HCM PUM Delta User Group Webinar-20241114_165717-Meeting Recording

November 14, 2024, 3:06PM

1h 50m 43s

Braga, Donna 0:25

Good morning. And we still have people showing up furiously.
Hey, good morning, everyone.
Welcome to the user group. We still have a flurry of folks. I'm going get another minute because there's too much knocking at the door.
Remind me to turn off the notification for the next meeting.
I think we're ready to get started.
Good morning, everybody.
Welcome to the core CTHCM Pum Delta user group meeting.
So we all know.
Core CTHCM is our group for HR users and CRM users, customer relationship management and POM stands for PeopleSoft upgrade management.
So this is a PeopleSoft upgrade.
Delta is the changes that you're going to see.
So our HCM Pum Delta user group today.
Welcome. My name is Donna Braga.
I'm the ERP business team lead, so I have the pleasure of working with the wonderful core CT business analyst that help you on a daily basis with your with your tax, with your tech questions and your issues for core next slide.
So actually, can we go to the accessibility slide, next slide?
Right. So before we get started, I did want to share with you a couple of changes.
This is a webinar so the format might be a little bit different for question and answer we have a question and answer feature that has been turned on for this meeting. So if you look at the ribbon across the top of your screen you should see AQ and.
A and if you click on that it will give you a little chat on the side and that's where you'll be able to answer.
Ask your questions and see your answers and we'll be using that during the meeting.
The other thing that I did want to point out is that if you do want closed for those that do need closed captioning, accessibility capability is available on the webinar, but you have to turn it on for yourself and the way that you would do that would be.

To use the ellipsis, the more button click on settings accessibility.
And I'm going to slow down in case you need to do this and then turn on the captions and that will turn on closed captioning for you, not necessarily for the whole meeting, but for people that need it for our meeting.
Shannon, someone said they clicked on Q&A and it was not available.
So if you just want, somebody wants to check on that. In the meantime, I'm going to get started.
So this meeting is scheduled for about two hours.
We do have time built in for questions.
There will be a question section at the end of each module.
There's AQ and A should be enabled. The frequently asked questions. The slide deck for this meeting recording and the transcript will all be posted to the modernization page.
So you'll have access to all of that stuff, all right.
The agenda that we have today is a a jam packed agenda.
I'm going to go over a few reminders and then we're going to hear about benefits from Rachel all tonight.
We're going to hear about changes and what's new in human resources from Rosemary Johnson, time and labor. Sean Anderson will be presenting that everybody's favorite payroll.
Lynn Bussa will be presenting that, and then you're going to hear about Security Co 1092 and other security information from Pradeep Padhenhar.
And Tracy, I'm sorry, Tracy Douglas.
And then you're going to hear about any updates we have from epm and stars and some help desk information from Shannon Reuter. And then at the end, this is specific to pension group retirement services division and Teachers Retirement Board.
Ralph Minettello will be presenting some changes for them and then we'll have the final questions in closing.
All right.
Next slide. So I'm just going to start out by saying, you know, this is a huge change for those of you that have helped us.
With user acceptance testing, I thank you very much and you had a glimpse into the big change that we're going to have. And when I say big change our business processes and the core way that we do business for the state, that is not what's

changing it.
The user interface for the most part that you're going to see.
In just the look and feel of core and how you're going to navigate to some of these different pages, that's really what's changing here with this upgrade and it allows us to be more flexible.
To be more up to date with the software and to start to be able to offer.
More functionality and in trying to find ways to make things more easy and to help you with self-service et cetera.
So one of the other things that I do I want to point out some of the ways that we have been working with you and your agencies and I want to send a special shout out and a thank you. Each agency has one or two or sometimes more.
Change agents and these are folks that work at your agency.
And they've been assigned to disseminate information regarding the modernization project and this pump upgrade.
So please, if you get emails from someone as your change agent looking for information such as have you attended training?
Have you reviewed training and those kind of communications?
Please be kind and respond to them because they are responsible for assessing the readiness of your agency for this upgrade, and they're going to be reporting back to us.
So we really appreciate you working with your change agents.
A lot.
The other thing that we've done for this particular upgrade is we've put out the core CT modernization page on the core CT website.
So I hope that you have had a chance to visit that and if you haven't, please mark it on your favorites because. It's going to be your pal during the first couple weeks or month of this upgrade to core and on that modernization page you will see there.
Registration for we have a couple more training classes that are instructor led.
But you'll see recordings for all of the training classes that we have had that are instructor led. There's a couple more user groups.
There will be one more of this HCM if they're, if you have colleagues who couldn't make it and they can register for those along with any other meeting schedules we have and for all the meetings that we have, we are putting out the slide decks, the recordings and.
The transcripts? Yes, this one will be posted.

And FA QS, if we have them, just be patient.
It takes a little while because these recordings are huge, so we have to get them.
Put on to a bit server before we can put them out there for you.
So, but they will be put out OK.
The other thing that you're going notice on that modernization page is a link to a new training and support page.
For now, it's new.
It's the training for core CT after the Palm upgrade.
So it doesn't apply exactly today, but it will after we go live and on that training and support page, there's links for every module.
Don't forget to check cross module because that is something.
Or infographics and things that apply to everyone.
And all modules.
But we have infographics.
These are one page Cheat Sheets that you can use to keep handy.
We have updated the job aids.
For the new screens and core there are e-learning videos and for those of you like myself who are short on patients or short on time, those e-learning videos are pretty short. We kept them to like 10 or 15 minutes. All right.
So they're very modularized and very short for you.
And we will have the materials from instructor led training as well posted there again, recordings and slide decks for people that can't make it. And the other thing is it'll also be a good place for you if you have staff who are changing duties or new staff.
You know these things will be helpful as well.
Right now it's a new support page because we haven't gone live yet, but eventually it's going to become our production support page after we go live.
So with that being said, we will wrap up a little bit later, but we have a very full agenda. We are going to start out with benefits and I am going to hand it over to Rachel Altinay.

AR **Altinay, Rachel** 9:35
Thank you.

Braga, Donna 9:35
Benefits lead. Thanks.

AR **Altinay, Rachel** 9:38

Thank you, Donna.
Hi, my name is Rachel Altinay and I am the benefits lead acting benefits lead for core CT and today I will be reviewing the fluid E benefits pages as well as the agency.
Pages for document upload and then I will go into open enrollment pages.
So let's start with the E benefits life event pages.
So with the E benefit life events pages, once you log into PeopleSoft, a role based home page will appear. The new fluid pages have icons and tiles that will help you understand how to interact with the system. And as you can see from the slide, there are several.
Icons that you would have to get familiar with and some of them being homepage list the tiles icon the home page scroll.
The notifications icon.
There's a home button, an action list. So all of these new icons will be introduced with the fluid pages. The tiles on the page are security role based and you only have to ask.
You only have access to the tiles.
If you are authorized to have access.
Yes.
There is also the fluid navigation bar which is used to access additional navigational options. The NAV bar icon displays all menus you have to access to the recently visit icon is a list listing recent pages you visited.
There is a favorites icon which is a listing of saved pages you frequently visit.
And then there is the menu icon, which is another listing of pages you can navigate through PeopleSoft.
For the fluid employee self-service and even if it's the goal here is to view benefit information using the fluid interface as well as manage life events that affect benefits and coverage and fluid interface.
There are key changes with the fluid E benefits.
It's to improve the look and feel of E benefits as well as the feature of uploading documents.
Which must be associated with a life event.
So here is the page for the fluid employee self-service.
The employee self-service home page tile you would click on click on the employee

self-service.
The E benefits life event tile is on the home page and can be selected from this particular tile. So once you click on the tile you will then be brought to the benefits detail tile which is next.
Once you get click on the benefit details tile.
This is the beginning of creating AE benefits life event, so you select the benefit tile to access your benefit homepage.
The next tile that you will come to will be the life events tile. This is how you start the beginning of creating an E benefits life event.
Select A life event tiles to start your life event.
Then the life event page will appear and here you will see to the left of the life event page you have what's called steps to your life event.
So the first step would be your benefit summary to look at your current benefit elections.
But the life of it step is the one that you would.
Start your actual life event and so on this page you will see there are benefit and adoption, marriage, divorce, loss of dependent coverage, loss of coverage and you just select the one that you would like to create a life event for.
Once you select the radio button for the life event, you enter the date of the life event and you click the start life of it event button.
It wouldn't take you to the birth event in this in this example and you will be brought to a welcome to the birth event page and again to the left of the pages.
These are called steps, fluid steps activity guide steps for you to follow and so you would click on each step in order to complete the.
The event.
So they welcome page and then if you click the next button.
We go to the benefits summary page.
The benefits summary page will give you an outline of your current benefits and what you're you are enrolled in.
As you can see, there is medical, dental, prescription help, Standard Life. But these are only view only pages.
You will not be able to make any benefit elections via this page. Is just a benefit summary to give an outline of your current benefits.
Then you click next.
They will take you to the dependent beneficiary information page.

