HCM PUM User Group Webinar-20241118_165022-Meeting Recording

November 18, 2024, 3:09PM

1h 40m 12s

Reutter, Shanon M started transcription

Braga, Donna 0:08

Great. Good morning.

Braga, Donna 0:52

Right. Thank you.

Sorry for all the technical difficulties. We do have a really large presence this morning, so that's great to see.

We have almost 500 people, so welcome to the core CTHCM Palm User Group webinar.

Again, I am Donna Braga.

Core CT ERP business team lead and I want to thank you for taking the time to join us.

To learn about what's going on with the pump upgrade, hopefully you've been to some training and you've had some exposure.

We've for those of you who've been around for quite a while, we've been through some of these upgrades before, but this one it's going to look and feel a lot different.

So I'm really glad that you're here. And if you have colleagues who couldn't make it today or.

Couldn't make it to any of the user groups you know.

Tell them to keep their eyes peeled and check the website to watch the recording because there's a lot of good, important information that will make your life a lot easier next week.

So.

Next slide.

So accessibility.

For those of you.

That.
My apologies.
I'm working off of two desktops here. For those of you that require closed captioning, that's something that you can turn on your own version of teams. If you go up to the three dot ellipsis where it says more select settings and accessibility, then you can choose closed.
Captioning. So that's something that you have to do on your side.
We can't do that for you. The other thing with this presentation is we've enabled Q&A.
So.
Click on the Q&A box at the bottom at the top of your ribbon.
You should be able to see AQ and a window on the side. You can toggle between that or the chat.
We request that you use the Q&A functionality.
It helps us to record our questions and answers a little bit easier, but if you for some reason you're not able to access it because that is a known bug with Microsoft Teams, then you can go ahead and put questions in the chat.
We'll be monitoring both.
All right.
And if for some reason you can't use either.
Then you can e-mail the readiness at ct.gov e-mail box and send your questions that way so that we can include them with the FAQs all right.
Or at least get your questions answered OK.
This morning the meeting is scheduled for about two hours.
We do have some time built in for questions.
There'll be questions at the end of each section, right?
So each person will go through. We'll have time for questions at the end of each section, and then we'll have questions at the very end.
We'll have probably have a 5 or 10 minute break around 11:00 AM and again the FA QS. The slide deck for this presentation, the recording and the transcript will be posted to the modernization page.
You just have to be patient.
It takes us a little while.
It's a big recording.
It takes us a little while to get it on the bit server for you, but it will be put there OK.

Next slide.
The agenda for today we have benefits with Rachel Altona, our acting benefits lead human resources overview with Rosemarie Jensen.
Time and labor with Sean Anderson payroll changes with Lynn Bussa.
Some security information from Pradeep.
And Tracy Douglas and we'll have EPM and stars information from Janet Popple and then Shannon will go over some help desk information and reminders. And then for those of you who work with pension.
Retirement Services division or teacher retirement Services Ralph Minetilla will go through and then we'll have a closing.
Before that, if you could go back one slide my I'm a little bit out of order, but that's fine.
So just a couple of reminders about this presentation.
We are.
You know, again, I thank you for coming.
There's going to be a lot of important information to supplement your training. OK, so part of the part of the process is that we will share the changes with you. Now.
You have to remember that you're going to have to take those changes and update any information or.
Training or business process or procedure screenshots that you have.
With your own agency, one of the big takeaways that I do want you to have for this meeting is that.
For the most part, our business processes or your business processes aren't changing.
It's the look and feel of core and some of the navigation, OK.
But the core way that you're doing business should not change.
All right, we've been working with agencies for a while.
Each of your agencies should have a change agent, one or two that have been assigned to disseminate information to you.
And they're also assigned to assess the readiness of your agency.
So if you have someone reaching out to you at your agency who said, you know, we're the change agent, we need to know who's gone to training or anything like that.
Please respond to requests from them because they are reporting back to us and letting us know how you're doing. So appreciate your cooperation with that.

I know Shannon's going to give you some reminders again at the end about our core CT modernization page on the core CT website.
Training registration information, although that's pretty much wrapped up, we have two more user groups tomorrow for the financial side. For those of you that may straddle the duties of both.
We have meeting schedules.
We have all the slide decks, recordings and transcripts, and again this one will be posted.
There's also a link to the new training and support page.
We have what we call infographics.
Just some really nice one page Cheat Sheets.
For navigating in the new version of core, we are updating all of our job aids.
All of our eLearning videos are posted, so there aren't any new ones that are coming at this point in time.
They're nice, they're short, they're quick.
10-15 minutes Max on some of the major functionality.
And don't forget to check cross module because the cross module, that's where you'll find changes that apply to everyone.
So like basic navigation and approvals.
And finally, we'll have materials from the instructor led training.
Again, recordings and transcripts, etcetera for folks that couldn't make it all right.
So again, if you know of any colleagues who weren't able to attend the user group or attend the training, or if you have staff in your agency that are changing duties, these are great ways to share that information and to help them to learn.
So with that being said, I'm going to go ahead and we'll move on to the benefits presentation and Rachel Altona will take over. Thank you.

AR **Altinay, Rachel** 8:47
Good morning.
Thank you, Donna.
My name is Rachel Altinay and I am the team leads acting benefits for core CT and I will be reviewing with you fluid E benefits for new hire life events, agency specialist for document upload and open enrollment.
With employee self-service, they look and feel for the PeopleSoft homepage.
It's a little different.

This page here will show you some really cool icons that you will see on the home page.
Icons for Home page list, tiles, notifications, different icons that will identify where you can navigate to.
And the tiles that you will have access to. So the particular page is.
Security role based and if you have access to the tiles that you'll authorize to then you'll be able to navigate throughout the the page without any you know problems, but everything is based on security role based.
There is also additional fluid navigation.
Icons there is the NAV bar which you can use to access additional navigational options.
There is the NAV bar for recently visited icons.
Sites that you recently went to or pages you recently went to.
There's also the favorites icon that you can save your favorites to.
And then there's the menu icon where you navigate throughout the menu to get to various pages.
The goals of the ebenefits is to view benefit information using the fluid interface, manage life events that affect benefits and coverage interface.
There are a few key changes with the fluid employee self-service. E benefits improve look and feel of E benefits and the ability for uploading documents associated with the life of it.
So with the E benefits the 1st.
Review I will go through is for the new hire enrollment. And so when you get to the navigation.
Home page you will see employee self-service and from that page you click on the benefits details.
And then you will see another tile home page which you will click on benefits enrollment.
Click on the benefits enrollment page.
It will take you to the benefits enrollment.
Events page. At that point you will click on the START button.
Why you click on the start button?
It will take you to the benefits enrollment page and this is where you select the coverage benefit plan that you would like to change.
So if you would like to change medical, you click on the medical tile.

