ASTRA
SHARP Upgrade Updates

Department of Administration
October 2012

Welcome

Presenters:

- **Connie Guerrero, Deputy Director, Office of Human Resources**

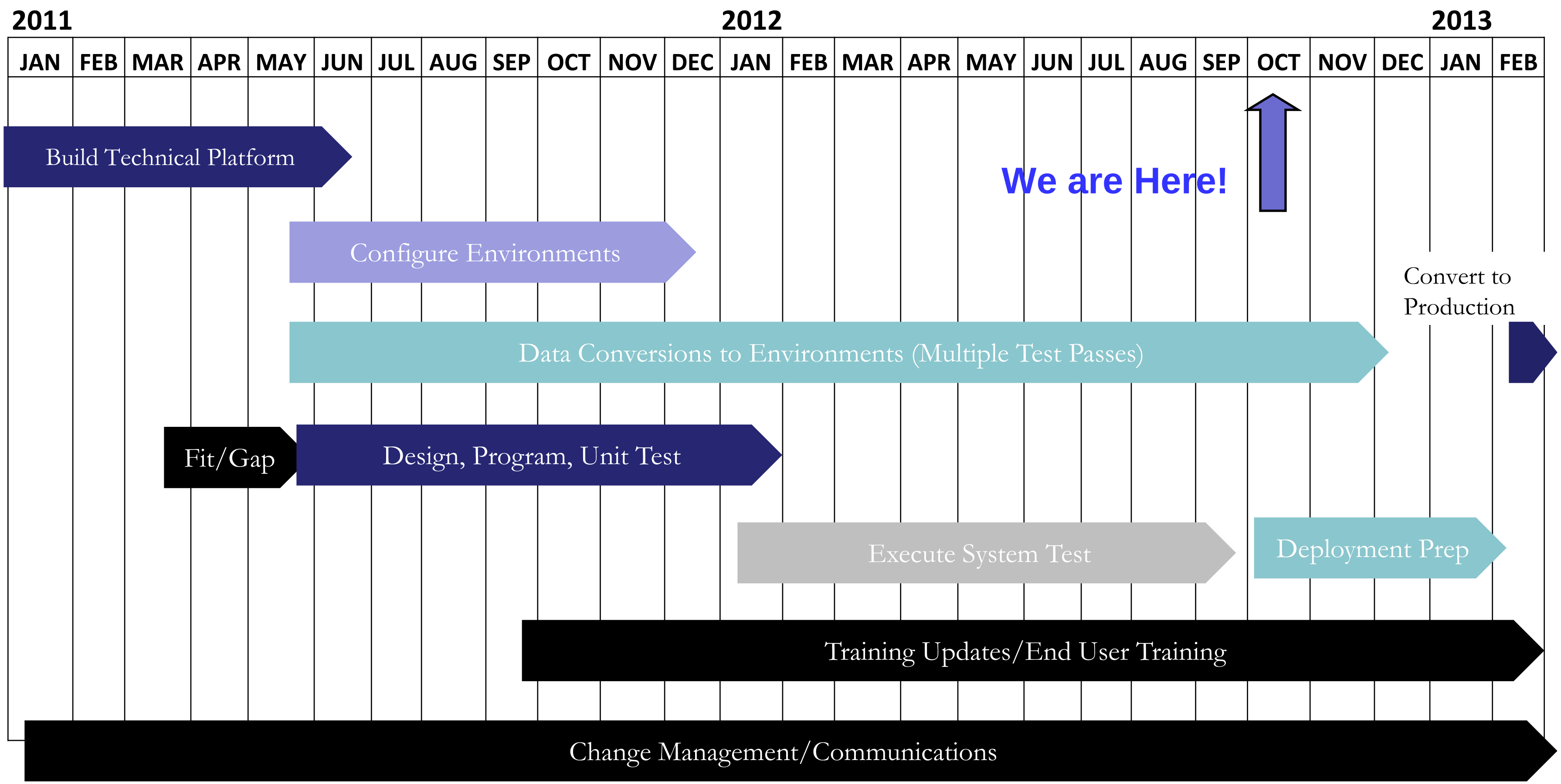
- **Nancy Ruoff, Payroll Services Manager, Office of General Services**

Meeting Agenda

- Welcome
- Upgrade Status and Activities
- General Changes in v9.1
- Electronic W-2 Reporting
- Payroll Calculation Tool
- Next Steps
- Wrap Up & Questions