Here is a listing of all your beneficiaries and.
Their information, which will display for you based on what you have entered into the system for relationship, if they're beneficiary, or if they are dependent, you click next and they will take you to the benefits enrollment page and hit. This is the page in which you start your.
Actual life of an enrollment.
So in the blue box there where it says start my enrollment.
You would click on that.
And click next.
And it will take you to the enrollment benefits enrollment process pages.
And so there were enrollment summary.
And the boxes there are medical and dental that you can see if you click on those boxes, you will then be able to start your.
Life event changes. Changing your medical plans, changing your dental plan and then the benefit enrollment information is there will give you information on the.
Enrollment summary display which gives you the benefit options and the information about how to go about your benefit enrollment.
Click next.
As part of the benefit enrollment process, there is the document upload process and again this is a activity guide step that will follow the benefit enrollment. And so the documents can only be uploaded using the fluid navigation Path, employee self-service benefits, live events or employee self.
Service benefits, enrollment and so once you attach your dependence documents.
On this page.
Click next.
OK, sorry. Once you click your upload your documents on that page then you will be able to see those attached documents and verify that they have been uploaded correctly.
So for the agency specialists, there is a new process and fluid employee self-service and this document upload for agency specialist. The navigation will be workforce administration.
So if you click on the tile to review document upload workforce administrator.
We'll be able to upload.
Individual documents for employees. Click next.
It would then take you to the review benefits attachment tile and here the

documents are available.
For this tile for employees.
To for you, for the agency specialist to upload the documents for employees and click next.
Why don't you click on the review benefits attachment tile?
You will enter the employees info ID and then it will display for you the select employees and you select the employee in which you would like to review benefits attachment for and they will.
Bring the document information up for that employee. Click next.
And the page will look like this.
It's page of listing of all document uploads for a specific employee.
So what you can see on line one where the information says that the event status was complete.
So for that particular event, the life event for divorce, the document was uploaded successfully. However, on the second line, if you.
Do not upload the document correctly. It will give you a warning.
Icon and it'll tell you attachment missing. But you can always go back and click on that attachment missing.
Icon and you can reload the document for the employee. So the first one is to show you that it's complete and then the second line is to show you that the attachment is missing.
And you would have to go back and upload it for the employee next.
OK. Also through fluid employee self-service.
There is the open enrollment tile, so the open enrollment tile is your opportunity to make benefit plan changes once a year. So you click on the open enrollment tile next.
And this is what the benefits enrollment page looks like for open enrollment.
It is a welcome page.
Next.
Benefit attachment page. Again, the ability to attach.
Documentation to the event for open enrollment. The next one is.
Had a dependent and beneficiary information. Just follow the steps of clicking on the add individual and follow the steps to add dependents and beneficiary to your enrollment.
The next one is the benefit summary page and this is a summary of your current benefit elections and if you wish to change those elections doing open enrollment,

then you just click on the tile, medical prescription, dental, any tile that you have access to, make changes.
To it will save review and so if you click on that tile you'll be able to make benefit changes.
When is benefits enrollment?
Sorry, not sure what happened.
The benefit enrollment page is just information regarding your benefit enrollment, giving you specific information around the health coverage.
And language for your you know for your enrollment and then the benefits summary page.
Once you have entered your enrollment, it will bring you out to the benefits summary page and then in the middle there.
There was a submit button.
Submit enrollment and once you submit the enrollment and then it will take you to the summary page here and then you are finished with your open enrollment and to the top right there is a mark complete button.
You click that and then your submission of your open enrollment will be submitted and you will be. You'll be done with your enrollment so.
Those are the three things that I have reviewed with you for benefits.
Are there any questions?

Reutter, Shanon M 22:13
Just take a quick breath break and I will.
We will get back to next slides in a few minutes.

Braga, Donna 23:04
We did have a question though, Rachel.
If you want to take a couple of questions.

AR **Altinay, Rachel** 23:15
Yes, once again.

Braga, Donna 23:17
Will the new higher enrollment be the same as open enrollment?

Altinay, Rachel 23:23

There was a slight change to the new hire enrollment process.

The look and feel is looks more like a life event than an open enrollment.

But they are not the same.

As far as viewing the pages and slight difference.

Braga, Donna 23:44

Because there might be a, is there a job aid on that as well?

Altinay, Rachel 23:49

I'm not sure, Donna.

Braga, Donna 23:50

But we can we can check on that really quick.

Altinay, Rachel 23:52

Yes.

Braga, Donna 23:54

And then I'll check on that while you answer the next question says, will we still receive an e-mail that a life event has been submitted through core?

Altinay, Rachel 24:04

Asset stills is the same.

Braga, Donna 24:10

And we had another question.

As a payroll slash benefits clerk need to, I need to approve new hire enrollment and open enrollment or I don't know if it's as or does.

Does a payroll slash benefits clerk need to approve new hire enrollment and open enrollment?

I think that's the question.

Altinay, Rachel 24:33
The question is asking do they have to approve?

Braga, Donna 24:37
It says as a payroll benefits clerk. Yeah, it does, she said.
Yes, that's her question, do they?

Altinay, Rachel 24:46
Is that being done today, that process?
Is that being done today, Donna?
I don't.

Braga, Donna 24:53
Yes, it is. Yep.

Altinay, Rachel 24:54
OK.
So that process will remain as is today.

Braga, Donna 24:58
Great.
Don't see a job a just yet for.

Altinay, Rachel 25:12
Hires.

Braga, Donna 25:14
For new hire, for benefits for new hires.
So that may be coming.
I don't have that answer, but that can be put into our FA QS.

Altinay, Rachel 25:23
Yes, I'll make a note of that, Don. Thank you.

Braga, Donna 25:25

OK. Thanks.

Shannon let us know when we're ready to start.

Reutter, Shanon M 25:32

You're ready to go.

Braga, Donna 25:33

I think OK. Thank you.

JR **Jensen, Rosemarie** 25:36

OK. Hi everyone.

My name is Rose Jensen.

I'm the principal HR specialist with the core HR team as we have already held in depth trainings for job, personal and position data.

Today I'll just be touching on some tips and reminders of key changes for the upgrade.

Let's begin with some key changes in searching.

There are now more fields to search by, including HR status and job code and managed job.

This allows users to readily search for only active employees or to identify employees in a certain job class.

However, be aware that you will need to include the business unit on both managed job and managed position. If you are searching by any field that has a magnifying glass next to it. So that would be location code department.

And job code. In addition, when searching for specific position number, be sure to include all 8 digits, including leading zeros.

Next, I'd like to touch on a few changes for employee addresses. When you are adding an employee address for the first time, you'll click the arrow highlighted here on the right.

This will open a new entry window where you'll input the address.

Any subsequent address changes or additional address types will need to be initiated by clicking the plus sign button. That's also highlighted here on the left.

For all address entries, the entire state name has to be entered.