And it will take you to medical screen for you to add and update dependent information and if you have no dependent information to add then you click on the plan name there at the bottom you just select the plan in which you would like to enroll in however.

If you do have dependents to be added, then click on the add and update dependent information.

And it will take you to the at individual dependent beneficiary information page.

Here is where you enter your dependent information. You fill out all of the required information.

Add the name, add the Social Security number, phone number, e-mail address and click the save button.

And it will pop up with the message after you save your dependent a message will appear.

Supporting documents are required for the changes made.

Select the attachment links from dependent beneficiary information or use dependent use benefits attachment to attach the documents you click OK.

Once you click OK, it will then go through the process of you adding the document for your dependent.

So you click on the add attachment box at the bottom.

And it would prompt you to attach the document through this file attachment page.

Once you attach the document, you click done.

And here you will see that you're dependent and beneficiary information.

Attachment was uploaded the link to your far right there that says view has your attachment.

In the document now.

And so if you would like to go back to your medical enrollment page and attach your dependent to your medical coverage, then once you click OK on the previous page, it will bring you to this page. You check the box under dependents there and then you select the.

Medical plan that you wish to enroll in with your dependent.

And then it will take you back to the home page landing page, there where you can submit your enrollment. If you're completed with your elections or if you wish to review your enrollments. If you click the enrollment preview statement button.

It will show you all of the elections and changes that you made for your new hire event.

So has your benefit plans, your coverage base and your dependents that are attached?
To your enrollment.
So this is the complete enrollment process for a new hire.
I will now move on to E benefits.
So again, under the employee self-service page, the landing page you will have.
Employee self-service and then on this page you would click the benefit details tile.
Once you click the benefits detail tiles.
Could you next slide please?
Another benefit detail tile that you have to click on is the life events.
Life events page will appear for you to make your selection of the type of life event you're trying to make. If it's a birth, adoption, marriage, divorce, loss of dependent coverage, loss of coverage, you just click the radio button in which event you would like to make a.
Change once you select that radio button or option. You then enter the.
As update, so the date as of the event.
So that the birth was 10/7 then that's the date you would put in 10-7 and then you click the start life event button.
And it will bring up a welcome to the birth adoption event and that would change depending on the type of event that you select. And so from this page you would click the next button.
And it will take you to the benefits summary page and let me just point out that the.
Pages to the left there the steps they cost.
Activity guide steps.
So those are steps that you have to take in order to complete the event.
So the first step was the welcome page.
Now the second step is this benefit summary page and the summary page is to show you your current benefit enrollments. What you are currently enrolled in.
And so the next step, click next.
Be your dependent beneficiary information, and if you would like to add individuals to your dependent beneficiary information, then you click the add individual button there just underneath benefit beneficiary info and you will follow the steps to add your individual dependent beneficiary's to your enrollment click next.
The next step is your benefits. Enrollment for your life event. So you click the start my enrollment button.

And it will bring you to the benefits enrollment information page as well as the tiles in which you can select to make your benefit enrollment change.
So if you click on the medical tile it will, it will take you to the enrollment of changing your medical coverage. If you click on the dental, it will take you again to the enrollment to make your change for your dental coverage.
Click next.
There's also, just like the new higher enrollment, there is a document upload process for E benefits life events and this is the page, the document upload. And so you would click on the add attachment button there and near the bottom to add your upload document for your life.
Event that you're changing click next.
The life of that information, similar to no hire but for the most part is it's pretty much the same.
So the next E benefits.
Change that. I will go over is for the benefits agency specialist and this is only for the benefits agency specialist.
The document upload process.
Is via the workforce administrator tile under.
Core CT Hrms Workforce administration and you click on the workforce administrator tile. Click next.
And then there's another tile review benefits attachment.
And then it will bring up this review benefits attachment search page.
So you enter the employ ID of the employee in which you would like to upload.
Or see their uploaded documents record so you enter their employ ID, click next.
And it will bring up the return selected employee information. As you can see on this particular page there was a upload on 10/10 for a divorce and that event status was complete, meaning that the document that was uploaded for that event was completed but on 10/10.
Again, there was a birth event and that document upload was not completed and this is the message that you will receive when you are.
Attachments during a life event, and so the agency specialist can click on that little icon button.
And if they have the document from the employee, they can then click on the icon and upload the document themselves.
So the next.

Employee self-service change is for open enrollment. So the open enrollment again there is a tile and as you can see the open enrollment information.
Is displayed on the tile, the date of the open enrollment and some other detailed information about the open enrollment deadline. So click on the open enrollment tile.
And it will bring you to the welcome page. It will provide information of the enrollment period. It gives you some page information of.
Required dependent information, documentation and so forth.
But again, it's the page that is a activity guide step page. So every step on this page.
You would just click the next button to get to.
So here's the welcome page. Click next.
The next one is the benefits attachment.
This is the page in which you attach any documents for your open enrollment. Click next.
This is the page you act independent beneficiary information. You want to add individuals to.
Your coverage you would just click this add individual and complete the process and the steps of doing that.
Then if it's only page again, it's a summary page of your current benefit enrollment, so you can review what you currently have.
And you cannot make any changes here.
It's just a review summary only, just as what you have today as coverage.
Benefit enrollment page.
Is a informational.
Page about your open enrollment and some guidelines in which you.
Would.
Some authorization election information and so forth.
And underneath the benefit information, you have your actual enrollment.
Tiles in which you can click on and make benefit elections. So your medical tile there you could click on it and it will open up and you make your benefit elections your dental tile.
You just click on it and make your benefit elections. So those two tiles you will be able to make benefit changes in elections and add dependence. However, on your life.
The life insurance tile.

You will notice that it is not highlighted in blue and that means that your life insurance cannot be changed during the open enrollment period.
Click next.
The last step is your summary page and it just gives you information on the submitted enrollment information.
For your open enrollment.
So underneath where you see steps.
It tells you the status of each step.
You visited the welcome.
You visited the benefits attachment.
You visit visited the ad. A dependent beneficiary information. You visited the benefits summary.
You visited the benefits enrollment and so if you wish to go back to any of those steps to the far right there, just click on go to step and it will take you back to that particular step.
And then once you're all done with your enrollment, if you click the mark complete button up top right, then your enrollment will be submitted.
Any questions?
OK. I'll turn it over to Rosemary Jensen for Hammond Resources.

Reutter, Shanon M 25:36
There's there is a question.
It says how do we make a change to our last name?

Altinay, Rachel 25:47
That would be HR.

Padinhare, Pradeep 25:50
Bye.

Altinay, Rachel 25:51
Rosemary probably would be able to answer that.

Jensen, Rosemarie 25:55

Sure, yeah, that'll be done through self-service much like you do it today. And then that would need to be approved by your HR representative.