Upgrade Status and Activities

SHARP PeopleSoft 9.1 Upgrade Project Timeline



General Changes in v9.1

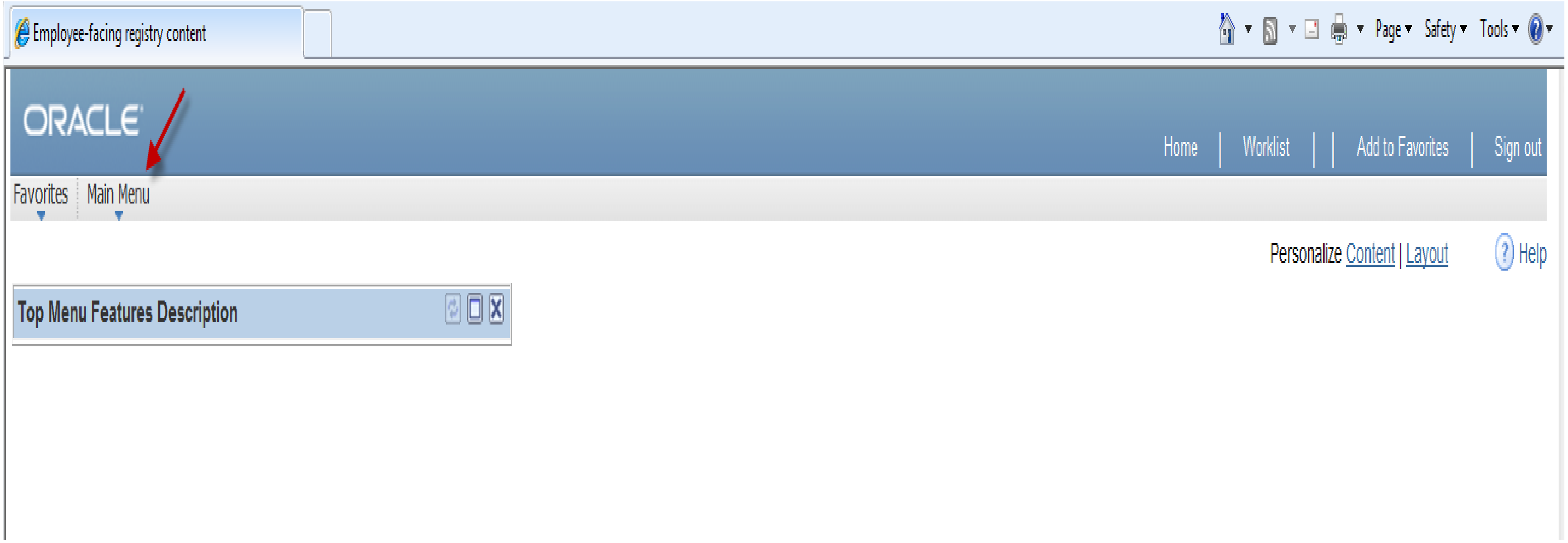
9.1 General Changes

New Navigation in v9.1:

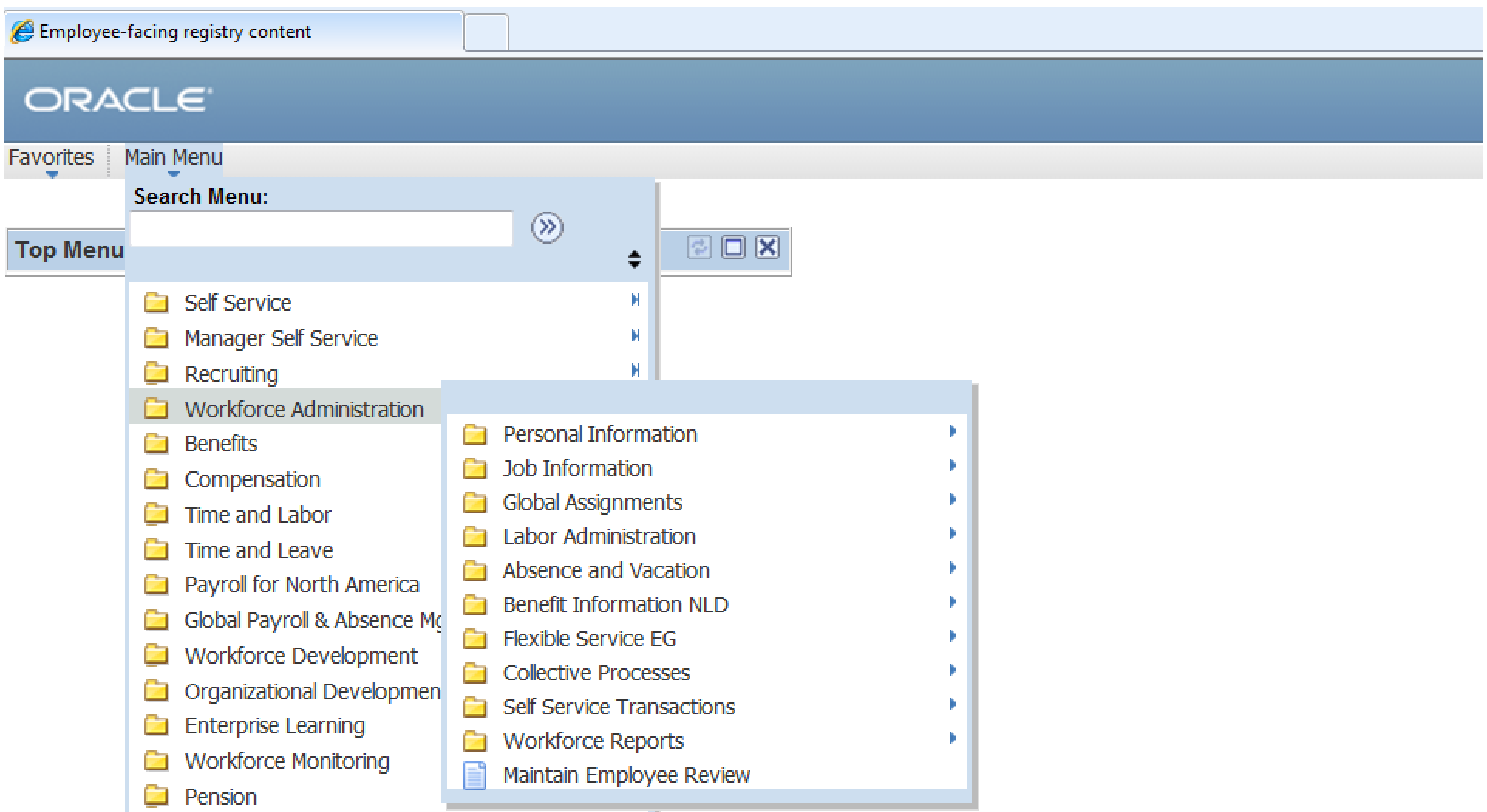
- You will ‘click-to-pick” when accessing pages within SHARP v9.1. In v8.9 you can “hover” your mouse over a folder in the Main Menu to access sub-folder and sub-pages. Instead of “hovering” you must “click”. This “click-to-pick” technology enables the sub-folders and pages to display at a faster rate.