That can be typed in manually or you can use the lookup function with the magnifying glass to select which state is correct.
And excuse me, and finally to view whether employee address is active or inactive, select the arrow on the right of an individual address entry.
This will open that entry in a new pop up and you'll see the status listed just below the effective date and country.
Alright, so moving on to job data, the change to fluid job data means that some fields have changed their location.
Or they may have slightly different fields than you're used to.
For instance, the overtime indicator and the FLSA period in days are now accessed by clicking open the USA indicator.
So it's actually in the same spot, but it's collapsed.
So you'll have to open it to see those fields.
You'll also notice that the FLSA period in days labels have changed a bit, so the period in date.
Currently reflected as 40 now shows us O7-40 and the period in days currently reflected as 80 in the system now.
Will show AS14-80 in the upgraded system.
So basically the number after the hyphen is the same number. You will recognize from production. There is no change for job codes within overtime indicator of no flex and A is still Na.
There is a new tab in job data.
Called additional job info and that's where the following fields can be found.
Permanent job code? Permanent PCN which are used for temporary service and higher class assignments, and also the Ste. rank and the certification list number.
Another change is if you enter OOP, I think we went forward.
There we go.
Thanks. If you enter an invalid value on a new page, you'll receive an error message and the field will highlight red. As you can see here, there's an invalid job code that's been entered to leave the page without saving the transaction. You'll need to click return to search.
Which is in the upper right and that's highlighted here in yellow. So you'll need to click that instead of the exit button.
In this specific situation.
There are also a few changes to how HR users will enter employee compensation.

First, you'll note that the default frequency is now biweekly 26.1 that can remain as is for full time employees and for full time employees.
And step plans.
You'll click default pay components and the compensation rate will populate just as that button works today.
Then the frequency for part time employees is now state of CT hourly instead of HCT. That's highlighted on the bottom screenshot.
For part time employees as well as all employees who are in range plans, you'll have one additional step you'll need to click the add pay component button before entering the rate, so you would click that button and then enter in the rate code of CT base enter your.
Compensation rate and then click calculate compensation just as you would today.
And next, we'll discuss changes to accessing notepads in job data. A key difference in the new system is that notepads cannot be added for a transaction until that transaction has been completed.
So after submitting a new row, you'll navigate to the job Action Summary page for that employee record from the actions drop down on the new row, select notes.
This will bring you to the notepad screen that you will recognize from today's system.
The effective date and effective sequence will be pre populated.
You'll click add a new note, enter any information you deem important for the transaction, and click save. And just as a general reminder, notepads are a great way to record relevant information and job data that can be particularly helpful when others are reviewing the record. So we do.
Encourage their use.
And there are now two ways to view existing notepad entries. A new feature that allows users to readily access all notepads for an employee record is shown in the top screenshot. The green circle here shows the number, the total number of notepads for that record in this case.
There are 33. You can click that icon and all of the notepads for the record will be listed by effective date.
Alternatively, to view the notepad for a specific transaction, you'll use the actions drop down on that row to select notes.
And that will bring you directly to the note with that effective date and effective sequence.
And then this is a quick list of changes you'll encounter in job data access through

the manage job tile in the new system.
First, you'll note that the employee class drop down options now appear with their short descriptions, and all of those can be found on the employee class. Job aid on the core CT website.
In addition, the employment data page can now only be updated by adding a new row.
And a reminder that an order to view an employee's past rose.
You'll need to check the include history checkbox before you enter the employee record, and then finally, as we discussed in our trainings, the effective date and action reason codes cannot be changed once the activity guide has started.
That applies in both managed job and managed position.
So if you realize these values are incorrect, you can exit the activity guide if you haven't yet submitted that transaction, or if you have submitted the transaction, submit a footprint.
And the core HR team will be happy to make the correction.
And finally, we'll touch on a few key tips for managing positions in the new system.
Note that when viewing an existing position data row, the refill indicator is found midway down the page under the USA heading. I point this out because it is in a different location than in the activity guide. As you may remember from trainings, the activity guide is used when.
You're adding a new position row or a new position entirely, and in the activity guide the ref.
Theater is the very first field on the very first tab.
I also want to point out that the funding information is the very last section when you are viewing an existing row and that's under the heading position funding details.
And then for those of you who submit positions for approval or approve position transactions, this is a reminder that the position approval tab has been replaced with the approval chain for position transactions that are entered after the upgrade. The approval change shows the names of the Approvers and.
The order of routing as well as the approver comments and timestamps of when each approval was made.
The position approval tab that's in the current system is still available as of you only feature to view historical position transactions.
And both the approval chain and the historical position approval tab can be viewed

by clicking the blue approval chain link on a specific position data row.
And that's all I have for today.
I'll pause for take some questions.

Braga, Donna 35:10
There are a couple questions.
Let me start with. So it appears that some folks can post in the Q&A. Some folks cannot post in the Q&A.

Jensen, Rosemarie 35:12
OK.

Braga, Donna 35:20
I'm not sure why it says it's disabled because it is enabled for our meeting.
But.
It's working for some and not for others and I can't tell you that might be a an agency specific issue. I'm not sure, but if anyone does have a question and they aren't able to get it in.
Please feel free to send an e-mail to the readiness at ct.gov and reference this user group so that we can add it to the frequently asked questions and post your answer.
Yes, as mentioned before, to all the slides, FAQs, recordings and transcript will be posted on the modernization website.
So after that PSA will get back to these questions here, Rosemary says.
FLSA with new 740 or 1480 applies only to positions that allow overtime, question mark or for all employees exempt or non exempt.

Jensen, Rosemarie 36:18
So that the rule of what's going to have those that option hasn't changed.
It's really just a label change, so if you have a job code that is currently shows as.
Non exempt and then the FLSA period in days is 40.
That's going to still apply.
It'll just say non exempt the FLSA period and days will be 07-40.

Braga, Donna 36:47
And I think the other.

The same rules will apply. I think the other question was a benefits question.
I don't know if we answered it or not.
I see it in the FA QS it was.
Can you still manually generate benefits forms?

Altinay, Rachel 37:07
Donna has not changed.
That process is still the same.

Braga, Donna 37:11
OK.
Great. Thank you.

Altinay, Rachel 37:12
You're welcome.

Braga, Donna 37:17
Let's see if we have questions in the chat.
No more new questions.

Jensen, Rosemarie 37:29
K.
All right.
Well, I'll hand it over to Sean Anderson to review time and labor.

Braga, Donna 37:34
Just one other tip I do want to point out. And again I know some people, even though they click on QA, aren't able to access it. But if you don't see Q&A in your ribbon, if you do click on the more ellipsis, the more actions in.
Your ribbon.
You should see AQ and a option there and you can give that a try.
Hopefully that will help will help.
Thanks. Sorry. Go ahead, Sean.

Anderson, Sean 37:58

Hi, my name is Sean Anderson.

I'm the core CT time and Labor team lead. So now we'll go over some items for time and labor.

First, we'll start off with employee self-service.

So in the one of the dashboards on the left hand side, when you log into the new system, there will be an employee self-service option.

Within that, you'll see a time tile and then if you click on that time tile.

We now have three versions of the timesheet, so first and foremost, there's enter time, which is more or less equivalent to the current timesheet.

It shows an entire pay period at a time.

Then next is weekly time which displays one week of a pay period at a time, and there's bubbles to hopefully easily make it able for an employee to click the bubbles and fill out their attendance for the week.

And then lastly, there's report time.

Which it allows an employee to report one day worth of attendance at a time.

Just another note, so weekly time and report time are supported through mobile.

So if a user an employee wanted to submit their timesheet on a tablet or mobile device, we would strongly encourage them to use either weekly time or report time.

Another big change here with the timesheet is that unfortunately employees leave balances and comp time balances.

In the current version of core, are displayed at the lower portion of the timesheet page.

In, in a new upgraded version of core, they will be on their own separate tile, so none of the three versions of the timesheet will contain employee leave or comp balances.

They'll be on the separate leave slash comp time tile in terms of functionality, everything will work the same when an employee enters time through either one of the time sheets, the bounces should be reduced to accordingly.

It's just how to view the balances is different.

So then For more information about employee self-service entering their timesheet, we do have a training.

So if you went to the core CT website, you went to modernization.

Then you clicked on course et pom upgrade training and support.

That should bring you to a new page.

On the new page you click time and labor in the lower left hand box and then lastly you click on level 100 time and labor self-service.

