as a result will not be sent on the carrier files for the next	Employee must be underpaid for the coverage month and all regular payrolls for the employee's pay cycle must have been processed	The report includes the following filters: • Required filters: OLO Code; Agency Sub Group (only applies to BENO entities); Coverage Begin Date (MM/DD/YYYY format; must be the first day of the coverage month); Coverage End Date (MM/DD/YYYY format; must be the last day of the coverage month), Report Format (defaults to PDF, can change to Excel) • Optional filters: Org Code (from – to); FLAIR Org (from – to); Budget Entity (from – to); Emp ID (PERNR);

#	Activity	Description	Dependencies	Uniqueness/Customizations
		coverage month		Plan Type (from – to) The report includes the following fields that are pulled from various infotypes: • Org Code • FLAIR Org • Coverage Period • Agency Sub Group/Title (blank for state agencies, only populated for BENO entities); • Coverage Level • Last Name • First Name • Middle Initial • Emp ID • LOA Status • FTE • Pay Plan Code/Description • Plan Type/Description • Employee Due (employee contribution due for the insurance plan for the coverage month) • Employee Paid (employee contribution paid for the insurance plan for the coverage month) • Employee Variance (employee underpayment amount for the insurance plan for the coverage month) The report is sorted in the following order: • Coverage Period • FLAIR Org • Employee Last Name • Employee First Name • Emp ID • Plan Type Code

#	Activity	Description	Dependencies	Uniqueness/Customizations
				The report provides the following totals: • Number of Employees
17.10	Benefits Changes Report	The Benefit Changes Report contains data from July 2010 forward and identifies employees who had a change in health and insurance enrollments; changes can be made by: employee, HR office, service center or a system batch program	Employee must have a change in at least one plan for the coverage month	The report can be processed for future dated months, as well as current and past months. Plan terminations are reflected in the month the Health and Insurance Benefits terminated, while plan changes (e.g., coverage level, carrier change) are reflected in the month the changes are effective The report includes the following filters: • Required filters: OLO Code; Agency Sub Group (only applies to BENO entities); Coverage Begin Date (MM/DD/YYYY format; must be the first day of the coverage month); Coverage End Date (MM/DD/YYYY format; must be the last day of the coverage month), Employee Type (All, Salaried, OPS), Report Format (defaults to PDF, can change to Excel) • Optional filters: Org Code (from – to); FLAIR Org (from – to); Budget Entity (from – to); Emp ID (PERNR) The report includes the following fields that are pulled from various infotypes: • Org Code • FLAIR Org • Last Name • First Name • Middle Initial • Emp ID (PERNR) • Pay Plan Code and Description • Class Code • FTE • Plan Type Description

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Old Benefit Plan • New Benefit Plan • Old Coverage (coverage level for the plan type prior to the change) • New Coverage (coverage level for the plan type for the new election) • Old EE (employee) Cost • New EE (employee) Cost • Old ER (employer) Cost • New ER (employer) Cost • Effective Date • Event Type (Qualified Status Change (QSC) or Open Enrollment event that allowed the employee to make the change) The report is sorted in the following order: • Coverage Period • FLAIR Org • Employee Last Name • Employee First Name • Emp ID (PERNR) • Plan Type Code The report provides the following totals: • Number of Employees
17.11	Benefits Underpayment /Overpayment Report	The Benefits Underpayment/Overpayment Report identifies employees whose health and insurance enrollments are either	Employee or employer contributions (or both) must be underpaid or overpaid for the coverage month	Data is available for 23 months back, current coverage month and next coverage month The report includes the following filters: • Required filters: OLO Code; Agency Sub Group (only applies to BENO entities); Coverage Begin Date (MM/DD/YYYY format; must be the first day of the

#	Activity	Description	Dependencies	Uniqueness/Customizations
		underpaid or overpaid (employee, employer or both the employee and employer contributions) for the requested coverage month		coverage month); Coverage End Date (MM/DD/YYYY format; must be the last day of the coverage month), Report Format (defaults to PDF, can change to Excel) ○ Important note: Coverage begin and end dates can be a range of coverage months instead of just one month. If processing for more than one month, enter the first day of the first coverage month in the Coverage Begin Date and enter the last day of the last coverage month in the Coverage End Date. • Optional filters: FLAIR Org (from – to); Emp ID (PERNR); Plan Type (from – to) The report includes the following fields that are pulled from various infotypes: • User ID (CP) • Employee Name (employee's full name) • COBRA Type • COBRA ID (COBRA Type and COBRA ID are only used for COBRA participants (blank for all agency employees)) • Agency/Agency Sub Group (blank for state agencies, only populated for BENO entities) • FLAIR Org Code • Plan Type • Plan Type Description • Benefit Plan • Benefit Plan Description • Coverage Period • Employee Due (employee contribution due for the insurance plan for the coverage month)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Employee Paid (employee contribution paid for the insurance plan for the coverage month) • Employee Variance (underpayment or overpayment amount for the insurance plan for the coverage month by the employee) • Employer Due (employer contribution due for the insurance plan for the coverage month) • Employer Paid (employer contribution paid for the insurance plan for the coverage month) • Employer Variance (underpayment or overpayment amount for the insurance plan for the coverage month by the employer) The report is sorted in the following order: • Coverage Period • FLAIR Org • Employee ID • Plan Type Code
17.12	Budgeted Positions Report	The Budgeted Positions Report displays a detail record for each agency position. Only employees of employee groups1, and 2 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from the People First System must have been executed and the data must have been loaded into the DW	The report includes the following filters: • Required filters: OLO Code, Report Mode (drop down selection including the following options: Budgeted Positions Status; Budgeted Positions by Org; Budgeted Positions by FLAIR Org; Budgeted Positions by Class; Budgeted Positions by Class and Division; Budgeted Positions within Division; and Budgeted Positions by County), Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), FLAIR Org (from – to), Budget Entity (from – to), Class Code (from – to) and County (from – to) The report includes the following fields: • Org Code • Budget Entity

#	Activity	Description	Dependencies	Uniqueness/Customizations

				• Position Number
				• Last Name
				• First Name
				• Middle Initial
				• Emp ID (PERNR)
				• Flair Org
				• Class Code
				• Class Title
				• Pay Plan
				• Pay Grade
				• Base Pay
				• County Code
				• Appointment Status
				• Retirement Code
				• Position FTE
				• Broadband Code
				• Pay Band
				• OCA (Only displayed for the Department of Children and Families, Agency for Persons with Disabilities and the Department of Health)
				
				Special coding for vacant positions:
				• Vacant OPS positions employee group 4 or 5, (OPS Included OPS Excluded) will default retirement code:
				  ○ ZZ for agency (OLO code) 2100 OR for employee subgroup = "K" (AmeriCorps).
				  ○ ZA for all other OPS positions
				• Vacant employee group 1 or 2 (Included, Excluded) positions with the special risk retirement flag will default the retirement code to HB.
				• Vacant employee group 1 or 2 (Included, Excluded) positions where the OLO code is 2200 AND the employee subgroup is 05 will default the retirement code to HC.
				• Vacant employee group 1 or 2 (Included, Excluded) positions with an employee subgroup 15 OR 16 will

#	Activity	Description	Dependencies	Uniqueness/Customizations

				default the retirement to HG
				• Vacant employee group 1 or 2 (Included, Excluded) positions where the OLO code is 2100 AND the employee subgroup is 05 will default the retirement code to HH
				• Vacant employee group 1 or 2 (Included, Excluded) positions will default HM for:
				  ○ employee subgroup 09,
				  ○ employee subgroup 33
				  ○ employee subgroup 05 with an HRP9121.class code equal to 9675 or 9681
				  ○ employee subgroup 84 with an HRP9121.class code equal to 8819 or 9819
				  ○ employee subgroup 85 with an HRP9121.class code equal to 4801 or 4803 or 4805 or 4806 or 4809 or 4811 or 4900
				  ○ employee subgroup 87 with an HRP9121.class code equal to 6900 or 6901
				  ○ employee subgroup 88 with an HRP9121.class code equal to 5901 or 5909
				
				The report is sorted in the following order based upon the report mode selected:
				• In Budgeted Positions Status mode the sort is by Position Number
				• In Budgeted Positions by Org mode the sort is by Org Code.
				• In Budgeted Positions by FLAIR Org mode the sort is by FLAIR Org code.
				• In Budgeted Positions by Class mode the sort is by Class Code.
				• In Budgeted Positions by Class and Division mode the sort is by Class and Division.
				• In Budgeted Positions within Division mode the sort is by Division.
				
				In Budgeted Positions by County mode the sort is by County.

#	Activity	Description	Dependencies	Uniqueness/Customizations
				The report provides the following totals: • Number of Positions • Number of Established FTE • Number of Vacancies • Total Employees
17.13	DW Stage Error Report	There are numerous error tables that are refreshed based on errors in the associated DW load programs. The error tables capture the error messages that identify the cause of the failure and the data row being processed when the error occurred The Stage Error report is intended to provide a single integrated error report for use by DMS personnel in researching data integrity or business rule errors. These errors may point at data entry errors or possibly unanticipated or exception conditions in the source data	All load programs must have been completed Users must have a security role code of 'S'	The report includes the following filters: • Required filter(s):Run Date (from); Run Date (to); Report Format (defaults to PDF, can change to Excel) The report includes the following fields: • Error Table Title • Key fields related to the specific Error Table (e.g., User ID (CP), Emp ID (PERNR), Begin Date, End Date) There are 75 stage error tables, each populated by an associated load program. These tables contain as few as four and as many as 284 columns. Historically, some of the load programs generate entries in their associated error tables rarely, if ever, while others produce errors regularly. To permit generation of a single integrated stage error report, a subset of no more than six data elements has been identified for each of these error tables. The selected fields were chosen to permit unique identification of the source data in the front-end system. Also included in the error report are two additional data elements: the Error Message and the Action Code fields. The Error Message is found in all of the error tables and identifies the specific error in the load program which resulted in the row being written to the error table. The Action Code found in most of the error tables specifies whether the change was an update, insert or delete action
17.14	EEO Utilization – ALM Analysis Report	The EEO Utilization-ALM Analysis Report provides the available labor market (ALM) data based on American	The data extract from People First System must have been executed and the data must be loaded into the DW	The EEO Utilization-ALM Analysis Report combines employee data updated nightly with ALM census data loaded separately into the DW ALM consists of population demographic data derived from

#	Activity	Description	Dependencies	Uniqueness/Customizations
		Community Survey (ACS) data provided by the U.S. Census Bureau. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)		ACS data provided by the U.S. Census Bureau that provides counts of workers by EE0 Job Category, Race/Ethnicity, Gender and location(county, city, CDP, Metro Area, Florida, etc.) of residence and work. ALM data shall be provided to Vendor by the DMS A legend which provides the race values is displayed on the last page of the report The report includes the following filters: • Required Filters: OLO Code, Report Format (defaults to PDF, can change to Excel) • Optional Filters: ALM Type (Place of Work or Place of Residence) and ALM (User may select which counties, cities, or other locations to be included in report. Can select up to 20 locations from a drop down menu. If no location is selected, all locations will be provided The report includes the following data fields: • EEO4 Job Category • Counts and percentages by each gender and race/ethnicity with totals by each EEO4 Job Category The report is sorted in the following order: • EEO Job Category The report provides the following totals: • Total Number • Percentage of Total by gender, race/ethnicity and EEO job category
17.15	EEO Utilization – Adverse Impact Analysis Report	The EEO Utilization-Adverse Impact Analysis Report is an impact ratio analysis report used to determine whether	The data extract from People First System must have been executed and the data must be loaded into the DW	The EEO Utilization-Adverse Impact Analysis Report combines employee data and transaction data updated nightly and loaded into the DW The report includes the following filters:

#	Activity	Description	Dependencies	Uniqueness/Customizations

		various gender and race/ethnic groups are adversely affected by demotions and separations compared to their representation in the current workforce. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)		• Required Filters: OLO code, Employee Type (All, Salaried, OPS), Begin Date (defaulted to the last day of the prior fiscal year and if changed will not produce a report. This default is updated at the beginning of each fiscal year); End Date (MM/DD/YYYY format; must be the last day of the month), Calculation Method (80% Rule, Standard Deviation Rule), Report Format (defaults to PDF, can change to Excel)
				• Optional Filters: Org Code (from – to), FLAIR Org (from – to), Budget Entity (from – to), Pay Plan, Transaction code (defaults to All Separations, can change to Demotion, Voluntary Separations, Involuntary Separations)
				
				A legend which provides the race values is displayed on the last page of the report
				
				The report includes the following data fields:
				• EEO Job Category with the following calculations by gender and race/ethnicity;
				  o Total Employees for each EEO4 Job Category for the selected appointment type
				  o # of Terminations
				  o #Demotions
				  o # In Incumbent Pool
				  o % Selection Rate
				  o % Impact Ratio
				  o Adverse Impact? (Y or N)
				  o Z Score
				  o Statistically Significant (Y or N)
				
				The report is sorted in the following order:
				• EEO Job Category

17.16	EEO Utilization – Incumbency to Availability Analysis/Goal Report	The EEO Utilization – Incumbency to Availability Analysis/Goal Report	The data extract from People First System must have been executed and the data must be loaded into the DW	The EEO Utilization-Incumbency to Availability Analysis Report combines employee data updated nightly with ALM data loaded separately into the DW

#	Activity	Description	Dependencies	Uniqueness/Customizations
		compares the current workforce to the relevant ALM data, and determines whether a particular gender and race/ethnic group is being underutilized. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)		The report includes the following filters: • Required Filters: OLO code, Employee Type (All, Salaried, OPS), Begin Date (defaulted to the last day of the prior fiscal year and if changed will not produce a report. This default is updated at the beginning of each fiscal year); End Date (MM/DD/YYYY format; must be the last day of the month), Calculation Method (80% Rule, Standard Deviation Rule, Any Difference Rule, Whole Person Rule), Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), FLAIR Org (from – to), Budget Entity (from – to), Pay Plan, ALM Type (Place of Work, Place of Residence), ALM County A legend which provides the race values is displayed on the last page of the report This report has an additional line added to the report header which displays the "Data as of" date The report includes the following data fields: • EEO Job Category • The following calculations by Males and Females by race/ethnicity o Workforce Count o Workforce Percentage o ALM Count o ALM Percentage o Expected Availability count o 80% of Expected Availability o Underutilized? o Goal The report is sorted in the following order: • EEO Job Category
17.17	EEO Workforce	The EEO Workforce	The data extract from People	The EEO Workforce Separations Detail Report combines

#	Activity	Description	Dependencies	Uniqueness/Customizations
	Separations Detail Report	Separations Detail Report provides detailed transaction and employee data for each separation within a specified timeframe. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	First System must have been executed and the data must be loaded into the DW	employee data and transactional data The report displays and organizes data by established EEO 4 Job categories: • 01 – Officials/Administrators • 02 – Professionals • 03 – Technicians • 04 – Protective Service Workers • 05 – Paraprofessionals • 06 – Administrative Support • 07 – Skilled Craft Workers • 08 – Service Maintenance The report includes the following filters: • Required Filters: OLO code, Employee Type (All, Salaried, OPS), Begin Date (defaulted to the last day of the prior fiscal year. This default is updated at the beginning of each fiscal year), End Date, Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), Flair Org (from – to), Budget Entity (from – to), Pay Plan, EEO4 Job Code, Separation Type (All Separations, Voluntary Separations, Involuntary Separations) A legend which provides the race values is displayed on the last page of the report This report includes the following data fields: • EEO4 Code/Description • Last Name • First Name • Middle Initial • Emp ID • Race/Ethnicity • Gender • Date of Birth

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Effective Date • Class Code • Class Title • Agency Service (yy/mm) • Agency Hire Date • Position Number • Pay Grade • Home County • Home City • Home State • Work County • Work City • Work State • Separation Code • Separation Reason Description • Separation Type (Involuntary or Voluntary) The report is sorted in the following order: • EEO Job Category • Last name The report provides the following totals: • Subtotal of the number of employees for the EEO4 job category • Grand total for the report
17.18	EEO Workforce Summary (Active Report)	The EEO Workforce Summary Report provides EEO data for the current active workforce. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are	The data extract from People First System must have been executed and the data must be loaded into the DW	The EEO Workforce Summary (Active Report) provides a breakdown of total employees and percentage within each Pay Plan/Class Code by gender and race/ethnicity The report includes the following filters: • Required Filters: OLO code, Employee Type (All, Salaried, OPS), Begin Date (defaulted to the last day of the prior fiscal year. This default is updated at the beginning of each fiscal year), End Date (MM/DD/YYYY format; must be the last day of the month), Report Format (defaults to PDF, can change

#	Activity	Description	Dependencies	Uniqueness/Customizations
		excluded)		to Excel) • Optional Filters: Org Code (from – to), Flair Org (from – to), Budget Entity (from – to) Pay Plan, EEO4 Job Code A legend which provides the race values is displayed on the last page of the report This report includes the following data fields: • EEO4 Code/Description • Pay Plan • Class Code • Pay Grade • Class Title • Employee Count and Percentage for Totals Employees, Total Males & Total Females by Race/Ethnicity, Unknown, Total Minority and by Age 40+ for Males and Females by EEO4 job category The report is sorted in the following order: • EEO Job Category • Pay Plan • Class Code • Pay Grade The report provides the following totals: • Subtotal of the number of employees by each EEO4 job category, minority and Age 40+ • Subtotal percentage for each gender and race/ethnicity by EEO4 job category, minority and Age 40+ • Grand total for the report of the number of employees by each EEO4 job category, minority and Age 40+ • Grand total percentage for each gender and race/ethnicity by EEO4 job category, minority and Age 40+

#	Activity	Description	Dependencies	Uniqueness/Customizations
17.19	EEO Workforce Transaction Detail Report	The EEO Workforce Transaction Detail Report provides detailed transaction and employee data for a selected transaction type (new hires, promotions, demotions or reassignments) within a specified time frame. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from People First System must have been executed and the data must be loaded into the DW	The report includes the following filters: • Required Filters: OLO code, Employee Type (All, Salaried, OPS), Begin Date (defaulted to the last day of the prior fiscal year. This default is updated at the beginning of each fiscal year), End Date (MM/DD/YYYY format), Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), Flair Org (from – to), Budget Entity (from – to), Pay Plan, EEO4 Job Code, Transaction Type (New Hires, Promotions, Demotions or Reassignments; defaults to New Hires) The report title displayed in the header is dynamic based on the transaction type selected A legend which provides the race values is displayed on the last page of the report The report will contain multiple selected transaction records for an employee (e.g., two reassignments) for during the requested reporting period This report includes the following data fields: • EEO4 Code/Description • Last Name • First Name • Middle Initial • Emp ID (PERNR) • Race/Ethnicity • Gender • Date of Birth • Effective Date • Class Code • Class Title • Agency Service (yy mm) • Agency Hire Date