Navigation in v9.1

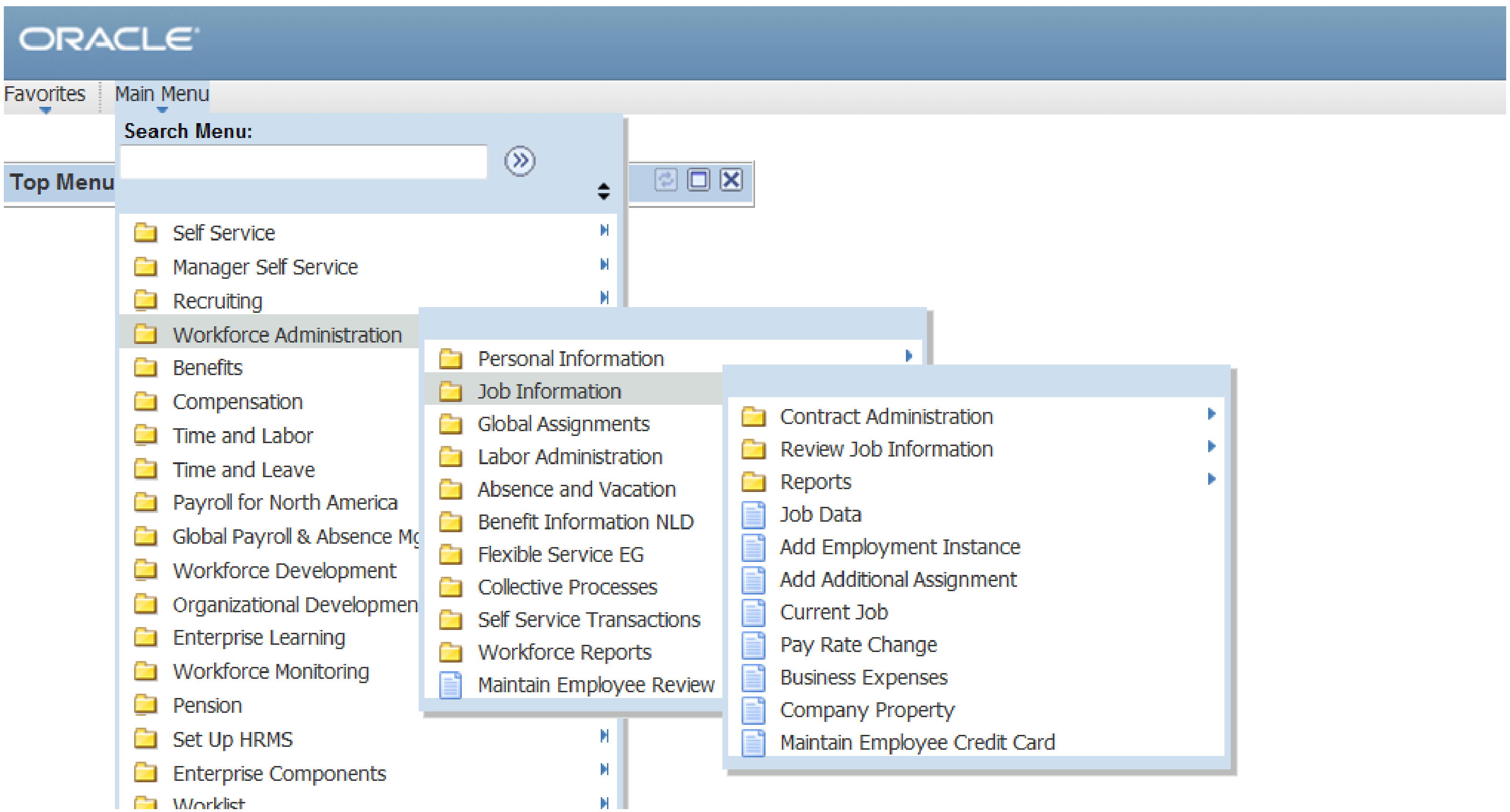
Click on Main Menu to see a list of sub-folders based on your security role