Reutter, Shanon M 26:05

K.

There's another question.

Do we need to re enter our information or will everything be migrated over with the update?

Altinay, Rachel 26:14

Do they mean the benefit information?

Everything will be migrated over.

Padinhare, Pradeep 26:21

I think it's already be answered. All the information will be migrated.

Yeah, except now open transactions, right?

I think that will be covering one of the slides.

Reutter, Shanon M 26:31

Then somebody has question, is the training going to cover entering a timesheet and approving timesheet?

Anderson, Sean 26:43

Yes, I'll touch on that when we get to timing later.

Braga, Donna 26:46

There's also, you know, this is more of a like what's different in core as well.

There's also training on the training and support page.

Reutter, Shanon M 26:57

OK.

There's another question during open enrollment. If there are no changes, do you still need to go through the steps?

Altinay, Rachel 27:04

No. If you have no changes with open enrollment, then your current changes will move forth for the following year.
So if you have no changes this year, you will have the same benefit coverage next year.

JR **Jensen, Rosemarie** 27:33
OK.
Good morning.
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 key tips and reminders of changes coming with the upgrade.
So let's begin with some key changes in searching. There are now more fields to search by, including HR status and job code in manage job that will allow users to search for only active employees.
Or to identify employees in a certain job class. However, please be aware that you will need to include the business unit on both managed job and managed position. If you're searching by any of the fields that have a magnifying glass next to it. So that would be Loc.
Code Department and job code. In addition, when searching for a specific position number, be sure to include all 8 digits, including the 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. Also highlighted here.
For all address entries, the entire state name and not the abbreviation will need to be entered in the new system that can be typed in manually or you can use a magnifying glass to select the state.
Finally, to view whether an employee address is active or inactive, select the arrow on the right of an individual address entry.
This will open the entry in a new pop up and you'll see the status listed just below the effective date and the country.

So a few changes in job data to go over the change to fluid means that some fields have changed their location or they might have slightly different names. For example, the overtime indicator and the FLSA period in days are now accessed by clicking open the USA indicator.
That's actually the same spot they are now, but in the current system you don't have to Click to open it.
You also notice that the FLSA period in days labels have changed slightly, so the period in days that you see currently in the system as 40 will now be O7-40 and the period in days currently reflected as 80 will now show AS14-80.
So the number after the hyphen is the same number from production.
There is no change for job codes with.
Overtime indicator of no FLSA that'll still be Na.
In job data, there's also a brand new tab called Additional Job Info where you'll find the following fields permanent job code and permanent PCN use for temporary service and higher class assignments, as well as the SDE rank and the certification this number.
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. In this example, there's an invalid job code, so to leave the page without saving the transaction, you'll need to click return to search.
Which is in the upper right highlighted here in yellow instead of the exit button.
There's also a few changes to how HR users will enter employee compensation.
First, note that the default frequency is now biweekly 26.1 that can remain as is for full time employees. For full time employees and step plans, you'll click default pay components and the compensation rate will populate just as it works that way today.
The frequency for.
Part Time employees is now state of Connecticut hourly instead of HCT.
For part time employees as well as all employees and range plans, you'll need to click the add pay component button before entering the rate.
So that is one additional step.
You'll then enter the rate code of CT base, enter the compensation, and then click the calculate compensation button.
See, next we'll discuss changes to accessing notepads and job data. A key difference in the new system is that notepads cannot be added for a transaction until that row has been saved.

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, you'll select notes and that will bring you to the notepad screen. That looks very similar to the screen in today's system.
The effective date and effective sequence will be prepopulated.
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 very effective way to record relevant information and job data. They can be particularly helpful when others are reviewing the record, so we.
Do encourage their use.
There are also now two ways to view existing notepad entries. A new feature that allows users to access all notepads for an employee record is shown in the top screenshot.
The green circle shows the total number of notepads for the employee record. So in this case there are 33 total. You can click that icon and all of the notepads for that 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'll 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 in the new system. First note that the employee class drop down options now appear with their short descriptions.
Those can all be found on the employee class. Job aid on the core CT website.
In addition, the employment data page can now only be added updated by adding a new row.
And then a reminder that in order to view employees past rows, you will need to check the include history box.
Before you enter the employee record.
And finally, as we discussed in our trainings, the effective date and action reason codes cannot be changed once you have begun the activity guide.
So that applies in both managed job and managed position. If you realize those values are incorrect, you can exit the activity guide. If you haven't submitted the transaction yet or if you have submitted the transaction, you can submit a footprints ticket and the core HR team will be.

Happy to make the correction for you.
And finally, I'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 wanted to 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 adding a new position transaction.
And in the activity guide the refill indicator is actually the very first field on the very first tab.
And I also want to point out that the funding information is the very last section when you're reviewing an existing physician data row under the heading position funding details.
So you'll want to be sure that you've scrolled all the way down to the bottom of the page to find that information.
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 will be entered post upgrade. The approval change shows the names of the Approvers and.
The order of routing as well as approver comments and timestamps of when each approval was made and the position approval tab is still available as a view only feature. To review historical position.
Actions and both the approval chain and historical position approval tab information are viewable by clicking the blue approval chain link on a specific row.
And now we'll pause for hour related questions.

Reutter, Shanon M 36:18
One, but this pertains to Rachel.
Do we have to do anything if a dependent is falling off our coverages?

Altinay, Rachel 36:28
No, you're dependent if your dependent falls off your coverage, you will see you will receive.
Notification.
From benefits or agencies regarding COBRA.
But you wouldn't have to do anything.

Braga, Donna 36:46

Again, those processes are not changing with the upgrade.

That's standard procedures today.

Reutter, Shanon M 36:54

OK.

And there's another question, will there still be an initialized feature?

Jensen, Rosemarie 37:01

The initialized feature has been replaced with a different feature that works very similarly called the Clone button. That will still let you use an existing position and create a new position that's essentially a copy of it with the same key fields.

Reutter, Shanon M 37:23

Hey, that's all I have for questions.

Jensen, Rosemarie 37:26

OK.

Thank you.

Next up is Sean Anderson with time and Labor.

Anderson, Sean 37:32

Hi everyone.

My name is Shawn Anderson.

I'm the time and Labor team lead.

First, we're going to talk about employee self-service options with the new upgrade.

So when you go into the new version of core on the left hand side of the page, you'll see a drop down menu to select the dashboard.

In this case you would select the employee self-service dashboard and then you would see the tiles and we will select the time tile.

That's how you get to the new versions of the timesheet.

And the new upgraded version of core, there's three different versions of the timesheet.