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Position Number • Pay Plan • Pay Grade • Home County • Home City • Home State • Work County • Work City • Work State The report is sorted in the following order: • EEO Job Category • Last Name The report provides the following totals: • Subtotal of the number of employees for the EEO4 job category • Grand total for the report
17.20	EEO Workforce Transaction Summary Report	The EEO Workforce Transaction Summary Report provides summary counts of new hires, promotions, demotions, reassignments or separations within a specified time frame, broken down by EEO Job Category, race, gender, pay plan, class code and pay grade. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers	The data extract from People First System must have been executed and the data must be loaded into the DW	The report includes the following filters: • Required Filters: OLO code, Employee Type (All, Salaried, OPS), Begin Date, End Date, Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), Flair Org (from – to), Budget Entity (from – to), Pay Plan, EEO4 Job Code, Transaction Type (New Hires, Promotions, Demotions, Reassignments or Separations) The report title displayed in the header is dynamic based on the transaction type selected A legend which provides the race values is displayed on the last page of the report The report is sorted in the following order: • EEO Job Category • Pay Plan

#	Activity	Description	Dependencies	Uniqueness/Customizations
		(i.e. contractors) are excluded)		• Class Code • Pay Grade This report includes the following data fields: • EEO4 Code/Description • Class Code • Class Title • Pay Plan • Pay Grade • Gender • Race/Ethnicity • Unknown • Total Males • Total Females • Total Minority • Age 40+ (Male/Female) The report provides the following totals: • Subtotal of the number of employees for the EEO4 job category, total employee count, and percentage by gender and race/ethnicity, Unknown, Total Males, Total Females, Total Minority, Age 40+ for Males and Females by Class Code, Pay Plan and Pay Grade, Total Count and percentage by EEO Job Group • Grand total for the report of the total employee count and percentage by gender and race/ethnicity, Unknown, Total Males, Total Females, Total Minority, Age 40+ for Males and Females by Class Code, Pay Plan and Pay Grade, Total Count and percentage by EEO Job Group
17.21	Employee Roster Report	The Employee Roster Report provides a listing of employee related demographic information Only employees of employee groups1, 2, 4	The data extract from People First System must have been executed and the data must be loaded into the DW	The report includes the following filters: • Required Filters: OLO Code, Employee Type (All, Salaried, OPS), Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), Flair Org Code (from – to), Budget Entity Code (from – to), Pay Plan

#	Activity	Description	Dependencies	Uniqueness/Customizations
		and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)		(from – to), Class Code (from – to), CBU, County (from – to), Age (from – to), Retirement code The report contains the following data fields: • Org Name • Org Code • Last Name • First Name • Middle Initial • Emp ID (PERNR) • County Headquarters • County Physical • Class Code • CBU • Gender • Race • State Hire Date • Agency Hire Date • Continuous Service Date • Education Level • Pay Plan • Base Pay • Employee Type • Service (yy) (mm) – The number of state service years and months employee has worked. For salaried employees it is derived from the leave accrual service date. No information is provided for OPS employees • Retirement Code • Birth Date • Age • Privacy Indicator – An indicator identifying whether employee data has a privacy indicator marked on the Personal Info screen in People First. An "X" indicates one or more of the following privacy flags are marked: ○ Restricted Employee (formerly titled Confidential)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				◦ Restricted Relative (formerly titled Exempt) ◦ Protected Identity ◦ Sworn/Certified • Class Title • Position Number • Flair Org Code • Flair Org Name • Budget Entity Code • Budget Entity Name • Org Level 2-4 • Mailing Address – Employee's home mailing address • City • State • Zip • Work Phone The report is sorted in the following order: • Org Code • Last Name
17.22	Employee Transaction Condensed Report	The Employee Transaction Condensed Report is a condensed version of the detailed Employee Transaction Report and provides agencies with historical HR transaction data for employees back to 1984. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from People First System must have been executed and the data must be loaded into the DW	Employee transactions include PARs as well as legacy HRIS (COPES) actions for employees predating People First. Report includes all PAR actions completed for the employee as well as mass loads that created a corresponding employee action The Employee Transaction Condensed Report includes all transactions for the employee during the time period selected, even if the transactions cross agencies. Additionally, Users with access to process this report can process the report for any employee statewide The report includes the following filters: • Required Filters: OLO code, Employee Type (All, Salaried, OPS), Begin Effective Date, End Effective Date, Report Format (defaults to PDF, can change to Excel)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Optional Filters: Org Code (from – to), Emp ID (PERNR), User ID (CP), Social Security Number, Transaction Code The report contains the following data fields: • Emp ID (PERNR) • Last Name • First Name • Middle Initial • Agency Name • Pay Plan Code– Pay plan code for the transaction record. If the employee is OPS, no data will be displayed for transactions after April 2012. Transactions prior to April 2012 will display the data that was captured at the time of the transaction • Appointment FTE • Position Number • Position Title • Transaction Description –The transaction description reflects the PAR action that was processed in People First or COPES • Reason Code Description • Pay Period Rate of Pay – The pay period rate of pay (including additives) at the time of the transaction. If the employee was OPS an hourly rate of pay will be displayed for the transaction record. It does not include shift pay, criminal justice incentive pay (CJIP) or FSCP • Annual Salary – Annual salary at the time of the transaction including additives. It does not include shift pay, criminal justice incentive pay (CJIP) or FSCP. No annual salary will be displayed for OPS employee transaction records • Effective Date The report is sorted in the following order:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Effective Date (ascending) The report provides a grand total of transactions
17.23	Employee Transaction Report	The Employee Transaction Report allows agencies to pull historical HR transactions data for their employees. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from People First System must have been executed and the data must be loaded into the DW	The Employee Transaction Report include PARs transactions as well as legacy HRIS (COPES) transactions for employees predating People First. Report includes transactions completed for the employee as well as mass loads that created a corresponding employee action Report includes all transactions for the employee during the time selected, even if the transactions cross agencies. Additionally, Users with access to process this report can process the report for any employee statewide The report includes the following filters: • Required Filters: OLO code (Agency identifier), Employee Type (All, Salaried, OPS), Begin Effective Date, End Effective Date, Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), EMP ID (PERNR), USER ID (CP), Social Security Number, Transaction Code The report contains the following data fields: • Emp ID (PERNR) • User ID (CP) • Last Name • First Name • Middle Initial • Agency Code • Agency Name • Org Code • Flair Org Code • Pay Plan Code/Title – Pay plan code for the transaction record. If the employee is OPS, no data

#	Activity	Description	Dependencies	Uniqueness/Customizations
				will be displayed for transactions after April 2012. Transactions prior to April 2012 will display the data that was captured at the time of the change • Class Code • Working title • Appointment FTE • Position Number • Position Title • Retirement Code • Effective Date • Transaction Date • Employee Type • Transaction Code • Transaction Description – The transaction description reflects the PAR action that was processed in People First or COPES • Reason Code • Reason Description • Base Rate of Pay • Pay Period Rate of Pay – The pay period rate of pay (including additives) at the time of the transaction. If the employee was OPS an hourly rate of pay will be displayed for the transaction record. It does not include shift pay, criminal justice incentive pay (CJIP) or FSCP • Pay Cycle Code • Annual Salary – Annual salary at the time of the transaction including additives. It does not include shift pay, criminal justice incentive pay (CJIP) or FSCP. No annual salary will be displayed for OPS employee transaction records The report is sorted in the following order: • Effective Date The report provides a grand total of transactions

#	Activity	Description	Dependencies	Uniqueness/Customizations
17.24	LAS/PBS Budget Entity/FLAIR Org Level Report	The LAS/PBS Legislative Appropriations System/Planning and Budgeting Subsystem (LAS/PBS) Budget Entity/FLAIR Org Level report displays a detail record for each agency position (filled and vacant) providing total funding costs associated with the agency positions according to the filter selection. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from the People First System must have been executed and the data must have been loaded into the DW	The report includes the following filters: • Required filters: OLO Code, Report Mode (drop down list including the following options: LAS/PBS by BE/FLAIR Org Level 2; LAS/PBS by BE/FLAIR Org Level 3; LAS/PBS by BE/FLAIR Org Level 4), Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), FLAIR Org (from – to), Budget Entity (from – to), SPC (from – to) The report title displayed in the header is dynamic based on the report mode selected The report includes the following fields: • Budget Entity code • Budget Entity description • Org Level2 • Overlap/Shared Indicator (O – overlap; S – shared) • Position Number • Pay Plan • Class Code • Class Title • Position FTE • Pay Grade • County Code • OCA – Only displayed for Department of Health, Department of Children and Families and Agency for Persons with Disabilities • CBU • Employee FTE • Retirement Code • Base Rate – Annual base rate (base rate of pay multiplied by 26.1 for biweekly agencies or base rate of pay multiplied by 12 for monthly agencies) without pay additives rounded to the nearest whole dollar • Pay Additive – Annual amount of pay additive (additive amount multiplied by 26.1 for biweekly

#	Activity	Description	Dependencies	Uniqueness/Customizations

				agencies or additive amount multiplied by 12 for monthly agencies) rounded to the nearest whole dollar
				• Pay Rate – Annual rate (base rate of pay plus additives multiplied by 26.1 for biweekly agencies or base rate of pay plus additives multiplied by 12 for monthly agencies) rounded to the nearest whole dollar
				• Employer Retirement Contribution Amount – Annual employer retirement contribution amount rounded to the nearest whole dollar
				• Employer FICA Contribution Amount – Annual employer FICA contribution amount rounded to the nearest whole dollar
				• Employer Health Contribution Amount – Annual employer health insurance contribution amount rounded to the nearest whole dollar
				• Employer Life Contribution Amount – Annual employer life insurance contribution amount rounded to the nearest whole dollar
				• Employer Disability Contribution Amount – Annual employer disability insurance contribution amount rounded to the nearest whole dollar
				
				Special coding for vacant positions:
				• Vacant OPS positions employee group 4 or 5, (OPS Included OPS Excluded) will default retirement code:
				  ○ ZZ for agency (OLO code) 2100 OR for employee subgroup = "K" (AmeriCorps).
				  ○ ZA for all other OPS positions
				• Vacant employee group 1 or 2 (Included, Excluded) positions with the special risk retirement flag will default the retirement code to HB.
				• Vacant employee group 1 or 2 (Included, Excluded) positions where the OLO code is 2200 AND the employee subgroup is 05 will default the retirement

#	Activity	Description	Dependencies	Uniqueness/Customizations

				code to HC.
				• Vacant employee group 1 or 2 (Included, Excluded) positions with an employee subgroup 15 OR 16 will default the retirement to HG
				• Vacant employee group 1 or 2 (Included, Excluded) positions where the OLO code is 2100 AND the employee subgroup is 05 will default the retirement code to HH
				• Vacant employee group 1 or 2 (Included, Excluded) positions will default HM for:
				  ○ employee subgroup 09,
				  ○ employee subgroup 33
				  ○ employee subgroup 05 with an HRP9121.class code equal to 9675 or 9681
				  ○ employee subgroup 84 with an HRP9121.class code equal to 8819 or 9819
				  ○ employee subgroup 85 with an HRP9121.class code equal to 4801 or 4803 or 4805 or 4806 or 4809 or 4811 or 4900
				  ○ employee subgroup 87 with an HRP9121.class code equal to 6900 or 6901
				  ○ employee subgroup 88 with an HRP9121.class code equal to 5901 or 5909
				
				The report is sorted in the following order:
				• Org Level
				• Budget Entity
				• Position Number
				The report provides the following totals/summaries:
				• Report Subtotals by Org Code Level and Budget Entity
				  ○ Total Position FTE
				  ○ Total Employee FTE
				  ○ Total Overlap FTE
				  ○ Total Vacant FTE
				  ○ Annualized Vacant Rate
				  ○ Annualized Salaries

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ Total CAD ○ Total Leadworker ○ Total Shift ○ Total Trainer ○ Total Critical Market ○ Total Hazardous ○ Total Coordinator ○ Total Legislative Approved ○ Total TSD – General ○ Total TSD – Absent Coworker ○ Total Other ○ Total Base Rate of Pay ○ Total Rate of Pay ○ Total Benefit Costs ○ Total Retirement ○ Total FICA ○ Total Health ○ Total Life ○ Total Disability • Report Totals ○ Total Position FTE ○ Total Employee FTE ○ Total Overlap FTE ○ Total Vacant FTE ○ Annualized Vacant Rate ○ Annualized Salaries ○ Total CAD ○ Total Leadworker ○ Total Shift ○ Total Trainer ○ Total Critical Market ○ Total Hazardous ○ Total Coordinator ○ Total Legislative Approved ○ Total TSD – General ○ Total TSD – Absent Coworker

#	Activity	Description	Dependencies	Uniqueness/Customizations
				◦ Total Other ◦ Total Base Rate of Pay ◦ Total Rate of Pay ◦ Total Benefit Costs ◦ Total Retirement ◦ Total FICA ◦ Total Health ◦ Total Life ◦ Total Disability
17.25	LAS/PBS Budget Report	The LAS/PBS Budget report displays a detail record for each agency Position (filled and vacant) providing total funding costs associated with the agency's positions. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from the People First System must have been executed and the data must have been loaded into the DW	The report includes the following filters: • Required filters: OLO Code, Report Mode (drop down list of the following options: Rate Report, Budget Report, Detail Report), Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), FLAIR Org (from – to), Budget Entity (from – to), SPC (from – to) The report title displayed in the header is dynamic based on the report mode selected The report includes the following fields: • Budget Entity code • Budget Entity description • Overlap/Shared Indicator (O – overlap; S – shared) • Position Number • Pay Plan • Class Code • Class Title – Class title for the selected position record. When the position is vacant or overlapped, a label of ***Overlapped Position*** or **Vacant Position** displays in this column • Position FTE • Pay Grade • County Code • OCA – Only displayed for Department of Health, Department of Children and Families and Agency for

#	Activity	Description	Dependencies	Uniqueness/Customizations
				Persons with Disabilities • CBU • Employee FTE • Retirement Code • Base Rate– Annual base rate (base rate of pay multiplied by 26.1 for biweekly agencies or base rate of pay multiplied by 12 for monthly agencies) without pay additives rounded to the nearest whole dollar • Pay Additive – Annual amount of pay additive (additive amount multiplied by 26.1 for biweekly agencies or additive amount multiplied by 12 for monthly agencies) rounded to the nearest whole dollar • Pay Rate – Annual rate (base rate of pay plus additives multiplied by 26.1 for biweekly agencies or base rate of pay plus additives multiplied by 12 for monthly agencies) rounded to the nearest whole dollar • Employer Retirement Contribution Amount – Annual employer retirement contribution amount rounded to the nearest whole dollar • Employer FICA Contribution Amount – Annual employer FICA contribution amount rounded to the nearest whole dollar • Employer Health Contribution Amount – Annual employer health insurance contribution amount rounded to the nearest whole dollar • Employer Life Contribution Amount – Annual employer life insurance contribution amount rounded to the nearest whole dollar • Employer Disability Contribution Amount – Annual employer disability insurance contribution amount rounded to the nearest whole dollar Special coding for vacant positions: • Vacant OPS positions employee group 4 or 5, (OPS

#	Activity	Description	Dependencies	Uniqueness/Customizations
				Included OPS Excluded) will default retirement code: ○ ZZ for agency (OLO code) 2100 OR for employee subgroup = “K” (AmeriCorps). ○ ZA for all other OPS positions • Vacant employee group 1 or 2 (Included, Excluded) positions with the special risk retirement flag will default the retirement code to HB. • Vacant employee group 1 or 2 (Included, Excluded) positions where the OLO code is 2200 AND the employee subgroup is 05 will default the retirement code to HC. • Vacant employee group 1 or 2 (Included, Excluded) positions with an employee subgroup 15 OR 16 will default the retirement to HG • Vacant employee group 1 or 2 (Included, Excluded) positions where the OLO code is 2100 AND the employee subgroup is 05 will default the retirement code to HH • Vacant employee group 1 or 2 (Included, Excluded) positions will default HM for: ○ employee subgroup 09, ○ employee subgroup 33 ○ employee subgroup 05 with an HRP9121.class code equal to 9675 or 9681 ○ employee subgroup 84 with an HRP9121.class code equal to 8819 or 9819 ○ employee subgroup 85 with an HRP9121.class code equal to 4801 or 4803 or 4805 or 4806 or 4809 or 4811 or 4900 ○ employee subgroup 87 with an HRP9121.class code equal to 6900 or 6901 ○ employee subgroup 88 with an HRP9121.class code equal to 5901 or 5909 The report is sorted in the following order when the Report Mode selected is Rate Report: • Budget Entity

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Flair Org Code • Position Number The report is sorted in the following order when the Report Mode selected is Budget Report: • Budget Entity • SPC • Org Code • Position Number The report is sorted in the following order when the Report Mode selected is Detail Report: • Budget Entity • SPC • Position Number The report provides the following totals/summaries depending on the report mode selected: • Report Subtotals by Org Code, FLAIR Org Code, SPC and Budget Entity ○ Total Position FTE ○ Total Employee FTE ○ Total Overlap FTE ○ Total Vacant FTE ○ Annualized Vacant Rate ○ Annualized Salaries ○ Total CAD ○ Total Leadworker ○ Total Shift ○ Total Trainer ○ Total Critical Market ○ Total Hazardous ○ Total Coordinator ○ Total Legislative Approved ○ Total TSD – General ○ Total TSD – Absent Coworker

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ Total Other ○ Total Base Rate of Pay ○ Total Rate of Pay ○ Total Benefit Costs ○ Total Retirement ○ Total FICA ○ Total Health ○ Total Life ○ Total Disability • Report Totals ○ Total Position FTE ○ Total Employee FTE ○ Total Overlap FTE ○ Total Vacant FTE ○ Annualized Vacant Rate ○ Annualized Salaries ○ Total CAD ○ Total Leadworker ○ Total Shift ○ Total Trainer ○ Total Critical Market ○ Total Hazardous ○ Total Coordinator ○ Total Legislative Approved ○ Total TSD – General ○ Total TSD – Absent Coworker ○ Total Other ○ Total Base Rate of Pay ○ Total Rate of Pay ○ Total Benefit Costs ○ Total Retirement ○ Total FICA ○ Total Health ○ Total Life ○ Total Disability
17.26	Leave Balance Report	The Leave Balance	The data extract from the	The report provides data back to the biweekly pay period