Click on Workforce Administration

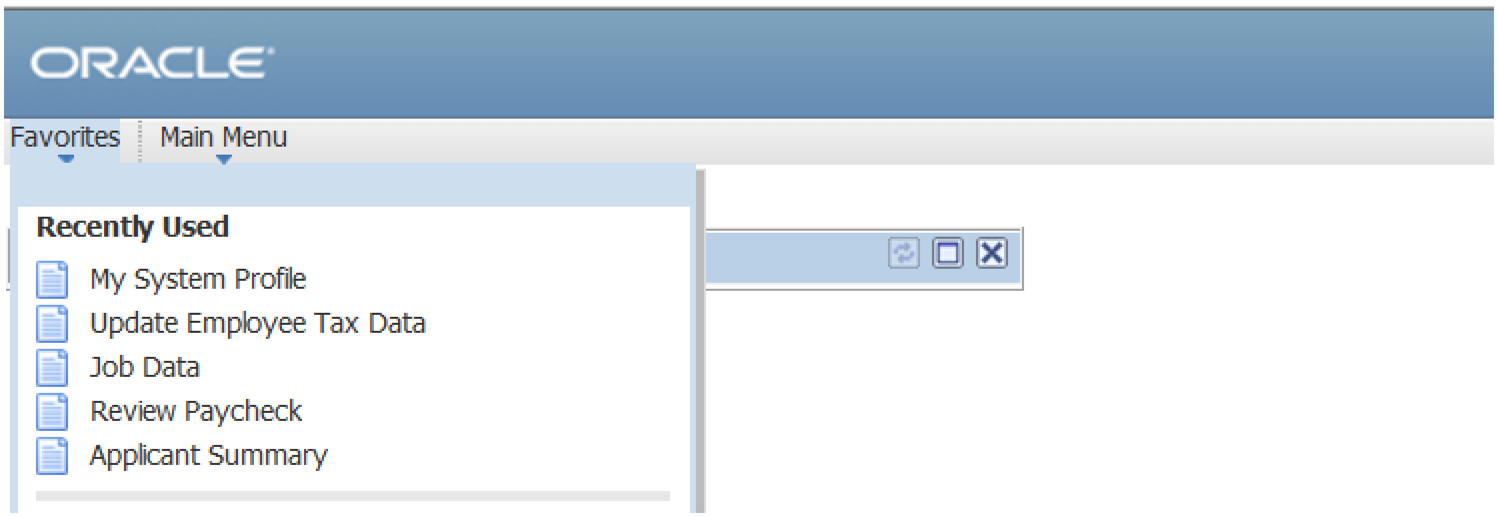


Click on Job Information



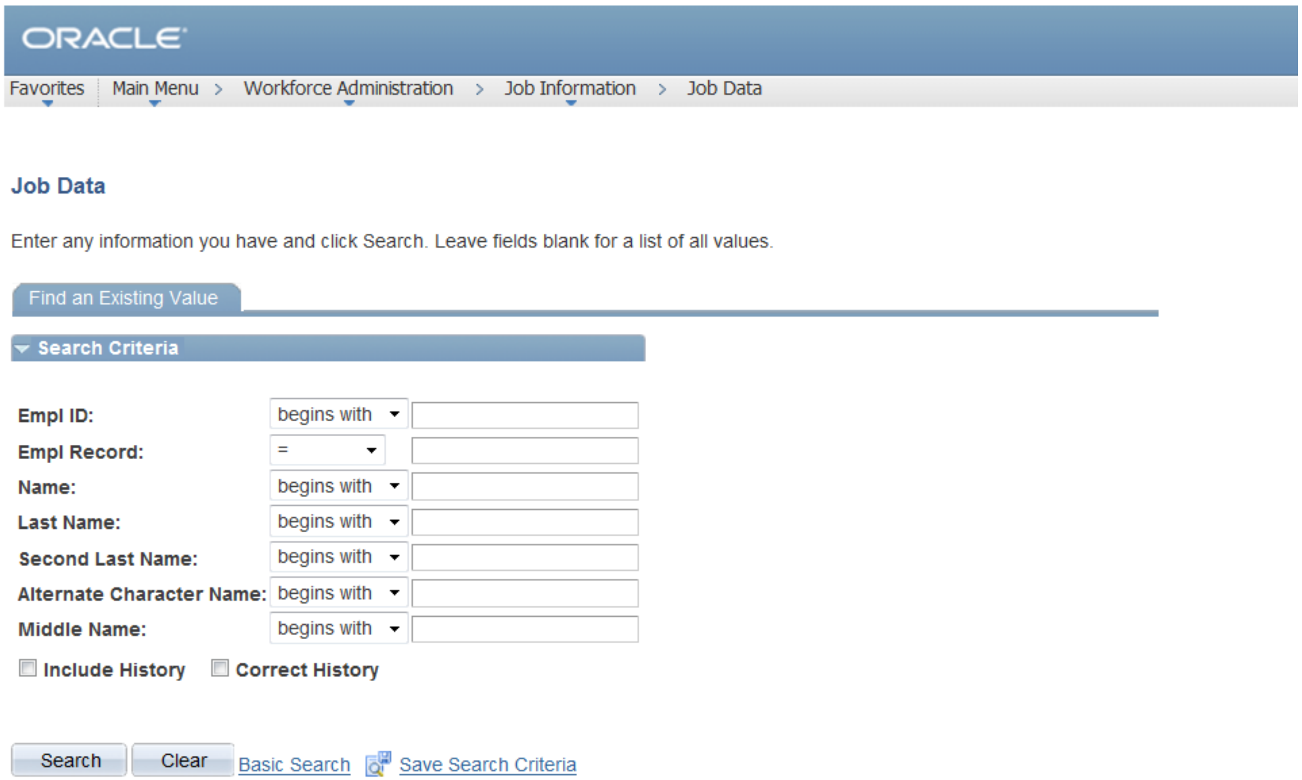
Recently Used

Recently Used pages now appear under the Favorites menu, located at the top left.