In the e-learning module box and this will give you a much more detailed rundown of the the variations between the three time sheets and how to properly guide your employees how to submit time through all three versions of the timesheet.
So I strongly encourage everyone to direct their staff and their employees to that training.
So next.
Another question that we get a lot about is time approval.
So the good news here is that time approvals will be the exact same as they are in the current version of core.
So for a manager looking to approve time for their employee, they would go to the core C TH RMS dashboard.
From there, then click on the manager self-service tile.
And that'll bring them to this dashboard in which they would click on the time approval tile and that'll take them to the time approval search page.
And this is how the search page looks in the new version of core and as you can see.
It's pretty much identical to the current version.
So time approvals are the exact same as they are in the current version of core, which is very reassuring to a lot of time, approvers and managers.
So next this section is for employees that you know conduct time and labor tasks as part of their, you know, regular assigned duties.
So such as like payroll and time and labor specialist. So if they want to corset room as dashboard, we've created a time and labor tile. So that time and labor tile is going to function as a one stop shop for all high action.
Time and labor functions.
So there's like a time reported data tile.
There is a aside work schedule, tile comp plan, enrollment leave plans and adjust paid time tile.
There's also time and Labor work center, which also offers one stop shop features.
This is just a way to try to make it easier for timely, specialist and payroll officers to be able to complete a variety of time labor functions.
All in one place.
So now we're going to look, take a little in depth. Look at the team time tile.
So this is where you go if you're going to enter time for your.
Staff as a as a payroll specialist or a time of Labor specialist.
And then if you click on that tile, it'll bring you to the to the enter times search page

and one key change. I want to point out here is if you have a saved search on the enter time that the timesheet in core now that saved search will carry.
Over into the upgrade, upgraded version of core. It's just a little trickier now to edit that search.
There used to be.
A button that said save search criteria, clear search criteria.
Now you have to toggle to a different screen to change that. So if you see here my saved search is time and Labor Group 080.
11 So I'll show you now how to either edit that or remove it or change it.
So the navigation would be, you'd have to click on the NAV bar which is in the upper right.
From there you click on manage yourself, service time management and then manager search options.
From there, that'll bring you to the manager search options page and you'll see all different fields that you could search on for at the team time page.
So if you have a saved search like I did, you would see it displayed here.
So for me, that time and Labor Group 08011 is displayed here. So you can either edit that, you can remove it, you can add a different value to a different field.
And then once you've edited or changed.
This page how you want you just hit save down the lower left and then once you save. Now when you go to the team time page in the future that change will be pre populated as your new save search.
So that's just a brief overview of some key changes for time and labor.
So now I'll take any questions.

Reutter, Shanon M 45:15
Doesn't look like we have any current questions.

Anderson, Sean 45:20
Right. So now I'll turn over to Lynn Lynn Bushe for and she'll give you a breakdown of payroll changes. Thanks, Sean.

Reutter, Shanon M 45:27
One question.

Sorry, sorry Lynn. It says we currently use report time to review our staff's timesheet.
Is there a job aid for these changes?

Anderson, Sean 45:38
Yeah, there's, there's there are many job aids on the on the core, on the core website that I showed you. If you go to that modernization page and then the palm upgrade and support and then the under the HTM box time of Labor, there's a my.
Of Job aids there that will take you through the new the new pages and features.

Reutter, Shanon M 46:03
Somebody asks.
Can you post a link to the modernization page?

Anderson, Sean 46:11
Sure.

Braga, Donna 46:16
I can do that.

Reutter, Shanon M 46:22
OK and.

Anderson, Sean 46:22
No, I just, I just.
I just did it but.

Reutter, Shanon M 46:25
OK.
There's one more we noticed. The new view is missing.
The shift and combo code.
Is there any other place we can view the timesheet with those items showing?

Anderson, Sean 46:40
So it's not missing, it's just you have to click on another little.
Box that has three little lines on it, and then once you click on that box you will see it.

It it's not all in one place like it currently is on the current timesheet.
That's due to spacing, and it'll be a a massive customization.
So it's not missing, it's just you would have to click on another little box.
We're looking into other options, possible reports or things like that to make it easier, but currently that is the option would be to have to click on that little box which brings up a pop up and then you would see the shift the combo code.
And those type of fields.

Reutter, Shanon M 47:31
She also said some of our staff have 15 to 20 lines in in the timesheet and the three dots took a while.

Anderson, Sean 47:38
Yeah, Amy, we do understand that.
We have addressed it, but like I said, it's a massive customization that is, you know, still being analyzed by Accenture and senior management.
But as of right now, this is what we have.
So this is what we're going to have to move forward with.

Reutter, Shanon M 47:55
OK. And then can you show the pathway to the reports?
Christine, can you be a little more specific?
Yes, the timesheet reports.

Braga, Donna 48:31
There might be is there.
There might be a job aid on that, right?

Anderson, Sean 48:36
So yeah, I just.
I.
I don't know.
Are you talking about the job aids on the Modernization website or are you talking about like canned reports within time of labor cause canned reports within time of labor?

The menu path would be the same as it is now.
You just have to click on the NAV bar in the upper right and then from there the bread crumbs will be the same path. If you're talking about the job aids.
Within the core website.
That link that I put in the chat and then from there if you Scroll down to the bottom, there's an HTM box and then you click on time and labor within that HTM box and then the job aids are in on that page.

Braga, Donna 49:20
With all the time in Labor reports and their navigation in there.

Reutter, Shanon M 49:25
So thank you.

Anderson, Sean 49:25
Correct, but that within core, if you're talking about the reports within core, it's the menu path is the same as it is now.
You just have to click on the NAV bar in the in the upper right and then follow the same path.

Reutter, Shanon M 49:44
Hey, I think we're going to take about a 4 minute break.
So if everybody wants to get up and stretch, we'll resume at 11:00.
OK.
We have one more question before we get started.
The question is, so are we going to be able to see all of our guys at once to do payroll?

Bussa, Lynne 55:02
And I'm sorry, was that for me?

Reutter, Shanon M 55:05
I'm not exactly sure who it's for, but it says so. Are we going to be able to see all of our guys that wants to do payroll?

Bussa, Lynne 55:16
This is a time.

Braga, Donna 55:17
I'm sure.

Padinhare, Pradeep 55:18
Good times, time and labor.

Braga, Donna 55:22
I don't know what guys.

Padinhare, Pradeep 55:23
Replay.

Bussa, Lynne 55:25
We can get back to that question, I guess.

Padinhare, Pradeep 55:27
Yeah. Thank you. And it.

Catania, Cheryl 55:27
Yeah, if.

Anderson, Sean 55:28
I'm. I'm sorry. What was the? What was the question?

Catania, Cheryl 55:30
You're.

Reutter, Shanon M 55:32
Going to be able to see our guys all at once to do payroll.

Anderson, Sean 55:40

But that's sort of vague, but so.
Your time and labor groups will still have the same structure, so if you're searching for your employees by time and labor groups.
They'll still appear in the same groups that you currently use.
Now I'm not exactly sure what that question means. because it's very vague but.
You can still search by a group and then click on individual employees to pull up their timesheet through team time and then.
There changes and then also the time and labor reports that you run for processing payroll should be the same.
And you can use the same search criteria by department by group ID or by individual employee.
So I'm not sure if that answers the question, but.

Reutter, Shanon M 56:33
That was the answer she was looking for. Thank you.
OK, Lynn, your turn. Take it away.