First and foremost, there's enter time, which is more or less the equivalent of the

current timesheet.
It shows a full pay period at a time.
Next, there's weekly time which allows the user to enter one week of an attendance at a time. This page contains different bubbles for the different days of the week, so the user would just click the bubbles for the days that they want to record the attendance and then.
Last but not least, there's report time.
And report time is used to enter one day of attendance at a time.
So a key thing here is that weekly time and report time are supported for mobile.
So if a user wants to record their timesheet attendance with using a tablet or mobile device, weekly time or report time would be the best option. To do that. Another thing I want to point out here is unfortunately with the new upgrade.
Your leave and comp time balances will no longer be displayed at the bottom of the timesheet.
This is the case for all three versions of the timesheet.
And employees leave in comp time balances are now displayed on a separate page which can be accessed which I highlighted here in blue to the leave slash comp time tile.
The functionality will remain the same as it is in the current version of core, but it just will not be displayed at the bottom of the of the timesheet.
It is currently.
So For more information on submitting your timesheet, there is a training which I know Donna mentioned when we got that time and labor related question.
So if you went to the core CT website, then on the left hand side you clicked on modernization and then clicked on core CT, POM upgrade training and support from there. That'll bring you to a new page.
And then on that new page in the lower left, there's an HTM box. If you click on the time and Labor link.
And then lastly, if you click on the L100 time and labor self-service in the e-learning module box, that'll take you to the time of Labor training which will go in depth on the three different versions of the timesheet and how to submit your times.
Et cetera.
And then next, the next question, we get a lot with the upgrade. When you talk about timesheet entry, you also need to address time approval. So on the left hand side, if you're an approver, there'll be a dashboard that says for C, T, H RMS you.

Click on manager self-service.
And then once you click on manage your self-service, there will be a time approval tile you can click on that time approval tile.
And then once you click on the time approval tile, that'll take you to the time approval search page.
This page functions and looks exactly how it does in the current version of core, so there really shouldn't be any issues because this page is is the exact same as now and it functions the exact same as it does now.
Next, we're going to talk about for users that perform payroll and time and labor functions as part of their daily work.
If you find the Core CT Hrms dashboard, we set up a time and labor tile.
So this tile is going to serve as a one stop shop for those individuals that work in payroll or service time and labor specialist and perform time and labor duties.
So if you click on that time and labor tile, it'll take you to.
What we created a series of high action tiles here.
So it's kind of a one stop shop.
You could, you know, enter time, report transactions, update employees, assign work schedule and royal employees and comp plans.
And leave plans or make adjust time entries. We kind of created this tile.
So it's all right here, so users have that ability to make all these transactions quite easily and quickly.
Now we're going to take an in depth look at the team time tile.
This is where you go.
To enter time for your employees. If you're a timely labor specialist.
So if you click on that tile, it'll bring you to the search page and then one thing I want to point out here with the search page is if you have a saved search set up already that saved search will carry over to the new version of core.
And I'm just going to show you how to edit that saved search if you ever need to change it or remove it because it's not quite as simple as it is in the current version of core.
So if we see here.
My safe search is 08/01 1:00 so that pre populates whenever I come to the team time page and I'll show you the navigation of how to edit that.
So you go to the to the NAV bar in the upper right of the core homepage. Then you click on manager self-service. From there you click on time management and then

manager search options.
Once you're there, it'll bring you to the manager search options page and you see there there's different fields here that you could edit and in my case the time reported group field is already prepopulated with that 08011. So if I wanted to change.
That I can either change the group that's there.
I could completely remove it or I could add a different value to a different field such as employee ID or last name, and then you just hit save and then however you have it saved when you go back to the enter time page, that's the value that will.
Now pre populate when you return to the team time page.
And that's all I have for time and labor changes. If you have any other questions.
I'll be happy to adjust those questions now.

Reutter, Shanon M 44:15
OK, we have a few questions.
Will supervisors have access to see the leave balances for their employees?

Anderson, Sean 44:23
Yes, it's going to function the same way.
Unfortunately, it's just it's not going to appear at the bottom of the timesheet.
They'll just have to go to the leave slash comp time.
Link and then from there they'll be able to see the Leave and comp balances for their employees. It just won't.
It will no longer be on the timesheet.

Reutter, Shanon M 44:44
Another question I have to enter combo codes for my timesheet to allot for time spent on certain federal projects.
Will I still have that ability?

Anderson, Sean 44:54
Yeah. So you'll still be able to enter comma codes on the timesheet just like you do now.
The only difference will be.
Currently, the combo code field is all the way to the far right of the timesheet due to

spacing and the fact that the time she's now supported through mobile it it you have to click on a three little dots that are found in between the time reporting code.
In the in the totals for the row. So you have to click on those 3 little dots.
That'll bring up another little.
Pagelet. And then that's where you can enter the combo code.
So the entry is still the same, it's just where to find the field is it will be a little bit different.

Reutter, Shanon M 45:34
Another question, why would a user elect the option to submit one day at a time and reverses a weekly time entry?

Anderson, Sean 45:43
It's personal preference, so we just we have, we currently have the option which we didn't have before.
So you know, different users have different preferences when it comes to submitting their timesheets.
Some users like to do it a day at a time.
Some users like to wait till the end of the day period and submit it all at once.
So it's personal preference.
So now we just we have more options available to you know, hopefully cater to everyone's different preferences.

Reutter, Shanon M 46:11
Currently, we review the time sheets on Thursday prior to approving on Friday, to ensure staff have correct entered time and combo codes. What are the steps?

Anderson, Sean 46:23
Steps for reviewing timesheets and approving timesheets will be the same as you as you do now.
So whatever business processes your agency has established now, I would expect those to continue in the new version of core. And you know, utilizing the same reports that you do now should also continue in the same in the same fashion.

Reutter, Shanon M 46:46

Next question, will a user be able to enter 2 pay periods in advance?

Anderson, Sean 46:53

Yes, that that same function that exists now and that same functionality will continue in the in the upgraded version of core.

Reutter, Shanon M 47:03

Question how do you enter on call time?

Anderson, Sean 47:09

So depending on what TRC your party unit qualifies for for on call pay, you would use that TRC and you would enter it just like you do now in one of the three versions of the of the timesheet. Depending on your personal preference.

Reutter, Shanon M 47:28

OK.

Next question, can we still print timesheets within the new system?

I currently have to print a timesheet for our Commissioner only.

Anderson, Sean 47:38

Yes, I believe that that you still have the ability to print the timesheet.

Reutter, Shanon M 47:47

The website address can be added in the chat which that did get done.

Another question, can we change our W4 in the new system by ourselves?

Padinhare, Pradeep 47:59

You can cover and pay.

Anderson, Sean 47:59

So W4, that's a that's a payroll question.

Or so Lynn Bussa I don't.

Bussa, Lynne 48:05
Yes, unfortunately no.