Breadcrumbs

Breadcrumbs visually display your navigation path and give you access to the contents of subfolders.



Electronic
W-2 Reporting

Employee Self Service
9.1 W-2 Options

Existing 8.9 process:

- Paper W-2s are printed/mailed in early January for the previous tax year
  - Paper W-2s will be printed/mailed to all employees in early January, 2013 for tax year 2012

- W-2 Reprints are run on a set schedule
  - Reprinted W-2 forms can be requested through ESS or through your agency HR/Payroll office beginning in late January

Employee Self Service
9.1 W-2 Options

Exciting 9.1 Changes:

- W-2s will be available electronically for self-service printing through ESS
  - Data from secure PeopleSoft database
  - W-2 form can be accessed through ESS at employee’s convenience
  - Multiple years of W-2 forms will be available
  - <u>All</u> employees have ESS access for W-2 information and it is available up to 18 months after leaving employment with SOK

Employee Self Service 9.1 W-2 Options

- Access to view/print W-2s via ESS requires employee consent to receive this information electronically
- W-2s will be available electronically for 2012 reprints shortly after Feb. 13, 2013
  - Encourage employees to utilize this as an alternative to requesting a paper W-2 reprint
- Tax Years 2007 – 2011 will be available on ESS by late February, 2013

Employee Self Service
9.1 W-2 Options

Changes in 2014 for 2013 W-2 forms:

- W-2s will be available electronically through ESS in <u>early</u> January, 2014
  - Employees who consent to access W-2 forms electronically will <u>not</u> receive a printed form
  - Employees can withdraw consent through ESS
  - Regent agency employees will need to know and use their SOK emplid to access W-2 forms through ESS

Employee Self Service
9.1 W-2 Options

Changes in 2014 for 2013 W-2 forms:

- Paper W-2 forms will be printed/mailed in <u>late</u> January, 2014 <u>only</u> for employees who do <u>not</u> consent to receive information electronically
- Employees will be encouraged to utilize ESS to obtain W-2 reprints electronically
- Instruction sheet will be available to provide to employees to assist them in accessing ESS to obtain electronic W-2 information

Employee Self Service
9.1 W-2 Options

Changes in 2014 for 2013 W-2 forms:

- Paper W-2 reprints will remain available for employees who are unable to access the information via ESS or who choose not to grant consent to receive information electronically

Employee Self Service
9.1 W-2 Options

ORACLE

Main Menu

[Benefits Open Enrollment](#)
During the month of October, update your benefit coverage.

[Benefit Confirmation Statement](#)
View your benefit confirmation statement.

[Update My Profile](#)
Change your password or email address and set up or change your secret question and answer.

[View Personal Information](#)
View your name, address, phone number, marital status, birthdate and original hire date.

[View Training Summary](#)
View a summary of your training information.

[View Leave Balances](#)
View your leave balance of the most current paycheck. This information is not available for Regent (University) Employees.

[View Paycheck](#)
Review current and prior paychecks. This information is not available for Regent (University) Employees.

[Total Compensation Statement](#)
View your total compensation from the previous year. This information is not available for Regent (University) Employees.

[Update W-4 Federal Tax Data](#)
Review or change your Federal W-4 information. (***IMPORTANT*** To change State tax withholding information, you must submit Form K-4 to agency payroll personnel). This information is not available for Regent (University) Employees.

[Request W-2 Reissue](#)
Request a duplicate W-2.

[Update My Time Sheet](#)
Enter reported time and task details for a day, week, or time period. This is only available for time and labor employees

[Report Time for My Employees](#)
Enter reported time and task details for a day, week, or time period. This is only available for time and labor managers.

[Approve Reported Time](#)
Approve reported time and task details for a day, week, or time period. This is only available for time and labor managers.

[W-2/W-2c Consent](#)
Grant or withdraw consent to receive electronic W-2 and W-2c forms.

[View W-2/W-2c Forms](#)
View electronic W-2 and W-2c forms.

[Request W-2 Reissue](#)
Request a duplicate W-2.

[Update My Time Sheet](#)
Enter reported time and task details for a day, week, or time period. This is only available for time and labor employees

[Report Time for My Employees](#)
Enter reported time and task details for a day, week, or time period. This is only available for time and labor managers.