Bussa, Lynne 56:39
Thank you, Sharon. Good morning, everybody.
This is Lynn Bussa from core CT payroll. The good news regarding payroll functionality is there are no major changes with this upgrade payroll navigation, but has basically stayed the same like it is today in core except for the few items. We will briefly go over today and 1:00.
Of those items encompasses a few of those things.
This is Employee self service self-service and it is found under that payroll tile. It has a new look and all of the payroll self-service items are.
Under that tile employee self-service is also now fluid.
So that users can access from their mobile device as well as their desktop from employee self-service dashboard, click on the payroll tile. From here you can access paycheck information. W2 consent informs and a new feature, the Paycheck Modeler.
From the payroll tile, the first self-service item is the W2W2 consent.
From this, employees can submit or withdraw their consent to receive electronic W twos or W2C forms.
By checking the box to either consent status to receive the W2 form electronically, or then if you wish to withdraw consent to receive a printed form, your status will now

be displayed under your current status. Also for verification and security, when users change their status a pop.
Up box will appear and ask you to enter your core password.
Please make note if employees do not have an e-mail address or a valid e-mail address.
The employee will receive a warning stating the employee has no.
Address or an invalid e-mail address.
They will not be able to change their consent at this point.
Employees will need to contact their agency to correct their e-mail address in personal details.
Like today in core OOP.
I think we missed one.
Go ahead. Sorry.
So, like today in court.
They're under the W.
Sorry under the W2 and WTC forms tile.
This is where employees will review their available W2 and W2C forms as well.
Instructions for those forms.
Next slide. Thanks. Like today in core, the tile has a drop down to select the year to view that year's W2 or W2C and then click the form. The W2 filing instructions can also be viewed by clicking on the box.
The forms W2 and W2C can then be viewed, printed or downloaded.
Next is the paycheck modeler.
The paycheck modeler is a hypothetical check and before use, the employee must agree to terms of use and check off the box. Users must agree to such terms as at the modeler is for general guidance and estimates only, and this is not a genuine paycheck.
Paycheck Mother is a hypothetical check.

Braga, Donna 1:00:04
We I lost Lynn.
Can anybody else hear her?

PP **Padinhare, Pradeep** 1:00:08
Yeah, I think we lost you for a minute.

Bussa, Lynne 1:00:08
I'm here.
Oh, I'm here.

Padinhare, Pradeep 1:00:10
We lost you for a minute. Yeah.

Braga, Donna 1:00:12
OK.

Bussa, Lynne 1:00:12
I'm here.
Can you hear me?

Braga, Donna 1:00:18
I can hear you now, Lynn.

Bussa, Lynne 1:00:19
Oh, OK.
I'm in the office too. I'm on my desktop.
Anyway, next tile slide. Thank you.
Me. Get back to where I was.
Modeler uses earnings that are based on the standard hours and rate of pay and job data that was in effect from previously confirmed paychecks.
Deductions are the employee's standard.
Deductions and taxes are based on the employee's current tax information, but employees can subtract and add earnings. They can add and subtract deductions and change their tax amounts, and this will show them those what if scenarios we do have a captivates.
Training on the core CT website where it will go into more depth in this new feature.
View paycheck information from this tile. Users can view their paycheck.
Employees can view the paycheck they wish to see, whether it be their most recent paycheck or paychecks from the past.
This is a little bit more detail for you.

So you can view current paycheck prior paycheck and it will show all of their details.
And again you can print or download that as well.
Next, we would like to touch on direct deposit. When setting up or processing changes to direct deposit for employees, there is new functionality that must be used for this processing.
The new functionality for request direct deposit is the use of balance of net pay for deposit type and a change in priority. The navigation to request direct deposit remains the same although the look is updated with the pump upgrade.
Use the navigation bar in the upper, upper right hand corner to navigate to the request direct deposit page.
In the slide, we have provided the reminder of the path.
In our example, when entering a direct deposit request where there is only one bank account, the option to choose net pay percent and deposit type percent is no longer valid.
The same if entering net pay amount and deposit type amount, you will now receive a hard stop error message. A balance of net pay account has not been configured.
So, for example, users must now use balance of net pay. So when there's only one bank account to be entered, users will now choose under deposit type balance of net pay. Then leaving net pay percent blank.
And then change the priority to 999.
Continue with adding the account number and save your transaction.
Here's an example of two bank accounts where there are two bank accounts for the first account it is.
It's the same functionality as today in core.
The user can choose for deposit type, percent or amount in the corresponding entry in net pay percent or net pay amount, then priority one for the second account. The user must choose for deposit type, balance of net pay and priority 999. If the second account is.
Not set to balance of net pay. The user will receive a hard stop and will be unable to save.
Transaction. The reason for the change in the new functionality is because with the PUM upgrade we wanted to sunset old customizations and use delivered functionality.
The delivered functionality also simplifies requests for direct deposit entries, and it also ensures that there if there's ever any future need Oracle support. We would have

that we have posted a request direct deposit job aid on the core website to assist and we hope that this presentation helps.
As you navigate the new features look and functionality of the POM upgrade.
That's what we have for payroll.
Thank you. Any questions.

Braga, Donna 1:04:23
There is a question in well was in the chat. I posted it in Q&A as well.
Siobhan Sanders.
Sorry, I typed your name in the chat in the chat.
Shyvon asked.
Will the HR payroll staff be notified by core when an employee makes a change to their E pay in any area?

BL **Bussa, Lynne** 1:04:43
For those no.
There's no agency notification at the moment.
There's a possibility we haven't turned it on.
Just because of the volume of notifications, it is a possibility. In the future we can look at that if if the need is to turn it on. But at this moment notifications to agency is not.

Braga, Donna 1:05:09
And that's in production today, correct, Lynn?
Can employees change direct deposit on their own now or is it still the agency entering info?

BL **Bussa, Lynne** 1:05:35
At this time, it's still agency.
Functionality.
Hopefully in the future all users will have the self-service direct deposit that will have to wait though until we get multi factor authentication.
Sorry, can't speak today.
Which we're looking to, I think next year, but yes, at this time it's agency will have to enter direct deposit information for employees.

Reutter, Shanon M 1:06:12
OK.
We have one more. Is the process still the same for direct deposit?
Will we need to wait until account number one we know has processed before adding #2?

Bussa, Lynne 1:06:24
To enter both accounts at the same time and pre note has not changed, so they both would need to go through prenote or if there's a new additional one, that one would go through pre you know and the other one would stay as is.

Braga, Donna 1:06:44
Can I just ask you when you said you should?
I'm just recording your answer.
You should about the pre note.
You should be able to add a prenote for both.
Is that what you said?

Bussa, Lynne 1:06:54
Add 2 accounts at the same time, yes.

Braga, Donna 1:06:58
And you should be able to add prenote.

Bussa, Lynne 1:07:01
But pre note happens automatically in the system.

Braga, Donna 1:07:03
OK.

Bussa, Lynne 1:07:03
It will pre note it for you if it's new account it will automatically.
The buttons automatic, sorry.

Braga, Donna 1:07:10

OK.

Thank you.

Bussa, Lynne 1:07:11

You're welcome.

Reutter, Shanon M 1:07:13

Another question, how will uploading Kronos to core be different, if at all?

Bussa, Lynne 1:07:19

That I'll pass on to time and Labor team.

Anderson, Sean 1:07:24

That process is going to be the exact same as it is now.

At least for the short term, I I you know obviously with the upgrade next year with kernels, maybe there'll be different differences.

But as of right now, until the new version of Kronos goes live, this the process will be the exact same.

Reutter, Shanon M 1:07:47

And then we had a comment adding a second account now with the first account is a big change.

Bussa, Lynne 1:07:55

OK.

Thank you.

And that's only if the employee you know has wants 2 accounts.

Either it's goes to one account or if they wanted two accounts it would be split that way.

Reutter, Shanon M 1:08:20

OK, that looks like all the questions for now.

Bussa, Lynne 1:08:24
All right, we'll turn it over to Tracy and Pradeep for security.

Douglas, Tracy 1:08:31
Thank you.
Good morning, everyone.
My name is Tracy Douglas and I work on the core security team.
Currently, there are four people on the team. Nada and I are primarily HCM and then we have Dustin who is financials but he goes between both.
HR and financials.
And then we have a new.
Person helping us during this upgrade period.
Brett Harris, you may have seen.
You may have seen some emails from him.
Periodically.
So I guess the first thing we'll do is we'll discuss.
The Co 1092.
Actually this might be.
A slide for yeah, this might be a yes. OK.

Padinhare, Pradeep 1:09:36
Tracy, I can.
I can cover this.
Yeah, I can cover this.
Yeah. All right. OK.
All right, no problem.
I think there is some confusion, but I think I can cover this.