#	Activity	Description	Dependencies	Uniqueness/Customizations
		Report displays a detail record for each employee and their leave balances for the accrued leave type. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	People First System must have been executed and the data must have been loaded into the DW	beginning on April 4, 2008 and monthly pay period beginning on April 1, 2008. This data is updated weekly on Saturdays. Therefore, timesheets approved after Saturday will not be included until the next refresh is completed (one week later) The report is current for the payroll cycle and is not used for accuracy against the Leave Balance Overview Screen because of timing issues. The accuracy is dependent on approval date of the timesheet and the manual adjustments that are completed in the system. The report is used by agencies for leave balance as of a specific pay period The report is not valid for State Courts System or Justice Administrative Commission Leave balance adjustments will always be presented in the pay period they are processed, regardless of the effective date of the adjustment The report captures leave only from approved timesheets The report title displayed in the header is dynamic based on the leave type selected There are eleven different versions of the report based on the following leave types: • 51 – Annual Leave • 52 – Sick Leave (balance includes Leave Type 53) • 54 – Regular Compensatory Leave • 55 – Special Compensatory Leave • 66 – Personal Holiday • 85 – FLSA Special Compensatory Leave • 91 – Special Comp – Holiday1 • 92 – Special Comp – Holiday2 • 93 – Special Comp – Holiday CO • 94 – Special Comp – Closures • 95 – Special Comp – Closures CO

#	Activity	Description	Dependencies	Uniqueness/Customizations
				The report includes the following filters: • Required filters: OLO Code, Start Date (Date filters must equal a biweekly or monthly pay period based upon the OLO selected), End Date (Date filters must equal a biweekly or monthly pay period based upon the OLO selected), Leave Type, Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), FLAIR Org (from – to), CBU, Emp ID (PERNR) The report includes the following fields: • OLO Code • Org Code • Org Name • Employee Name • Emp ID • Position Number • Interdepartmental Number • Adjusted Rate by Pay Period – Pay period amount including benefit matching costs • Pay-Period End Date • Appointment Status • Begin Balance • Amount Earned • Amount Used • Amount Adjusted -– Leave balance adjustment amount; is based on date adjustment is processed, not effective date of adjustment • End Balance • Creditable Service Months • Class Code • Class Title • CBU • CBU Description

#	Activity	Description	Dependencies	Uniqueness/Customizations

				The report is sorted in the following order:
				• Org Code
				• FLAIR Org Code
				• Last Name
				• First Name
				
				The report provides the following totals/summaries by:
				• ORG Code
				  ○ Begin Balance
				  ○ Amount Earned
				  ○ Amount Used
				  ○ Amount Adjusted
				  ○ End Balance
				• FLAIR Org Code
				  ○ Begin Balance
				  ○ Amount Earned
				  ○ Amount Used
				  ○ Amount Adjusted
				  ○ End Balance
				• OLO Code
				  ○ Begin Balance
				  ○ Amount Earned
				  ○ Amount Used
				  ○ Amount Adjusted
				  ○ End Balance

17.27	Leave Without Pay (LWOP) Report	The Leave Without Pay report displays a detail record for each employee and the leave without pay hours. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Each entry in the report includes the approved LWOP timesheet hours and the associated LOA Without Pay PAR, if available When a LWOP or Suspension PAR with an effective date within the selected date range is available without a corresponding timesheet entry, the PAR is reported, and in the absence of timesheet data for the covered period, scheduled hours are reported for LWOP hours The report is not valid for State Courts System or Justice

#	Activity	Description	Dependencies	Uniqueness/Customizations
				Administrative Commission The report includes the following filters: • Required filters: OLO Code, Begin Date, End Date, Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), FLAIR Org (from – to), Emp ID (PERNR) The report includes the following fields: • ORG Code • FLAIR ORG Code • FLAIR Account Code • Interdepartmental Number • Last Name • First Name • Middle Initial • Emp ID (PERNR) • Class Title • Leave With Out Pay (LWOP) Hours • Timesheet Approval Date • Leave Type Code • Leave Type Description • PAR Effective Date • PAR Reason Code The report is sorted in the following order: • Org Code • FLAIR Org Code • Last Name • First Name The report provides the following totals/summaries: • Total Unauthorized hours and employee count • Total LWOP – Workers' Comp hours and employee count • LWOP – Authorized hours and employee count

#	Activity	Description	Dependencies	Uniqueness/Customizations
17.28	Licensure Expiration Report	The Licensure Expiration Report provides a list of active employees who have an expired professional license or certification. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from People First System must have been executed and the data must be loaded into the DW	Includes all active employees holding a license or certification. Expirations are clearly identified The report includes the following filters: • Required Filters: OLO code, Certification Effective Date, Certification Expiration Date, Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from) (to), Flair Org (from) (to), Required by Position Indicator (defaults to 'Select Value'. Drop down values are "Y" (license or certification is required by the position) or "N" (license or certification is not required for the position). If left blank data will provide data for "N" records), Certification Type (if left blank all certification records will be returned) The report contains the following data fields: • Emp ID (PERNR) • Last Name • First Name • Middle Initial • Position Number • Pay Plan • Class Code • Class Title • Certification Type • Certification Name • Effective Date • Expiration Date – if the license or certification has expired, it is be bolded • Org Code • Flair Org Code The report is sorted in the following order: • Org Code

#	Activity	Description	Dependencies	Uniqueness/Customizations
				The report provides the following totals/summaries: • Count of employees with expired certifications • Count of employees with current certifications • Total employees
17.29	New Hires Report	The New Hires Report allows agencies to pull historical data for newly hired employees. Only employees of employee groups1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from People First System must have been executed and the data must be loaded into the DW	New hires shall be defined as any employee who is "initially" hired to an agency regardless of whether they were hired from another State of Florida agency or are new to state government. Additionally, new hires shall include employees who were OPS and then hired by an agency as full-time equivalents Hire status is determined by examination of personnel action codes (Transaction Code) maintained in the EMPLOYEE_ TRANSACTION view The report includes the following filters: • Required Filters: OLO code, Employee Type (All, Salaried, OPS), Begin Date, End Date, Primary Sort Key (Org Code, FLAIR Org Code, Budget Entity Code), Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from) (to), Flair Org (from) (to), Budget Entity (from) (to) The report contains the following data fields: • Emp ID (PERNR) • Last Name • First Name • Middle Initial • Position Number • Agency Hire Date – blank for employee group 4 and 5 • Org Code • Flair Org • Budget Entity Code • Class Code • Class Title

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Pay Grade – blank for employee group 4 and 5 • Pay Plan – blank for employee group 4 and 5 • EEO code • Gender • Race • Employee Type Description • Appointment Type Description The report is sorted in the following order according to the primary sort key selected on the filter page: • Org Code • FLAIR Org Code • Budget Entity Code This report provides subtotals of employees by (primary sort) and a Grand Total
17.30	OPS FYTD Report	The OPS FYTD Report provides fiscal year to date approved timesheet hours for the agency’s OPS employees. Only employees of employee groups 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Data for populating this report is updated weekly and is based on approved timesheet hours (data is calculated in the SAP extract and is not calculated based on the timesheet hours included in the timesheet active views) The report includes the following filters: • Required filter(s): OLO Code, Begin Run Date (mm/dd/yyyy), End Run Date (mm/dd/yyyy), Report Format (defaults to PDF, can change to Excel) • Optional filter(s): Org Code (from – to), FLAIR Org (from – to), Emp ID (PERNR) The report includes the following fields: • Org Code • FLAIR Org • Budget Entity • Last Name • First Name • Position Number • User ID (CP)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Emp ID • Appointment Status • Appointment Description • Supervisor Name • Supervisor Position Number • Position Hire Date – Date the OPS employee was hired into the position • Multiple Indicator Agency/Position – The OLO code will be presented in the field when the employee is dually employed in another agency. Position represents how many OPS positions the employee is holding in your agency • Function Code • FTE • Hourly Pay Rate • Fiscal Year To Date Hours – Total hours worked by the employee during the fiscal year The report is sorted in the following order: • Org Code • Flair Org • Budget Entity
17.31	Overlap and Shared Positions Report	The Overlap and Shared Positions Report identifies positions that are correctly and incorrectly (is no longer overlapped or shared, but is marked as such) marked as overlapped or shared as well as positions that are not marked as overlapped or shared and should be. Only employees of employee groups 1 and	The data extract from People First System must have been executed and the data must be loaded into the DW	Report is separated into two sections for the.pdf version. The first section contains records where either the "Overlap Indicator" or "Shared Indicator" is not marked correctly (is either no longer overlapped or shared, but is marked as such or is overlapped or shared, but is not marked) in People First. These records require a corrective action be processed by the agency to ensure the correct rate information is captured for the position. The second section lists all records that are correctly marked as shared or overlapped The report includes the following filters: • Required Filters: OLO code, Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from) (to), Flair Org (from)

#	Activity	Description	Dependencies	Uniqueness/Customizations

		2 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)		(to), Budget Entity (from) (to)
				
				A legend which provides the overlap/shared flag values is displayed on the last page of the report. An additional footnote is added to the report which states, "Legend for O/S field appears on last page of report."
				
				The report contains the following data fields:
				• Overlap/Shared Indicator
				  ○ O – overlap
				  ○ S – shared
				  ○ B – both overlap and shared
				  ○ X – one employee in position; employee is marked as overlap
				  ○ XO – one or more employees in position, not marked as overlap but should be
				  ○ XS – position is filled with an FTE less than the position FTE and is not marked as a shared position
				• Flair Org Code
				• Position Number
				• Emp ID (PERNR)
				• Pay Plan
				• Class Code
				• Last Name
				• First Name
				• Middle Initial
				• Class Title
				• Appointment Status
				• Appointment FTE
				• Position FTE
				• Vacant FTE
				• Org Code
				• Overlap Date
				
				The report is sorted in the following order:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Org Code • Overlap Date (if applicable) The report provides the following totals: • Total Shared positions • Total Overlap positions • Total both Overlap/Shared • Total count of employees
17.32	Payroll Changes Report	The Payroll Changes Report compares payroll records for which key values have changed between the two most recent, consecutive payroll runs for the same payroll area. Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from the People First System must have been executed and the data must have been loaded into the DW	Data for populating this report is updated based upon the running of prelim/final runs of the F0001 for biweekly and monthly payrolls The report compares the preliminary payroll file data against the previous period's final payroll file or the current payroll file data to the previous period's payroll file data for the same payroll area (UB – biweekly, UM – monthly). The default comparison should be to compare preliminary data, if available Only regular payroll (record type 10) data corresponding to either biweekly (pay period type: 45) or monthly pay plans (pay period type: 11) are reported. The pay period type is implied by the target agency F0001 payroll data is transmitted to the DW on a regular schedule for both biweekly and monthly pay schedules. Typically preliminary data is provided first, to be followed by final data a few days later. Reports are based on the most recent payroll data available The report includes the following filters: • Required filter(s): OLO Code, Report Format (defaults to PDF, can change to Excel) • Optional filter(s): FLAIR Org (from – to), User ID (CP) The report includes the following fields:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• FLAIR Org • Last Name • First Name • Middle Initial • User ID (CP) • Emp ID (PERNR) • Position Number • Field Description (field from F0001) • Pay Period Beginning MM/DD/YYYY • Pay Period Ending MM/DD/YYYY The report is sorted in the following order: • User ID (CP) • Flair Org
17.33	Payroll Overpayment Report	The Payroll Overpayment Report allows agencies to identify when an employee has been overpaid for a given pay period. Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The interface file from DFS must have been executed and the data must have been loaded into the DW The data extracts from the People First System must have been executed and the data must have been loaded into the DW	Data for populating this report is updated nightly and is based on payments recorded on the salary detail files (includes payments, cancellations, salary refunds and adjustments) received from DFS combined with the timesheet data (if approved) and PAR related data for the employee. The timesheet and PAR data are used to calculate the correct gross salary the employee should be paid. This data is used as the base for determining if the employee was overpaid. The salary detail records are applied to this base amount to determine if there is a difference. Only employees who were overpaid are included in the report All fields mentioned below for the report output are captured as of previous day Due to the volume of data required to run this report, the available pay period begin and end dates are restricted to the last three calendar months The report includes the following filters: • Required filter(s): OLO Code, Period Begin Date (mm/dd/yyyy), Period End Date (mm/dd/yyyy) (Date

#	Activity	Description	Dependencies	Uniqueness/Customizations
				filters must equal a biweekly or monthly pay period based upon the OLO selected), Report Format (defaults to PDF, can change to Excel) • Optional filter(s): Org Code (from – to), FLAIR Org (from – to), Social Security Number The report includes the following fields: • Last Name • First Name • Warrant Date • Warrant Number • Social Security Number • Payroll Period Begin Date • Payroll Period End Date • Payroll Indicator (B=Biweekly, S=Supplemental, M=Monthly, O=On demand, C=Cancellation) • FLAIR Org Code • Org Code • Contracted Hours • FTE Begin • FTE End • Beginning Hours • Ending Hours • Beginning Rate of Pay • Ending Rate of Pay • Beginning Compensable Hours • Ending Compensable Hours • Payment Type (Wage Type) • Gross Amount Paid • Gross Amount Owed • Over Payment Amount The report is sorted in the following order: • Flair Org • Last Name

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• First Name • Social Security Number • Warrant Date The following calculations are used for calculating rate of pay for FSDB: • A then Hourly Rate = (“Base Rate of Pay” multiplied by 20.7)/1656 • B then Hourly Rate = (“Base Rate of Pay” multiplied by 21.5)/1720 • C then Hourly Rate = (“Base Rate of Pay” multiplied by 24.0)/1920 • E then Hourly Rate = (“Base Rate of Pay” multiplied by 26.0)/1520 • F then Hourly Rate = (“Base Rate of Pay” multiplied by 26.0)/1520 • G then Hourly Rate = (“Base Rate of Pay” multiplied by 26.0)/1840 • J then Hourly Rate = (“Base Rate of Pay” multiplied by 26.0)/1656 • K then Hourly Rate = (“Base Rate of Pay” multiplied by 26.0)/1720 • L then Hourly Rate = (“Base Rate of Pay” multiplied by 21.0)/1520 • M then Hourly Rate = (“Base Rate of Pay” multiplied by 26.0)/1680 • N then Hourly Rate = (“Base Rate of Pay” multiplied by 26.0)/1920
17.34	Position FTE Totals by Pay Plan Report	Report provides a summary of the number of positions and FTE’s by pay plan. Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and	The data extract from People First System must have been executed and the data must be loaded into the DW	The report includes the following filters: • Required Filters: OLO code, Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), Flair Org (from – to), Budget Entity (from – to) The report contains the following data fields: • Pay Plan Code

#	Activity	Description	Dependencies	Uniqueness/Customizations
		non-state workers (i.e. contractors) are excluded)		• Pay Plan Description • Total Positions • Total FTE The report is sorted in the following order: • Pay Plan The report provides the following totals: • Total positions • Total FTE
17.35	Premium History Report	The Premium History Report identifies premium payments and adjustment for health and insurance enrollments for the requested period	Premium payments must have processed for the employee to show on the report	The Premium History Report can be requested from January. 1, 2005, onward The report includes the following filters: • Required filters: OLO Code; Agency Sub Group (only applies to Benefits Only (BENO) entities); Coverage Begin Date (MM/DD/YYYY format; must be the first day of the coverage month); Coverage End Date (MM/DD/YYYY format; must be the last day of the coverage month), Report Format (defaults to PDF, can change to Excel) ○ Important note: Coverage begin and end dates can be a range of coverage months instead of just one month. If processing for more than one month, enter the first day of the first coverage month in the Coverage Begin Date and enter the last day of the last coverage month in the Coverage End Date • Optional filters: Org Code (from – to); FLAIR Org (from – to); Budget Entity (from – to); Employee ID (PERNR); Plan Type (from – to)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				The report includes the following fields that are pulled from various infotypes: • FLAIR Org • FLAIR Acct Code • Agency Sub Group (blank for state agencies, only populated for BENO entities) • Emp ID (PERNR) • First Name • Middle Initial • Last Name • Pay Plan • Class Code • FTE • Plan Type • Benefit Plan – benefit plan title for the plan type • Coverage Level – coverage level for the plan type • Coverage Period • Warrant Date • Payment Source – how the payment was made (e.g., payroll deduction, payroll on demand, payroll cancellation, manual, etc.) • Trans Date – date the payment was entered in the People First System; formatted MM/DD/YYYY • Employee Paid (employee contribution paid for the insurance plan for the coverage month) • Employer Paid (employer contribution paid for the insurance plan for the coverage month) The report is sorted in the following order: • Coverage Period • FLAIR Org

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Last Name • First Name • Employee ID • Plan Type Code The report provides the following total: • Employee count
17.36	Rate Report	The Rate Report displays a detail record for each agency Position (filled and vacant) providing rate costs associated with the agency positions. Only employees of employee groups 1 and 2 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from the People First System must have been executed and the data must have been loaded into the DW	The Rate Report allows agencies to monitor position and rate information by providing pay additive, insurance coverage codes, position and employee rate data. It can be used to ensure the accuracy of data being sent on the Legislative Appropriations System/Planning and Budgeting Subsystem (LAS/PBS) file each month and at fiscal yearend The report includes the following filters: • Required filters: OLO Code (Agency Identifier), Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), FLAIR Org (from – to), Budget Entity (from – to), SPC (from – to) The report includes the following fields: • Budget Entity Description • Budget Entity Code • Org Description • Org Code • Position Number • Pay Plan • Class Code • Class Title • Pay Grade • Position FTE • Appointment FTE • County Code • Expansion Option • Funding ID

#	Activity	Description	Dependencies	Uniqueness/Customizations

				• Overlap/Shared Indicator – When the position is vacant or overlapped, an identifier (***Overlapped Position*** or **Vacant Position**) will be displayed in this column
				• Last Name
				• First Name
				• Middle Initial
				• Emp ID (PERNR)
				• Life Insurance Code –Y (has life insurance) or N (does not have life insurance)
				• Health Insurance Code – 00 = not enrolled in Health Insurance; 01 = single; 02 = family; 22 = spouse program (participant); 89 = spouse program (dependent); if the position is vacant no code will be displayed
				• HMO Code–00 = not enrolled; 01 = standard PPO coverage; 02 = standard HMO coverage’ 03 = HIHP PPO coverage; 04 = HIHP HMO coverage; if the position is vacant no code will be displayed
				• Retirement Code – defaults to HA for vacant positions (including special risk positions)
				• Base Pay – Annual Base Rate without additives rounded to the nearest whole dollar amount
				• Annual Base plus Additives – Annual base amount plus annual pay additives rounded to the nearest whole dollar amount
				
				Special coding for vacant positions:
				• Vacant OPS positions employee group 4 or 5, (OPS Included OPS Excluded) will default retirement code:
				    ○ ZZ for agency (OLO code) 2100 OR for employee subgroup = “K” (AmeriCorps).
				    ○ ZA for all other OPS positions
				• Vacant employee group 1 or 2 (Included, Excluded) positions with the special risk retirement flag will default the retirement code to HB.