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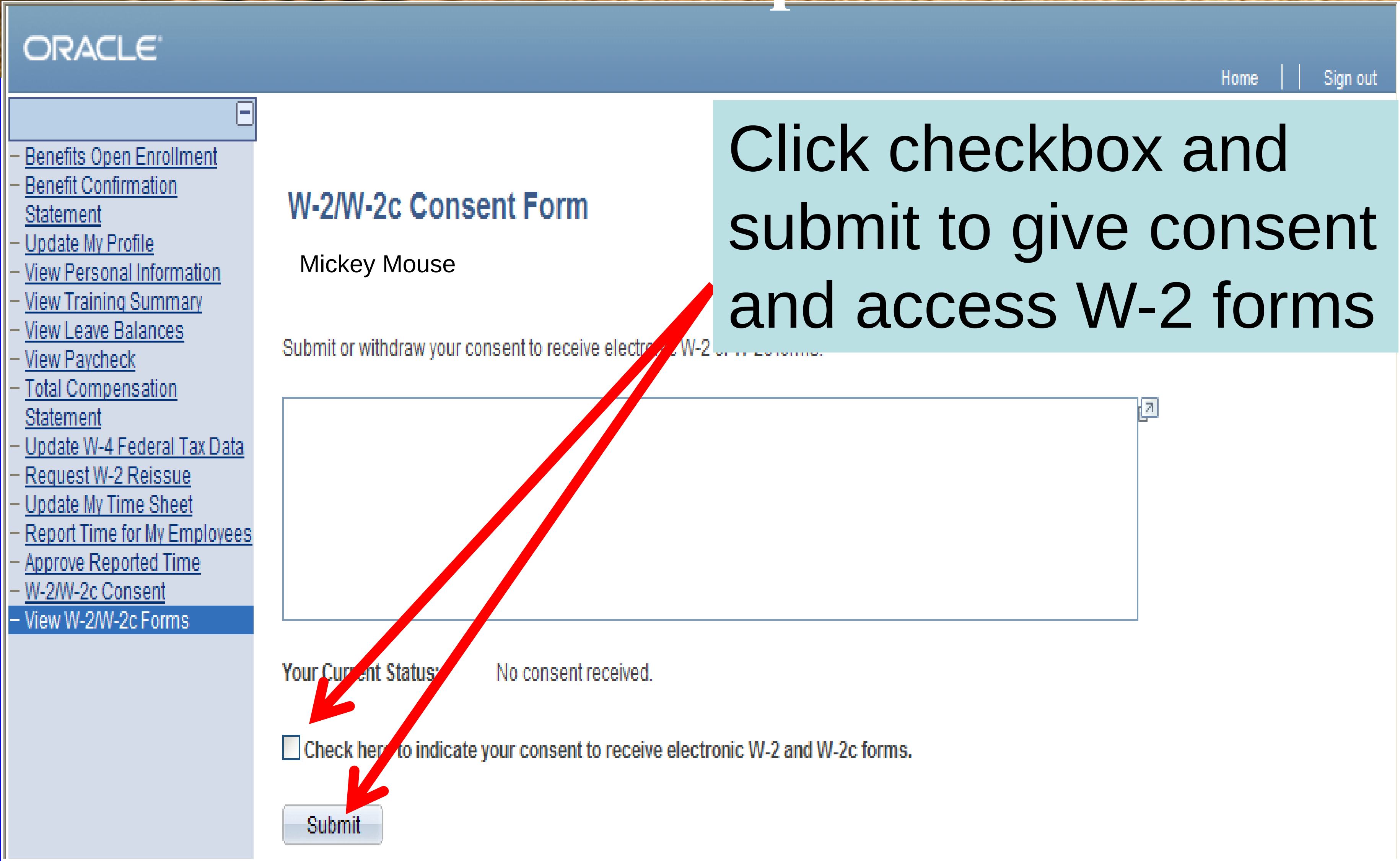
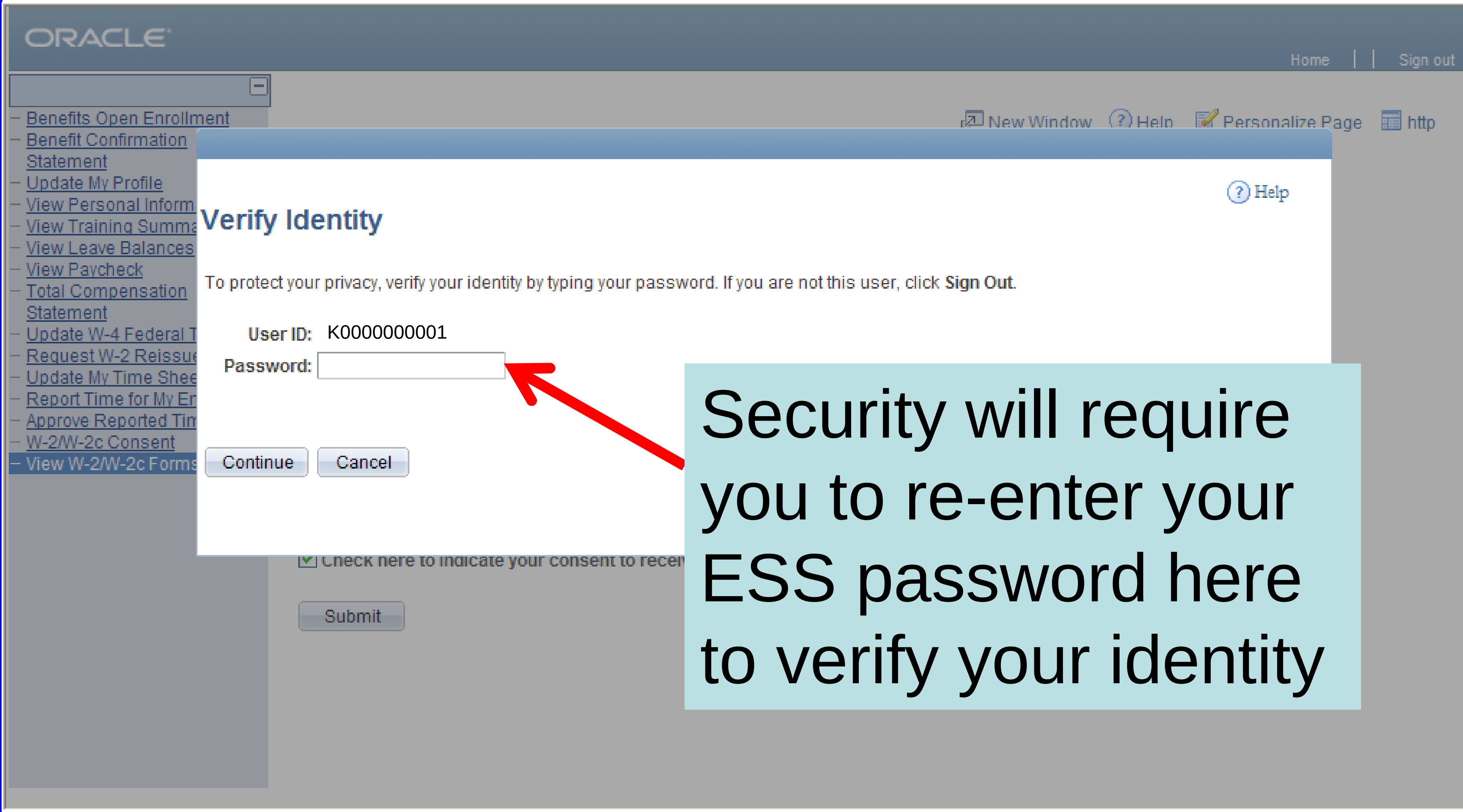
[View W-2/W-2c Forms](#)
View electronic W-2 and W-2c forms.