Douglas, Tracy 1:09:46
That's OK.

Padinhare, Pradeep 1:09:47
Yep. Hey, good morning, everyone.
My name is Pradeep and the agency IT manager at core.

I think I'll quickly talk about, you know, the CEO, 1092 like submission and approval process.
The overall process doesn't change. I think the navigation basically changed.
I think we created a tile under core C T H RMS.
You can see on the dashboard. So if you login, yeah, once you go to hrms and then you'll be able to see something or security from there. You know based on your you know access you'll have you know these three types. I think most of most of them. Right. They have security request tile. That's what we request the security for and then.
You know, people who has access to approve it.
They love security approval tile and then certain managers you know within the team. In the agency, they need to approve initially, so they'll have that manager up all time. It's exactly same what you see now in the bread crumb or in the navigation bar, but this is something we wanted to convert and give a like a new look and feel using the fluid tile.
One thing I just want to talk about.
Can you go back to the previous slide?
Just one really quick.
Yeah, I think 11 major change. One functionality which I really love in this equity.
I think there's something called notification bar.
I think you can see on this side.
Which shows you know whatever you know, request coming to you, right. If a request is coming you should be able to see that from your notification icon or Bell icon which talk about and from there you know you can even just click that you know if.
You are part of a security approval team member.
You can click it.
It will bring you to the form and you can approve from there, which is a really, really good functionality, you know.
Move on to the next slide, please. All right.
And this I think I just want to show you the current navigation. I think this is the current navigation.
The tops, you know this part of the screen and then the same navigation can be accessed also like you know this is you know this is current navigation that is basically replaced with the new navigation via NAV bar.

So you have two options. You could use tiles which is which is my personal choice.
I like it.
Or, if you're not comfortable, you can definitely access the same functionality here NAV bar.
So I think yeah. And based on you are you know access you'll get you know those three options.
I think I mentioned about this Bell icon, the notification icon before that.
So once you login you will be able to see a bell icon on the top and if there is an I item for your approval it shows in a different car and then it shows.
You know, if you have some items waiting for your approval, so once you click that Bell icon, I think I've showed you before. I think it will bring you.
The notification shows what is pending.
In your queue and you can, you know, select each transaction approve it.
I think that's what I wanted to cover.
Just one reminder, I want to everyone to think part of this upgrade process. If there is an approval right waiting on your queue, please get them approved before 11:18.
That's one request. I just wanted to everyone.
Is there anything waiting for your approval?
I just moved to the next I think.
Yeah, I think I now I'll hand over to Tracy to talk about the, the changes in that role handbook and everything else.
Thank you everyone.
And then we'll address the questions in the end.
Yeah, this is a prese section after this.
Tracy, back to you.

Douglas, Tracy 1:13:26
OK.
Thank you, Pradeep.
So one thing I couple things that I wanted to just mention today is that for the liaisons and hrms liaisons as well as the Co 1092 liaisons and in a lot of cases they be, they may be one in the same person.
So when you.
Are selecting there.
There's been a lot of new.

Delivered roles that will be updated on the role handbook and you will need to request the new deliver roles when you select an existing roles and in a lot of cases so.
You can go to the next slide, I believe.
For now, you can find a list of the new deliver roles on the core website under the modernization.
Link and then go to security and you will see the spreadsheet which lists all of the delivered roles for HCM.
Existing roles.
Some of the existing roles will be noted.
In.
In your hrms role handbook. And for those that are not on the roll handbook, if they are requested in the CL1092, you'll have to make sure.
That anytime you select A role that requires.
A.
A deliverable.
You put that delivered role in the comments section of the CL1092. Can we go to the next slide please?
So.
This is where you. I'm not sure if you if that is that link active right now.
Let's see if it'll bring you to the spreadsheet, OK.
Maybe it's not.
Maybe that link is not active, but again, if you if you go to the core website and click on modernization and then security you'll see.
The list of roles and the columns as the roles relate back to the existing roles.
So I think that the spreadsheet contains 4 columns and it's clearly noted which role corresponds which new deliver role corresponds to the existing role.
Is there?
Is there another spreadsheet?
Another slide. OK.
So when you go currently.
The Roll Handbook, the Hrms Roll Handbook is being revised.
We have not uploaded it yet. We.
Want to wait until after the upgrade?
I believe to post it, but it'll be in the same location as it always has been, and that's

depicted here. You would go to the core website.
You click on security and then from there you would click on the role handbook link and.
Those new delivered roles will be listed in the message box.
Right underneath the role name.
So it will be clearly noted which role you need to request in addition to the role that populates on the Co Tin 92 form.
And we don't anticipate updating the Co 1092.
I'm talking about Hrms Co 1092 form.
We don't anticipate updating that form to populate the delivery roles until maybe after the upgrade. So it'll be sometime down the line. So for now.
At least you know for a couple of months after the upgrade, you'll be populating the delivered.
In in the comments section, when necessary, and what we'll do when we, when we, when we see that you've selected.
An existing role that needs a delivered role will try to, you know, cross check and make sure that you have the correct.
Delivered role.
In in the.
Comments section and.
Hopefully.
There won't be too many issues with that um idea.
But again, you'll be able to. We're going to also put that spreadsheet under security as well.
The one that in the previous slide that you saw noted will also be listed on the security site.
So that way you can click and cross check yourself to see what deliver role you'll need to populate.
And in some cases I know a lot of people like me like to.
Just copy and paste it in so in a lot of cases you'll be able to do that from the spreadsheet.
Are there any questions?

Reutter, Shanon M 1:19:29
Looks like we're all set.

Oh wait.
Go ahead.

Braga, Donna 1:19:32
There was one question.
It was answered, but I'll share it.
It says is the security tile where you where you would process core password resets and the answer was no.
This security tile is for submitting Co 1092 requests in for approving them. If there's anything else that you want to add to that, Tracy.

Douglas, Tracy 1:19:51
No, the navigation as Pradeep said has not changed for the Co 1092. The only thing that has changed is that there are a number of delivered roles that must be requested.
In conjunction with.
The existing roles and the only other new item is that the role handbook will be updated to list the delivered roles as it corresponds to the existing roles.
So it hopefully it'll be documented well enough so that people, when they put when they submit when they're submitting their.
1092 request. Hopefully it'll be documented well enough so that they understand what delivery role they'll need to request.
And the only reason we could not.
We could not.
Add the deliver role.
On the spreadsheet currently is because there's just a lot of changes as that are going to happen.
Couple of months down the line after the.
The upgrade and we decided it would be best to just hold off on some things.
Any questions?

Reutter, Shanon M 1:21:45
Yes. Can you go over the process to reset a core password?

Douglas, Tracy 1:21:54

OK, for your well, in each agency, there are a number of password reset liaisons.
Is that what you're referring to?
So that that functionality does not change. You will still contact your password reset liaison or your HR liaison.
Because each agency has a number of liaisons on board that can reset the password for you. If there's any reason that a liaison is unable to reset a password, they would then contact the security team via e-mail.
We have in the past gotten ticket.
For password resets, which is really not necessary, your agency liaison can certainly contact.
The security team for password reset. If your account is locked.
If the account is locked you, they won't be able to do anything because we would have to take the lock off. But so that process not has not changed and we really stress having an HR.
Liaison who can be the go between?
The security team and the agency, because otherwise we'd be getting an abundance of e-mail requests from.
Several different people from different agencies, and we don't want that.
We want the liaisons to be the contact person.
Does that answer your question I hope.
If there's something I need to clarify, let me know.

Reutter, Shanon M 1:23:42
OK.
There's another question will the I forgot my password link still be available?

Douglas, Tracy 1:23:47
As far as I know, yes, that doesn't change.

Reutter, Shanon M 1:23:54
And then somebody also asked, can you provide the names and emails for the password liaisons for the different agencies?

Douglas, Tracy 1:24:03
For OK, so the HR liaisons, there's a list of HR liaisons on the core website.

