



Type: March 2018 System Enhancements	ID Number: 01 – Portal Upgrade
Date: March 6, 2018 (Updated)	Subject: People First Portal Upgrade – Summary

Suggested Audience:

Agency human resource offices, leave and attendance staff, payroll staff, benefits staff, and classification staff

Details:

All details included in this communication are for changes implemented on March 26, 2018.

Browser Support:

- *Browser Types* – Employees can use the latest version of Chrome, Edge, Internet Explorer, Safari (Apple iOS and Macintosh products), Firefox, and WebView (Android devices).
- *Device Types* – Employees can log in to People First using phones and tablets as long as they are using the latest version of any of the browsers listed above.
- Refer to the [02 – Portal Upgrade; Agency-Required Technical Updates for March 2018 People First Portal Upgrade](#) communication for additional technical details.

Screen Resolutions:

The People First system is designed for optimal screen resolutions between 1024 x 768 and 1280 x 800 (or x 768 for laptops). However, while the design is optimized for these resolutions, all resolution sizes are supported. If employees use a different resolution, some fields and field labels may be truncated.

Password and Login ID:

- *Password Requirements* – Password requirements are NOT changing; however, when changing passwords, employees will follow a new process that shows each required component of the password and whether it meets the requirements.
- *Password Reset Process* – The password reset process has been modernized to allow users to reset their passwords easily without contacting the People First Service Center for assistance.
 - ALL password resets require multifactor authentication (i.e., require receiving a security code via email or text).
 - Step 1: Verify your information (login ID, SSN, and date of birth).
 - Step 2: Select how to receive your security code (email or text).
 - Step 3: Enter your security code.
 - Step 4: Enter your new password (twice to confirm) to log in.
 - Prior to requesting to receive the security code, ALL employees must have in People First either a valid work or notification email address or a mobile phone number that is capable of receiving SMS text.

- If employees do not have in People First a valid email or a mobile phone number that is capable of receiving SMS text, they will be directed to contact their HR office or manager to have their data in People First updated. Once that occurs, employees will be able to reset their password using the multifactor authentication process and log in to People First.
- Security questions are no longer used in the online password reset process but may be used for additional identification purposes when employees call the People First Service Center.
- The People First Service Center password reset process will require additional security validation prior to the resetting of passwords; employees should use the online process if possible.
- *Password Strength Indicator* – A feature is available that shows the strength of a password as employees are typing in their new passwords.
 - Weak – Does not meet password requirements
 - Medium – Meets minimum password requirements
 - Strong – Meets minimum password requirements and is at least 12 characters in length
 - Very Strong – Meets minimum password requirements and is at least 15 characters in length
- *Password Masking* – Passwords continue to be masked (hidden) when employees type their password; however, employees have the option to view the password (unhide). This same feature is available for Social Security numbers when employees are resetting their passwords or recovering their login IDs.
- *Login ID Recovery* – This feature allows employees to retrieve their login ID online if they are unable to remember it when attempting to log in.

Navigation and Look and Feel:

- *Login Page*
 - Includes an updated People First logo
 - Login page is simplified and focuses only on critical information (i.e., logging in to People First, accessing candidate site, resetting password, recovering login ID, navigating to contact information)
 - Login page includes 12 different images of cities in Florida; images change daily
- *Landing Pages*
 - Separate landing pages for employee self-service and manager self-service
 - Header, Footer, Inbox, Other Resources, Talent Management, and Announcements tiles are the same (shared) on both landing pages
 - Header Area
 - Shared across both Employee and Manager landing pages (only one header)
 - Left Side – Updated People First logo that, if selected, returns user to landing page (either Employee or Manager depending on security role code)
 - Right Side – Links displayed as images with simple text and can include the following (links are displayed based on where the employee works and the employee’s employment status (active or terminated)):
 - EAP – Displayed only for State Personnel System agencies, the Justice Administrative Commission, the State Courts System, and the Florida Department of Lottery
 - Timesheet – Displayed only for State Personnel System agencies and the Florida Department of Lottery
 - Account – Displayed only for employees who hold more than one active position or who are both retired and an active employee; link is used to navigate between positions. Displays the position number and title.
 - Log Off – Used to log out of People First
 - Footer Area
 - Shared across both Employee and Manager landing pages (only one footer)

- Contact – Includes the contact information for the People First Service Center and for the Chard Snyder Service Center
- Settings – Includes the following employee-specific options:
 - High Contrast – Allows employees to turn high contrast theming on and off; high contrast essentially converts background colors to black and text to white; the employee’s preference is saved for future logins but can be changed
 - Keys On – By default, alpha descriptions are displayed and not the associated numeric code; however, employees who prefer to view both code and the description can turn their keys on; the employee’s preference is saved but can be changed
 - Animations – By default, there are very subtle animations built into People First when users transition from screen to screen, when data is loading, and when users hover over certain buttons and links; however, employees can turn animation off if they prefer; the employee’s preference is saved for future logins but can be changed
 - Change Password – If employees want to change their current password, they can change it after they have logged in to People First; the process requires entering the current password as well as entering and verifying the new password
 - Security Questions
 - While security questions are no longer used as part of the online password reset process, security questions may be used for additional identification purposes when employees call the People First Service Center.
 - All security questions used prior to the portal upgrade have been reset, allowing employees a fresh start upon initial login.
 - Additional questions are available, providing employees a larger selection to choose from.
 - Employees are able to maintain their security questions after initial creation.
- Inbox
 - Shared across both Employee and Manager landing pages (only one Inbox)
 - Includes employee-specific tasks, manager-specific tasks, and HR-specific tasks, that need to be completed
 - A number is presented beside each Inbox item that shows the number of tasks pending for each item.
 - Tasks that are due but not overdue will show with a blue circle, with the number of tasks due within it; if at least one task is overdue, the circle is red, with the number of tasks due within it.
 - For manager timesheet approvals, this number represents the number of employees who have a timesheet ready to approve, instead of the number of timesheets pending approval.
 - When all tasks are completed for the respective Inbox item, the Inbox item is removed until a future action requires the item to be generated again
 - Includes a refresh button that updates the Inbox items and counts based on actions completed (you must either leave the landing page and navigate back or use the refresh button to update the items)
 - Selecting either the Inbox item count or title navigates you to the applicable screen to complete the required action.

- If an Inbox item (i.e., Extra Pay Approvals, FMLA/FSWP Approvals, PAR Liaison Approvals) has more than one owner, both owners see the item in their respective Inbox and have access to complete the task. The task will be removed from the Inbox of all owners once it's completed.
- Inbox items are generated based on an action needing to be taken and are driven based on employees' roles in the system. These actions may include the following:
 - Update Dependent's SSN – Displayed to all employees when at least one registered dependent has either an invalid SSN or no SSN
 - Choose Benefits Now – Displayed to a benefits-eligible employee if the employee has an active qualified status change (QSC) event; shows through the last day of the QSC
 - Complete Open Enrollment Now – Displayed to all benefits-eligible employees and only during the state's annual Open Enrollment period
 - Complete Timesheet – Displayed only for State Personnel System agencies and the Florida Department of Lottery. Displayed when the employee has at least one past-due timesheet (timesheet period ended prior to the system date)
 - Complete Your Direct Deposit – Displayed only for State Personnel System agencies, the Justice Administrative Commission, the State Courts System, and the Florida Department of Lottery. Displayed when the employee does not have an active direct deposit record
 - Verify Your Information – Displayed to all employees when the annual verification process is activated (August 1 each year)
 - Approve Timesheet – Displayed only for State Personnel System agencies and Florida Department of Lottery managers. Displayed when a timesheet is pending approval for one or more direct reports; includes indirect reports if the direct report's manager position is vacant
 - Approve Leave/Attendance Request – Displayed only for State Personnel System agencies and the Florida Department of Lottery. Displayed when a leave and OT or flexible work schedule request is pending approval for a direct report; includes indirect reports if the direct report's manager position is vacant. Displayed to HR (A, H, and X) when an employee in the agency submits an FMLA or FSWP request for approval
 - Complete PAR Action – Displayed only for State Personnel System agencies, the Justice Administrative Commission, the State Courts System, and the Florida Department of Lottery. Displayed when a PAR is pending action by the accessing employee
 - Approve Extra Compensatory Payments – Displayed only for State Personnel System agencies and the Florida Department of Lottery and only for HR professionals with security role codes of A, H, U, X and Y; navigates HR professionals to the Extra Pay Approvals screen, where they can approve or reject pending extra payments (timesheet codes 1016 and 1017)
- Other Resources Tile
 - Shared across both Employee and Manager landing pages (only one Other Resources tile)
 - Includes single sign-on links as follows:
 - Chard Snyder – Displayed only for employees who are enrolled in a flexible spending account (FSA) or health savings account (HSA); navigates employees to their Chard Snyder account landing page