Anderson, Sean 48:06
Know.

Bussa, Lynne 48:08
W4 self-service is not part of the upgrade.
It will be a future enhancement which we hope will be next year sometime.

Reutter, Shanon M 48:22
Looks like all the questions for now.
We're going to go ahead and take a 5 minute break and we'll come back at 11:03.
OK.
We have one more question before we get started.
On the next section.
Question is, I understand that there's a webinar for self-service users, but will there be a PowerPoint to share with users as was the case previously?

Padinhare, Pradeep 54:27
Is this what time entry or something specifically?
A lot of training for time and labor.

Reutter, Shanon M 54:39
Bring on your question please.

Padinhare, Pradeep 54:59
John, you want to answer that question?
I think there are a lot of documentation, yeah, so.

Anderson, Sean 55:03
I'm sorry I missed the first part of the question.
What was the question?

Reutter, Shanon M 55:06

OK, it says.

I understand that there is a webinar for self-service users, but will there be a PowerPoint to share with users as was the case previously for time entry?

Anderson, Sean 55:21

Yeah. So there's the training. And then there's also those.

I forget what those documents are called, but there's also like single page documents. I believe that are on the website.

Yeah, info infographics.

Braga, Donna 55:33

The graphics.

Anderson, Sean 55:34

Yep. Thank you, Donald.

Braga, Donna 55:36

So for time entry, there's a there's AI, believe there's an infographic.

There's also an e-learning video which is about 10 to 15 minutes.

There was no webinar, but yeah, I think the terminology was like the e-learning videos.

So you'll see those under time and labor.

On the training and support page, and I believe you'll see some of them under cross module as well.

Reutter, Shanon M 56:04

OK.

That's all we have for questions.

We will jump ahead and we're going to discuss payroll.

Lynn, take it away.

Bussa, Lynne 56:18

Morning, everybody.

This is Lynn Bussa from core CT payroll.
Welcome back. The good news regarding payroll functionality is there were no major changes with this upgrade. Payroll navigation has basically stayed the same like it is today in core except for a few items that we will briefly go over today.
One of those items encompasses a few of those things, and this is eBay self-service.
It has a new look and all payroll self-service items are found under this tile.
Employee self-service is now fluid so that users can access from any of their mobile devices.
As well as her desktop O from the employee self-service Dashboard, click on the payroll tile and from here you can access paycheck information, W2 consent and forms and a new feature the Paycheck modeler.
So let's see W2 and W2C consent. So 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.
Checking the box to either consent status to receive the W form electronically or then if you wish to withdraw consent to receive a printed form, your status will be displayed under your current status for verification and security when users change their status, a pop up box will now.
Appear and ask you to enter your core password.
So please make note if employees do not have an e-mail address or a valid e-mail address.
The employee will receive a receive a warning message.
Stating the employee has no e-mail address or an invalid e-mail address, they will not be able to change their consent status.
Employees will need to contact their agency to correct their e-mail address in personal details under the contact details tile.
Next W2W2C forms.
Click the tile to access. This is where you can view your W2 or your W2C as well as instructions for those forms.
So like today in core, the tile has a drop down to select the year that you wish to view for your W2 or W2C and then click view forms. The W2 filing instructions can also be viewed at this point by clicking on the box.
Then here we have just an example of AW two and then either the W2 or W2C can be printed and or downloaded as well.
Next, we have a new feature with this upgrade.

It is the paycheck modeler. This much anticipated feature is for employees to use to simulate their own paycheck and see the results of what if scenarios.
The paycheck modeler is a hypothetical check, and before the employee must agree to use, they must check off the terms of agreement.
Users must agree to such terms as at the modeler is for general guidance and estimates only, and that it does not a genuine paycheck.
The modeler uses earnings that are based on the standard hours and rate of pay and job data that was in effect from the previously confirmed paycheck. Deductions are the employees' standard deductions and taxes are based on the employee's current tax information.
Employees can add or subtract earnings, add, or subtract deductions, as well as change their tax withholding amounts to see those what if scenarios? For more information on the new Paycheck modeler, please watch the captivates training video on the core CT website and it will provide.
Much more information on its use.
Next we have is view paycheck information from the 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.
So from view paycheck information in the paycheck details page, employees can view their whole paycheck and its details.
They can also print or download it. We think users will like the easy access of E pay self-service through the tiles as well as the ability to access the tiles on their go on the go with their mobile devices.
And next we're going to touch on direct deposit.
So there was a significant change with direct deposit when setting up our processing changes to direct deposit for your employees. There's 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 a navigation bar and the upper right hand corner to navigate to the request direct deposit page and then in the slide we provided the navigation path but it's the same as today.

So in our example, when entering a direct deposit request, when there's only one bank account, the option to choose net pay percent or 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. So you must use balance of net pay or else the account will not be configured.
So we're going to do an example here.
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 direct deposit type balance of net pay, then leaving net pay percent blank and change the priority to 99.
Continue with adding account number and then save your transaction.
So that was example of one account.
So here's an example of entering two bank accounts when they're two bank accounts for the first account, it is the same functionality as it in court today. The user can choose for deposit type percent or amount, and then the corresponding entry in that 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 99.
Or 999. Excuse me if the second account is not set to balance of net pay, the user will receive a hard stop message and will be unable to save the transaction.
The reason for the change?
In the new functionality is because with the pump upgrade we wanted to sunset old customizations and use delivered functionality.
Balance of net pay actually exists today, but with our customization it wasn't allowable. But now with the upgrade we are bringing balance of net pay back.
The delivered functionality also simplifies request for direct deposit entries.
It also ensures if there's ever any future need, we'll receive support from Oracle and we have posted a request direct deposit job aid on the core CT website.
Assist as well.
We hope that this presentation helps as you navigate the new futures new features look and functionality of the pump upgrade, and happy to take any questions that you might have.

Reutter, Shanon M 1:03:38

OK.
We have one previous question for Rose.
Will we still be able to run the personnel actions history report and will it print the notepad along with each associated transaction that was processed?

Jensen, Rosemarie 1:03:52
Yes, the personal actions history report will function in the same way, and that'll include the notepad at the bottom.

Reutter, Shanon M 1:03:59
OK.
Next question, do we need to check the W2 consent form with the new upgrade or will the consent carry over if we currently have currently consent now?

Bussa, Lynne 1:04:10
The consent will carry over, but you're welcome to go in there and flip flop back and forth. You will receive like we said, an e-mail notification that you did that, but you can change it if you wanted to check it out, but it will carry forward and then.
Again, just a reminder, employees do need a valid e-mail address in the system in order to use.

Reutter, Shanon M 1:04:34
OK.
Next question will users be able to still see two years of pay stubs?

Bussa, Lynne 1:04:39
Yes, yes, I believe now it's up to seven years.

