Payroll Improvement Project

Agency Update

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Meeting Goals

- We want to provide:
  - An update on project progress
  - Expectations and demonstrations for what is, and is not, changing
  - An outline of commitments for upcoming activities
  - Answers to your questions

Meeting Agenda

- Project Timeline
- Conversion
- General Impacts
- Direct Deposit
- Additional Pay
- OnBoarding
- Future Discussion

- Retirement / Pension
- TIAA / VDC / 403(b)
- Reporting
- Testing
- What's Next
- Questions

TIMELINE

WIN'18 ANALYZE & DESIGN

Pain Points & Improvements

Project staff will evaluate PeopleSoft delivered functionality against NYS requirements. Whenever possible, delivered functionality will be leveraged to improve business processes and system performance.

SUM'19 TECHNICAL DEVELOPMENT

Configuration & Coding

Using the identified requirements, technical staff will configure and code the system, keeping the system current with the vendor's technical solution.

FALL'19 REPORTING UPDATES

Interfaces & Queries

Project staff and technical staff will work with stakeholders to modernize file transfers and update all locked queries so they continue to function in the upgraded system.

WIN'19 TEST

Interface & User Acceptance Testing (UAT)

All interfaces will be tested to make sure that information is processed correctly and timely. During UAT, PayServ users will test the system to make sure it can handle the required tasks in real-world scenarios. Testing will be iterative, with errors being corrected and re-tested as activities proceed.

SPR'20 TRAIN

Training

A variety of training will be provided to make sure end users are prepared to successfully operate and interact with the PayServ system on the day the upgraded system goes live. Completion of training will be a measure used in evaluation of agency readiness for go live.

SUM'20 DEPLOY

Go-Live & Production Support

The upgraded PayServ system goes live! After Go-Live, increased support will be available to end users as they get comfortable using the upgraded system.

Conversion

- Conversion row for all active Job records and all employees termed in the last five years
- Historical data will be available on all retained fields, not on eliminated custom fields
- Pay Basis Code will now be Comp Rate Code

General Impacts

Look and Feel

- Classic Plus pages
- Navigation changes
  - Job Data
  - Position
- Additional grayed out fields will display

Direct Deposit

- EMPL record removed from direct deposit
  - Set up at the employee level, visible to all
  - Will require outreach and cleanup
  - Page will remain same, including having up to 9 accounts per employee

Additional Pay

- Code changes in addl pay to help automate mid-pay period proration
  - Changes based on Employee Work % on Job
  - No more manual adjustment required
  - Sequence number 2 on Addl Pay

OnBoarding

- Add a Person will replace Hire (Agency)
  - Navigation changes
- Add Employment Instance replaces Add Concurrent Job (Agency)
  - Navigation changes

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OnBoarding (cont)

- Changes to the reserve EMPLID process
  - More personal data required
  - New pages to enter data online
  - Still have 60 days to hire employee
  - New pages to hire employee
  - Changes to the Automated Interface

Retirement/Pension

- Retirement plans will become pension plans
  - New navigation, page, layout, and values
  - Conversion of data
    - New records
    - Retirement History

TIAA/VDC/403(b)

- TIAA/VDC/403(b) plans will become Saving Plans
  - New navigation, page, layout, and values
  - Conversion of data
    - New records
    - Retirement History
    - General Deduction for Codes

Future Discussion

- General Deductions

- Off Cycle

- Electronic Forms

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Reporting

Queries

- Locked queries will be converted
- Information on other queries will be shared in a bulletin this winter

Reporting

Control D Reports

- Some reports will be improved, others will be eliminated

- Exploring options for alternate delivery
  - Excel or CSV web files, locked queries, etc.
  - Received feedback from survey

Reporting

MasterFile

- Bulletin with layout provided week of 10/7/19
  - File size will increase
  - Fields positions and lengths will change
  - Fields will change based on system changes
  - Fields will be eliminated

Testing

Interfaces

- New AI rules (Reserving EMPLID) provided in a Payroll Bulletin

- Testing will begin early in 2020

- Project Team will work with IT and Payroll staff to complete end to end testing

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Testing

User Acceptance Testing (UAT)

- UAT begins early 2020
- Agency staff will be needed to test upgraded system spring 2020
  - Testing will take place in person and online
  - Participation will be reported on agency readiness assessments

What's Next

- Additional agency meetings
- Agency Readiness Assessments / Scorecards
- PayServ Code Freeze
- Interface and User Acceptance Testing
- Full Dress Rehearsal
- Go Live

Questions?

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