- Securian – Displayed only for employees who are enrolled in basic life, retiree life, or vested legislator life insurance; navigates employees to their Securian account, where they can manage their beneficiaries for life insurance
 - If employees are not enrolled in an FSA, HSA, or life insurance plan, the Other Resources tile is not displayed.
 - Announcements Tile
 - Shared across both Employee and manager landing pages (only one Announcements tile)
 - Is displayed for all employees
 - Includes important messages for upcoming and on-going activities (e.g., Open Enrollment)
 - Is not employee- or employer-specific; everyone is presented the same messages at all times
 - Employee Landing Page
 - All employees have an Employee landing page, which is the employees’ primary navigation starting point for employee self-service.
 - Except for the areas that are shared across Employee and Manager landing pages, all information on this page is for functions specific to the employee.
 - All employees who do not have direct reports and who have a security role code of E (employee only) are defaulted to this page when logging in to People First.
 - Presentation of the tiles is based on where the employee works and the employee’s position type (i.e., OPS, salaried) and can include the following:
 - Personal Info – Provides employees a menu of personal information screens where they can view (e.g., Personal Information) or update (e.g., Contact Information) their information
 - Work Info – Provides employees a menu of work-related screens where they can view (e.g., Action History) their information
 - Insurance Benefits – Provides employees a menu of insurance benefits-related screens where they can view (e.g., My Dependent Information) or update (e.g., Change My Benefits) their information
 - Pay Info – Provides employees a menu of payroll items where they can view (e.g., Pay Info) or update (e.g., Payroll Deductions, if allowed by agency) their information
 - Time and Attendance – Provides employees a menu of attendance and leave items where they can view (e.g., Leave Balance Overview) or update (e.g., Timesheet) their information
 - Manager Landing Page
 - All employees who have direct reports, as well as employees with a security role code other than E (employee only), collectively referred to as “managers,” are defaulted to this page after logging in. Managers still have access to the Employee landing page to view and update their own information.
 - Manager landing page is the managers’ primary navigation starting point for manager self-service (e.g., timesheet approval)
 - Except for the areas that are shared across Employee and Manager landing pages, all information and navigation within this page is for manager functions.
 - Presentation of the tiles is based on where the employee works and can include the following:
 - My Team – Navigates managers to the My Team landing page, where they can review their direct reports as well as other employees in their reporting

- structure; for all other security role codes (other than E), this allows for searching of employees within their security access
 - Reports – Navigates managers to the Reports landing page
 - PARs – Provides managers a menu where they can select to initiate a PAR or access the PAR Menu (PAR landing page); for HR security role codes, this includes a menu item for the PAR Liaison Maintenance table
 - Org Management – Provides a menu to the Org Management screens where managers can view position details for all positions that report to them and org units within their agency; for HR security role codes, the menu includes additional items that only HR has access to (e.g., position and org actions)
 - KPI – Placeholder tile; will be developed in a future release after March 26, 2018
 - Functional tiles, and the menu items within each functional tile, are presented only if employees have access; if the employee does not have access to a tile or menu item, the items are dynamically moved up within the screen.
 - Employee photo option is available.
 - Access to update the photo option is limited to HR professionals.
 - At initial implementation photos will not be shared across appointment IDs.
 - If photos are added, they will also be loaded in the employee’s talent profile in the Talent Management system (update is near real-time).
- *Quick Links*
 - Quick links provide quick navigation to specific screens within People First.
 - Quick links are static but are dynamically generated based on employees’ access within People First.
 - Quick links can be hidden or presented on all screens; the quick links presented are determined based on employee or manager self-service areas.
 - Quick links for employee self-service areas are specific to employee functions and can include the following:
 - Open Enrollment – Presented to all benefits-eligible employees during the state’s annual Open Enrollment period
 - Timesheet – Displayed only for State Personnel System agencies and the Florida Department of Lottery; navigates employees to their timesheet to view past timesheets and to update timesheets that require action
 - Leave and Overtime Request – Displayed only for State Personnel System agencies and the Florida Department of Lottery; navigates employees to their Leave and Overtime Request screen to view the status of previous leave requests or to create new leave requests
 - Leave Balance Overview – Displayed only for State Personnel System agencies and the Florida Department of Lottery; navigates employees to the Leave Balance Overview screen to view their leave balances and leave history (up to 18 months back)
 - FSA/HSA – Displayed only for employees who are enrolled in an FSA or HSA; navigates employees to their ChardSnyder account landing page
 - Contact Information – Displayed for all employees; navigates employees to their Contact Information screen, where they can update their home (which includes mobile phone), mailing, and notification email addresses
 - Employee Profile – Displayed for all employees; generates a PDF snapshot that contains a summary of the employees’ information, including personal info, contact information, emergency contact, and work contact information
 - My Benefits – Displayed for all employees who are enrolled in at least one insurance plan; navigates employees to the My Benefits screen, where they can view their enrolled plan information

- Training Transcript – Displayed only for State Personnel System agencies, the Justice Administrative Commission, the State Courts System, and the Florida Department of Lottery; generates a PDF Training Transcript that contains all training that the employee has completed that are captured in People First (current functionality, no changes)
 - Training Videos – Displayed only for State Personnel System agencies, the Justice Administrative Commission, the State Courts System, and the Florida Department of Lottery; navigates employees to the Training Videos landing page, where they can view available videos (current functionality, no changes)
 - Quick links for manager self-service areas are specific to manager functions and can include the following:
 - Timesheet Approval – Displayed only for State Personnel System agencies and the Florida Department of Lottery; navigates managers to the Employee Timesheet Approval screen, where they can approve submitted timesheets as well as view all timesheets pending employee submission
 - Requests Pending Approval – Displayed only for State Personnel System agencies and the Florida Department of Lottery; navigates managers to the Requests Pending Approval screen, where they can approve leave and overtime requests and flexible work schedule requests that have been submitted
 - Extra Pay Approvals – Displayed only for State Personnel System agencies and the Florida Department of Lottery and for HR security role codes of A, H, U, X, and Y; navigates HR professionals to the Extra Pay Approvals screen, where they can approve or reject pending extra payments (timesheet codes 1016 and 1017)
 - Charge Objects – Displayed only for State Personnel System agencies and the Florida Department of Lottery and for employees with a security role code that has access; navigates employees to the Charge Objects screen, where they can maintain charge objects
 - Wage Type Permissibility – Displayed only for State Personnel System agencies, the Justice Administrative Commission, the State Courts System, and the Florida Department of Lottery and for HR security role codes; navigates HR professionals to the Wage Type Permissibility Table, where they can view what miscellaneous deductions are currently allowed for their agency
 - Training Library – Displayed only for State Personnel System agencies, the Justice Administrative Commission, the State Courts System, and the Florida Department of Lottery and for employees with a security role code that has access; navigates employees to the Training Library screen, where they can maintain training courses for their agency

My Team Page:

- *Default* – Defaults to managers’ direct reports, but for employees with access to the My Team page who do not have direct reports, the screen defaults to blank (no employees shown).
- *Card View*
 - Default view for direct reports
 - Defaults to all cards being non-focused, but when a card is selected, the employee is brought into focus
 - Non-focused cards include the following: photo (silhouette presented if no photo is available), employee name (the text “Vacant” displayed for vacant positions), and position title
 - Focused cards include the following: photo (silhouette presented if no photo is available), employee name (the text “Vacant” displayed for vacant positions), position title, position number, appointment ID, login ID, agency name, org name, and work email address and work phone number

- Includes left and right navigation arrows to access other direct reports not shown in the initial presentation; cards rotate in and out based on selection of left and right navigation arrows
- When a card is in focus, the manager has a menu option available in the bottom right corner of the employee's focused card where they can navigate to the various screens to view related information (e.g., leave balances) and complete actions on behalf of the employee (e.g., timesheets, PARs)
- *List View*
 - Managers can change their direct reports card view to a list view; option is not saved, and when managers log out and log back in, their view is defaulted back to the card view.
 - List view details include the following: photo (silhouette presented if no photo is available), employee name (the text "Vacant" displayed for vacant positions), position title, position number, appointment ID, login ID, org name, org code, and work email address and work phone number
 - Search results are presented in the list view (card view is available only for search results if you select an individual employee)
 - For each employee returned in the list view, there is a menu option on the right of the employee that is used to navigate to the various screens to view related information (e.g., leave balances) and complete actions on behalf of the employee (e.g., timesheets, PAR).
- *On Behalf of Employee* – Except for approval screens (which are accessed by using the applicable quick link), all other activities on behalf of an employee (e.g., PARs, completing timesheet entries, leave requests on behalf of employee) start from the My Team page, whether using the card or list view.
- *Search*
 - One search field that allows employees with access to search by SSN, login ID, appointment ID, employee name, position number, position title, org title or org number
 - Searching by appointment ID will only return the specific record for that ID. To return all available active or inactive records for an employee, you must use the login ID.
 - Each value entered must be found for an employee or position to be returned in the search results; the order you enter your search parameters does not matter (e.g., first name does not have to be first).
 - Search parameters can be combined (with exception of SSN) to narrow the results; for example, if you are searching for John Snow, you could type S John, John S, Snow J, J Snow or John Snow to limit the results.
 - All searches must include at minimum three characters; the more you enter, the more your results will be narrowed down.
 - If searching by SSN, the full 9-digit SSN must be entered and no other values should be entered; for example, do not enter part of the employee's name and his or her SSN; enter only the SSN.
 - Position titles and org titles are considered phrases. To search by either position title or org title you must use quotation marks. E.g., to search for a position titled People First Administrator, you would have to enter the search as "People First Administrator".
 - If an employee's name (first, middle, or last) includes two names, with a space separating them, you must also use quotes for that field. E.g., if an employee's first name is Sara Beth, and her last name is Smith, you would enter "Sara Beth" Smith.
 - Do not use quotations for single values. For example, if you only use the first word of the position or org title, do not use quotes.
 - Each space entered in the search field works as both a wildcard (*) for the previous search value and includes both the previous search value and the next search value. For example, if you enter J Snow 7200, the system will search the employee name fields, position title, and org title for anyone who includes J and Snow at the start of one of

these fields (both values must be met), then will search those results to see if the position number or org number starts with 7200; only if all three criteria are met will the employee be returned in the search results.