Employee Self Service
9.1 W-2 Options



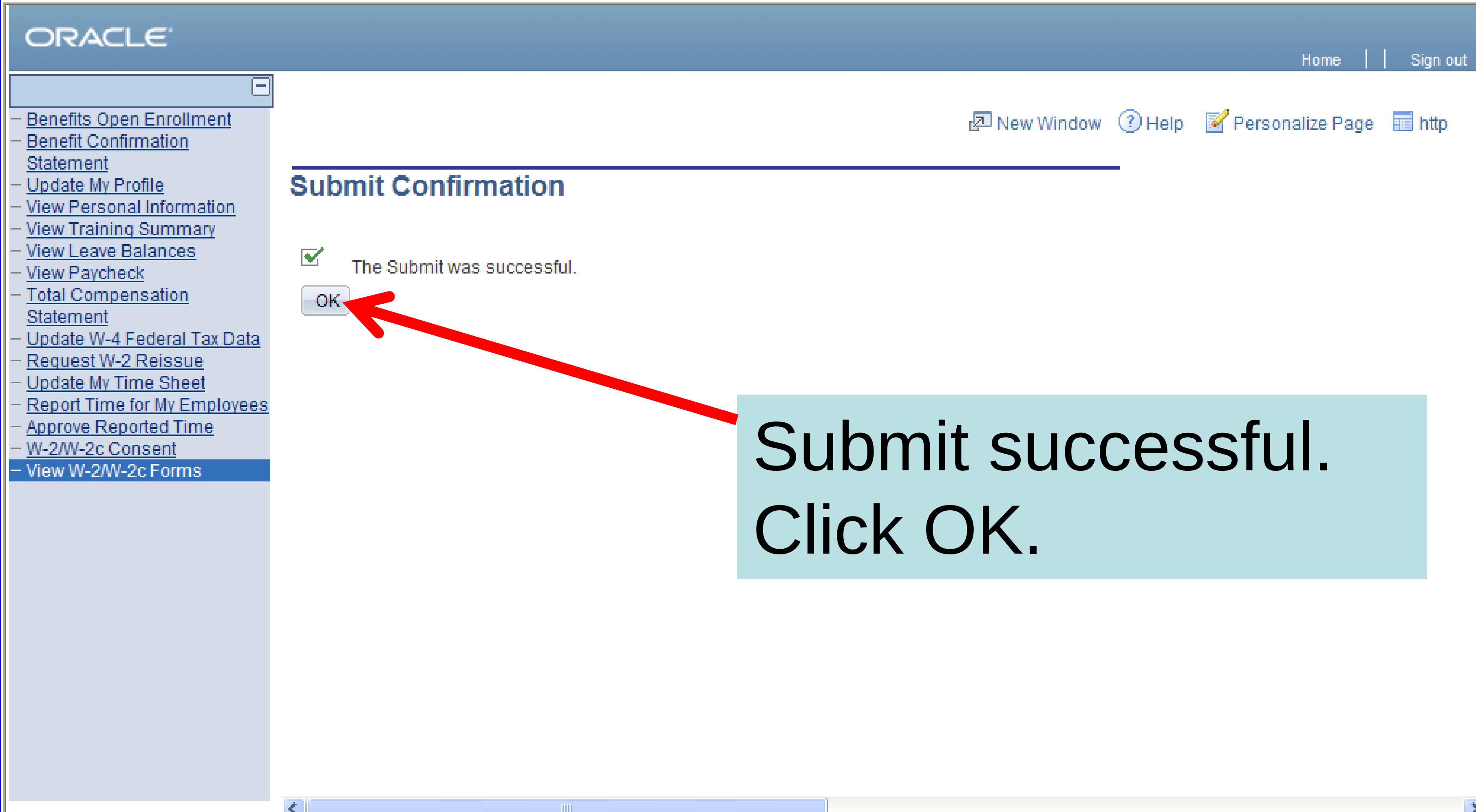
Click checkbox and submit to give consent and access W-2 forms