#	Activity	Description	Dependencies	Uniqueness/Customizations

				• Vacant employee group 1 or 2 (Included, Excluded) positions where the OLO code is 2200 AND the employee subgroup is 05 will default the retirement code to HC.
				• Vacant employee group 1 or 2 (Included, Excluded) positions with an employee subgroup 15 OR 16 will default the retirement to HG
				• Vacant employee group 1 or 2 (Included, Excluded) positions where the OLO code is 2100 AND the employee subgroup is 05 will default the retirement code to HH
				• Vacant employee group 1 or 2 (Included, Excluded) positions will default HM for:
				  ○ employee subgroup 09,
				  ○ employee subgroup 33
				  ○ employee subgroup 05 with an HRP9121.class_code equal to 9675 or 9681
				  ○ employee subgroup 84 with an HRP9121.class_code equal to 8819 or 9819
				  ○ employee subgroup 85 with an HRP9121.class_code equal to 4801 or 4803 or 4805 or 4806 or 4809 or 4811 or 4900
				  ○ employee subgroup 87 with an HRP9121.class_code equal to 6900 or 6901
				  ○ employee subgroup 88 with an HRP9121.class_code equal to 5901 or 5909
				
				The report is sorted in the following order:
				• FLAIR Org
				• Pos Num
				
				The report provides the following totals/summaries:
				• Report Subtotals by Org Code, FLAIR Org Code and Budget Entity
				  ○ Total Employees
				  ○ Total Vacancies
				  ○ Total Position

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ Total Position FTE ○ Total Overlap/Shared ○ Pay Period Total Base Pay ○ Total Annualized Salaries A separate budget entity recap is provided at the end of the report which provides the following totals: ○ Total Employees ○ Total Vacancies ○ Total Position ○ Total Position FTE ○ Total Overlap/Shared ○ Pay Period Total Base Pay ○ Total Annualized Salaries This recap is sorted by budget entity code
17.37	Separated Employees Report	The Separated Employees Report allows agencies to pull historical data for employees that have separated from their agency. Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The data extract from People First System must have been executed and the data must be loaded into the DW	Separated employees are defined as employees who have terminated from the State of Florida and/or terminated or transferred from one agency to another either voluntarily or involuntarily. For the latter case, the agency that the employee left shows a separation within the report for the agency All transaction codes of 06 (Voluntary Separation) and 23 (Involuntary Separation) are displayed on the report The report includes the following filters: • Required Filters: OLO code, Employee Type (All, Salaried, OPS), Begin Effective Date, End Effective Date, Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), Flair Org (from – to), Budget Entity (from – to), EEO4 Job Code, Reason Code The report contains the following data fields:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Org Code • Flair Org • Budget Entity • Last Name • First Name • Middle Initial • Emp ID (PERNR) • Appointment FTE • Appointment Status • Position Number • Pay Plan • Class Code • Class Title • Separation Action (Voluntary or Involuntary) • Separation Reason Code/Description • Separation Date • EEO Code • EEO Description • Gender • Race • Age • Transaction Date • Employee Type The report is sorted in the following order: • Org Code • Last Name The report provides the following total: • Org Code employee count
17.38	Service Awards Report	This report provides a list of active employees who have attained at least five years of service. The report	The data extract from People First System must have been executed and the data must be loaded into the DW	The report includes the following filters: • Required Filters: OLO code, Begin Date, End Date, Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), Flair Org (from – to), Budget Entity (from – to)

#	Activity	Description	Dependencies	Uniqueness/Customizations
		shows five-year increments, starting with five up to 60 years. The service year data is based on creditable months of service as reflected on the Key Service Date Screen in People First Only employees of employee groups 1and 2 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)		The report contains the following data fields: • Org Code • Org Code Description • Flair Org Code • Flair Org Description • Budget Entity • Budget Entity Description • Service Length • Position Number • Service Months • Employee Name • Class Code • Class Title • Work Address • City • State • Zip • Work Phone • Work Email Address The report is sorted in the following order: • Org Code • FLAIR Org Code • Budget Entity Code • Service Length • Last Name The report provides the following totals/summaries for each five year increment: • Report Subtotals by Service Length, Budget Entity, FLAIR Org Code and Org Code • Total Employees
17.39	Timesheet Interface Error Report	The Timesheet Interface Error Report will list all	The data extract from People First System must have been executed and the data must	This report includes the following filters: • Required filters: OLO code, File Indicator, Run Date,

#	Activity	Description	Dependencies	Uniqueness/Customizations

		errors from the processing of the timesheet interface with a brief description, including whether the error is a fatal, warning or informational message.
		
		While the report is visible for all agencies, the reports' results will only be returned if the agency is submitting employee time using the timesheet interface process.
			be loaded into the DW	Report Format (defaults to PDF, can change to Excel)
				• Optional filters: Flair Org (from – to), Employee ID (from – to), Type of Error, Run Time
				
				The report contains the following data fields:
				• OLO Code
				• FLAIR Org Code
				• Employee ID
				• Last Name
				• First Name
				• Run Date
				• Run Time
				• Timesheet Day
				• Type of Error
				  ○ W = Warning
				  ○ E = Fatal Error
				  ○ All Errors
				• Error Message
				
				The report is sorted in the following order:
				• FLAIR Org Code
				• Employee ID

17.40	Turnover Report	The Turnover Report provides an average turnover rate based on the number of positions divided by the number of separations in a given period of time. Only employees of employee groups 1and 2 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are	The data extract from People First System must have been executed and the data must be loaded into the DW	Static position counts used in the average calculation are pulled from the Combined Employee Records (historical) view. This view update on the first day of each month and contain data as of the last day of the prior month The report consists of two parts, Turnover and a Summary by Separation Reason Code/Class Code. Turnover data from January 1, 2007 is available Turnover is defined as the number of separations in a given period of time divided by the average number of filled positions in the time period. Average number of filled positions is defined as the sum of the number of filled positions at the

#	Activity	Description	Dependencies	Uniqueness/Customizations
		excluded)		beginning of the period and the number of filled positions at the end of the period divided by two. Separations are defined by reason codes listed below Voluntary Separation (06) Reason Codes 51 – Move to Private Sector 52 – Move Within St of Florida Gov 53 – Other 56 – Retirement 58 – End of Appointment Period 62 – Abandonment 63 – Move to Non St of Florida Gov Involuntary Separation (23) Reason Codes 55 – Failed Probationary Period 57 – Layoff 59 – Dismissal 60 – Death of the Employee 61 – Death of Employee Line of Duty 64 – Dismissal – Employee also Retires 65 – Legislative Directed Transfer The report has an additional footnote which provides information on how interagency transfers, abolishment of positions and agency divestitures are reported. It also provides a statement on which separation codes are used for competitive pay purposes The report includes the following filters: • Required Filters: OLO code, Begin Date (This must be the first day of the month., End Date (This must be the last day of the month., Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), Pay Plan, Class Code, CBU, County, Reason Code(if no separation reason code is selected, the report will only provide data for separation reason codes 51, 53

#	Activity	Description	Dependencies	Uniqueness/Customizations

				and 62)
				
				The report contains the following data fields:
				• Class Code
				• Class Title
				• Beginning Period
				• Numbers of Positions for begin and end dates.
				• Number of Vacant Positions for begin and end dates
				• Percentage of Vacant Positions for begin and end dates
				• Ending Period
				• Numbers of Positions for begin and end dates.
				• Number of Vacant Positions for begin and end dates
				• Percentage of Vacant Positions for begin and end dates
				• Average number of positions for begin and end date
				• Number of Separations
				• Turnover Percentage
				
				The report is sorted in the following order:
				• Turnover
				  ○ Class Code
				  ○ Class Title
				  ○ Summary by Separation Reason Code/Class Code
				  ○ Class Code
				
				The Summary Reason Code/Class Code summary provides the following totals:
				• Subtotal Reason Code Count
				• Grand total Reason Code Count

17.41	Vacancy Report	The Vacancy Report provides a detail listing of vacant positions for an agency	The data extract from People First System must have been executed and the data must be loaded into the DW	The report includes the following filters: • Required Filters: OLO code, Employee Type (All, Salaried, OPS), Begin Date, End Date, Report Format (defaults to PDF, can change to Excel) • Optional Filters: Org Code (from – to), Flair Org

#	Activity	Description	Dependencies	Uniqueness/Customizations
				(from)(to), Budget Entity (from) (to), County (from) (to), Days Vacant (options include “All”, 1 – 89 Days, 90 – 179 Days, and 180+ Days. The “Begin Date” and “End Date” filters will not be available when you select this filter) The report contains the following data fields: • Org Code • Org Name • Budget Entity • Flair Org • Position Number • Class Code • Class Title • Pay Plan • Pay Grade • CBU • Physical County Code/Name • Position FTE • Days Vacant • Vacant Date • Base Salary • CAD Amount • Pay Band • Pay Band Minimum • Broadband Occupation The report is sorted in the following order: • Org Code The report provides the following totals: • Subtotal of positions by Org Code • Grand total of positions for report • Total FTE
Reports – SAP				
18.1	SAP Reports -	Standard formatting is	N/A	All report headers contain the following items:

#	Activity	Description	Dependencies	Uniqueness/Customizations
	Report Formatting	applied to each SAP Report		• Run Date: MM/DD/YYYY – left justified on top line of the header • Page: <number> – left justified below run date • Report Title – centered on top line of the header • Agency Name – based on the OLO used in the report filters; centered below report title. (If OLO 4900 is selected, the subagency name is displayed) • People First logo – right justified A footer is presented on each report and contains the following statement: • This report may contain information that is confidential under state or federal law. Improper access or release of such information may be a violation of such laws. The last page of each report identifies all filters available for selection for the specific report and displays the filter value entered; if no filter value is selected, the value is blank All SAP reports are available in both PDF and Excel formats: • A PDF report is generated when the “View PDF” or “Generate New PDF” buttons are selected. The PDF formatted report opens in a new window and the User can print and/or save the PDF file • An Excel file is generated when the “Export to Excel” button is selected. When the button is selected, the Excel file opens and the User can work with the data as needed and save the file to a local drive. The Excel file is not formatted for printing
18.2	Report Filtering	Report filters are used to define specific data to be included in a SAP report	User’s security role code determines access allowed to each report	Filters applied to a report are selected by the User and the data presented in the reports is based on the filters selected Each SAP report requires that a filter be completed before the report can be processed; at a minimum the required filter fields must be completed Informational (e.g., report taking longer than 3 minutes to process) and error messages (e.g., fill all required entry fields) are presented within the filter screen

#	Activity	Description	Dependencies	Uniqueness/Customizations
				Once filter options are selected, the User processes the SAP report The report is presented in a table (report grid) format with the ability for the User to view as PDF format or export to Excel When the report grid is presented, the User has the ability to change the report filters and re-process the report using the updated filters Users have the ability to apply simple filters and sort options within the report grid; Users also have the ability to apply advanced settings to the report grid (Setting Menu): • Column Selection tab – add or remove columns; change the order of columns • Sort tab – add sort order • Filter tab – add filters to report grid • Display tab – control number of rows displayed per page, control number of columns displayed, select table design (e.g., standard, transparent) and control how gridlines are displayed Filter, sort and advanced settings applied to the report grid are not reflected on the PDF and Excel files
18.3	My Reports screen	A custom screen that stores the SAP (Management) reports that have been processed by the User. The screen is accessed in the Reports module of the People First System	User's security role code determines access to the Reports module	Each time a User processes a SAP report, the data is presented in the report grid below the filter section and the report is systematically saved to the My Reports screen using the following logic: • For reports that take longer than three minutes to process, the data is not presented in the report grid (separate window); in these cases, the User is presented with a message after three minutes stating the report will take longer than three minutes to process and will be available in the My Reports screen once processing is complete; the report will not show on the My Reports screen until it has fully

#	Activity	Description	Dependencies	Uniqueness/Customizations
				processed • Reports are saved to a table titled Report Run Queue within the My Reports screen Reports are saved in both PDF and Excel formats and are stored in the My Reports queue using the following logic: • PDF formatted reports are removed from the User’s queue weekly • Excel formatted reports are never purged; all Excel reports since implementation of the SAP Reports functionality (July 2010) are available When a User selects the My Reports link (from the Reports home page), the Report Run Queue table is presented and the following steps are followed: • There are two separate tabs in the Reports Run Queue; one tab for PDF reports and one tab for Excel reports • Once report is selected, a file link is presented at the bottom of the table • User selects the file link and the report opens in the applicable format Within each tab (PDF and Excel), the following information is presented for each report: • File Identifier (report/file name) –identifies the name of the report along with a system generated report code; the file name is not maintainable by the User • Date – identifies the date the report was processed • Time – identifies the time (hh:mm:ss) the report was processed; the time is displayed using 24 hour clock format (e.g., 13:46:22) Data in the reports is for the period of time the report was originally processed for (static data); if current data is needed, a new report must be processed

#	Activity	Description	Dependencies	Uniqueness/Customizations
18.4	Agency Address Verification Monitoring Report	The Agency Address Verification Monitoring report shows whether an employee has completed the annual Address Verification process The report is accessed in the Reports module of the People First System; data is displayed in "real time," meaning it will reflect an employee's completion status of the address verification process as of the point in time the report is processed	User must have security access that allows them to access the report; access is based on the security role code assigned to the User	The report includes the following filters: • Required Filters – Effective Date (date the Address Verification process is activated); OLO Code (Agency Identifier); Complete (Yes = employees who have completed the address verification process, No = employees who have not completed the address verification process; All = all employees in the agency as of the effective date) • Optional Filters – All Agencies (select to show all agencies; only available for use by Users with a N and S security role code); Sub-Agency (only valid for BENO entities (employee groups 8 and 9) - e.g., universities, legislature); Employee ID; Direct Reports (i.e., direct reports, 2 Level of reports and all reports); FLAIR Org (from – to) • The report results are driven off the selected filters; in general, filters are used to narrow down the amount of data returned in the report The report results are presented in a grid within the People First System and can be exported to Excel or PDF format The report includes the following fields which are pulled from various SAP info types: • FLAIR Org • FLAIR Org Name • Emp ID • Last Name • First Name • Completed (status of verification process – if completed, date process was completed) • Supervisor • Notification Email • Work Email • Supervisor's Notification Email • Supervisor's Work Email

#	Activity	Description	Dependencies	Uniqueness/Customizations
				The report is sorted in the following order: • FLAIR Org • Last Name When generated in PDF format, the report has a Totals Page (last page of the report) that includes the following data: • Eligible Employees – Number of employees in the report filter • Employees Completed – Number of employees in the report filter who have completed the process • Employees Pending – Number of employees in the report filter who have not completed the process • Percentage Complete – Number of employees in the report filter who have completed the process divided by the number of eligible employees
18.5	Agency Dependent Certification Monitoring Report	The Dependent Certification Monitoring Report identifies the status of employees in completing the dependent certification process for the annual Open Enrollment period	User must have security access that allows them to access the report; access is based on the security role code assigned to the User	The following filters are included in the report: • Required Filters: Effective Date (MM/DD/YYYY format; must enter the first day of the annual Open Enrollment period); OLO Code; Sub-Agency (only applies to Benefits Only (BENO) entities); Complete (Yes = employees who have completed the address verification process, No = employees who have not completed the address verification process; All = all employees in the agency as of the effective date) • Optional Filters: All Agencies (checkbox; selection is restricted to F, N and S security role codes); Employee ID (PERNR); Direct Reports (Direct Reports, 2 Level of Reports and All Reports); FLAIR Org (from – to) The report includes the following fields that are pulled from various infotypes: • FLAIR Org;

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• FLAIR Org Name • Emp ID • Last Name • First Name • Completed (if completed, displays the date it was completed, else displays NO) • Supervisor (supervisor’s name or “VACANT") • Notification Email • Work Email; Supervisor’s • Notification Email; Supervisor’s Work Email The report is sorted in the following order: • FLAIR Org • Employee Last Name When generated in PDF format, the report has a Totals Page (last page of the report) that includes the following data: • Eligible Employees – number of employees • Employees with Dependents – number of employees with at least one dependent registered (whether or not enrolled) • Employees with Covered Dependents – number of employees with at least one dependent covered in at least one insurance plan • Employees with Dependents Completed – number of employees with at least one dependent registered (whether or not enrolled) who have completed the process • Employees with Covered Dependents Completed – number of employees with at least one dependent covered in at least one insurance plan who have completed the process

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Employees Pending – number of employees who have not completed the process • Percentage Complete with Dependents – number of employees with at least one registered dependent (whether or not enrolled) who have completed the process divided by the number of employees with at least one dependent registered (whether or not enrolled) • Percentage Complete with Covered Dependents – number of employees with at least one dependent covered in at least one insurance plan who have completed the process divided by the number of employees with at least one covered dependent in at least one insurance plan
18.6	Agency Open Enrollment Elections Completed Report	The Agency Open Enrollment Elections Completed Report identifies the status of employees in completing the annual Open Enrollment process	User must have security access that allows them to access the report; access is based on the security role code assigned to the User	The following filters are included in the report. • Required Filters: Effective Date (MM/DD/YYYY format; must enter the first day of the new plan year (01/01/20NY)); OLO; Sub-Agency (only applies to BENO entities); Complete (Yes, No or All) • Optional Filters: All Agencies (checkbox; selection is restricted to F, N and S security role codes); FLAIR Org; Employee ID (PERNR); Direct Reports (Direct Reports, 2 Level of Reports and All Reports); FLAIR Org (from – to) The report includes the following fields that are pulled from various infotypes: • FLAIR Org • FLAIR Org Name • Emp ID • Last Name • First Name

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Completed (if completed, displays the date it was completed, else displays NO) • Supervisor (supervisor’s name or “VACANT”) • Notification Email • Work Email • Supervisor’s Notification Email • Supervisor’s Work Email The report is sorted in the following order: • FLAIR Org • Employee Last Name The totals page for the report includes the following: • Eligible Employees – number of • Employees Completed – number of employees who have completed the process • Employees Pending – number of employees who have not completed the process • Percentage Completed – number of who have completed the process divided by the number of eligible employees
18.7	Audit Report	The Audit Report is accessed in the HR Reports Module of the People First System. The report is used to show old and new values of certain system infotypes including who/when the update was made as well as the effective date of the change	User must have security access that allows them to access the report; access is based on the security role code assigned to the User When running the report for a specific employee ID or by organization code, a change must have been made to at least one infotype within the follow functional areas for the change to be displayed on	The report includes the following filters: • Required Filter – Date range (from and to with lookup functionality) • Employee ID • Organization Code The report includes the following fields from various infotypes*:* • Employee ID • Employee Full Name • Position • Position Description • Infotype

#	Activity	Description	Dependencies	Uniqueness/Customizations
			the report • Personal Information Management • Work Information Management • Time and Payroll • Performance Management • Training • Benefits	• Infotype Description • Subtype • Subtype Description • Change by • Change Date • Change Time • Effective Date • End Date • Operation (Insert, Delete or Update) • Field Description • Old Value • New Value The report is sorted in the following order: • Date/Time the change was made
18.8	Benefits Early Effective Date Report	The Benefits Early Effective Date Report identifies employees who have elected an early effective date for health and insurance enrollments	User must have security access that allows them to access the report; access is based on the security role code assigned to the User Employee must have elected an early effective date to show on the report	The report can be requested from Jan. 1, 2010, forward. The report uses the following filters: • Required filters: OLO Code; Enrollment Date (MM/DD/YYYY format; date election was completed in the system; includes from – to date range) • Optional filters: Org Code (from – to); Employee ID (PERNR); Plan Type (from – to); Benefit Plan (from – to) The report includes the following fields that are pulled from various infotypes: • Emp ID (PERNR) • First Name • Middle Initial • Last Name • Plan Type • Benefit Plan • Coverage Level