- For agencies with a statewide HR security role code (A, X and Y), an agency dropdown is provided that allows the user to do a combined search using both the main search field and the agency value.
- Inactive checkbox is presented and must be marked when searching for a terminated employee (e.g., inactive, retired)
- Includes the ability to reset the search as well as return to the default view (e.g., direct reports)
- All search results are restricted based on employee's security role code.

Emails:

- **Batched Emails** – Based on certain actions, the following emails are sent to employees and managers at 9 a.m. Eastern time each day:
 - “It’s Time to Validate Your Information in People First” – Sent to the notification email on August 1 each year (replaces address verification)
 - “You Have Timesheets Pending Your Approval” – Sent to the work email when managers have one or more timesheets pending approval
 - “Personnel Actions Pending Your [Approval or Completion]” – Sent to the work email when the employee has one or more PARs that are in a submitted status, pending employees’ approval or completion
 - “Underpayment for Your Health & Insurance Plans” – Sent to the notification email when employee has an underpayment at the time the carrier files are generated
 - “Notice of Premium Increase for Your Health & Insurance Plan(s)” – Sent to the notification email when a premium increase is identified for the employee; email replaces the mailed letter if the employee has an active notification email address in People First
 - “Your Insurance Premium is Decreasing” – Sent to the notification email when a premium decrease is identified for the employee
 - “Your Flexible Work Schedule is About to Expire” – Sent to the work email 14 days prior to the employee’s end date of his or her current flexible work schedule
 - “Your Personal Holiday Expires June 30” – Sent to the work email on June 1 each year if the employee has not used his or her personal holiday for the current fiscal year
 - “Your Tax Exemption for [prior calendar year] is About to Expire” – Sent to the work email on January 1 each year if the employee claimed tax exemption in the prior calendar year (expires on February 15 of year after year claimed)
 - “Your People First Password is About to Expire” – Sent to the work email 15 days before the employee’s password expires
 - “Your People First Password Has Expired” – Sent to the work email the day after the employee’s password expires
 - “Congratulations on Your Retirement!” – Sent to the notification email when a retirement PAR is processed and employee has been enrolled in health and or life insurance
- **Real-Time Emails** – The following emails are triggered real-time when an action occurs in People First:
 - “Your Direct Deposit Request Was Rejected by Your Financial Institution” – Sent to the work email if a rejection code is received by People First from the Department of Financial Services
 - “Your PAR for [employee name] Has Been Rejected” – Sent to the work email of the PAR creator when PAR is rejected by an approver or the PAR liaison
 - “Your Employment Status Has Changed to Leave Without Pay” – Sent to the notification email when a PAR is processed placing the employee in a LWOP status
 - “Your Employment Status Has Changed to Medical or Family Leave” – Sent to the work email when a PAR is processed placing employee in FMLA/FSWP status

- “Your Employment Status Has Changed to Active” – Sent to the notification email when a PAR is processed returning the employee from LWOP
- “Your Employment Status Has Changed” – Sent to the work email when a PAR is processed returning the employee from an LOA with pay action
- “[Employee Name] Has Submitted a [Leave, Flexible Work Schedule] Request for Your Approval” – Sent to the manager’s work email when a request is submitted
- “Your [Leave, Flexible Work Schedule, FMLA, FSWP, FMLA/FSWP] Request for [date/date range] Has Been Approved” – Sent to the work email when a submitted request has been approved
- “Your [Leave, Flexible Work Schedule, FMLA, FSWP, FMLA/FSWP] Request for [date/date range] Has Been Rejected” – Sent to the work email when a submitted request has been rejected
- “Your [leave type] Request for [dates] Has Been Cancelled” – Sent to the work email when the leave request is canceled by someone other than the employee
- “Select Insurance Benefits Before Your Qualifying Event Closes on [last day of QSC]” – Sent to the notification email when a QSC is generated for the employee
- “Action Required for Your Newly Elected Coverage Level” – Sent to the notification email when the employee enrolls in an optional life or spouse life level that requires evidence of insurability
- “Your People First Password Has Been Updated” – Sent to the work email when the employee’s password is changed
- “Your People First Account Has Been Locked” – Sent to the work email when the employee’s account has been locked because of invalid login attempts
- “Your People First Account Has Been Unlocked and Your Password Has Been Updated” – Sent to the work email when the employee successfully completes the password reset process when his or her account is in a locked status
- “Your People First Login ID” – Sent to the work email when the employee’s login ID is retrieved using the Forgot Login ID process

People First IDs:

- *Appointment ID* – Employee (Emp) ID is shown as appointment ID in People First.
 - Appointment ID is shown primarily to managers and HR staff.
 - Employees only see the appointment ID in People First on select screens (e.g., payroll deductions, FMLA/FSWP).
 - HR professionals must continue to use the appointment ID for human resource, payroll, etc., purposes.
 - **Appointment ID should NOT be provided to the employee.**
- *Login ID* – User ID is shown as login ID and is the ONLY ID that the employee sees in People First and is the ONLY ID employees need when using People First or when contacting the People First Service Center.

Security Role Codes:

- *Groups* – Groups functionality is no longer available; group role codes (B, R, and T) are now org restricted role codes and must be maintained from the Security screen on the position.

Reports Landing Page:

- New Reports landing page includes one location (instead of two separate Reports Menu tiles) to access the human resource, payroll, time and attendance, insurance benefits, and data warehouse reports
 - When selecting data warehouse reports, the employee will be navigated to the data warehouse Reports landing page.
 - No change to the source of the reports (i.e., data warehouse or SAP)
- Future Release (TBD) – All reports will be rolled into the Reports landing page and a new separate data warehouse Reports landing page will be deployed (date is TBD, but likely in fall 2018).

- Refer to each functional area within this communication for updates to specific reports.

Payroll:

- *Criminal Justice Incentive Program (CJIP)*
 - CJIP change order process is no longer used
 - Separate CJIP payroll is no longer processed
 - CJIP payments are maintained on the Recurring Payments screen and are paid on the regular payroll (either 12 or 26 times per year) as a separate warrant
 - CJIP amounts are restricted to no more than \$60 for biweekly employees and \$130 for monthly employees
 - FLAIR Account Code is required and must have a category that starts with 10*
 - FLAIR Org Code and Inter-Department ID are available (optional); if not entered, defaults to the values on the Position Funding screen
- *Firefighter Incentive Program (FFIP)*
 - FFIP payments are maintained on the Recurring Payments screen and are paid on the regular payroll (either 12 or 26 times per year) as a separate warrant
 - FFIP amounts are restricted to no more than \$51 for biweekly employees and \$110 for monthly employees
 - FLAIR Org Code and Inter-Department ID are available (optional); if not entered, defaults to the values on the Position Funding screen
- *Payroll Deductions Screen*
 - Consolidates and replaces the One-Time and Recurring Deductions screens
 - Allows for the ability to delete deductions prior to the payroll processing
 - All deductions require entry of an amount, including employer deductions that are treated as an employee deduction.
 - Union deductions are not amount-restricted, allowing quicker adjustments when dues amounts change.
- *Screen Retitling* – Recurring Pay Additives & Military Pay screen is retitled to Recurring Payments
- *Additional One-Time Payments Screen*
 - Consolidates and replaces the One-Time Regular Payroll Pay and Supplemental Pay screens
- *Awards Payroll* – A separate awards payroll is no longer processed.
- *Form W-4*
 - W-4 records are end dated if the employee is inactive for three calendar years.
 - Password not required when creating and changing a W-4 record
- *Direct Deposit*
 - Field titled Re-enter Account Number is required when creating a direct deposit record or updating an existing direct deposit record
 - Password not required when creating and changing a direct deposit record
 - If the employee changes financial institutions, a new record must be created (cannot edit in this scenario).
 - Direct deposit records are end dated for employees who have been inactive for more than two years.
- *Payroll Processing and Employee Access*
 - In an effort to increase system availability time, People First is not brought offline while payroll is running.
 - While all employees can log in while payroll is running, what they have access to is restricted based on their pay cycle, as follows:
 - If biweekly payroll is processing, all payroll-related functions (e.g., time, payroll, PARs, position actions) are in read-only mode for all biweekly employees.