If you just go to the core website, you'll see the link where you can click and it list.
It's like a spreadsheet that'll pop up and it'll list all the agencies as well as the HR liaisons. As far as the password reset liaisons, we do not keep a.
Ongoing list of there's just too many because there could be up to 10 password reset liaisons for each agency.
And so we don't monitor a list, we always tell the HR liaisons that if they would put together a list that they could send out to their employees, that would be most beneficial.
But if someone did contact.
The security team we could certainly provide that information on the spot.
We would rather.
The HR liaisons in each agency.
Let their employees know who their password reset liaisons are. Since there's so many of them.

Reutter, Shanon M 1:25:32
We have another one.
What tile would the liaison use to make the password reset?

Douglas, Tracy 1:25:44
That is a good question Pradeep.
Are you still on?

Braga, Donna 1:25:47
I don't think. I don't think that that's not a tile.
So there's going to be, yeah, there's going to be navigation through the menu like you normally do.

Douglas, Tracy 1:25:50
OK.
So it would be the same.

PP **Padinhare, Pradeep** 1:25:51
Yeah, that is that.

Braga, Donna 1:25:55

Yep, Yep. Alright. I think for time wise though I think we need to move on to the next topic so that we can we can have some time for questions at the end as well.

Douglas, Tracy 1:25:55

OK.

OK.

That's what I thought.

Padinhare, Pradeep 1:25:57

Yep, awesome.

Douglas, Tracy 1:26:05

OK.

Thank you.

Poppel, Janet 1:26:14

Hi everyone.

My name is Janet Popple from the EPM team and I'm just going to cover some changes that will be happening in regards to EPM and stars.

So for EPM, the navigation will stay the same. You can get to that menu by clicking on the upper right hand corner icon noted by the black arrow on the screen there, and you'll go through the same navigation that you go through today going to core CT.

EPM reporting tools and query manager.

You can also save that navigation to favorites if you want to return to that more easily.

The biggest change with the pump upgrade is the there is going to be.

A new EPM reporting table.

It's called CTW, under score position under score E.

This impacts anyone working with position workflow. If a position is in the process of going through its approval.

Those details will be in the position E table. Once that position is approved, then that information will get copied to the position table, so any.

Queries that anyone has using position table today will need to be analyzed to see if it needs to be changed to position E and you can always log a footprints ticket and the team will be happy to help.
As far as the query impacts, the biggest thing is.
Your scheduled queries generally over the years, whenever there's a, you know, any kind of an upgrade to the application or tools. Anything scheduled has to be rescheduled.
So it's just a good reminder go through your scheduled list today.
Make note of it. So after the upgrade you can reschedule your queries the other.
Subject Areas of queries.
Will be fine.
Your run controls will be there.
Your private queries will be there and your favorites will be there.
For the stars, navigation stars will have a tile.
So if you click on the employee self-service menu there you can click on stars and you will get a stars tile.
Are there any questions?
Again, if any questions come up with EPM.
You can log a footprints ticket and if you can't get to footprints, you can send an e-mail to Donna.
You have to remind me of the e-mail.
Readiness@ct.gov, I think it is.

Braga, Donna 1:29:07
Correct, correct.

Poppel, Janet 1:29:09
OK.

Braga, Donna 1:29:11
You do have one question and.
It is will all of our EPM reports come over?

Poppel, Janet 1:29:19

All of your PPM private queries will come over, yes.
If there's no other questions, I'll send it on to Shannon.

Braga, Donna 1:29:34
We might have another one hold on.
Nope, that was a thank you. OK.

Reutter, Shanon M 1:29:42
Morning everyone.
I'm Shannon Reiter from the core CT help desk.
Today I'm going to discuss a few things.
With the Puma upgrade.
We encourage everyone to log a ticket, answers the tickets as quickly as possible when the tickets are submitted. Keep an eye out for emails when you have a ticket open, the help desk will communicate through that ticket.
You can respond to the e-mail from footprints and the footprints will automatically attach the e-mail to the ticket and notify the person working on the ticket.
That you have responded.
Footprints routing the tickets are routed directly to the team that handles the module for faster processing.
The footprints access. If you were in need of any footprints access, please e-mail the readiness mailbox with the subject footprints access and we can add you 2 footprints so you can easily submit a ticket.
Readiness mailbox is available for anyone who does not have act.gov e-mail address.
And again, please watch for emails from the footprints, even though you don't have footprints access, you can still respond to the e-mail, and it'll attach to the ticket. You will automatically receive an e-mail when a ticket is created on your behalf using the readiness SCTF.
Gov mailbox.
And we ask that you please refrain from reaching out to the module B as we need to document every issue that comes in.
This is the core CT modernization.
Page. It's where you'll find all of the decks from previous.
Long with recording transcripts and Q and as there's a link for the core CT POM upgrade training registration page that contains the L100 classes. All the previous

class recordings, transcripts and QA that are available for you to either register for. If you haven't, we have class.
Available or just view previous classes.
E-learning modules.
For a 10 to 15 minute training module that can be viewed at any time at your own pace, steps can be saved as a PDF for your own reference.
The instructor led modules are the L200 courses that cover more complex topics than are currently available as instructor led training sessions lasting up to two hours, these will become available.
It'll be posted online as they become available.
There's also a link on the modernization page to our new core epm upgrade training and support page, which you saw in some of the previous slides.
Here again you'll find the infographics which are the one page documents recap, cross module topics such as navigation and approvals. You will also find job aids which are printable document outlining the business processes and steps within core. Again, the you'll also find the e-learning modules here in the L200.
Just a couple.
Just something to remind everybody, with the upgrade, it's important to clear your browser cache, especially when logging into corset for the first time after the upgrade to also clear your cache anytime something doesn't look right to you.
One of the first things that the help desk will ask you is if you have cleared your cache. If you are having problems with the browser, you can try to use a new window in the Incognito mode or.
In private window in Microsoft.
Just a few reminders. Favorites will not carry over with the upgrade.
You will have to write down your navigations. Take screenshots.
You can add them once we go live.
Your run controls will in fact carry over though.
And also something to keep in mind now that we are using mobile devices more than we have in the past.
All your devices must have an up to date browser to properly access Corsette device system software and.
Play stores must be up to date to update the browser apps with the manufacturer.
Stop supporting a device.
It won't be able to be updated.

Let's do another hint here that we're used to now because some users like the option to alphabetize their menus.
This is still an option today.
All you have to do is click on the navigation setting where you click on the NAV bar, click on the settings, click on alphabetical and click save and there's a screenshot of what it looks like after itself after post.
Another thing I'd like to point out is we still have the bread crumbs.
So you'll always see if you use the NAV bar you'll always see like Menu, SC, T, H RMS and Workforce administration.
You'll always see that there.
Does anybody have any questions?

Braga, Donna 1:35:06
You know, there was a question that went back to the Stars and it said and it says, does this new stars work with the Stars equipment program as well or as well so.

Poppel, Janet 1:35:16
Cortana, do you want me to answer that?

Braga, Donna 1:35:19
Yeah, there should be no change to stars, but go ahead.

Poppel, Janet 1:35:23
Yeah, I it that's basically it.
So stars is going to be doing an upgrade to their application in the future. I think after Pom. However, when you click on the Stars link today and when you click on the stars link or tile in the future, it's still going to go to that external stars. Application. I hope that answers your question.

Reutter, Shanon M 1:35:59
OK, we do have another question. Aside from the position EPM queries, will any other EPM queries change?

Braga, Donna 1:36:01
OK.

Poppel, Janet 1:36:11

There are two public queries related to position information that will change.

We'll be sending out a hot topic on that with more details.

Other than that, all of the public queries that are out there now will still be there, and all of your private queries will be there.

Reutter, Shanon M 1:36:39

No further questions. We're going to move on to pension, RSD and TRS.

I'm going to turn it over to Ralph.

MR **Minutillo, Ralph** 1:36:48

Hi, good morning, everybody.

My name is Ralph Mituto number. The core CT pension support team.

And next, we're going to take a look at some of the new fluid views for pension CRM for RSD retirement services division and TRS, which is the teacher's retirement system.