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Coverage Effective Date • Employee Cost (amount the employee pays each month for the benefit plan) • Employer Cost (amount the employer pays for the employee each month for the benefit plan) • Event Type Description (QSC event that allowed the employee to choose an early effective date) The report is sorted in the following order: • Org Code; FLAIR Org • Employee Last Name • Employee First Name • Employee ID
18.9	File 1 Payment History Report	Report is used to provide agencies access to both the preliminary payroll data and the final payroll data, as submitted to the BOSP for payment processing. Report is used as an audit tool to identify potential payment issues (e.g., incorrect payments). Only employees in employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	Either the preliminary payroll or the final payroll runs must have been processed and loaded to the F0001 staging table User must have security access that allows them to access the report; access is based on the security role code assigned to the User	Report is available for both preliminary payroll and final payroll runs. Preliminary payroll data is ONLY available until the final payroll is processed. Once the final payroll is processed the test/prelim filter is no longer valid for use. Final payroll data is retained and is available for historical reference and future audit use. The report includes the following filters: • Required filters – OLO Code; Processing Date (used to pull the payroll input data for a given payroll; typically requires entry of a two day range to pull all details for a payroll for an agency; includes from – to fields) • Optional filters – Emp ID (PERNR); Social Security Number (from – to); Last Name (from – to);; First Name (from – to); FLAIR Org Code (from – to); BOSP Rec Ty (record type; from – to); BOSP Wage Type (from – to)**;** People First Wage Type (from – to); Run Time (from – to); Payroll Area (from – to); Payroll Period (from – to); Payroll Year (from – to); Supp Date (from – to); Test/Prelim (Check Box; must be selected

#	Activity	Description	Dependencies	Uniqueness/Customizations
				if running the report for the preliminary payroll run) The report includes the following fields that are pulled from various infotypes: • Run Date (MM/DD/YYYY format) • Emp ID (PERNR) • BOSP Wage Type (4-digit earnings code) • PF Wage Type (4-digit wage type code) • PF Wage Type Description • Pos Num (Position Number) • Last Name • First Name • FLAIR Org • Contract Hours • Payroll Area • Pay Period Begin Date (MM/DD/YYYY format; • Pay Period End Date (MM/DD/YYYY format) • FTE • Begin Rate • Begin Hours • End Rate • End Hours • Total Gross The report is sorted in the following order: • Run Date • BOSP Wage Type
18.10	FMLA/FSWP Tracking Report	The FMLA/FSWP Report is used to track an employee's use of FMLA/FSWP leave for a period of time (based on filters applied). Report also allows an agency to run an agency-wide report for a 31-day	Timesheet hours must be submitted and approved to show in the report results User must have security access that allows them to access the report; access is based on the security role	The following filters are included in the report: • Required filters – OLO Code; Date (from – to) • Optional filters –Emp ID (PERNR – if more than 31 days, Emp ID must be specified); FLAIR Org (from – to) The report is not valid for State Courts System or Justice Administrative Commission

#	Activity	Description	Dependencies	Uniqueness/Customizations
		period. Only employees of employee groups 1 and 2are included in the report; (i.e., OPS, benefits only and non-state workers (i.e. contractors) are excluded)	code assigned to the User	The report includes the following fields that are pulled from various infotypes: • Org Code • Emp ID (PERNR) • Last Name • First Name • Middle Initial) • FLAIR Org • Interdept ID • FMLA Reason • Absence Type (Continuous or Intermittent) • Timesheet Approved Hours • Timesheet Pending Hours • Total Hours • FMLA Effective Date (MM/DD/YYYY format) • FMLA End Date (MM/DD/YYYY format) • Requestor Comment • Approver Comments • Medical Certificate Provided (Yes or No) The report is sorted in the following order: • Org Code • Last Name
18.11	Groups Report	The Groups Report is accessed in the HR Reports Module of the People First System. The report is used to obtain a listing of an established Requisition Group, Time Group, or Requisition & Time Group and the assigned organization code ranges for each group Only employees of	The groups must have been previously established in the system and be active as of the report run date User must have security access that allows them to access the report; access is based on the security role code assigned to the User	The report includes the following filters: • Required Filters – Report By: (dropdown list of three different group types); OLO Code • Optional Filters – Select all OLO check box (only Users with appropriate security access can mark) The report includes the following fields from various infotypes*:* • Group Number • Group Abbreviation • Description • Group Effective Date • Group Position Number

#	Activity	Description	Dependencies	Uniqueness/Customizations
		employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)		• Group Administrator Description • Administrator Effective Date • Organization Code • Organization Code Description The report is sorted in the following order: • Group Number • Organization Code • Group Administrator Description
18.12	Leave Audit Report	The Leave Audit Report provides agencies and employees information on leave accruals, usage, payouts and adjustments. The report includes a running balance for the selected period of time. The report is real-time and includes leave for all active employee IDs (even if the IDs are in different agencies) for the employee for the selected period of time Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	For timesheet entries, ONLY approved timesheets entries are included User must have security access that allows them to access the report; access is based on the security role code assigned to the User	Report can only be run for one employee at a time (not available for the entire agency). The beginning balance presented in the report is pulled as of the date entered in the Begin Date filter. The balance presented in the final record for each leave type is based on the date entered in the End Date filter and does not represent the employee's current balance (unless current system date is entered as the end date) The report is not valid for State Courts System or Justice Administrative Commission The report includes the following filters: • Required filters – EMP/User ID (report will pull all leave eligible IDs for the employee for the date range entered); Begin Date (MM/DD/YYYY format); End Date (MM/DD/YYYY format) • Optional filter – Leave Type ○ The leave types included in this report are: annual, sick, personal holiday, regular comp, special comp pre-July 2012, FLSA comp, pre-1973 sick and the 90 series special comp leave types The report includes the following fields that are pulled from various infotypes (report includes different fields if exported to PDF versus Excel: • Fields if exported to PDF:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				○ Last Name ○ First Name ○ Middle Initial ○ FTE ○ Continuous Service Date ○ State Hire Date ○ SES/SMS Leave Accrual Date ○ Creditable Service Months ○ Agency ○ EMP ID (PERNR) ○ Effective Date ○ Transaction Date ○ Leave Type ○ Hours ○ Balance ○ Activity ○ Scheduled Hours • Fields if exported to Excel: ○ Agency (OLO and Agency description) ○ EMP ID (PERNR) ○ Last Name ○ First Name ○ Middle Name ○ Effective Date ○ Transaction Date ○ Leave Type (shows separate columns for each leave type) ○ Hours ○ Balance ○ Activity Type ○ Scheduled Hours ○ FTE ○ State Hire Date ○ Continuous Service Date ○ Creditable Service Months ○ SES/SMS Leave Accrual Date

#	Activity	Description	Dependencies	Uniqueness/Customizations
				The report is sorted in the following order: • Effective Date

18.13	Leave Summary Report	The Leave Summary report provides agencies information about current leave balances for their employees. The report is real-time and reflects current balances as of the time the report is processed Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	Employees must be active to show on the report
			
			User must have security access that allows them to access the report; access is based on the security role code assigned to the User
				The report is not valid for State Courts System or Justice Administrative Commission
				
				The report includes the following filters:
				• Required filters – Report By (select one of the following: Employee; Supervisor; Timekeeper ID); OLO Code
				    ○ If employee is selected in the Report By filter, an Emp ID filter is presented and is required
				    ○ If Supervisor is selected in the Report By filter, Supervisor ID and Direct Reports Level fields are presented and are required; Direct Report Level field is used to drive who shows in the report (e.g., for direct reports only, use 1; for both direct reports and direct reports for those individuals, use 2)
				    ○ If Timekeeper ID is selected in the Report By filter, a Timekeeper ID field is presented and is required
				• Optional filters – Org Code (from – to); FLAIR Org (from – to)
				
				The report includes the following fields that are pulled from various infotypes:
				• Emp ID (PERNR)
				• Last Name
				• First Name
				• Middle Initial
				• Position Number
				• Org Code
				• FLAIR Org
				• Annual Leave
				• Sick Leave
				• Personal Holiday (Y or N)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Special Comp (balance in any of the six special comp leave types (e.g., Special Comp Holiday, Special Comp Closures, etc.)); Regular Comp; FLSA Comp The report is sorted in the following order: • Org Code • Employee ID
18.14	Miscellaneous Deductions Report	The Miscellaneous Deduction Report is used to identify miscellaneous deductions for a selected time period Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	Employees must have the selected miscellaneous deduction active for the period selected User must have security access that allows them to access the report; access is based on the security role code assigned to the User	Report can be generated for an employee or for a specific deduction code (restricted to the agency) The following filters are included in the report: • Required filters – OLO Code; Begin Date (MM/DD/YYYY format); End Date (MM/DD/YYYY format) • Conditional filters (one must be used, but not both) – must enter either Emp ID (PERNR) or select a Deduction Code (all available deductions codes are presented in a pop-up list; User can also type in the code) to process the report • Optional filters – Org Code (from – to); FLAIR Org (from – to) The report includes the following fields that are pulled from various infotypes: • Org Code • FLAIR Org • Emp ID (PERNR) • Last Name • First Name • Middle Initial • Position Number • Deduction Code • Deduction Code Description • Deduction Amount • Begin Date (MM/DD/YYYY format) • End Date (MM/DD/YYYY format)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				When processed for a single employee, report is sorted in the following order: • Deduction Code • Begin Date (Descending) When processed for a single deduction code, report is sorted in the following order: • Employee ID
18.15	Missing Timesheet Report	The Missing Timesheet Report provides agencies the ability to identify employees that have **missing time** on a timesheet Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	Timesheets must either be missing time or be pending approval (i.e., timesheet hours are met, but either the time has not been submitted for approval or has been submitted, but not approved) User must have security access that allows them to access the report; access is based on the security role code assigned to the User	Report includes the current state fiscal year (July 1 to June 30) data only. The data in the report is updated once a week on Sunday The report includes the following filters: • Required filters – Timesheet Start Date (MM/DD/YYYY format); Timesheet Up-To-Date (MM/DD/YYYY format); OLO Code • Optional filters – Emp ID (PERNR); Payroll Area (from – to); Employee Group (from – to) The report is not valid for State Courts System or Justice Administrative Commission The report includes the following fields that are pulled from various infotypes: • Org Code • Emp ID (PERNR) • Pay Period Begin Date (MM/DD/YYYY format) • Pay Period End Date (MM/DD/YYYY format) • Employee Name • OT (overtime) Eligibility (Y or N) • Pay Plan • Work Week (i.e., 40 hour FLSA Week) • Contract Hours; Approved Time Worked (includes hours type 1000, 1004, 1006, 1014, 1016, 1017, 1024, 1034, 1044)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Approved Leave Time (included compensable leave and LWOP hours) • FTE • Flex (displays Y if employee has an approved flexible work schedule for the period or Blank if there is no approved flex schedule for the period) • Last Action Date (displays the effective date of the last HR action completed (based on a PAR being completed) on the employee • Last Action Description (displays the description for the last HR action (PAR) completed on the employee); • Time Entered (reflects time that is in a saved status; number of hours, including the total hours of all hours types, except On-Call hours (hours type 1002), Mentor/Volunteer Unpaid hours (hours type 1008), Work – CS Extraordinary Pay (hours type 1016), Work – SES Extraordinary Pay (hours type 1017) and FNA Hours (hours type 1018) which have been entered on timesheet but not submitted and/or approved) • Time Submitted (reflects time that is in a submitted status; number of hours, including the total of all hours types, except On-Call hours (hours type 1002), Mentor/Volunteer Unpaid hours (hours type 1008), Work – CS Extraordinary Pay (hours type 1016), Work – SES Extraordinary Pay (hours type 1017) and FNA Hours (hours type 1018) which have been submitted on the timesheet but not approved) • Position Number • FLAIR Org • FLAIR Org Name • Org Code Name • Supervisor Name (supervisor's name or "VACANT") • Supervisor Pos Num • Run Date (MM/DD/YYYY format) When viewed through the portal, this report is sorted in the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				following order: • Org Code • Employee ID When viewed as pdf, this report is sorted in the following order: • Org Code • Employee ID • Pay Period Begin Date
18.16	OPS Academic Break Report	The OPS Academic Break Report identifies OPS employees who are on a leave of absence (academic break, FMLA leave or military leave) during the requested period	Employee must have been OPS during the requested period and have been on a leave of absence during the period. User must have security access that allows them to access the report; access is based on the security role code assigned to the User	The following filters are included in the report. • Required Filters: Leave Type (Academic Break, Military Leave, FMLA or all); Agency (if the leave type Academic Break is selected, Sub-Agency (only applies to Benefits Only (BENO) entities) • Optional Filters: Employee ID (PERNR); Begin Date (MM/DD/YYYY format; if not entered returns all OPS employees who are on a leave of absences as of the system date); Org Code; Statewide (restricted to F, N and S security role codes) The report includes the following fields that are pulled from various infotypes: • Employee Name (employee’s full name) • User ID (CP) • Emp ID(PERNR) • Agency • Sub Agency • Action Reason Code (HR action code) • Action Reason Description • Leave Start Date • Leave End Date • Benefits Eligible • Enrolled Status

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Measurement Start Date • Measurement End Date The report is sorted in the following order: • Agency/sub agency • User ID • Action Reason Code • Leave Start Date • Employee ID The totals page for the report includes the following totals: • Total OPS Employees on Academic Break • Total OPS Employees on Military Leave • Total OPS Employees on FMLA Leave • Total Employees – number of employees in the report filter
18.17	OPS Employee Benefits Eligibility Report	The OPS Employee Benefits Report identifies OPS employees for the requesting agency and their Health and Insurance Benefits eligibility status	Employee must have been OPS during the requested period. User must have security access that allows them to access the report; access is based on the security role code assigned to the User	If the OPS employee is enrolled in more than one insurance plan, separate rows are shown for each plan the employee is enrolled in. The report includes the following filters: • Required filters: Effective Date (MM/DD/YYYY format; pulls all active OPS as of the date entered); Agency; Sub Agency (only applies to BENO entities); Benefits Eligible/Enrollment [All (returns all OPS); Eligible (returns only OPS eligible for Health & Insurance Benefits); Not Eligible (returns only OPS not eligible for benefits); Enrolled (returns only OPS employees who are enrolled in at least one plan)] • Optional filters: Employee ID (PERNR); Org Code (from – to); FLAIR Org (from – to); Budget Entity (from – to);); Plan Type (from – to); All Agencies (checkbox;

#	Activity	Description	Dependencies	Uniqueness/Customizations
				selection is restricted to F, N and S security role codes) The report includes the following fields that are pulled from various infotypes: • Employee Name • User ID (CP) • Employee ID (PERNR) • Agency • Sub-Agency (blank for state agencies, only populated for BENO entities) • Employment Start Date • Employment End Date • Group Description • Subgroup Description • Actual Average Hours/Week • Estimated Weekly Hours • Earliest Coverage Start Date • Enrolled Status • Measurement Start Date • Measurement End Date • Measurement Type • Plan Type Code and Name • Benefit Plan Code and Name • Effective Date for the Benefit Plan • Coverage Level • Effective Date for the Coverage Level • EE (employee) Cost • ER (employer) Cost The report is sorted in the following order:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• User ID (CP) • Emp ID (PERNR) • Plan Type Code The report provides the following totals: • Total OPS Employees (sum of unique CP occurrences) • Total Eligible OPS Employees (sum of unique CP occurrences for eligible OPS employees) • Total Not Eligible OPS Employees (sum of unique CP occurrences for OPS employees who are not Health & Insurance Benefits eligible) • Total Employees Enrolled in each Plan Type (sum of unique CP occurrences for enrolled OPS employees; shows separate count by plan type)
18.18	OPS Benefits Eligibility Report	The OPS Benefits Eligibility Report identifies an employee's current employment and current eligibility to participate in Health and Insurance Benefits	User must have security access that allows them to access the report; access is based on the security role code assigned to the User	The following filters are included in the report. • Required Filter(all filters are required): Emp ID; SSN (must enter either employee ID or SSN); Effective Date (MM/DD/YYYY format) The report includes the following fields that are pulled from various infotypes: • Employee Name • User ID (CP) • Emp ID (PERNR) • Agency • Sub-Agency (only presented for BENO entities, blank for all others) • Employment End Date • Group Description • Subgroup Description • Salaried FTE

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Actual Average Hours (only presented if the employee has been measured) • Estimated Hours (only presented if the employee has not been measured) • Eligibility Indicator (Yes–Assigned to Salary; Yes–OPS At My Agency; Yes–OPS At Another Agency; Not Eligible; Blank for salaried positions) • Enrolled Status • Measurement Start Date • Measurement End Date • Hours Worked During Measurement Period • Measurement Type The report is sorted in the following order: • Employment End Date (descending) • Employee ID • User ID • Measurement Start Date (descending)
18.19	OPS Measurement Period Report	The OPS Measurement Period Report identifies OPS employees who have been measured (either for their new hire measurement or for Open Enrollment) and reflects the employee's eligibility to participate in the benefit plans	Employee must have been measured for the period the report is run for. User must have security access that allows them to access the report; access is based on the security role code assigned to the User	The following filters are included in the report. • Required Filters: Measurement Type (Open Enrollment or new hire); Effective Date (MM/DD/YYYY format; defaults based on Measurement Type, for new hire first day of current month and current year, for Open Enrollment 10/03/current year; can be updated); Agency; Sub-Agency (only applies to BENO entities) • Optional Filters: Employee ID (PERNR); Social Security Number; Org Code (from – to); Benefits Eligible (Yes–Assigned to Salary; Yes–OPS at My Agency; Yes–OPS at Another Agency; Yes–All Eligible OPS; Not Eligible; Blank (all)); Statewide (checkbox selection restricted to F, N and S security role codes)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				The report includes the following fields that are pulled from various infotypes: • Employee Name (employee's full name) • User ID (CP) • Emp ID (PERNR) • Agency • Sub-Agency (only presented for BENO entities, blank for all others) • Employment Start Date • Employment End Date • Employee Group Description • Employee Subgroup Description • Salaried FTE • Hours (Average/Weekly) – average number of hours worked (total hours divided by number of weeks in measurement period) during the measurement period for the OPS position. It will be zero if the hours worked during the measurement period cannot be determined • Hours (Total Average/Week) – average number of hours worked during the measurement period for all OPS positions the employee held during the measurement period. It will be zero if the hours worked during the measurement period cannot be determined • Benefits Eligible (Yes/No) • Benefits Eligible Description (Yes–Assigned to Salary; Yes–OPS at My Agency; Yes–OPS at Another Agency; Yes–All Eligible OPS; Not Eligible); • Error Message (OPS with partial service and no eligibility have been set. Manual review required; OPS eligibility could not be updated)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Earliest Coverage Start Date – earliest date (may be an early effective date) the OPS employee can begin coverage based on gaining benefits eligibility. It will be N/A if the employee is not eligible for benefits • Coverage End Date –date coverage will end if OPS employee loses coverage. It will be N/A if the employee is not benefits eligible • Enrolled Status • Measurement Start Date • Measurement End Date • Previous Benefits Eligibility The report is sorted in the following order: • User ID • Agency/Sub-Agency • Employment End Date (descending) • Employee ID The totals page for the report includes the following: • Eligible Employees – OPS Benefits Eligibility Assigned to my Agency • Eligible Employees – OPS Benefits Eligibility Assigned to Another Agency • Eligible Employees – Benefits Assigned to Salary Position • Total Eligible OPS Employees • Not Eligible OPS Employee • Total Employees
18.20	OPS New Hire Monitoring Report	The OPS New Hire Monitoring Report shows OPS employees who are	Employee must be in the initial measurement period for the period the report is run	The following filters are included in the report. • Required Filters: Effective Date (MM/DD/YYYY format; must be the first day of initial measurement