- If monthly payroll is processing, all payroll-related functions (e.g., time, payroll, PARs, position actions) are in read-only mode for all monthly employees.
 - If supplemental payroll is processing, all payroll-related functions (e.g., time, payroll, PARs, position actions) are in read-only mode for all biweekly and monthly employees.
 - If an agency has employees on both biweekly and monthly pay cycles, all payroll-related functions (e.g., time, payroll, PARs, position actions) are in read-only mode for those employees during all payroll runs.
 - Even when payroll-related processes are in read-only mode, employees can access the Talent Management system (SuccessFactors) to complete performance- and recruiting-management activities. Additionally, employees enrolled in an FSA or HSA are able to access their Chard Snyder account while payroll is running.
- *Charge Objects*
 - Charge object creation, maintenance, org range assignment, inactivation, etc., are all performed within a single screen.
 - Charge Object Text field is available and is the default presentation to employees on the timesheet screens and should be created using plain language (e.g., Project A), not codes
 - Ability to assign a charge object to a position is not available.
- *Employment Status* – Payroll uses the employee’s employment status (shown on the Action History screen) as of the payroll period and not the last completed PAR. Return from LWOP PARs must be processed when employee returns to active work.

Attendance and Leave:

- *Timesheet*
 - Information Icon – Presented as a separate menu and includes links to the timesheet frequently asked questions, payroll schedule, and a link to the Department of Financial Services’ Employee Information Center
 - Calendar View – Allows employees to select a calendar to navigate to a specific timesheet period (calendar is view-only)
 - Leave Request Icon – Provides a link from the timesheet to the Leave and Overtime Request screen
 - Weekly View – Available for 40-hour included employees; allows 40-hour included employees to change their timesheet view from a pay period view to a weekly view
 - Work Period – Presented as a left/right navigation allowing employees to move forward and backward between timesheet periods
 - Charge Object – Presented as the Charge Object, not as separate fields (one field instead of three); Charge Object search within the timesheet still allows employees to view all components (project, activity and sub activity)
 - Hours Type
 - When the menu option is selected, most common hours type are presented first (general list, not employee-specific); all hours types are presented in a second section of the menu in alphabetical order
 - New hours types available:
 - 0040 – Annual Discretionary Admin Leave
 - 0070 – LWOP-Military Training
 - 0071 – LWOP Enlisted
 - 0072 – LWOP-Non FL State Activation
 - 0096 – Leave – SC Holiday CO
 - FMLA/FSWP – When the employee has an approved FMLA, FSWP, or FMLA/FSWP request, a dropdown is presented during the validity period of the request, allowing the employee to

select which type of leave the hours should be counted toward. Only the following hours types can be used with FMLA and FSWP:

- 0040 – Annual Discretionary Admin Leave
- 0051 – Annual Leave
- 0052 – Sick Leave
- 0053 – Family Sick Leave
- 0054 – Regular Comp
- 0055 – Special Comp – Pre July 2012
- 0058 – Authorized LWOP
- 0059 – Unauthorized LWOP
- 0060 – Workers Comp LWOP
- 0065 – Workers Comp Admin
- 0066 – Personal Holiday
- 0075 – Veterans Disability
- 0076 – Personal Leave (FSDB ONLY)
- 0085 – FLSA Comp
- 009* - Special Comp Leave Types
- Current Leave Balances Icon
 - Allows employees to view their current available (net) leave balances without navigating away from the timesheet (presents in an overlay on the timesheet).
 - Balances presented are as of the moment the employee selects the icon.
 - Includes an expiration date for leave types (e.g., special holiday compensatory leave, personal holiday) that expire; expiration date is the last timesheet day the leave can be used.
- New/Improved Timesheet Functionality for Specific Hours Types
 - Type 1016/1017 will now require employees to work more than their scheduled hours in a day and scheduled hours in the period.
 - Updates to allow additional hours types to be used when employee is on military leave without pay (with supplement – 82 and without supplement – 83). The following hours types will be allowed when an employee is on military leave:
 - 0040 – Annual Discretionary Admin Leave
 - 0045 – Office Closure Admin Leave
 - 0051 – Annual Leave
 - 0054 – Regular Comp
 - 0055 – Special Comp Pre July 2012
 - 0066 – Personal Holiday
 - 0082 or 0083 – Military Leave
 - 0085 – FLSA Comp
 - 0091 – Special Comp Holiday
 - 0093 (only through April 30, 2018)/0096 (starting May 1, 2018) – Special Comp Holiday Carry-Over
 - 0094 – Special Comp Office Closure
 - Several “soft” edits that exist in the current system will become “hard” stops in the upgrade:
 - The edit for 0035 – Admin – Voting will now restrict the use to no more than one hour per workday.
 - The edit for 0044 – Admin – Mentor/Volunteer will now restrict the use to no more than 4 hours per workday and 5 hours per calendar month.
 - The edit for 0080 – Admin – Child’s Activities will now restrict the use to no more than one hour per calendar month.

- The edit for 0075 – Admin – Veterans Disability will now restrict the use to no more than 48 hours per calendar year.
 - Timesheet Template
 - Separate timesheet template screen is not available
 - Save Template button allows employees to save their current timesheet rows as their template
 - After a template is saved, employees will have option to apply template or update template.
 - Only charge objects and hours types are saved in the timesheet template.
 - Template will allow up to 50 rows to be saved
 - Timesheet templates created prior to the portal upgrade will be wiped out, and employees will have to create a new template post-upgrade.
 - Delete Icon (trash can) – Allows employees to delete a timesheet row that has not been approved
 - Add Row Icon – Allows employees to add an additional row to their timesheet
 - Defaulted Rows – Five rows are defaulted on the timesheet.
 - Comments Icon – Allows employees to add comments and review saved comments for the time period
 - Audit Trail – Audit trail stores the last action per timesheet status (submitted, approved, returned for correction, and unapproved) instead of storing only the last action; information is available when you hover over the entry in the timesheet and is available in the Timesheet Summary report.
- *Timesheet Approval*
 - Screen is not separated out by timesheet period; rather, all approvals are presented together
 - Screen is split into two sections; the first section, Ready to Approve, shows all timesheets requiring approval, and the second section, Pending Employee Submission, includes all timesheets that are still pending employee submission
 - Return for correction process replaces the rejection process; once selected, sends the timesheet back to the employee to update. Resets the timesheet to a saved status
 - To use the return for correction process, you must navigate to the Timesheet screen for the period that needs to be returned.
 - Once approved, timesheets are removed from the Timesheet Approval screen; screen shows ONLY timesheets that require either manager or employee action (does not show approved timesheets).
- *Flexible Work Schedule*
 - Monthly excluded employees establish their flexible work schedule based on a 14-day period instead of a 7-day period.
 - Emails are sent to the manager when a new request is submitted for approval.
 - Emails are sent to the employee when a request is either rejected or approved.
- *FMLA/FSWP*
 - Requests pending approval (submitted status) that are older than 19 months will be deleted.
 - Available request types have been updated to match existing laws around both the FMLA and the FSWP process.
 - FMLA and FSWP eligibility are maintained separately
 - Separate deduction periods are used for FMLA and FSWP (no longer combined).
 - Deduction period is assigned based on the first occurrence for each type (FMLA or FSWP) and is a 12-month period from the first occurrence
 - Separate FMLA or FSWP reason types may be requested during the deduction period.
 - Balance shown with the request is based on the employee’s remaining balance for the deduction period at the point the request is made

- Request cannot cross deduction periods
 - If an employee has a new FMLA or FSWP event that crosses deduction periods, separate requests must be processed: one through the end of the current deduction period and one that starts on the first day of the next deduction period.
- Both event request dates and deduction period are shown in both the Overview and Details section for each request.
- Military Caregiver is not tracked in People First; if this is selected, the employee will receive a message to contact the human resource office for assistance
- If a combined FMLA/FSWP (e.g., birth or adoption of a child) request is created, separate FMLA and FSWP requests are created to allow time to be tracked accordingly for each FMLA and FSWP request.
 - Employees have the option to charge time to either FMLA, FSWP, or to both FMLA and FSWP when recording time on the timesheet for combined requests.
- Available hours for each FMLA and FSWP request type is based on the employee's FLSA period at the point of the initial request for the 12-month period.
 - FMLA
 - C6 – 192-Hour FLSA period – 576 hours
 - C7 – 168-Hour FLSA period – 504 hours
 - All other FLSA periods are 480 hours
 - FSWP –
 - C6 – 192-Hour FLSA period – 1,248 hours
 - C7 – 168-Hour FLSA period – 1,092 hours
 - All other FLSA periods are 1,040 hours
- Request and available balance is based on all appointment IDs, not just the appointment ID the employee is making the request under
- FMLA and FSWP Approvals
 - Approvals are sent to HR security role codes of A, H, and X within the employee's agency and NOT to the employee's manager.
 - Managers can create the FMLA or FSWP request on behalf of the employee; once saved, it is submitted to HR for approval.
 - All A, H, and X security role code users within the employee's agency will receive an Inbox task when an FMLA or FSWP request is submitted.
 - Once the responsible A, H, or X security role code user claims the request, the Inbox task is removed from all other A, H, and X security role code users' tiles.
 - If the request is submitted on behalf of the employee by an A, H, or X user, the request goes into an approved status.
- *Leave Balance Adjustment*
 - New Update Balances button is available that allows agencies to force the leave adjustment to update the employee's balance when the adjustment is saved instead of waiting for nightly time evaluation to run
 - Leave types 0092 Leave – SC Holiday, 0093 Leave – SC Holiday CO, and 0095 Leave – SC Closures CO are not available as adjustment types.
 - Leave type 0096 Leave – SC Holiday CO is available for processing a leave adjustment.
 - Adjustments cannot be processed with an effective date prior to the employee's agency hire date or after the employee's last day worked.
 - Personal holiday is now available as an adjustment type; adjustment will only allow addition of the personal holiday if the employee has not had one on the appointment ID in the fiscal year
 - Includes a new Leave Adjustment History screen that stores all leave balance adjustments for the appointment ID