Reutter, Shanon M 1:04:45
OK. And the next question, previous payroll staff had access to view 300 records in paycheck.
Is this the?
Is this the upgrade the same?

Bussa, Lynne 1:04:56

It's still up to 300 and then if you want further back, you need to type in. You know more settings you need to sort of break it down a little bit more, but yes, it's still 300 is the Max.

Reutter, Shanon M 1:05:09
OK.
Next question, is there still only two accounts allowed?

Bussa, Lynne 1:05:14
Correct, yes.
Correct only to direct deposit accounts allowed, yes.

Reutter, Shanon M 1:05:21
OK.
Next question, does the change in direct deposit mean we can use any two banks or one still must be the state employees credit union?

Bussa, Lynne 1:05:31
No, you couldn't use any banks. I think there is an issue with. I'm trying to think of the term of those banks.
Not like a mutual fund or something. It has to actually be like a checking or savings account.
It can't be like an investment account.
But it doesn't have to be the credit union.
It could be any two banks.

Reutter, Shanon M 1:05:55
Next question, does the e-mail need to be a state e-mail or can it be a personal e-mail?

Bussa, Lynne 1:06:02
I believe the priority is the business, which is the state e-mail.
Yes, that is, that's preferred.

Reutter, Shanon M 1:06:12

Let me switch over.
Hey, that looks like all of our questions for now.

BL **Bussa, Lynne** 1:06:26
Turning it over to Pradeep for security updates with the Palm upgrade.

PP **Padinhare, Pradeep** 1:06:34
All right.
Good morning, everyone.
My name is Pradeep and I'm the agency it manager at core and I'll quickly cover one of the interesting topics which is Co 1092 and the submission the approval process.
I think we've the reason I think before even jump on to these slides, there is no process change.
What we did is we just created a like, you know, new tile for submitting the CEO 1099, I'm sorry.
Co 1092.
So if you go once you log in.
If you go to left side employee self-service and if you click HRMSI think you go to security tile. Once you click on the security tile you'll see three different options.
Again based on your it's all based on your access. I think for me.
I see like manager approval and the security approval, these two tiles and some other. You know, people may see you know.
1092 security request.
So this this is the one of new change or the new navigation where you know?
People can submit their Co 292.
Over the next sorry, can you go back?
I'm sorry. Just one. One thing I wanted to mention here.
I think once you submit your Co 1092 the way it works, you can either you know go to the manager's approval tile or the you know the security approval tile to approve the request.
The new feature, which is added a part of this pump upgrade is basically you have a bell icon on the top where you can see the notifications.
You know, whatever requests been coming through to you.
And you can click from there which is which is this part of the. You know the notification and you'll see right now if there are request in your queue, you can click

from there and also provide.
I think there are people.
They use emails.
I mean, you can continue to do that.
Also you can click on the e-mail which will take you to the same interface and you can upload the request from there as well.
Next slide please.
Right. Also, I'm just you know showing what is a current navigation of security request right the way use it now in core basically go to this path to submit the request and those will be like in a move into a core which is which you can access V.
A NAV bar.
So exactly, if you go to the right side, you'll be able to access them from now bar and you'll see three exact same requests. Same options, the manager approval, security requests and the security approvals.
That will be there.
All right.
Next slide, I think, I think I mentioned this before, the only one change which I've noticed I think is came in the previous session as well.
I think you know existing workplace.
I think people see that worklist will be removed or I would say replaced with the notification icon which I mentioned before.
So you go to Bell icon, the Bell icon will show all the stuff you know pending request which is waiting for your approval.
So you click on the Bell icon.
You see the list? You click one of those transaction and you can upload them from there, which is again you know you know select a replacement for the worklist.
And I think we also mentioned I think in the previous session is you know just wanted to make sure all your security approvals are submitted and approved by today. I think the sub submission date was last week 1113 and then everything should be approved by today if.
Not I think you have to submit once the system come back on 11/25 on Monday.
Right. I think that's all I had.
I think I'll hand it over to Tracy and Ada for you know, more changes on the security side.

Douglas, Tracy 1:10:25

Good morning, everyone.

With the security as far as submitting Co 1090 twos, it's just been some just a few changes.

That the liaisons and Co 1092 liaisons will have to pay special attention to and if we can go to the next slide.

The role handbook is in the process of being updated.

It for the most part it has been updated with the delivery roles.

And those deliver roles have to be requested along with the new, with the existing roles.

So that is something that the security liaisons and the Co 1092 liaisons and I say that because a lot of agencies, they're one and the same security liaison is also ACO 1092 liaison.

So when requesting HCM roles for the most part, if you look at the role handbook, you'll see a list of existing.

Roles that correspond with I'm sorry.

A list of delivered roles that correspond with the existing roles that you must request.

Um, currently the.

List of delivered roles the new delivered roles can be found under the modernization. Link.

On the corn website, we are in the process of making sure that that spreadsheet is also listed on the security page just for easy of access.

And just in case, a liaison will want to.

You know, just look at it.

In advance of submitting their CL1092 request.

So I don't believe this link is live. If it I mean is active, if it were active you just would click on that link to the spreadsheet and you'll see a list it.

It'll be like I think it's 4 columns and it lists all of the current HCM roles along with the new.

The new HCM delivered roles.

And that'll.

Be, umm, you'll understand it better once you see the spreadsheet, but those.

Delivered roles must be requested if.

You're requesting.

An existing role that is on the.

Hrms role handbook currently.

You'll have to look to see what delivery roles go with that and.

Those deliverables cannot be populated on the form itself.

You'll have to put those.

Deliver roles in the comments section of the CL1092.

So yes, we're going to have this is a link where you could find on the security page where you'll find the role handbook. And we're also once you click on that link, we're going to put a link to this, the deliver role spreadsheet in that same area just for E.

Of use.

And right now if you have any questions, I'll, I'll try the answering for you at this point.

Reutter, Shanon M 1:14:45

It doesn't look like there's any security questions.

Douglas, Tracy 1:14:47

Yay.

Just just kidding.

Oh, I just saw something pop up.

Reutter, Shanon M 1:15:02

OK, Co 1092 should be entered for new participants, correct?

Douglas, Tracy 1:15:12

For new participants.

Can you elaborate on that question a little bit? When you say new participants, are you saying are you asking if there is a a request for an employee to have?

Roles other than their dynamic roles populated on their profile, is that the transaction levels.

Is that the question?

Well.

For, for new users if, the agency or the management in the agency requires that new user to have transactional roles, then yes, you would have to use the Co 1092.

Otherwise, you know, there's no need to put in a request.

Did I answer you a question?
So all users, once they are in core, they have a list of I believe 8 dynamic roles that come on their profile.
And so those are primarily for viewing your paycheck or?
Submitting your time and attendance.
And just giving you access to core. However, if you are.
Do not need other transactional roles and there's no need to submit a CL1092 request.