#	Activity	Description	Dependencies	Uniqueness/Customizations
		in the initial measurement period and have not been measured and reflects the employee’s eligibility to participate in the benefit plans	for. User must have security access that allows them to access the report; access is based on the security role code assigned to the User	period); Agency; Sub-Agency (only applies to BENO entities) • Optional Filters: All Agencies (checkbox; selection is restricted to F, N and S security role codes); Eligible/Not Eligible (Yes, No, Blank (all))Employee ID (PERNR); SSN; Org Code (from – to) The report includes the following fields that are pulled from various infotypes: • Employee Name • User ID (CP) • Emp ID (PERNR) • Agency • Sub Agency (only presented for BENO entities, blank for all others) • Employment End Date • Group Description • Subgroup Description • Salaried FTE • Hours Worked During Measurement Period – sum of approved OPS hours from measurement start date to today’s date for this position. Zero if the hours worked during the measurement period cannot be determined • Benefits Eligible (Yes–Assigned to Salary; Yes–OPS at My Agency; Yes–OPS at Another Agency; Yes–All Eligible OPS; Not Eligible) • Enrolled Status (indicates if the employee is enrolled in health insurance in the position on the report; Yes = enrolled; No = not enrolled. If the employee is in two positions on the report, the position the employee is enrolled in health insurance under will have Yes and the other will have No

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Measurement Start Date • Measurement End Date • Total Hours Worked During Measurement Period;– sum of approved OPS hours from new hire measurement start date to today's date for all OPS positions for the employee during the new hire measurement period. Zero if the hours worked during the measurement period cannot be determined. Blank for salaried position • Benefits Eligible Position (displays the benefits eligible position number if employee is eligible under a different employee ID) The report is sorted in the following order: • User ID • Employment End Date (descending) • Employee ID The totals page for the report includes the following: • Total Eligible Employees – Number of OPS employees eligible for benefits • Eligible Employees – Benefits Assigned to Salary Position • Not Eligible Employees – Number of OPS employees not eligible for benefits • Total Employees – Number of employees on the report
18.21	PAR Audit Report	The PAR Audit Report is accessed in the HR Reports Module of the People First System. The report is used to	PARs must have been previously established. User must have security access that allows them to access the report; access is based	The report includes the following filters: • Required Filters: Agency; Date range (from to); PAR Status • Optional Filters: FLAIR Org Code (from – to); PAR Number; Employee ID

#	Activity	Description	Dependencies	Uniqueness/Customizations
		show PAR data as well as status. Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	on the security role code assigned to the User	The report includes the following fields from various infotypes: • PAR Number • Employee ID • Last Name • First Name • PAR Creator • From Position (position number) • From Position Title • From Agency • From Org Name • From FLAIR Org • From City • From County • To Position (position number) • To Position Title • To Agency • To Org Name • To FLAIR Org • To City • To County • Action Code/Description • Reason Code/Description • Pending Action by • PAR Created on • PAR Status • Effective Date The report is sorted in the following order: • Approval Status • Effective Date
18.22	PAR Liaison Report	The PAR Liaison Report is accessed in the HR Reports Module of the People First System.	Agency must have at least one PAR liaison established. User must have security access that allows them to	The report includes the following filter: • Required Filter – OLO Code The report includes the following fields from various infotypes:

#	Activity	Description	Dependencies	Uniqueness/Customizations
		The report is used to obtain a listing of the established PAR liaisons and the assigned organization codes ranges for an agency. Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	access the report; access is based on the security role code assigned to the User	• From Organization Code • To Organization Code • Liaison Position Number • Liaison Position Holder • Class Title The report is sorted in the following order: • Organization Code
18.23	Pay Additive Monitoring Report	The Pay Additive Monitoring Report allows agencies to identify all pay additives that are being paid to employees. Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	Employees must have an active pay additive for the period selected. User must have security access that allows them to access the report; access is based on the security role code assigned to the User	Report can be generated for an employee or for a specific pay additive code (restricted to the agency) The following filters are included in the report: • Required filters – OLO Code; Begin Date (MM/DD/YYYY format); End Date (MM/DD/YYYY format) • Conditional filters (one must be used, but not both) – must enter either Emp ID (PERNR) or select an Additive Code (all available additive codes are presented in a look-up list; User can type in the code) to process the report • Optional filters –Org Code (from – to); FLAIR Org (from – to) The report includes the following fields that are pulled from various infotypes: • Org Code • FLAIR Org • Emp ID (PERNR) • Last Name • First Name • Middle Initial

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Position Number • Additive Type Code • Additive Type Description • Additive Type Amount • Begin Date (MM/DD/YYYY format) • End Date (MM/DD/YYYY format) The report is sorted in the following order: • Org Code • Last Name
18.24	Payments Not Sent to BOSP Report	The Payments Not Sent to BOSP Report provides agencies the ability to view all retro payments that were either generated in the preliminary payroll run or the final payroll run, and were not sent on F0001 to BOSP as the payments are for more than two pay periods back (state custom restriction). Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	Either the preliminary payroll or the final payroll runs must have been processed and loaded to the F0001 staging table. User must have security access that allows them to access the report; access is based on the security role code assigned to the User	Report is available for both preliminary payroll and final payroll runs. Preliminary payroll data is ONLY available until the final payroll is processed. Once the final payroll is processed the test/preliminary filter is no longer valid for use. Final payroll data is retained and is available for historical reference and future audit use The report includes the following filters: • Required filters – OLO Code; Processing Date (used to pull the payroll input data for a given payroll; typically requires entry of a two day range to pull all details for a payroll for an agency; includes from – to fields) • Optional filters – Emp ID (PERNR); Social Security Number; Test/Prelim (Check Box; must be selected if running the report for the preliminary payroll run); BOSP Wage Type (from – to); FLAIR Org (from – to) The report includes the following fields that are pulled from various infotypes: • Processing Date • Emp ID (PERNR) • BOSP Wage Type (4-digit earnings code) • PF Wage Type (4-digit wage type code) • People First Wage Type Description • Position Number

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Last Name • First Name • FLAIR Org • Contract Hours • OLO Code • Pay Period Begin Date (MM/DD/YYYY format) • Pay Period End Date (MM/DD/YYYY format) • FTE • Begin Rate • Begin Hours • End Rate • End Hours • Total Gross The report is sorted in the following order: • BOSP Wage Type • Processing Date • Pay Period Begin Date • Pay Period Begin Date
18.25	Potential Overtime Report	The Potential Overtime Report is used to identify potential overtime when an employee has at least two active Emp IDs (PERNR) in any FLSA period and was included (employee group 1 or 4) for at least one of the IDs. Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	The employee must have held at least two positions, with two separate employee IDs during the FLSA period and must have been overtime eligible in at least one position during the period. User must have security access that allows them to access the report; access is based on the security role code assigned to the User	Report allows agencies to review and determine when overtime is due to an employee based on the employee having a mid-period change in the FLSA period (where employee has two separate employee IDs during the period and was overtime eligible in at least one position) or the employee was dually employed during the period The following filters are included in the report: • Required filters – OLO Code; FLSA Period Type (presents a dropdown that includes all potential FLSA periods; must be selected for the FLSA Period Range filter to be shown); FLSA Period Range (available date ranges for the past 60 days and next 30 days are presented based on the FLSA Period Type selected) The report includes the following fields that are pulled from various infotypes:

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• User ID • Emp ID (PERNR) • Last Name • First Name • Middle Initial • Begin Date (MM/DD/YYYY format) • End Date (MM/DD/YYYY format) • OLO Code • Position Number • Class Title • Org Code • FLAIR Org • FLSA Period • Employee Group • Employee Subgroup • Hours Worked • Disaster Hours • Total Hours • Total Hours By FLSA The report is sorted in the following order: • Employee ID • Begin Date
18.26	Retroactive Payments Sent to BOSP Report	The Retroactive Payments Sent to BOSP Report provides agencies the ability to view all retro payments that were either generated in the preliminary payroll run or the final payroll run, and were sent on the F0001 to BOSP for payment (payments are within the last two pay periods	Either the preliminary payroll or the final payroll runs must have been processed and loaded to the F0001 staging table. User must have security access that allows them to access the report; access is based on the security role code assigned to the User	Report is available for both preliminary payroll and final payroll runs. Preliminary payroll data is ONLY available until the final payroll is processed. Once the final payroll is processed the test/preliminary filter is no longer valid for use. Final payroll data is retained and is available for historical reference and future audit use. Report is only available for regular payroll runs (biweekly and monthly payrolls) and is not available for the supplemental payroll The report includes the following filters: • Required filters – OLO Code (Agency Identifier); Processing Date (used to pull the payroll input data for a given payroll); Pay Period (biweekly or monthly)

#	Activity	Description	Dependencies	Uniqueness/Customizations
		back). Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)		• Optional filters – Employee ID (PERNR); Test/Prelim (Check Box; must be selected if running the report for the preliminary payroll run); FLAIR Org (from – to) The report includes the following fields that are pulled from various infotypes: • Processing Date • Emp ID (PERNR) • BOSP Wage Type (4-digit earnings code) • PF Wage Type (4-digit wage type code) • People First Wage Type Description • Pos Num (Position Number) • Last Name • First Name • Middle Initial • FLAIR Org • Contract Hours • OLO Code • Pay Cycle • Pay Period Begin Date (MM/DD/YYYY format) • Pay Period End Date (MM/DD/YYYY format) • FTE • Begin Rate • Begin Hours • End Rate • End Hours • Total Gross When viewed through the portal, this report is sorted in the following order: • BOSP Wage Type • Processing Date When viewed as.pdf, this report is sorted in the following order: • Flair Org

#	Activity	Description	Dependencies	Uniqueness/Customizations
18.27	Special Compensatory Leave Audit Report	The Special Compensatory Leave Audit Report is available for post-July 2012 Special Comp leave types (90 series leave types). Report allows agencies to obtain current special comp balances, balances as of a point in time or to receive an audit of all special comp activities for the agency for a calendar month (e.g., month of January). Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	Employee's must either have activity during the month (if running as an audit report) or have an existing balance (if running as of a point in time or current balance). User must have security access that allows them to access the report; access is based on the security role code assigned to the User	The following filters are included in the report: • Required filters – OLO Code; Leave Type (must select either 0001 for Special Comp – Holiday (hours type 91, 92 and 93) or 0002 for Special Comp – Closures (hours type 94 and 95)) • Optional filters – Emp ID (PERNR – If used, the system will require the Current Balance check box to be marked or the Start Date to be entered); Current Balance; Start Date (used to generate all activity (used, earned, adjustments) for an agency for a calendar month; date entered should be the first day of the month; Current Balance checkbox and Balance As of date should not be used when applying the Start Date filter); Balance As of Date (allows an agency to obtain balances for all employees as of a point in time; Current Balance and Start Date should NOT be entered when using this filter) The report includes the following fields that are pulled from various infotypes: • Emp ID (PERNR) • Last Name • First Name • Leave Type • Leave Type Code • Transaction Type • CBU • Effective Date • Leave Used Date • Hours (the number of hours adjusted, accrued, or used) • Balance (calculated in the report, which may be different than the balance in the Leave Balance Overview, based on the date range entered in filter criteria) • Special Comp Expiration Date

#	Activity	Description	Dependencies	Uniqueness/Customizations
				The report is sorted in the following order: • Emp ID • Special Comp Exp Date (descending)
18.28	Statewide Address Verification Monitoring Report	The Statewide Address Verification Monitoring Report shows statewide totals of each agency's employees' status for completing the annual Address Verification process The report is accessed in the Reports module of the People First; data is displayed in "real time," meaning it reflects completion status of the address verification process as of the point in time the report is processed	Only Users with a "N" or "S" security role code can access the report	The report includes the following filters: • Required Filters – Effective Date (date the Address Verification process is activated); OLO Code • Optional Filters – All Agencies (select to show all agencies); Sub-Agency (only valid for BENO entities (employee groups 8 and 9) - e.g., universities, legislature) The report includes the following fields: • OLO Code • Agency Name • Eligible Employees • Employees Completed • Employees Pending • Percentage Complete The report is sorted in the following order: • OLO Code The data in the report presents totals for each field by agency as well as a grand total (all agencies combined) for each field: • Eligible Employees – Number of employees in the report filter • Employees Completed – Number of employees in the report filter who have completed the process • Employees Pending – Number of employees in the report filter who have not completed the process • Percentage Complete – Number of employees in the report filter who have completed the process divided by the number of eligible employees

#	Activity	Description	Dependencies	Uniqueness/Customizations

18.29	Statewide Dependent Certification Monitoring Report	The Statewide Dependent Certification Monitoring Report is a summary by agency that allows DMS to monitor each agency's progress in completing the dependent certification process	User must have either an N or S role code for the report to show as an available report	The following filters are included in the report:
				• Required Filters: Effective Date (MM/DD/YYYY format; must enter the first day of the annual Open Enrollment period); OLO; Sub-Agency (only applies to BENO entities)
				• Optional Filters: All Agencies (checkbox; selection is restricted to F, N and S security role codes)
				
				The report includes the following fields that are pulled from various infotypes:
				• OLO Code
				• Agency Name (presents Sub Agency name for BENO entities)
				• Eligible Employees
				  ○ Total
				  ○ Completed
				  ○ Pending
				  ○ Percent
				• Eligible with Dependents
				  ○ Total
				  ○ Completed
				  ○ Pending
				  ○ Percent
				• Eligible with Covered Dependents
				  ○ Total
				  ○ Completed
				  ○ Pending
				  ○ Percent
				
				The report is sorted in the following order:
				• OLO
				
				The data in the report presents totals for each field by agency as well as a grand total (all agencies combined) for each field:
				• Eligible Employees – Number of employees in the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				report filter • Employees Completed – Number of employees in the report filter who have completed the process • Employees Pending – Number of employees in the report filter who have not completed the process • Percentage Complete – Number of employees in the report filter who have completed the process divided by the number of eligible employees
18.30	Statewide Open Enrollment Elections Completed Report	The Statewide Open Enrollment Elections Completed Report is a summary by agency that allows DMS to monitor each agency's progress in completing the annual Open Enrollment process	User must have either an N or S role code for the report to show as an available report	The following filters are included in the report. • Required Filters: Effective Date (MM/DD/YYYY format; must enter the first day of the annual Open Enrollment period); OLO; Sub-Agency (only applies to BENO entities) • Optional Filters: All Agencies (checkbox; selection is restricted to F, N and S security role codes) The report includes the following fields that are pulled from various infotypes: • OLO Code • Agency Name (presents Sub Agency name for BENO entities; • Eligible Employees • Employees Completed • Employees Pending; Percentage Completed The report is sorted in the following order: • OLO The data in the report presents totals for each field by agency as well as a grand total (all agencies combined) for each field: • Eligible Employees – Number of employees in the report filter • Employees Completed – Number of employees in the

#	Activity	Description	Dependencies	Uniqueness/Customizations
				report filter who have completed the process • Employees Pending – Number of employees in the report filter who have not completed the process • Percentage Complete – Number of employees in the report filter who have completed the process divided by the number of eligible employees
18.31	Timesheet Audit Report	The Timesheet Audit Report allows agencies to summarize time by hours type for a period of time for groups of employees Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	Timesheet hours must be approved to show in the report results. User must have security access that allows them to access the report; access is based on the security role code assigned to the User	The following filters are included in the report: • Required filters: Report By (select one of the following: Employee; Supervisor; Timekeeper ID); OLO Code; From Date (MM/DD/YYYY format); To Date (MM/DD/YYYY format) ○ If employee is selected in the Report By filter, an Emp ID filter is presented and is required ○ If Supervisor is selected in the Report By filter, Supervisor ID and Direct Reports Level fields are presented and are required; Direct Report Level field is used to drive who shows in the report (e.g., for direct reports only, use 1; for both direct reports and direct reports for those individuals, use 2) ○ If Timekeeper ID is selected in the Report By filter, Timekeeper ID field is presented and is required The report includes the following fields that are pulled from various infotypes: • Emp ID (PERNR) • Employee Group • Position Number • Employee Name • Hours Type • Project • Activity • Sub Activity • Status

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Hours The report is sorted in the following order: • Hours type
18.32	Timesheet Information Report	The Timesheet Information Report allows agencies to pull all time worked, leave used and observed holidays for a period of time for either the entire agency or a selected employee. Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	There must be timesheet entries on the timesheet for the date range entered. User must have security access that allows them to access the report; access is based on the security role code assigned to the User	Report includes all time that has at least been saved on the employee's timesheet (includes saved, submitted, approved, rejected and unapproved hours). If running for an agency, report is restricted to 31 days. If running for an employee, report can be ran back to the start of the employee ID The following filters are included in the report: • Required filters – OLO Code; Emp ID (PERNR – if more than 31 days Emp ID must be specified); From Date (MM/DD/YYYY format); To Date (MM/DD/YYYY format) • Optional filters – Emp ID (PERNR); Pay Cycle (from – to); Employee Group (from – to); Processing Status (allows agencies to restrict to a specific status, if left blank pulls all statuses; allows from – to selection); Hours Type (allows agencies to restrict to a specific hours type, if left blank pulls all hours types; allows from – to selection) The report includes the following fields that are pulled from various infotypes: • Emp ID (PERNR) • Last Name • First Name • Middle Initial • OLO Code • Org Code • FLAIR Org • Employee Group • Work Week • Pay Cycle • Pos Num (Position Number)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				• Date (MM/DD/YYYY format) • Hours Type • Hours; Status • Approver (Emp ID) • Approval Date (MM/DD/YYYY format) • Project • Activity • Sub Activity When viewed through the portal, this report is sorted in the following order: • Hours Type When viewed as.pdf, this report is sorted in the following order: • Hours Type • Work Date (descending)
18.33	Timesheet Summary Report	Report allows agencies to pull all time worked, leave used and observed holidays for a period of time for an employee. Employees can also pull a report for themselves	There must be timesheet entries on the timesheet for the date range entered	Report includes all time that has at least been saved on the employee's timesheet (includes saved, submitted, approved, rejected and unapproved hours). The date (to – from) in the report is defaulted based on the timesheet period selected in the employee timesheet, but can be updated. Report can be generated back to the start of the employee ID. Report is only available from the employee's timesheet (must select the employee, select Employee Timesheet and then select the Timesheet Summary link) The following filters are included in the report: • Required filters – Date (MM/DD/YYYY format; from - to) • Optional filters –Hours Type (can restrict to a specific hours type, if left blank pulls all hours types; allows from – to selection); Status (can restrict to a specific status, if left blank pulls all status; allows from – to selection)