- Future-dated adjustments are also available in the Leave Adjustment History Screen for viewing and deleting if needed
- *Leave Balance Overview*
 - Military training is displayed ONLY after the employee has used the hours type for this leave during the current military fiscal year (will NOT be displayed to all employees, only to those who are actively using during the current military fiscal year)
 - Leave type 0096 Leave – SC Holiday CO is included under the column for Special Comp-Holiday CO
 - Personal holiday is shown with the text of “Available” if it has not been used and “Pending” if the time has been committed on the employee’s timesheet but has not yet been approved
 - Ability to select pending leave hours to see what days and how many hours per day the employee is using for leave
- *Leave Payout*
 - Remaining balances for previously paid out leave is zeroed out when an appointment PAR is completed to rehire an employee after a break in service greater than 60 days instead of waiting for the appointment effective date
 - Zero out balance option is available when creating a separation leave payout
 - Previously paid out leave types are not shown.
 - Payouts do not consider any previously paid out hours; agencies must validate the hours previously paid out using the FLAIR PYRL Annual Leave Payment History screen and determine the hours eligible for payout; all rules in the Leave Payout screen will be based on the employee’s pay plan.
 - Special compensatory leave types 0091 Leave – SC Holiday, 0094 Leave – SC Closures, and 0096 Leave – SC Holiday CO are available for payout in the Leave Payout screen; agencies are responsible for ensuring payouts occur only when supported by the collective bargaining unit assigned to the position.
 - Special compensatory and FLSA compensatory caps are not applied, allowing payouts up to the greater of the employee’s current balance and 999.75 hours (if balance is greater than 999.75, payments must continue to be split as the maximum hours per payment is 999.75 hours).
 - July 1, 2012, hourly rate of pay warning message is not shown for special compensatory leave payouts
- *Leave and Overtime Requests*
 - Ability to cancel an approved leave request
 - Hours for an approved leave request are defaulted on the employee’s timesheet when initially accessing the period, but it must be saved by the employee to be retained on the timesheet; hours are editable as needed on the timesheet.
 - Additional fields are displayed based on the request submission, approval, rejection, and cancellation status. These fields are dynamically presented based on the status of the request.
 - Fields are presented only for requests processed in the new portal; requests processed prior to March 16, 2018, will not have these fields.
 - Employee current leave balances are available by hovering over the Leave Balance icon; balances are displayed as net available balances.
- *Leave Transfer*
 - Leave transferred is available on first day at the new agency, once transferred from the exiting agency.
 - Personal holiday is available for transfer if the employee has not used.
- *Requests Pending Approval*
 - The Leave, OT, and Other Approvals screen is now titled Requests Pending Approval.
 - FMLA and FSWP requests are sent to HR professionals (A, H, and X security role codes) for approval and are no longer available for the manager to approve.

- Emails are sent to the manager when a new request is submitted for approval.
- Emails are sent to the employee when a request is either rejected or approved.
- *Special Compensatory Leave*
 - Leave types 0092 Leave – SC Holiday and 0093 Leave – SC Holiday CO are not available for use beginning 05/01/2018.
 - For leave type 0091 Leave – SC Holiday, beginning 05/01/2018, all holiday special compensatory leave will be accrued under leave type 0091 Leave – SC Holiday.
 - Starting with the accrual period of 05/01/2018 – 10/31/2018, leave type 0091 Leave – SC Holiday is restricted by a 6-month period (05/01 – 10/31 and 11/01 – 04/30) but does not have a limited grace period; this allows employees to use the leave during the 6-month accrual period, even if completing the timesheet after the period has ended.
 - Effective 05/01/2018, leave type 0096 Leave – SC Holiday CO is used for special compensatory leave holiday carry-over (cannot be used with an effective date before 05/01/2018).
 - Leave type 0096 Leave – SC Holiday CO is restricted by a 180-day period starting 05/01 and 11/01 each year; if the effective date of the adjustment is not 05/01 or 11/01, the 180-day period still starts from 05/1 or 11/01, depending on the period the adjustment is performed in. While use is limited to the 180-day period, the leave is available if completing the timesheet after the period has ended.
 - Effective March 26, 2018, leave type 0095 Leave – SC Closures CO is not available for use.
 - CBU allowances that allow using sick leave or collective bargaining administrative leave to accrue special compensatory leave (has already been removed from the union agreements) are no longer available.
 - Special compensatory leave forced use logic order is as follows (does not apply to CBUs 6, 10, or 12): Priority 1 – leave type 0096 Leave – SC Holiday CO; Priority 2 – leave type 0091 Leave – SC Holiday; Priority 3 – leave type 0094 Leave – SC Closures; Priority 4 – leave type 0055 Leave – SC Pre July 2012
- *FMLA/FSWP Report*
 - Report includes the FMLA/FSWP reason code changes (refer to FMLA/FSWP section of this communication for additional details)
 - The following fields are not displayed:
 - FLAIR InterDept
 - Requestor Comments
 - Approver Comments
 - The following new fields are available:
 - Leave Type
 - Leave Type Starting Balance
- *Leave Audit Report*
 - Updated based on special compensatory changes described above (i.e., includes leave type 0096 Leave – SC Holiday CO, leave type 0091 Leave – SC Holiday for 05/01 – 10/31; does not include leave types 0092 Leave – SC Holiday, 0093 Leave – SC Holiday CO, and 0095 Leave – SC Closures CO starting 05/01/2018)
 - Updated calculation or creditable service months to stop based on last day worked
- *Leave Balance Report* – Updated based on special compensatory changes described above (i.e., includes leave type 0096 Leave – SC Holiday CO, includes type 0091 Leave – SC Holiday for 05/01 – 10/31, does not include leave types 0092 Leave – SC Holiday, 0093 Leave – SC Holiday CO and 0095 Leave – SC Closures CO starting 05/01/2018)
- *Leave Liability Reports* – Updated to include leave type 0091 Leave – SC Holiday in special compensatory leave liability section
- *Leave Summary Report* – Updated based on special compensatory changes described above (i.e., includes leave type 0096 Leave – SC Holiday CO, leave type 0091 Leave – SC Holiday for 05/01 – 10/31;

does not include leave types 0092 Leave – SC Holiday, 0093 Leave – SC Holiday CO, and 0095 Leave – SC Closures CO starting 05/01/2018)

- *Special Comp Leave Audit Report* – Updated based on special compensatory changes described above (i.e., includes leave type 0096 Leave – SC Holiday CO, leave type 0091 Leave – SC Holiday for 05/01 – 10/31; does not include leave types 0092 Leave – SC Holiday, 0093 Leave – SC Holiday CO, and 0095 Leave – SC Closures CO starting 05/01/2018)
- *Timesheet Audit Report* – Updated based on special compensatory changes described above (i.e., includes leave type 0096 Leave – SC Holiday CO, leave type 0091 Leave – SC Holiday for 05/01 – 10/31; does not include leave types 0092 Leave – SC Holiday, 0093 Leave – SC Holiday CO, and 0095 Leave – SC Closures CO starting 05/01/2018)
- *Time Information Report* – Charge Object Text field added; updated to include special compensatory changes described above (i.e., includes leave type 0096 Leave – SC Holiday CO, leave type 0091 Leave – SC Holiday for 05/01 – 10/31; does not include leave types 0092 Leave – SC Holiday, 0093 Leave – SC Holiday CO, and 0095 Leave – SC Closures CO starting 05/01/2018)
- *Timesheet Summary Report* – Updated to include special compensatory changes described above (i.e., includes leave type 0096 Leave – SC Holiday CO, leave type 0091 Leave – SC Holiday for 05/01 – 10/31; does not include leave types 0092 Leave – SC Holiday, 0093 Leave – SC Holiday CO, and 0095 Leave – SC Closures CO starting 5/1/2018)

Insurance Benefits:

- *Enrollment Process Flow*
 - Enrollment process is presented in a process flow that includes steps to show employees where they are in the enrollment process (current step is highlighted and underlined in blue). The process flow also includes indicators that show the steps that have been completed (completed steps are highlighted in green and include a checkmark). Includes the following steps:
 - Step 1: Select event (no changes to available events).
 - Step 2: Dependent Verification – Allows the employee to simply mark the dependent as still valid or to select to remove the dependent
 - All active dependents are presented to the employee for verification.
 - Select the checkbox beside each eligible dependent and select the delete icon (trash can) beside the dependent(s) who should be removed.
 - Deleted dependents are shown as struck through once removed; if the incorrect dependent is removed, the employee has an undo button presented beside the dependent.
 - If the dependent’s SSN is incorrect or blank, select the update icon (pencil) to update.
 - Select the register a new dependent icon (plus) to add an eligible dependent who is not already registered.
 - Step 3: Choose Plans
 - Provides employees with a snapshot of all available plans, including showing which plans they are currently enrolled in
 - Allows employees to navigate to the plan-specific pages to update coverage election
 - Plan pages includes two sections: current plans and new plans.
 - Employees make elections in the new plans section.
 - Shows the number of dependents enrolled for each enrolled plan
 - Step 4: Dependent Summary
 - Provides a summary view including ONLY the plans the employee is enrolled in, with a clear presentation of which dependents are enrolled in each plan
 - Step 5: Plan Summary

- Provides a final summary view of all enrolled plans, including the number of dependents enrolled in each plan
 - Step 6: Complete Enrollment
 - Provides certification language, password field, and Complete Enrollment button
 - Step 7: Confirmation Statement
 - Presents the confirmation statement in a print-friendly format
- *Dependent Certification* – The step-by-step dependent certification process is removed.
- *Dependent Audit*
 - Tracks which employees (and which dependents) have been audited; tracking includes whether the dependent passed the audit or was determined not eligible
 - Edit that prevents the employee from adding back a dependent who was determined ineligible; if the dependent is truly eligible, the employee must work through the appeal process.
 - Automatic updates to modify the coverage level if dependents are removed and the current coverage level no longer matches the employee's enrolled coverage level
 - When dependents are removed, a confirmation statement will be sent to the employee.
 - New Dependent Audit Summary and Dependent Audit Details reports provides information on who has been audited and whether dependents were added since the employee was audited; report is available only for HR professionals.
- *Correspondence History*
 - Includes the new emails:
 - Employee Underpayment
 - Qualified Status Change
 - Optional/Spouse Life Requires Medical Underwriting
 - Premium Increase Notice
 - Premium Decrease Notice
 - Direct Deposit Rejection Notice
 - Tax Exemption is Expiring
 - Personal Verification Due
 - Congratulations on Your Retirement
 - Leave Without (LWOP) Pay Commencement
 - Return from LWOP
 - FMLA/FSWP PAR Processed
 - Return from Leave of Absence
 - Includes the ability to print the employee's correspondence history
 - When selected, generates a PDF snapshot of the employee's entire correspondence history
 - Print/Save capabilities use browser-specific print settings
- *Premium History*
 - Overview Section
 - Includes a separate row for each coverage month (23-months back, current month, plus next coverage month), including a summary total of the over/under amount for the coverage month
 - Coverage months are expandable, presenting the plan-specific summary details (over/under) in separate rows once expanded
 - Details section will include all payments received, adjustments, refunds, etc., by plan type and coverage month
 - Ability to access the Over/Under Payment Details report for two years for employee
 - Ability to access a two year Premium History Report for the employee

- For HR professionals only, includes the ability to access the Retro Posting Report for the employee
- *Payroll Deduction Process*
 - Employee and employer underpayments (full amount due) are payroll deducted for active employees (employees not on full LWOP), which eliminates the need for active employees to write a personal check when underpayments occur
 - Early effective date process informs the employee that both the amount due for the early effective date and the regular amount due for the next coverage month will be deducted on the next payroll (employees will not submit a personal check); no longer requires a personal check since it will be payroll deducted
 - Employee underpayment deductions will be limited to \$180 per biweekly payroll and \$360 per monthly payroll. Underpayment deductions will not occur on the third biweekly payroll.
 - Employer underpayment deductions are not limited and the total due will be taken on the first payroll after the underpayment is calculated.
 - Double deductions process will remain for biweekly agencies only (no longer available for monthly agencies). However, the double deduct process should ONLY be used by biweekly agencies if the employee is terminated in the first biweekly period and is not going to another state agency (is truly terminating state employment).
 - New Premiums Due Report will be available for HR professionals. Report will show only employees that have an underpayment due. For the employees presented, will show the underpayment amount and the current deduction that is due.
- *Underpayment Process*
 - Employees are no longer underpaid until the end of the coverage month (approximately 3 business days prior to the end of the month).
 - Employee underpayment notices will be sent as follows:
 - Notices sent on the 2nd and 27th of the month are eliminated
 - New email notice will be sent on approximately the 27th of month prior to the coverage month.
 - Email will be triggered based on the employee being underpaid by at least \$4 for one or more plans at the point the monthly carrier file is processed.
 - Email will advise employees that the underpayment will be deducted from their next paycheck.
 - For example, if the employee is underpaid for April coverage, the employee will be sent an email on approximately March 27.
 - Letters sent on the 15th of the month will be moved to process on approximately the 27th of the coverage month
 - Letter will not be certified.
 - Should only trigger for employees who are on extended LWOP or who have an underpayment that is too large to deduct from the payroll that paid during the coverage month
 - Email will also be sent when the letters are generated.
 - Employees electing an early effective date will receive an email letting them know the premium due for the early effective date will be deducted from their next paycheck.
 - Retiree underpayment notices will be sent as follows:
 - Notice sent on the 2nd of the coverage month will now be sent on ~27 of the month prior to the coverage month
 - Notice sent on the 15th of the coverage month will continue to be sent on the 15th via certified mail

- Emails will also be sent when the letters are generated.
 - In preparation for the new payroll process, the existing underpayment notices have been updated for the February 2, February 15, March 2, and March 15 letters as follows:
 - Notices sent on the 2nd and 15th of the month to active **agency** employees will be updated to include the following transition language: **“Important note: Starting April 1, 2018, any remaining balances will be automatically deducted from your payroll—up to \$180 per payroll for employees paid biweekly and up to \$360 per payroll for employees paid monthly.”**
 - Notices sent on the 2nd and 15th of the month to active **university** employees will be updated to include the following transition language: **“Important note: Starting April 1, 2018, any remaining balances will be automatically deducted from your payroll.”**
 - Notice sent on the 27th of the month is not impacted
- *Confirmation Statements Screen* – Shows all available statements in the Overview section rather than first having to select a plan year
- *Health Insurance Tax Forms Screen* – Shows all available statements in the Overview section rather than first having to select a plan year
- *My Benefits Screen* – Defaults to enrolled plans as of system date
 - Allows running an enrollment history by plan type and for all plans (Benefits Details by Plan Type)
 - Allows running an enrollment history as of a certain date (Benefits Details As of a Certain Date)
 - Clicking on one of the records presents a PDF for that enrollment
 - Separate PDF for all plans is not available
 - Selecting the coverage link (when shown as a hyperlink) presents the enrolled dependents for that coverage.
- *My Dependents Information Screen*
 - Includes a health insurance and a dental insurance end date for each dependent
 - Includes audit status and audit date for each dependent
 - Additional fields for dependent address, Medicare, etc., have been added to the screen.
 - Fields are not valid for most employees and will generally be blank.
 - Medicare fields are only editable by the People First Service Center.

Org Management:

- *One Maintenance Landing Page*
 - The landing page is accessed from the Org Management tile on the Manager landing page.
 - Defaults to direct reports in a list view; for employees who do not have direct reports, the screen defaults to blank.
 - Managers can search for and access all positions in their reporting structure but must use the search or the reporting structure drilldown feature to access indirect reports; managers can search for all org units within their agency.
 - Includes the ability to search by Position, Org Unit, Broadband, or Class
 - Position Search – One search field that allows searching by employee name, social security number, login ID, appointment ID, position number, position title, org code, org description, and pay plan
 - Org Unit Search – Search by org code and org description
 - Broadband Search – Search by broadband code and broadband description
 - Class Search (non-broadband classes) – Search by class code and class title
 - Includes the ability to clear the search, as well as return to your default view (position search only), for example, to show your direct reports
 - All search results will be restricted based on employee’s security role code.