Reutter, Shanon M 1:16:49
All for questions.

Padinhare, Pradeep 1:16:51
And plus, that process is not changing right?
The process remain the same, right?
That's the only thing.

Douglas, Tracy 1:16:55
Processes. Yeah, the process is the same.

Padinhare, Pradeep 1:16:58
Exactly. Yep.

Reutter, Shanon M 1:17:05
She said thank you for clarification.

Douglas, Tracy 1:17:08
Oh, you're welcome.
So now we'll we'll turn it over to EPM and stars Janet Popple and Wendy Mock.

Monk, Wendy 1:17:19
Good morning.
This is Wendy.
Can everybody hear me?

Padinhare, Pradeep 1:17:26
Can hear you.

Monk, Wendy 1:17:26
Cool.
I'll just be talking a little bit about EPM.
Navigation and then in palm it's going to be the old type of navigation over the right hand side.
Where the black arrow is showing.
You can always save it to your favorites though.
There is no tile for it, but you can always save it to your favorites.
Side.
And the Puma upgrade APM reporting changes if you have any existing private queries using the CTW position table for the purpose of the workflow only knowledge.
Will have to recreate them and utilize the CTW position E table. If you. If you need assistance, please reach out to the EPM team by logging in to footprints ticket.
We'll recreate it for you.
We'll modify it for you.
We'll assist you in any way we can.
Next slide.
Epm query impacts.
Run controls will not be deleted.
Prescheduled report or queries will have to be rescheduled.
Private queries will not be deleted EPM query favorites. They will be erased.
They will be erased.
Your favorites will be erased. It's saying will not that that is incorrect.
They will be erased. All you have to do is make them your favorites again. Once Pub goes live.
Lastly, stars has a tile.
It's on the left hand navigation.
It's under my reports and again you can always save that to your favorites as well.
That's it for APM.
Does anybody have any questions?

Reutter, Shanon M 1:19:39

OK.

We have some questions.

Will core CT provide training for new security liaisons?

Douglas, Tracy 1:19:49

So we haven't really.

Had a real need for.

New liaison training in quite a while the process.

Pretty much the process is pretty much remain the same. We have several.

Job aids on the core website and of course, if there's something that liaison.

Is not familiar with or can't understand.

The security mailbox is open for questions.

You can put your questions or concerns in an e-mail and send it to security mailbox.

Nada. Or I will respond.

Reutter, Shanon M 1:20:36

OK. Question. Will the CT under score core reports remain available?

Monk, Wendy 1:20:45

Lower ports will remain available. All of the reports.

In terms of EPM, nothing has changed in that.

Reutter, Shanon M 1:20:59

OK, that looks like.

That looks like all the questions we have so far.

Monk, Wendy 1:21:05

Thank you.

Reutter, Shanon M 1:21:21

Hello everyone.

I'm Shannon Rider from the core help desk.

I'll be talking to you today about some important items.

1st I'm going to start with.
The URL for footprints, we encourage everyone to log a ticket.
The help desk answers tickets as quickly as possible when the tickets are submitted.
Keep an eye out for emails when you have open tickets because the help desk will communicate through the ticket. You can respond directly to the ticket through the e-mail that you get from footprints and.
It attaches to your response to the ticket and notifies the help desk that you have responded.
Footprints routing the tickets are routed directly to the team that handles the.
Module for faster processing.
If you are in need of footprint access, please e-mail the readiness mailbox with the subject footprints access and we will grant you access.
The readiness mailbox. If you have an e-mail address that does not end in ct.gov, you can e-mail the readiness mailbox for the help desk to create a footprints ticket on your behalf. Again, even though you do not have access to footprints, you can still receive e-mail.
From footprints and respond in them.
And they also will attach to the footprints ticket and notify the help desk person that you have responded.
And please refrain from reaching out to the module leads as we need to document every issue that comes in, especially after this upgrade.
Now the core CT modernization page, everybody's kind of hit on.
It's where you'll find the decks from previous change agent meetings, along with recordings, transcripts, and Q.
And as there's a link for the course CT POM upgrade training registration page that contains the L100 classes along with previous class recordings, transcripts and Q. And as that you can.
Review at any point in time.
They'll always be there for you.
We also have e-learning modules as was discussed earlier.
That are 10 to 15 minute training modules that can be viewed at anytime at your own pace and the steps can be saved as a pdf for your own reference.
Then the instructor led modules the L200 courses.
There they cover more complex topics and are currently available.
Or were currently available as instructed.

Lid training sessions and you can actually view all those recordings online.
The next page is our new core CT pum upgrade training and support page.
Here you'll find the infographics that were discussed which are the one page documents that one-page documents that recap cross-module topics such as navigation and approvals.

You'll also find job aids, which are printable documents outlining the business processes and steps within core.
Again, you'll find e-learning modules which are the 10 to 15 minute trainings.
And you will also find the L200 courses that cover the most more complex topics.
Couple things.
It's important to clear your browser cache, especially when logging into core for the first time. After the upgrade. You should also clear your cache anytime something doesn't look right to you because one of the first things the help desk will ask you is if you cleared your cache.
If you're having any problems with your browser, you can always try using a new window in the Incognito mode or.
Use an in private window in Microsoft Edge.
Just a few reminders. Favorites will not carry over with the upgrade.
You will have to take screenshots.
Write them down. Whatever you need to do to add to be able to add your favorites once or comes back on the 25th run controls will carry forward with the upgrade.
Scheduled reports and queries will need to be rescheduled.
Any report or query that you are already about there that runs automatically will have to be rescheduled also.
Devices keep in mind it's fluid now and you'll be using mobile devices, but all devices must have an up to date browser to properly access core device operating systems.
Software apps all must be up to date. If a manufacturer stops supporting a device, then you will not.
Be able to update it.
That means you will not be able to use it.
A couple extra things here.
Some of the users like the option to alphabetize their menus.
This is still an option in the new system. All you would have to do is click on the settings icon on the NAV bar menu.

Click on alphabetical and click save.
This will then I there's also a screenshot of what it looks like alphabetized.
Another thing that I wanted to point out, we still have the bread crumbs as you do till it today, but they're located at the top of the NAV bar menu. When you navigate through the NAV bar.
Are there any questions?
I heard that EPM query favorites will be erased.
Can you elaborate? Will the EPM query favorites report still be available but they just won't be noted as favorites?
An answer for that.
To get back to you on that question, second question, just to confirm, when you say that EPM favorites will be erased, only the listing will be removed and will need to be re saved them, resave them as favorites.
It does not mean that the actual EPM queries will be erased.
We'll have to have Wendy get back to you on that one also.