#	Activity	Description	Dependencies	Uniqueness/Customizations
				Report includes the following fields that are pulled from various infotypes: • OLO Code • FLAIR Org • Position • Project • Activity • Sub Activity • Hours Type • Date (MM/DD/YYYY format) • Hours • Status • Status Text Approver Name • Approval Date (MM/DD/YYYY format) • FMLA (Yes or No) When viewed through the portal, this report is sorted in the following order: • Hours Type • Status • Date When viewed as.pdf, this report is sorted in the following order: • Hours Type • Date
18.33	Training History Report	The Training History Report (training transcript) is a report that can only be processed by the employee; the report captures training courses entered on the employee's training record in People First.	Employee accessing the report must be active as of system date Employee must be in employee groups 1, 2, 4 or 5 to be captured in the report	Access to the Training History Report (Training Transcript) is part of the employee self-service functionality and is only accessible by the employee through the Training tab The report is not available for BENO entities (e.g., university employees, retirees) When the Training History link is selected from the Training tab, the employee's Training Transcript is launched

#	Activity	Description	Dependencies	Uniqueness/Customizations
		Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)		The report includes the following fields: • Course Code - SAP system generated code • Course Description –training course title • Completion Date – date the training course was completed • Supervisor – the supervisor (name) the employee reported to on the completion date of the training course • OLO Code– the agency where the employee was employed when training course was completed • Org Code – the organization code assigned to the employee on the completion date of the training course • Result – the result of the employee completing the training course (i.e., pass, fail, not applicable) • Comment – any notes related to the training course • The training courses captured in the Training Transcript are only the employee's training records (pulled from the Employee Training Entry screen) that are tied to the agency where the employee is employed, at the time the Training History Report is accessed; for this report, training courses are tied to an agency and not a specific employee ID The Training Transcript is presented as a PDF file only that can be saved by the User
18.34	Training Library Report	The Training Library Report identifies all agency and statewide training courses and is accessed in the Reports module of the People First System	User must have security access that allows them to access the report Agency must maintain training data in People First in order to use the report to identify agency training courses	The report includes the following filters: • Required Filters – OLO Code; Begin Date; End Date • Optional Filters – Course Name The report includes the following fields from various SAP info types: • Agency Name • Course Code • Course Name • Begin Date

#	Activity	Description	Dependencies	Uniqueness/Customizations
			Training course must be in the Training Library	• End Date The report is sorted in the following order: • Course Code • Course Name • Begin Date
18.35	Training Summary Report	The Training Summary Report identifies training an employee has taken while employed at the agency, but only for the employee ID entered in the filter, Only employees of employee groups 1, 2, 4 and 5 are included in the report; (i.e., benefits only and non-state workers (i.e. contractors) are excluded)	User must have security access that allows them to access the report .	The report includes the following filters: • Required Filters – OLO Code; Report By; Emp ID (if Employee is selected in Report By filter); Supervisor ID (if Supervisor is selected in Report By filter enter the supervisor's Emp ID); Course (if Course Code is selected in Report By filter) • Optional Filters – Direct Reports check box (if Supervisor is selected in Report By filter); Org Code (from – to); FLAIR Org (from – to); Budget Entity (from – to); FLAIR Account (from – to) The report includes the following fields from various SAP info types: • Org Code • Last Name • First Name • Middle Initial • Emp ID (PERNR); • Supervisor Name • Org Name • Agency • Course Code • Course Name • Completion Date • Result (pass/fail/not applicable) • Comments
Talent Management General Functionality				
19.1	General System Functionality	Functionality that applies to the Performance & Talent Management	None	• Auto-save functionality is set at five minutes. If the manager/employee has not saved after five minutes of inactivity, all data input is saved

		System		• After one hour of inactivity, the employee is logged-off and any unsaved changes are auto-saved. (One hour of inactivity applies to the entire Performance & Talent Management System) • Central ID is used (instead of using agency specific employee ID) for performance management purposes in order for the employee, manager and HR to view a complete performance evaluation history for the employee; using separate employee IDs would result in evaluation history stored for each ID issued and the employee would not have one central location for all evaluation information • Separate logic is in place to determine primary position (based on position's security role code) for performance management purposes when the employee holds more than one salaried (employee groups 1 or 2) position • All system updates are captured in the audit log. The audit log is visible during critical stages within the expectations setting and evaluation processes. Once the performance evaluation is complete, the audit log is only captured in the backend and can only be made available through audit reporting
19.2	Performance and Talent Management Dashboard	The performance and talent management dashboard consists of widgets of easy to access key data as well as data through the main navigation menu	Must be an active employee	• The header section contains the home icon, org chart icon, quick find, primary navigation menu and the Logoff button. Administrators also have access to turn on or turn off configuration access, as well as review their account information (access is limited to administrators) • Home icon always returns the User back to the dashboard no matter where they are in the solution • The org chart displays the User's current reporting relationship in an org chart (tree structure) format that is associated with their assigned organization and allows the User to move up and down the structure. Users have the ability to view each person's profile and if the User's security allows access, the User can view performance expectation and performance

				evaluation information. The reporting structure is based on the position reporting relationships in SAP Organization Management (infotype HRP1001, Object Maintenance)
				• The quick find allows Users to search for employee, applicant, requisition, and position information. Search capabilities are limited based on the User’s security access for recruiting and performance management information
				• The main navigation menu allows Users to quickly access data and includes the following menu options: my dashboard, my team, organization data, performance expectation reports, performance evaluation reports, requisition grids, applicant grids, and bulk printing for evaluations
				• The Dashboard includes the following sections:
				  ○ About me – consists of information related to the User including: profile, performance expectations, and performance evaluations (available to all Users)
				  ○ My Reporting Structure – consists of the User’s current reporting relationship in their assigned organization and allows the User to move up and down the structure. Access is the same as accessing through the org chart (available to all Users)
				  ○ Performance Evaluations – summarizes, depending on the User’s security role what workflow employees are in for the expectation or evaluation process. Views include statewide, all my employees, and my direct reports (available to managers and HR Users)
				  ○ My Tasks – shows the User any tasks requiring action; approvals for recruiting as well as performance related (available to all Users)
				  ○ My Requisitions – summarizes (count) requisitions for which the User is the hiring

				manager for and what status they are in (open, draft, pending, filled, and canceled) for the previous six months. Choosing the summary number in each category takes the User to a list of those requisitions (available to Users that perform recruitment functions) ○ Helpful Websites – related State of Florida websites preloaded by an administrator (available to all Users) ○ Additional widgets are available, but are not currently exposed to Users including: My Applicants (shows summary counts of applicants for job requisitions assigned to the User as the hiring manager); Explore (provides the ability to expose various training materials for the Performance & Talent Management site – not currently used as the state does not use the solution as provided out of the box; Development Activities (not currently being utilized by the state); and Organizational Goals (not currently being utilized by the state)
19.3	Integrations	Key data that is sent from SAP to performance and talent management in order to drive business processes and eliminate the need for Users to reenter data	Employee organization and position data must exist in SAP prior to being sent	Separate SAP programs are used to create and send 12 feeds at various intervals
19.4	Requisition Applicant, Expectation and Performance Grids (used for reporting)	The applicant and performance grids provide key data in one view for Users and also allows them to be used for reporting purposes The standard applicant	Applicants must have applied to a vacancy the User has access to view or maintain Employees must have been initiated into an expectation and/or evaluation plan	• Applicant, Expectation, and Performance Grid columns are standard and assigned by DMS • Expectation and Performance Grids are available directly from the main navigation menu. DMS then determines the standard report grids available during each evaluation cycle simplifying the reporting process for managers and HR Users to help determine expectation and evaluation completion,

		grid is available to the hiring manager, assigned team members and Users with the proper HR authorization. Applicant grids can be customized (e.g., add fields, move sequence of fields and remove fields) and saved by the hiring manager or HR User as their own personal grid Standard performance grids are created and saved by administrators and are used by managers and HR staff to report expectation and performance evaluation information. Expectation and performance grids can be customized (e.g., add fields, move sequence of fields and remove fields) and saved by the manager or HR User as their own personal grid If the applicant, expectation or performance grids are saved by a User, the customized grid is only available to the User that created and saved the grid		evaluation ratings, administratively closed expectations and evaluation, and expectation and evaluation details • Columns can be sorted, rearranged, and marked to indicate completed steps. Filtering features allow Users to sort applicants to better meet their needs. Filtering options include: ○ Starts with ○ Is empty ○ Is not empty ○ Is equal to ○ Is not equal to ○ Contains ○ Does not contain • Setting columns allows Users to add additional columns containing information not on the standard grid • Once the grid is updated, the User can save a custom grid with the updates so that it will not have to be recreated in the future • At any point, the User can download the data to a CSV or Excel format. If more than 500 rows, the report is run in batch processing offline and sent by email to the User to avoid long loading times

Talent Management - Performance Management				
20.1	Setting Performance Expectations Process	The performance expectations process is comprised of three separate stages: • Set Performance Expectations • Employee Acknowledgement • Performance Expectations Setting Completed	Employee must be eligible and initiated in the applicable setting expectations workflow	Set Performance Expectations: • Manager receives a task on their performance and talent management dashboard and an email notification to begin setting performance expectations for each employee in the performance expectations setting workflow. The task remains on the manager’s dashboard until completed and reminder emails are sent at predetermined times (every 15 days) until the task is complete. Selecting the task takes the manager directly to the Performance Expectations form • Individual tasks can be delegated statewide to other Users (no limitation as to security role or agency). Delegation results in the related tasks being assigned to the User receiving delegation access, as well as any future email notifications. Delegation for a task can be assigned for a specific date range or left open • Based on the nightly position integration files from SAP, tasks are reassigned when a manager position is vacated (rolled up based off of reporting structure). Once the vacant manager position is filled, the task is reassigned back to the manager position (following the nightly position integration files run) • Performance expectations can be assigned automatically at a single level (e.g. agency or class code level). When done, these performance expectations are cascaded to the performance expectation form for each employee meeting the cascade criteria and cannot be edited during either the performance expectations setting or performance evaluation workflows • Managers have the ability to set job-specific performance expectations for their direct reports. Fields presented when creating job-specific performance expectations include: performance expectation type, performance expectation title, and performance expectation description

				• Performance expectations can be saved and the manager can return at a later time. The performance expectation setting process includes formatting features such as spell check, font size/style. All fields are required and if the form is attempted to be sent without all required fields completed, the manager receives an error message and must complete the fields prior to sending the performance expectations to the employee • An audit log of changes is stored in the backend, but can be viewed on the form, including if completed by someone with delegation access or by the second-level or higher manager • Manager can copy job-specific performance expectations from a previous evaluation workflow to an open performance evaluation plan for each employee • Once the manager sends the performance expectations to the employee, the performance expectations are systematically moved to the Employee Acknowledgement stage Employee Acknowledgement: • Once performance expectations are sent to the employee, the employee receives a task and email to acknowledge receipt of their performance expectations. The task remains on the employee's performance and talent management dashboard until completed and reminder emails are sent at predetermined times (every 15 days) until the Employee Acknowledgement step is completed. Selecting the task takes the employee directly to the performance expectation form • The employee has no update capabilities to the performance expectations provided to them, and can only acknowledge receipt by marking the acknowledgement box, entering an acknowledgment date and selected the Acknowledge Performance

				Expectations button. If the employee is unable to acknowledge (e.g., employee does not have computer access), the manager can do so on their behalf. Doing so forces the manager to add comments as to why they are acknowledging on behalf of the employee • All fields are required and if the form is attempted to be sent without being completed, the employee/manager receives an error message and must complete the fields prior to acknowledging the performance expectations • Once the employee or manager on behalf of the employee acknowledges, the performance expectations are systematically moved to the Performance Expectations Setting Completed stage • If job-specific performance expectations require modification, the manager can select to move the performance expectations back to the Set Performance Expectations step (manager can only move back if the performance expectations have not been acknowledged). If this is done, the manager will receive the task to set performance expectations for the employee. The manager then makes the necessary updates and sends the performance expectations back to the employee for acknowledgement, re-triggering the task and email notifications to the employee • An audit log of changes is stored in the backend but cannot be viewed on the form, including if completed by employee, someone with delegation access, the manager or by the second-level or higher manager Performance Expectations Setting Completed: • Once the employee acknowledges receipt, the performance expectations are systematically moved to the completed stage • The employee and manager retain access to view the performance expectations setting form. Employees retain access to the performance expectations on their

				performance and talent management dashboard • Once in the completed stage, all fields on the completed performance expectations form are view only. If any updates are required once the performance expectations have been acknowledged, a request must be made to the service center to reopen the process back to the Set Performance Expectations stage. If this is done, the employee is removed from the performance evaluation process The performance expectation setting form is printable in all stages
20.2	Performance Evaluation Process	The performance evaluation is comprised of five separate stages: • Performance Evaluation (monitoring performance throughout the evaluation period/evaluating the employee) • Second Level Review • Ready for Employee Acknowledgment • Employee Acknowledgement • Performance Evaluation Completed	Performance expectations must have been previously acknowledged and the employee must be initiated in the performance evaluation process (manual process completed daily by the service center) Employee must be eligible and initiated in the applicable evaluation workflow	Employees are initiated into the performance evaluation workflow once the performance expectations have moved to the Performance Expectations Setting Completed stage. The initiation into the final evaluation workflow is a manual process the service center manages daily by running reports of employees who acknowledged receipt of their expectations from the previous day Performance Evaluation Stage: • Once the employee is initiated into the Performance Evaluation stage, the manager receives an email notification and task to monitor and evaluate performance • The task remains on the manager’s performance and talent management dashboard until the performance evaluation is sent to the Second-Level Review stage. Selecting the task takes the manager directly to the evaluation form • Quarterly email reminders to monitor performance are sent manually by the service center, to the manager • System generated email reminders are sent at predetermined (30 days) periods prior to the end of the evaluation period and every 15 days after the evaluation due date, until the performance evaluation is completed • Based on the nightly position integration files from

				SAP, tasks are reassigned when a manager position is vacated (rolled up based off of reporting structure). Once the vacant manager position is filled, the task is reassigned back to the manager position (following the nightly integration file run) • Individual tasks can be delegated statewide to other Users (no limitation as to security role or agency). Delegation results in the related tasks being assigned to the User receiving delegation access, as well as any future email notifications. Delegation for a task can be assigned for a specific date range or left open • Once in the Performance Evaluation stage, access is no longer available to update the performance expectation title or performance expectation description. This is only done in the Performance Expectations process • Each performance expectation now contains a manager notepad field for each performance expectation designed for the manager to track employee performance during the evaluation period. This field is configured to only be visible during the Performance Evaluation stage. This field is not required. Audit log of changes is stored and can be viewed on the form as well as in the audit history. Only the manager, second-level and above managers have access to view the notepad information • Each performance expectation contains a performance expectation rating field. This field allows the manager to score each individual expectation with a score of 1 through 5 or N. This field is required. Audit log is stored and can be viewed on the form as well as in audit history. After each selection of an individual score, the system performs an auto-save (for the score, does not wait five minutes to auto save) • Each performance expectation contains a comments field where final comments can be entered for each performance expectation. Edits are in place to require comments for each performance expectation that is

				scored with a rating other than 3 (including rating of N). The performance evaluation cannot move past the Performance Evaluation step until all performance expectations have comments for scores other than a 3. If attempted, the User is prompted with an error message. Comments fields are visible for the entire performance evaluation process. Audit log of changes is stored and can be viewed on the form as well as in the audit history • The final performance evaluation score is automatically computed based off of the average of all performance expectations; must be truncated at the second decimal place with no rounding. Ratings of N (Not Applicable) for individual performance expectations are not factored into the final rating • Managers can attach supporting documentation to the performance evaluation form using standard document types (e.g. PDF, Word, Excel, PowerPoint, etc.) Each file can be up to five megabytes with no total size limit and no attachment limit. Attachments can be added during each evaluation stage with the exception of the Performance Employee Acknowledgement and Performance Evaluation Completed stages • Manager Overall Comments allow the manager to add additional overall comments related to the employee's performance. This field is not required • Managers maintain access to update and save data until the performance evaluation is sent to the Second-Level Review stage. The second-level manager and above have access to act upon behalf of the manager and update the performance evaluation form but does not have the ability to send the performance evaluation to the Second-Level Review stage • An audit log of changes is stored in the backend and can be viewed on the form, including if completed by someone delegated access or by the second-level or

				higher manager Second-Level Review Stage: • Once the manager completes the Performance Evaluation stage, the performance evaluation is systematically sent to the Second-Level Review stage. The second level review is assigned based off of employee's reporting structure. The second-level manager receives an email notification and task to begin the Second-Level Review process • The task remains on the second-level manager's performance and talent management dashboard until the stage is completed by the second-level manager. Reminder email notifications are sent at predetermined intervals (every 15 days) until completion • Based on the nightly position integration files from SAP, tasks are reassigned when a manager or second-level manager position is vacated (rolled up based off of reporting structure). Once the vacant position is filled, the task is reassigned back (following the nightly integration file run) • Individual tasks can be delegated statewide to other Users (no limitation as to security role or agency). Delegation results in a task being assigned as well as any future email notifications. Delegation for a task can be assigned for a specific date range or left open • The second-level manager has no access to update previous information entered during the performance evaluation stage. The only field the second-level manager can update is the second-level comments field • During this stage, the manager retains access to make updates to the performance expectation scores, performance expectation comments, manager's notepad and overall comments • An audit log of changes is stored in the backend, but cannot be viewed on the performance evaluation form