- Search results can be sorted and filtered by selecting a column heading.
 - Includes an Inactive checkbox that allows searching for a position, org unit, broadband, or class that has an end date prior to system date
- For each result returned in the list view, there is a menu option on the right of the record that is used to navigate to specific screens to view various information (e.g., position details, org details) and complete position and org actions (e.g., reclassify position, update position details, create org code)
- *Position Actions*
 - All position changes require the use of one of the following position actions to ensure all changes across the position are synced in order to prevent invalid associations and different effective dates:
 - Create Position Action – Used to establish a FTE (salaried) position
 - Create OPS Position Action – Used to establish an OPS position
 - Reclassify Position Action – Used to make reclassification changes to a position
 - Update Position Details Action – Used to make updates (e.g., supervisor, org code, FLSA work period, funding codes, security role code) to a position not defined as a reclassification action
 - Abolish Position Action – Used to abolish both active FTE and OPS positions; can only be processed if the position is vacant and does not have positions reporting to it as of the effective date of the action or a future date
 - Delete OPS Position – Action is no longer available; to abolish an OPS position, the Abolish Position action should be used.
 - Re-activate Abolish Position – Action is no longer available; positions cannot be re-activated, rather a new position must be created.
 - Org Change/Position Move – Action is no longer available; for this type of change, the Update Position Details action should be used.
 - Screens within each action are presented in a tabular format and includes next and back buttons allowing the HR user to navigate through the action.
 - All actions, except for Update Position Details action, require completion of each screen in sequential order.
 - Edits implemented to identify allowed and default values (e.g., excluded positions cannot have 40-hour FLSA period) for each field
 - Pay Additives screen is only shown during a position action if the position is eligible for an additive (e.g., not shown for OPS positions or SES/SMS positions)
 - Position updates are not applied until the entire position action is completed and all errors have been addressed
 - Ability to start a Create Position action from a position, org unit, broadband or class which defaults the selected information (i.e., position number, org code, broadband code or class code) into the position action. For example, if the Create Position action is started from an org unit, the org code populates in the Belongs to Org field during the position action
- *Take Action Landing Page*
 - Position actions can be saved as a draft and completed at a later time; when a position action is saved, but not completed, it is available on the Take Action page to access and complete.
 - The following information is included on the Take Action page for a saved position action:
 - Effective Date
 - Position Number
 - Position Title
 - Action Type – Name of the position action (e.g., Create Position, Reclassify Position) that was saved and not completed
 - Saved on Date – Date the user last saved the position action

- Delete Icon (trash can) – allows the HR professional to delete the incomplete position action; once the action is deleted, it cannot be retrieved
 - Selecting the position action allows the HR professional to restart and complete the action, including updating any previously entered information.
 - Only the creator of the position action can restart the action.
- *Position Screens*
 - All position screens are read-only (no direct entry), regardless of the user security role code; all position updates must be completed using a position action.
 - Object Maintenance Screen
 - Screen not displayed in People First
 - Historical data previously assigned to a position is captured in the data warehouse
 - Description field (e.g., working title) is captured in the Overview section of position screens and is titled Position Title
 - Object Relationships Screen
 - Screen is retitled Position Relationships
 - Captures the org unit (Belongs to Organization) assigned to the position, the supervisor position assigned to the position, positions that are supervised (direct reports) by the position and the holder (employee) of the position
 - Class or broadband assigned to the position is captured on the Position Attributes screen
 - Time and Requisition groups no longer exist and are not captured on this screen; access to orgs for attendance and leave (e.g. timesheet) and requisition tasks is now assigned on the Security screen
 - Description Screen
 - Screen not displayed in People First
 - Historical data previously assigned to a position is captured in the data warehouse
 - Vacancy Screen – Screen is available only from My Team page
 - Employee Group/Subgroup Screen
 - Screen not displayed in People First
 - Fields captured on Position Attributes screen and titled Included/Excluded (previously titled Employee Group) and Pay Plan or OPS Type (previously titled Employee Subgroup)
 - Security Screen
 - In addition to assigning a security role code to a position, screen is also used to assign an org unit(s) to B security role codes (time and requisition), R security role codes (requisition), and T security role codes (timekeeper)
 - Pay Additives Screen
 - At initial implementation, the Uniform Allowance indicator will not be displayed. In a future release (TBD), the indicator will be captured on Position Attributes screen. Historical data assigned to a position is captured in the data warehouse
 - At initial implementation, the Salary Incentive (CJIP) indicator will not be displayed. In a future release (TBD), the indicator will be retitled to CJIP and captured on Position Attributes screen. Historical data assigned to a position is captured in the data warehouse
 - Cannot remove (end date) pay additive if the employee (position holder) has an active additive record; additive must be removed on the employee before it can be end dated on the position (e.g., if additive on the employee is removed effective 01/31/2018, then the additive on the position cannot be removed until 02/01/2018 or later)Shift Differential – The only values available for selection for Shift Type 1 (% Using Base) and Shift Type 2 (% Using Min. of Grade) are 5%, 7.50%, 10%, and 15%; agencies can assign shift-differential as a percentage of the employee’s base salary, percentage of the pay

- grade minimum, percentage of the pay band minimum (percentage of the pay band minimum is available for use only by Department of Highway Safety and Motor Vehicles) or by fixed amount
- Additional Attributes Screen
 - Screen not displayed in People First
 - Fields captured on Position Attributes screen
 - The following fields are not displayed in People First; historical data previously assigned to a position is captured in the data warehouse.
 - Date Established
 - HSMV City Location
 - HSMV Location Code
 - HSMV Troop Assignment
- Position Attributes Screen
 - Fields previously captured on the Object Maintenance, Employee Group/Subgroup, and Additional Attributes screen are captured on this screen.
 - The Class and Broadband fields previously captured on the Position Relationships screen are captured on this screen.
 - SES Criteria field is displayed only if the Exempt Category 2 is 2w; only options for SES criteria field are confidential, managerial, and supervisory.
 - The following fields are not displayed in People First; historical data previously assigned to a position is captured in the data.
 - Fill Priority
 - CS to SES
 - Original SES Criteria
 - Vendor Invoice Indicator (In a future release (TBD), the indicator will be displayed.)
 - Seasonal Indicator
 - Restricted Employee Indicator checkbox retitled to Restricted Position
 - Shared Indicator checkbox retitled to Shared Position
 - Special Risk Retirement checkbox retitled to Special Risk
 - Rescreen Nbr Months field retitled to Rescreen Months
 - DL Class field retitled to Driver License Class
 - Instructor Indicator checkbox retitled to Instructor
 - Sworn/Certified Indicator checkbox retitled to Sworn/Certified
 - Supervisor Indicator checkbox retitled to Supervisor
 - Bond Indicator checkbox retitled to Bond
- Job Roles Screen
 - Screen not displayed in People First
 - Historical data previously assigned to a position is captured in the data warehouse.
- Position Funding Screen
 - The screen is divided into various sections: General funding information, FLAIR Account Code Details, Funding Distribution (**not** displayed for positions belonging to Department of Children and Families, Agency for Persons with Disabilities, and Department of Health) and OCA Funding Percentages (displayed only for positions belonging to Department of Children and Families, Agency for Persons with Disabilities, and Department of Health)
 - DOE Budget Entity field displayed only for positions belonging to the Department of Education
- Addresses Screen
 - Location Address is not required when completing a position action

- Mailing Address – City and State fields are auto-populated based on the ZIP code; County field not displayed
 - License/Certification/State Property Screen
 - Screen retitled to Licenses and Certifications
 - State Property not captured on the position
- *Org Actions*
 - All org changes require the use of one of the org actions to ensure all changes across the org are synced in order to prevent invalid associations and different effective dates:
 - Create Org Code action – Used to establish an Org Unit
 - Update Org Details action – Used to make updates (e.g., change Org title, change funding codes) to an org unit
 - Reactivate Org Code action – Used to reactivate an inactive org unit
 - Abolish Org action – Used to abolish an org unit; action is available only if the org does not have positions assigned to it or org(s) reporting to it as of the effective date of the action or a future date
- *Org Screens*
 - Object Maintenance, State Agency Data, State Org Data, and State Org Financial Data Screens – Screens are not displayed in People First; fields from these screens are captured on the Org Details screen
 - Contact Screen – Screen is not displayed in People First
 - Object Relationships Screen
 - Screen is retitled Org Relationships
 - Screen is read-only and updates must be made through the Update Org Details action
 - Captures the reporting relationships (Reports to Organization and Parent of Organization) for the org and the positions that are assigned (Contains Positions) to the org
 - Org Details Screen
 - Screen is read-only and updates must be made through the Update Org Details action
 - Captures all the org attributes (e.g., org title, pay cycle, funding codes)
- *Broadband Screen*
 - Object Maintenance and Compensation Screens – Screens are not displayed in People First; fields from these screens are captured on the Broadband Details screen.
 - Broadband Details Screen
 - Screen is read-only
 - Captures all the broadband attributes (e.g., Occupation, Pay Band)
- *Class Screen (non-broadband classes)*
 - Object Maintenance, Description, and Compensation screens are not displayed in People First; fields from these screens are captured on the Class Details screen
 - Class Details Screen
 - Screen is read-only
 - Captures all the class attributes (e.g., CBU, EEO-4, Pay Grade)
 - The EEO-4 category defaults to the position; field is editable on the position
 - The Occupation Group and CBU default to the position; fields and are not editable on the position
- *Broadband Crosswalk*
 - EEO-4 field added to Broadband Crosswalk; the category assigned to the EEO-4 field for each broadband record will be determined by the DMS/Division of Human Resource Management
 - EEO-4 category defaults to the position based on the Broadband/Class assigned; field is editable on the position

- Occupation Group and CBU default to the position based on the Broadband/Class assigned; fields are not editable on the position

Appointments and Status:

- *New Employment Screening Screen*
 - Replaces the Drug Screening, Background Check, Background Check – Abuse Case and Fingerprints screens
 - Fingerprints are not captured separately; fingerprints are part of the background screening types of level 1 and or level 2.
 - Fields include the following: Screening Type, Date Submitted, Date Completed and Rescreen Due Date.
 - Screening Types include the following: Drug Screening, Level 1, Abuse Case, and Level 2
 - Abuse Case is available only for the Department of Children and Families
 - No historical data prior to March 26, 2018, is available in this screen; historical data is available in the new Employment Screening report.
 - Records that existed prior to March 26, 2018, do not have to be re-entered after March 26, 2018, but there will be a mass load option for agencies; but if a mass load is completed, the background screening report will result in duplicate records for those employees.
 - Records are not combined across appointment IDs.
 - No Inbox tasks or emails are sent.
- *New Employment Screening Report* – Includes both historical screening records (records created prior to March 17, 2018) and current screening records (records created on or after March 26, 2018)
- *Employee Languages* – Allows end dating employee language records
- *Fitness Screen* – Screen is not available for use; history is available only in the data warehouse
- *Employee Verification Process*
 - Replaces the annual address verification process
 - Employee receives a task in their Inbox on August 1 of each year. Newly hired employees also receive the task.
 - Inbox task is also presented to all new hires.
 - Employment verification process includes a process flow that shows exactly where the employee is in the verification process.
 - Steps that have not been completed are greyed out.
 - The step the employee is completing is both shaded in blue and is underlined in blue.
 - Once the employee completes a step, the step is shaded green and includes a checkmark indicating the step is complete.
 - Buttons within the process are dynamic based on which step the employee is completing.
 - Buttons are the only way to navigate within the process (e.g., Back, Save, and Complete).
 - Presents the following screens for the employee to validate their information:
 - Personal Info – Presents the employee’s personal info records for review; only nickname can be updated
 - Address Info – Presents the employee’s home, mailing, and notification addresses for review and updating
 - Emergency Contact
 - Presents the employee’s emergency contacts for review and updating
 - If the employee has more than one emergency contact, each record is presented to the employee.

- Employee must review each emergency contact before moving to the EEO-Veteran step.
 - Includes a delete button to allow employees to delete an emergency contact who is no longer valid
 - EEO-Veteran – Presents the employee’s current EEO-Veteran record for review and updating
 - Form W-4 – Presents the employee’s current W-4 record for review and updating
 - Work Contact – Presents the employee’s work email and work location address for review; read-only
- *Agency Address Verification Monitoring report has been removed. A new report will be available in August 2018 for the Employee Verification process.*
- *New Other Employment Screen*
 - Combines the current Outside Employment and Dual Employment screens into one screen
 - No historical data for dual employment is available prior to March 26, 2018, in this screen; historical data for dual employment is available only in the data warehouse
 - Current Outside Employment records will transition to the new system
 - Screen is not combined across appointment IDs
 - State employment section is presented and shows all state-related employment based on the employee having one or more active appointment IDs in People First
- *Appointment Status*
 - New fields include an overlap start date and overlap end date.
 - Following the completion of a PAR, a batch process will be used to remove the overlap indicator from the appointment status record if the active employee record for the position no longer meets the overlap criteria (e.g., only one employee now holds the position).
 - Only applicable fields will be displayed for each employee (e.g., probationary dates will not display for SES employees).
- *Contact Info*
 - Primary Phone Number is relabeled as Mobile Phone.
 - Re-Enter Notification Email Address field requires direct entry; no longer allows pasting email
- *New License and Certifications Screen*
 - Combines the Professional Licenses & Certs and Driver’s License screens into one screen.
 - Status of each record is based on the end date of the record. If the end date is equal to or greater than system date, the record shows a status of Active. If the end date is before the system date, the record shows a status of Expired
 - Only the last expired record per license type is presented in the screen
 - No inbox tasks or emails are sent
- *Emergency Contact Screen*
 - Only active records are displayed
 - ZIP code logic, as used in the home and mailing address screens, is used to prepopulate city and state.
- *Assigned Property* – Screen is not available
- *Key Service Dates*
 - Leave Accrual Service Date is retitled to Adjusted Leave Accrual Date
 - Adjusted Leave Accrual Date is visible to employees.
- *Org Work Assignment*
 - Time Administrator, Requisition Manager, Time Admin./Req. Manager fields are no longer included (groups functionality is eliminated).
 - Includes Second-Level Manager
- *Work Contact Information*
 - Telework indicator is now included on this screen

- Includes a Re-enter Email field

Personnel Action Request (PAR):

- *PAR Menu*
 - All PARs that the employee has access to as the creator, act upon employee, liaison, or approver are combined in one screen.
 - PARs are sorted with those requiring action first, then by oldest effective date
 - PAR menu columns can be sorted and filtered.
 - PARs that require action have an edit icon in the first column.
 - PARs that are in a draft status have a delete icon (trash can) in the last column.
 - PARs can be created from the PAR menu.
 - PAR menu includes the following columns:
 - Actionable Icon (if applicable)
 - Effective Date
 - Status
 - Agency
 - Appt ID
 - Employee Name
 - Action
 - PAR Number
 - Delete Icon (if applicable)
 - Users can search for pending and completed PARs from the PAR menu.
- *PAR Statuses*
 - PAR progress flow will show the PAR status of where the PAR is in the process when the acting process is taking place; a status that has been completed will show in green and the current status will show in blue. PAR statuses include the following:
 - Draft – PAR that has been saved but not submitted to the liaison for approval; while the PAR is in a draft status, a delete button is available. If you select delete, the PAR form will be removed and no history will be retained since the PAR was not submitted for approval
 - Submitted – PAR that has been submitted to the liaison for approval and routing
 - Partially Approved – PAR that has been routed for approval, but one or more approvers have not completed the approval process yet
 - Approved – PAR has been approved by all approvers and is ready to act upon
 - Returned for Correction – Replaces the reject PAR functionality and means the PAR was returned to the creator for updates by the liaison or an approver; if returned, the following apply:
 - The creator can either choose to make the requested update and resubmit the PAR for approval or can cancel the PAR.
 - PAR number is retained if the PAR is resubmitted.
 - Comments are retained.
 - Approvals are reset, requiring all approvers to re-approve the PAR.
 - Completed – PAR has been acted upon and updates applied
 - Cancelled – PAR was cancelled by the creator, act upon employee, liaison, approver, or HR user; once the PAR is cancelled, no further action can be performed on the PAR other than adding comments
- *PAR Search*
 - Simplified search from the PAR menu that allows searching for PARs using one search field; can search by PAR number, PAR status, employee name, from/to position number, login ID, appointment ID, or SSN

- Effective date to/from in separate search fields, allowing a search by date and the simplified search field to narrow search results
- Search results include effective date, PAR status, agency, appointment ID, employee name, action, and action reason
- Results are both sortable and filterable.
- Search includes a delete icon that allows the searcher to clear results and start over
- PARs in a completed status will appear in a printable PDF format when selected
- *PAR Liaison*
 - If multiple employees occupy a position and are the assigned liaison for a PAR, both will have access to complete the liaison step.
 - When there are two liaisons assigned to the PAR, the first user who approves the PAR will be the named liaison on the PAR; ability to search for employee or position to assign as the liaison position
 - In the event a liaison is unable to route/approve or perform liaison duties after the initial routing/approving, HR users with an HR security role code (A, H, U, X, and Y) will have the ability to assign a new PAR liaison for the PAR or complete the PAR liaison step.
- *HR User (A, H, X, U, and Y security role code)*
 - HR users will be able to act upon a PAR without being listed as the act upon employee; if an HR user claims the PAR, the PAR audit history (bottom portion of PAR) will show who acted upon the PAR
 - HR users with an HR security role code (A, H, X, U, and Y) will be able to act as the PAR liaison, change approvers, approve on behalf of, or assign an act upon employee on PAR forms which they have access to
 - A new column will be added to the PAR form that will display who performed the action
- *PAR Act Upon Employee*
 - Interceptor is now called act upon and represents the person who will complete the PAR once approved
 - The default act upon employee is the user who created the PAR but can be updated by the liaison or an HR user with an HR security role code (A, H, X, U, and Y).
 - Act upon employee can be anyone in the agency who has PAR access
- *PAR Initiation*
 - The PAR can be initiated from the My Team view or from the PAR menu.
 - If initiated from the My Team view, position and employee information are prepopulated, simplifying the PAR initiation process.
 - PAR number is not created until the PAR has been submitted to the liaison
 - PAR can be saved as a draft, allowing the creator to come back and submit at a later time or delete
- *Act Upon Process*
 - Required screens based on the type of action are presented in a tabular format, requiring the act upon employee to complete tabs in sequential order
 - PARs that do not require additional information (e.g., pay changes) will not be presented in a tabular format
 - When tabs are available, they include next and back buttons that allow the act upon employee to move through the PAR tabs.
 - PAR updates will not be applied to an employee record until the entire PAR process is completed and all errors have been addressed.
 - Users have the ability to save updates throughout the act upon process and return to complete the PAR a later time.

- PAR Audit Report has been temporarily removed. This report will be available in a future release (TBD). When needed, make a request to the People First Org Management Team at pf.org.management@ngahrhosting.com to obtain a copy of the report.