Braga, Donna 1:28:13
Queries themselves will not be gone, so the queries will still be there.
That is the answer to that question and we have someone with their hand up.
Tram.
Know if you're able to.
I don't know if you're able to access your microphone and ask the question trim.

PP **Padinhare, Pradeep** 1:28:36
I think we disabled microphone and maybe he has to type the question in chat.

Reutter, Shanon M 1:28:51
We'll wait for a question.
I'm just going to read this other question that was answered.
What is the best Internet browser to use with the upgrade?
The answer was core CT supports use an edge, Chrome and Firefox. It is a matter of preference.
And then will we be able to rewatch this in video form?
Yes, the recording and transcripts will be posted to the modernization page.
And it looks like a couple of you are having a problem with the footprints link.

You can also you can e-mail the readiness mailbox and I can address the issue after the user group.
Make no wait one second post.
Just popped up.
Is there an easy way to know if we have a query built off the DTW, under score position, under score, table?
Or do we need to open up each query individually to look?
If you put in a help desk ticket for that, I'm sure Wendy will be able to help you.
OK. Next we're going to move on to pension. Rsd and TRS, and I'm going to introduce Ralph.

MR **Minutillo, Ralph** 1:30:24
Good morning, everybody.
My name is Ralph and your total number of the course tea pension support team.
Next, we're going to take a look at some of the new fluid views for pension CRM for retirement Services Division, RSD and the teachers retirement system, the Rs.
Users can experience a few changes to the CRM and HCM pages. The Fluid home page drop down selectors is used to navigate between different modules in CRM and HCM and the navigation bar gives you access to non fluid navigation options.
The navigation bar or navbar is now used to navigate to the menu recently visited and so forth. You see to the right.
Home page view the icons have been introduced providing a new look and feel for the homepages.
Tiles include user friendly graphics to help you identify the functions that you need and to access the file just simply type select a file by clicking or tapping and this allows you to navigate to the underlying applications within the tile and from there from there you could perform.
Your routine tasks.
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 landing page that includes different tiles that allow for a range of information to be accessed, and below we see a manager view and an agent view.
Fluid CRM dashboard and pivot current CRM page.
Let's my cases provider group cases created versus closed by provider groups are now located under core CTCRM analytics. As we see in the screenshot below and

those could be accessed from the home page trapped on navigator.
Filter options.
Users my case backlog on the left side of the screen of the page, there's filter options that are available to let you narrow down your case list, and you can filter by case priority, case status, Provider group, and case type, and so forth.
New case actions. You could take action with the case without dialing into the case.
Action options include notified view contact info.
Add a note, reassign the case to go to case action option will open up a new tab and bring you directly to the case.
And searching cases frequently will use search criteria can be safe.
Future use simply just fill in the search criteria.
It saves search criteria to name and save your search and after the search has been saved you be able to access it in the future for a use safe search drop down options and save searches can also be deleted if you're not going to use them anymore.
And the new hrht three note 60° view fluid below is a look at how the pages access with the pommel Creek.
This is a managers view.
CRM users can now reassign add notes to the case without actually leaving the page.
The key steps just click on the homepage navigator and the hrht 360° view. You would enter in.
That's the identifying information for a member, usually.
A member's ample ID, click search and then you're going to get the main.
Users 360° view of cases address such as we see over on the right there.
And we have some tips to upgrade again, as we've heard in previous sections, it's going to cause user favorites to be deleted.
So again, this is the third or four times going to be important for users.
Simply take a screenshot your current favorites, so you could resave them all in the future again because they're going to be deleted.
So again, that really is important.
Page navigation pads are not going to display at the top of the screen and for optimal performance just you know, give it a little time.
Wait for the fluid tiles to load completely.
Homepage selection before clicking on a fluid tile to view data and below we have some manager and agent new queries to replace some of the pivot grids.
And if they have any questions.

Reutter, Shanon M 1:35:27

It does not look like there's any questions.

Minutillo, Ralph 1:35:31

That's correct.

Think we have.

I don't have to close out things.

Will we lose our queries?

No, I don't think the queries are going to disappear.

It's just that the numbers actually favorites, not completely sure on that, but I do recall in the previous section the queries are going to remain.

Braga, Donna 1:35:53

Yes, Yep, queries will not be deleted.

Run controls will not be deleted and queries will not be deleted.

Favorites will be erased and you have to add favorites back.

Favorites would be just the path to get to those queries or pages.

So again, I want to thank everybody for their time.

I know there were a lot of questions.

Again, the reminder on favorites.

I know I have it on my To Do List this week.

I've got a screenshot.

My favorites may I got to make sure I don't forget. You need to make sure you don't forget.

Thankfully, run controls will be kept intact.

And again another reminder that you know yes, the recording and the transcript will be posted to the modernization page. Be patient.

You know.

I get a lot of emails after this people looking for it.

It will be there and there is also the recording from the one prior to this that we had last week and it should be the same.

Pretty much the same information. And also again, I implore you, number one you know if you talk to colleagues who.

If you talk to colleagues who were not able to attend either the user group or

training or both, please direct them to the modernization page and tell them they really should be. If they work in HCMHR or CRM that they should be looking.
At this user group, because you can see all the information that is really going to be helpful for you on Monday.
And also for them to take some of the e-learning training or watch recordings.
And then finally, if you have business processes of your own that.
Golf course. Remember, you've got to start thinking about updating, you know, the screenshots and your documentation on your business processes. Or if you don't have them, maybe now is a good time to start working on that as you get used to as you go through this training you.
Know maybe it's a good time to print out some of those job aids or some of those screenshots from the videos and make up your own.
Documentation for your agency.
A good opportunity for you to do that since you're going to be, you know, in there anyway.
We do have a couple more questions.
So again, will the path stay the same for favorites? Yes.
There are some navigation changes, so again, if you look at the screens going to look different. So actually the path for favorites is going to be a little heart icon at the top and again you're going to want to look at the navigation.
Infographic will employees have the tools for calculations for estimates when we retire?
If you have those, if you have that ability today, you will have that ability going forward.
We're not rolling out any new agencies for that right now with this upgrade, but if you already have access to the pension estimator today, then you will have access to the pension estimator next week.
Back to benefits. If my wife is on insurance with my kids and she's a new heart.
So these questions are specific.
Any specific questions? Then you would have to ask your benefits specialist for your agency.
You know the methodology that they will use or the pages that they're going to use in core may look different, but the processes are the same, so.
Those specific questions about your own particular benefits would have to be addressed.

By your agency's HR.
All right. I think that's it for questions.
I hope to give you 10 minutes back in your day and again, I thank you very much for coming.
This ends our session.

PP **Padinhare, Pradeep** 1:40:10
Thank you.

Reutter, Shanon M stopped transcription