The users are going to experience changes to the CRM and HCM pages. The home page drop down selectors used to navigate between different modules and CRM and HCM and the navigation bar gives you access to non fluid navigation options and the NAV bar which is the navigation bar.

Is now used to navigate to the menu recently visited, such as. We can see to the right in the screenshot.

For the home page view, the icons have been introduced, providing a new look and feel for the homepages.

The tiles include user friendly graphics, help you identify the functions that you need and to access the tiles, simply select the tile by clicking or tapping in.

This allows the user to navigate to the underlying applications and from there he could proceed to perform your routine tasks.

And this we have the fluid CRM dashboard.

Managing my CRM are now known as Core CTCRM and can be accessed from the home page drop down navigator.

It's a land page that includes different tiles that allow for a range of information to be accessed and below we have the manager and the agent views of the core ctcrm pieces.

With CRM dashboard and pivot grids.
Current CRM page let's my cases provider group cases created versus closed by different provider groups are now located under the core Ctcrm analytics can be accessed from the whole page drop down navigator.
And there's different filter options for the user. In my case, backlogs on the left hand side of the page, their filter options.
Available to narrow down your case list and you can also filter by case priority, case status, Provider, Group, case type and so forth.
New case actions. You could take action with case filed and into the case itself.
Action options include notified view contact info.
Add a note, reassign the case the go to case action option will open up a new tab and bring you to the specific case.
And search cases frequently use search criteria can be saved for future use. You can fill in the search criteria.
Hit save search criteria to name and save that particular search. After the search is saved, be able to access it from your used save search, drop down options and save.
Searches can also be deleted if they're not going to be used anymore in the future.
We have the HR HD360 degree view in fluid here.
This is a look at the view page, which is accessed with the palm upgrade. This particular view is for managers.
We CRM users can now reassign.
Add notes to a case without leaving the page.
Key steps you click on the home page navigator, then the hrht 360° view tile.
You enter the identifying information for the member.
Usually ample ID and populates their 360° view page after.
Click on the search button.
And some tips again, as previously noted, the upgrade will cause the user favorites to be deleted, so it's going to be important for the users to take a screenshot your current favorites so you can re save them again after the upgrade.
Page navigation paths will not display at the top of the screen and for optimal performance you wait for the fluid style to load completely on the home page selection or clicking.
On a fluid tile to view the data.
And below are some manager and agent new queries to replace some of the pivot

grids.
And that's it. We have any questions?

Reutter, Shanon M 1:41:55
Question was like.

Minutillo, Ralph 1:41:55
I guess.

Braga, Donna 1:41:57
And.
Some questions in the Q&A.
And I don't know if this is a crm question.
I'm sorry, it's Teresa.
Do we have to make sure all of our apps are up to date before Wednesday and uploaded?
And I don't know what she means by apps.
So is that.

Padinhare, Pradeep 1:42:20
Teams app.
Yeah, I think.

Minutillo, Ralph 1:42:22
Not sure what that means.

Braga, Donna 1:42:26
Theresa, can you be more specific as to which apps you're referring to?
You're talking about.
I I think she might be referring to the apps on her mobile device.
So if you are referring to the apps on the mobile device that Shannon referred to, that would be we are going live with this new version on November 25th, so.
That would be.
You would want it for Monday.
Let's see.

Oh, let's see.
Yes, OK.
I think that answered the question.

Reutter, Shanon M 1:43:19
OK. Then move on to closing. Donna, it's all on you.

Braga, Donna 1:43:25
Closing time.
All right.
So, you know, I've got the reminders, tips and tricks that Shannon already went through and Janet had mentioned to favorites are not going to be carried over with POM.
Take your screenshots now and I have to take my own advice.
Also run controls will be carried over with POM.
So yes, Yahoo. Thank you.
They're still there. And then for those of you that want them deleted, no, they won't be deleted.
So I think it could be 601, half dozen or the other.
But definitely.
Screenshot your favorites because. It's going to. You're going to have to set them back up, and I know that's a bit of a drag.
And the other thing that you might want to screenshot or take a list of is your schedule queries and reports, particularly for, you know, EPM and everything. As Janet mentioned, you will have to reschedule in both EPM and any other reports that you might have scheduled you will have.
To reschedule those run controls to run again after we go live.
Do you have any?
I had a new question.
So we have a new question here.
It says security and this is from the state colleges. We have student workers from the state colleges.
Is there a way to request core limited access or view only access to assist with tasks?
So that question? Well, it's a good question, is actually there's not anything that's changing with the upgrade.

That's a Security question.
So you would have to reach out to the security team separately.
That's a whole.
Nut to crack other than what we're going to crack today. So, but it's a good question.
As Tracy, you're unmuting.
So if you have anything to add to that.

Douglas, Tracy 1:45:18
No, I was just going to say it's on a case by case basis.
Generally, we do not allow core access to anyone outside the agency, but certainly.
And specifically if you're not a state employee. But if you want to send an e-mail to the core security mailbox, that's fine.
We'll address it in the e-mail.

Braga, Donna 1:45:44
Thank you, Tracy. That's awesome.
So again, I thank you for your participation today.
We did send out a reminder.
Did send out a Daily Mail. If you're not signed up for daily mails, go to the core CT website and sign up for daily mails. OK, because that's the best way for you to stay up to date with really important information.
So reminder, we are going live with this on November 25th, which is the Monday before Thanksgiving.
We will be taking the system down early.
So what's going to happen next week is a confirm week. So for those of you that are familiar with that process where we have soft lock until 2:00 PM and then at 2:00 PM, we have hard lock instead of that happening on Thursday, it's going to happen on Wednesday.
All right, the 21st and then you will have access Thursday morning until about noon.
All right.
And then we're going to take the system for the upgrade.
It won't be available.
You know Friday at all? Thursday afternoon time it won't available at all.
So not even view only.
Nobody's going to have access to it. We aren't either.

So just a reminder of that, I'll be sending out another Daily Mail and it will be available again on Monday, November 25th and look all brand new and shiny. Tracy, you have your hand up so.

Douglas, Tracy 1:47:14

I just wanted to mention only because I can't remember who mentioned submitting a Co 1092 form.

By the 18th we sent out Daily Mail. I believe correspondence that told everyone that we did have a cut off date which is already past I tech.

We've been diligently going through and completing all the Co 1092 requests, at least on the HR side that were in pending status.

Whether it was submitted or not, we've whittled it down on the submitted site to zero and on the going through work approval.

Process for.

Those that have been.

Already approved in the in the workflow process, we only have 4 so I wanted we were trying to keep it to a manageable amount of requests that we could.

Complete before you know the upgrade, and so we don't want, you know, I guess if it's necessary, you can submit a Co 292, but we don't want an abundance of requests coming through because we won't be able to complete those requests before the upgrade and.

If they're in process, they will be lost and you'll have to resubmit anyway.

So that's why we sent out the correspondence.

Braga, Donna 1:48:47

OK. And then a couple of the reminders for those of you that are approving transactions for position changes.

You know those will need to be approved.

And I believe by the 18th and also name and address changes, we need to get those approved because of people, employees are submitting name and address changes and they don't go through. It might be difficult to get those approved and they would have to be.

Re entered and by the HR specialists on the employee's behalf.

Also, again like Tracy mentioned, get your Co.

Two changes in although there may not be many changes specifically related to the

upgrade, we are referring to your daily course of business just to make sure that they get processed in time because, we do have to sort of clean up and cut off transactions after a while.
Again, log footprints tickets if you if you have issues or questions.
Or if you don't and you are for example at one of the colleges and you use the readiness box, then use the readiness at ct.gov.
Stay tuned on the modern modernization web page. Also, when we do go live on that modernization page, if they're in the slim event that there happens to be some sort of issue that's you know, statewide and we do recognize that issue will be posting some notifications there to.
Kind of keep you up to date as to what's going on if.
Or any major issues that are known issues OK.
And thank you again everybody for all of your time. We give you back 4 minutes of your day.
And thank you again.
Please, please respond to your change agents.
Thank you.

PP **Padinhare, Pradeep** 1:50:37
Thanks everyone.
Thank you.

Reutter, Shanon M stopped transcription