				Ready For Employee Acknowledgement: • Once the second-level review is completed, the performance evaluation is systematically moved back to the manager (to the "Ready for Employee Acknowledgement" stage). The manager receives an email notification and task to conduct the performance evaluation with the employee • At this point, the manager determines when the performance evaluation is sent to the employee. No edits can be made to the performance evaluation at this point • The task remains on the manager's performance and talent management dashboard until the performance evaluation is sent to the Employee acknowledgement stage and reminder email notifications are sent every 15 days until completion • Based on the nightly positions integrations file from SAP, tasks are reassigned when a manager position is vacated (rolled up based off of reporting structure). Once the vacant manager position is filled, the task is reassigned back to the manager (following the nightly integration file run) • Individual tasks can be delegated statewide to other Users (no limitation as to security role or agency). Delegation results in a task being assigned as well as any future email notifications. Delegation for a task can be assigned for a specific date range or left open Employee Acknowledgement: • Once the performance evaluation is sent to the employee, it moves to the Employee Acknowledgement stage. This stage provides access to the employee to review and acknowledge their performance evaluation • The employee receives an email notification and task to acknowledge receipt of their performance evaluation

				• The task remains on the employee’s performance and talent management dashboard until the performance evaluation is acknowledged and reminder email notifications are sent at predetermined interval (every 15 days) until complete. This task cannot be delegated • The employee can now view all of the performance evaluation information previously entered by the manager and second-level manager with the exception of the manager’s notepad information • No edits can be made to the performance evaluation information previously input by the manager or second-level manager • The employee has no update capabilities to information previously entered on the performance evaluation form and can only acknowledge receipt by marking the acknowledgement box and entering an acknowledgment date. If the employee is unable to acknowledge, the manager can do so on their behalf. Doing so forces the manager to add comments as to why they are acknowledging on behalf of the employee • The employee (and only the employee) can add comments in the employee comments section prior to acknowledging the performance evaluation. This field is not required • All required fields must be completed prior to acknowledgment. If the performance evaluation is acknowledged without any of the required fields completed, the employee/manager receives an error message and must complete the fields prior to acknowledging the performance evaluation • Once the employee/manager acknowledges receipt, the performance evaluation moves to the Performance Evaluations Completed state • An audit log of changes is kept in the backend but cannot be viewed on the form, including if completed by someone delegated access or by the second-level

				or higher manager Performance Completed Evaluation Stage**:** • The employee retains access to view the completed evaluation form on their performance and talent management dashboard • Once the performance evaluation is moved to a completed stage, all fields on the form are locked down and can no longer be updated through position integration files (e.g. position title, manager, position number, agency, etc.) • Once in a completed stage, all fields on the performance evaluation form are view only. If the performance evaluation needs to be returned to previous stage, a request must be made to the service center The performance evaluation form is printable during all stages
20.3	Bulk Print Evaluation Information	Process where a group of performance evaluations can be selected and printed in a single PDF document	Employees must be initiated in a Performance Evaluation plan and be in the Performance Evaluation Completed stage	• Using BIRT technology, bulk printing of performance evaluations is possible. Through a print wizard, the User determines the performance evaluations by selecting the plan year, agency or other data using the grid filtering functions • Once the data is determined, the User can then bulk print one PDF file for all selected employees
20.4	Security	Security is determined by the User’s security role in People First. Administrator roles are assigned individually	User must be active in People First. Security is assigned based off of the User’s security role code in People First	Security access to performance expectations and evaluations ("in progress" and "completed") includes: • HR has access to all performance evaluations regardless of the evaluation status ("in progress" or "completed") for all active employees statewide • Manager has access to all evaluations for all employees that currently report to the manager and all employees that report up to the manager in their chain of command • Employees have access to all performance evaluations completed for them, regardless of the agency the evaluation was completed at and regardless of where the employee currently works

Talent Management - Recruitment				
21.1	Filter/Navigation from People First Log In Page	Ability to load a pre-filtered list of requisitions using deep-linking hyperlinks (into the requisitions that is searchable content used to return specific requisitions based on the Users selection of either a region or county) from the People First Log In page	None, applicants are not required to be logged in to perform a search. Login is only necessary when making updates to the applicant profile or when applying to a vacancy	Using the deep-links from the People First Log In page, applicants can view requisitions pre-filtered by selecting from a dropdown listing containing all counties within Florida or by selecting a region from the State of Florida map (selectable list of regions is also presented below the map for 508 compliance)
21.2	Applicant Landing Page	The applicant website allows applicants to log in to an existing account, create an account and to search for open vacancies (covered below). Requisitions (vacancies) are grouped by category (category is assigned by the hiring manger when creating the requisition)	Login is only necessary when making updates to the applicant profile or when applying to a vacancy	If login is selected from the People First Log In page, the applicant is taken to the applicant landing page where they can log in to a previously established account or create a new account • A password reset option is also available • Each applicant account requires a unique email address • Password is case sensitive • If password changes are made, applicant is sent a notification email to the applicant's login email address The applicant landing page also includes search links (covered below) and a link to view the FAQ associated with applying to vacancies
21.3	Search Features	The applicant website includes the ability for applicants to perform searches to narrow down the job requisitions to only the ones they are potentially interested in	None, applicants are not required to be logged in to perform a search	Ability for applicants to search and locate requisitions easily including having a simple and advanced search or combination of both. Applicants can filter requisitions by different search parameters as detailed below Search features include both a simple and advanced search capability Simple search includes: • Key Words • Occupation • Category

				• Region/County Advanced search includes simple search as well as: • Job Type • Years of Experience • Percent of Travel • Education • Agency Search capabilities include a search hints feature that when selected details search functionality for using additional search features If the applicant is not logged in when accessing a requisition and selects “begin application process”, they are forced to login or create an applicant account before continuing. If the applicant does not remember their password, they can use the “forgot your password” functionality. After entering their email address, the applicant will receive an email of what their temporary password is
21.4	Applicant Home Page Features	Applicant Home Page is the landing page for applicants once they either log in to their applicant account or create a new account. This page allows the applicant to navigate to other key areas, including to vacancies matching their preferences, prior submissions, pending submissions, their applicant profile and either create or update their State of Florida Application	Applicant account must have been previously created and applicant must be logged in	Once logged in, the applicant has several options including: • View vacancies matching the applicant’s profile – displays requisitions matching the applicant’s previously set matching criteria • View applicant submissions – displays requisitions the applicant previously applied to including being able to view the job posting details and the application the applicant submitted • View draft submissions – displays requisitions that were saved as draft and allows applicant to finish submission of requisitions that are still open • Search and apply – allows applicant to find requisitions currently being advertised • Maintain applicant profile and notification preferences – allows the applicant to select job search categories with option of being notified once a requisition is posted. When making selection notification

				preferences, applicant has the ability to specify plain text or html format for emails as well as the frequency of email alerts • Maintain login preferences – allows the applicant to update their email, password and password recovery question/answer • Maintain Master Online Job Application Form – allows the applicant to update their State of Florida Employment Application without applying to a vacancy • Maintain Files – allows the applicant to manage documents and files that can be attached during the submission process
21.5	Application Process	Process by which applicants apply for vacancies allowing them to submit their State of Florida Employment Application, answer qualifying questions, and submit supporting documentation	Applicant account must have been previously created and applicant must be logged in or the applicant must create an account to apply. Applicant must then select a requisition to apply to	During the process of applying, applicants are taken through a predefined process consisting of multiple steps that must be completed within a predetermined time period for each section: • Step One: Survey question(s) – multiple choice questions inquiring of where applicant learned of vacancy. Screen is required and is designed to capture any necessary additional information (30 minute time limit) • Step Two: Qualifying Questions – applicant must answer each question. If the hiring manager elects to not have qualifying questions, this step is not presented to the applicant (90 minute time limit) • Step Three: EEO/Layoff/Veterans' Preference – layoff and veteran questions are required (30 minute time limit) ○ The EEO section consists of an information section with standard language as well as data used for applicant EEO reporting using the following fields; race, ethnicity, date of birth and gender ○ The CS Right to First Interview consists of an information section that explains when an employee is eligible to claim layoff status and a question to self-identify eligibility (Yes or N/A answer)

				◦ The Veterans' Preference section consists of both an information section that explains veteran categories and eligibility as well as questions directed at determining those applicants claiming veterans' preference • Step Four: Attachments – applicant can select any previously saved attachments, as well as add new attachments; attachments must be selected for each requisition the applicant wishes to include when submitting to the vacancy. Once the applicant completes the attachments step, they are no longer able to attach anything electronically to that vacancy submission. (30 minute time limit) • Step Five: State of Florida Employment Application – the state does not use the standard resume builder/parsing functionality. If previously created, the saved application is presented. At this point, the applicant can make updates or save the submission to draft (only application can be updated after saving draft), or complete submission. Application contains several required fields. Additional detail below in the State of Florida Employment Application section. (90 minute time limit that restarts each time the applicant selects save) Applicant has the ability to save a draft submission once they have completed Step 4. After saving a draft, the applicant can return and finish the submission with the ability to complete Step 5 only Applicants are notified of a successful application submission by email directly after applying. Also, applicants do not have the option to apply to a vacancy they have previously applied to. Instead of seeing apply, the button tells the applicant they have already applied to the vacancy Currently, the State of Florida does not allow applicants to withdraw their application from consideration

21.6	Attachments	The attachments feature gives the applicant the ability to attach documents to their profile that can be used during their applicant submission to a vacancy	Applicant account must have been previously created and applicant must be logged in	• Attachments can be saved by specific category: resume, veterans' preference, cover letter, references, State Personnel System layoff letter, and other • Standard formats include: Word, Excel, PDF, PowerPoint, HTML, Text, and WordPerfect • Each file is given a specific name assigned by the applicant
21.7	State of Florida Employment Application	The State of Florida Employment Application is a custom process developed in a 508 compliant HTML coding format to match the standard PDF version used by all state agencies	Applicant account must have been previously created and applicant must be logged in or applicant must be in process of creating account	Information is displayed using a breadcrumb format which is converted to a standard PDF form once the applicant applies to a vacancy (unique PDF form per vacancy) or elects to print the form. Information on the application form includes: • About Applicant – includes required fields: name, address, phone number, exemption from public record disclosure, citizenship, relatives working in agency, selective service system registration and background (criminal) information. Optional fields include: People First ID, US county or foreign country and alternate phone number. Email address is pre-populated based off of login information • Education and Certification – fields are not required unless a record is being added. Fields include: high school name and diploma received, college/university or professional school, course of study, degree earned, semester/quarter credit hours and dates of attendance. College/university or professional school allows up to seven entries • Job Related Training or Course Work – fields are not required unless a record is being added. Fields include: name of school, location, start and end date, class and credit hours clock, course of study and completion status. Job related training or course work allows up to 15 entries • Licensure, Registration and Certification – fields are not required unless a record is being added. Fields include: license registration or certification name, number, state licensing agency, date received, and expiration date. Licensure, Registration and Certification allows up to seven entries.

				• Knowledge Skills and Abilities – free-form field with maximum of 35 lines • Experience – fields are not required unless a record is being added. Fields include: name of employer, address, job title, supervisor name, phone, start and end date and hours per week, duties and responsibilities (maximum of 17 lines), reason for leaving, name (if different during employment). Experience allows up to 20 entries with ability to insert and reorder entries • Signature – certifies all information on the application is correct and requires signature (login password) with each application submission The application allows for standard formatting such as copy and paste, save, and preview (preview is presented in PDF format)
21.8	Hiring Manager Opening a Requisition	The process of requesting a requisition to be opened from the People First portal	Must have proper security role code	• Managers, requisition managers and HR Users open requisitions in SAP using infotype PA1007 (Position Vacancy). An interface file runs every 15 minutes to create the draft requisition in the Performance and Talent Management module. At this point, the draft requisition can be modified • Hiring managers can request to open requisitions directly in the Talent Management solution by making a request to the service center. When opening a requisition directly in Talent Management, the service center enters the necessary job code information
21.9	Updating a Draft Requisition	Once the requisition has been opened in a draft status, the hiring manager updates the information prior to posting the requisition	The requisition must be in draft status and the User must be the assigned hiring manager, an assigned team member, an assigned approver or have an appropriate HR security role code	Once the requisition is opened in draft status, information is populated based off of interfaces from SAP Organization Management Prior to submitting the draft requisition for approval, updates are made to each tab within the requisition. As the requisition moves through the different statuses (draft, pending, open and filled), the status is updated and indicated at the tops of the requisition. Requisition tabs consist of: • Details – includes required fields: requisition title, fill

				type, status, number of openings and announcement type. Pre-populated and not editable fields include: agency, requisition status and the requisition status history fields ◦ All required fields must be completed prior to saving the requisition. If changes are made, but not saved, the User is presented with a message asking if changes should be saved • Position – includes required fields: salary (defaulted based on the pay band or pay grade range), city, position type. Fields that are pre-populated and not editable through direct entry include: position number, position title, job code, organization code and organization name ◦ All required fields must be completed prior to the page being saved. If changes are made, but not saved, User is presented with a message asking if changes should be saved ◦ If the position is pending reclassification, HR Users must update the position and are not able to update the position tab within a requisition • Team – includes the following fields: notates the hiring manager (HR has access to update only), the staffing specialist (not editable) assigned to assist with posting the requisition, and shows any team members who can access the requisition (editable) • Activities – shows the workflow of activities completed by the service center, examples include: ◦ When the initial contact was made to the hiring manger ◦ When the draft was sent for approval ◦ When approvals were complete and the requisition was posted ◦ When the requisition was closed and the final service center functions were completed • Approval Process – Allows for multiple levels of approvers. All approvals set in the first level must be completed prior to moving to the second level of

				approvers. Multiple approvers can be set in each level. All approvals must be complete prior to the vacancy being posted. Approvers can be overridden by HR Users or reassigned as needed. Automatic approvers can be assigned at the organization level but can be updated by the hiring manager as needed • Applicants – applicant grid allows Users to view and print all applicant information and make notations on applicants (additional information below). The applicants tab is only available after the requisition is moved to open status • Posting Information – where key information that is populated to the applicant site is updated (additional information below): • Notes – where notes, attachments, and emails are kept concerning key actives by the hiring manger and service center staff. Examples include: o Correspondence o Veterans' Preference verification o Completion notes When posting the requisition, options are available (not currently being utilized by the state) to post the advertisement internally or to post the advertisement to external sources Requisitions support at least 20,000 applicants and can be advertised continuously notating multiple hired applicants in separate intervals
21.10	Bulk Activities	Bulk Activities are designed to assist hiring managers with completing tasks associated with applicants	Applicants must have applied to a requisition	After selecting applicants, bulk activities and actions can be performed such as email (allows agencies to contact applicants for notification of additional steps such as supplemental application), disposition, bulk printing (includes all applicant data; qualifying questions, application, attachments and profile information), as well as selecting completed task such as notating printed applicants, background screening, drug screening, and reference check completion

				Applicants can be moved to different stages for easy viewing. Summaries are easily seen by showing the total number in each stage. Stages include: • Evaluation • Interview • Offer • Hire Dispositioning of applicants takes place from the applicant grid and can be done as a bulk action. Once dispositioned, an email is sent to the applicant. The Email notification template for dispositioning applicants is pre-established and cannot be updated by the hiring manager
21.11	Posting Description	The posting description contains position vacancy information that applicants view when applying	Requisition must have been previously opened	Posting Description includes key information that is populated to the applicant site: • Posting and closing dates • Title • Synopsis – includes the title, position number and city location for the vacancy • Posting Description – initially consists of description based off of job information stored in SAP but can be updated to meet the agency's need; field is HTML based and can contain formatting and links to external sites; description is the posting details for the vacancy • Additional Posting Details - consists of position data (previously established from required fields in position tab) as well as other links to outside sites such as a link to E-verify • Qualifying questions (additional information below) • Job posting preview (additional information below) • Matching criteria (additional information below) All required fields must be completed prior to the page being completed. If changes are made, but not saved, User is presented with a message asking if changes should be saved
21.12	Qualifying Questions	Pre-screening tool that allows the hiring	Requisition must have been opened and in a draft status	• Qualifying questions can be created in multiple formats including:

		manager to create questions applicants must respond to during the application process	to create qualifying questions	- Yes/No - True/False - Multiple Choice - Free Text (must contain specific words) - Comment - Number - Number Range • Questions can be created as screen-out or screen-in and can be assigned weights. If questions are screen-out and answers provided by applicants do not match the required answer, the applicant is dispositioned and is shown as dispositioned due to pre-screening on the applicant grid • Qualifying questions can be stored in a library format where Users can choose when creating the requisition. Options are available to restrict who can add questions to the library as well to restrict Users from being able to add a question to the requisition from the library
21.13	Job Posting Preview	Allows the User to view the advertisement as it would appear on the web, prior to posting the actual requisition	Requisition must have been opened.	Allows the hiring manger to view the advertisement as it would appear on the web, prior to posting the actual requisition
21.14	Requisition/Applicant Matching Criteria	Updates made by the hiring manager/recruiter that allows applicants to be notified of vacancies they are interested in as well when searching for vacancies	Requisition must have been opened	Matching criteria includes the following fields: • Job category (required) • Agency (required) • Certification • City • Salary • Occupation (required) • Education • Job type • Region/County • Years of Experience • Percent of Travel
21.15	Applicant Site Stats	Monthly report created	Applicant accounts must be	Allows the agency to monitor applicant activity and report on a

	Report	by applicant vendor that presents the following numbers on a monthly basis: • New Applicants • Number of Job Submissions • Vacancies Posted • Number of Jobs Viewed Totals are maintained by year on the report. A history of the entire year is presented with previous yearly totals as well	created. Applicants must apply to vacancies. Vacancies must be posted. Applicants must view vacancies.	monthly basis
21.16	Job Requisition Purge Process (Records Retention)	Process is used to delete requisitions and all related details for all requisitions that are older than four years (State of Florida record retention schedule for job postings)	No lawsuit must have been filed for the associated requisition or by an associated applicant	Process is a custom process that permanently deletes all requisitions that are at least four years old. The process includes an exclusion process that allows requisitions and/or selected applicant data to be retained if needed due to litigation. Process is executed once per calendar year
21.17	Interfaces	Interfacing capabilities allows data to be sent to outside sites where it can be hosted	A relationship must be established from vendor to intended host	This allows applicants to view requisitions outside of People First, but a link takes them to the People First site when applying. Current interfaces occur on a nightly basis with the Employ Florida website as well as on an hourly basis to the Department of Agriculture and Consumer Services' agency website. Files are sent using a standard FTP process
21.18	Security	Security is defined by each User's security role in SAP and is fed to talent management nightly	Security is determined by the User's security role in SAP	Security access to recruiting data: • HR has access to all requisitions within their assigned agency • Manager has access to create requisitions for any position in their reporting structure • Once a requisition is open, any role outside of an employee role can be added as a "team member"

				giving the User complete update access to the requisition and its associated applicants • Administrator access allows statewide update access to all requisitions
21.19	Applicant and Requisition Reporting	Reporting captured from applicant and requisition grids	Requisition must be opened for requisition reporting and applicants must have applied for applicant reporting	Requisition and applicant reporting captures: • Data based off of authorization access • Ability to download into different formats such as CSV and Excel • Ability to filter, add, and sort data • Capture and report applicant EEO data based on federal guidelines/requirements