Employee Self Service
9.1 W-2 Options



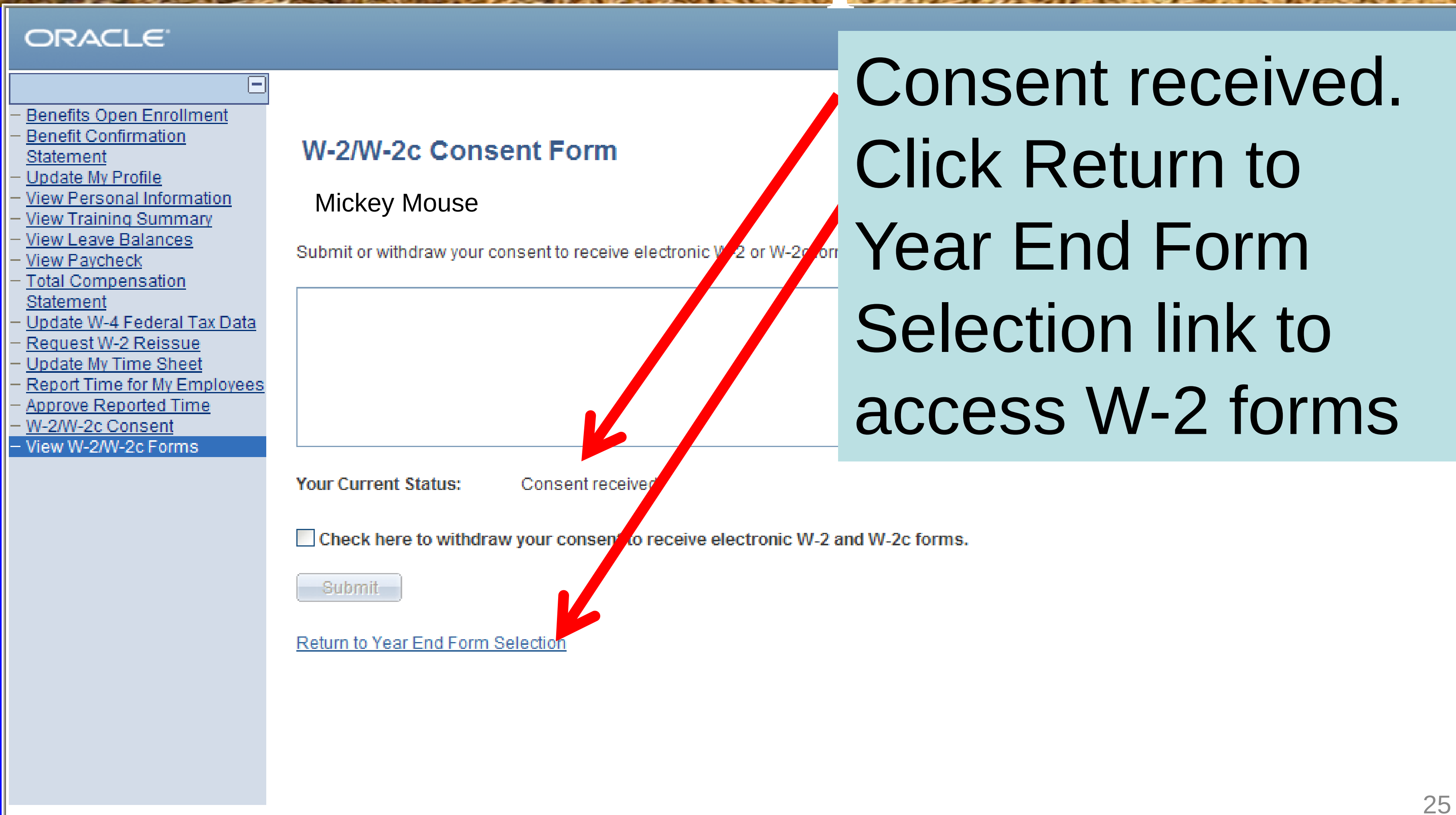
Security will require you to re-enter your ESS password here to verify your identity

Employee Self Service
9.1 W-2 Options



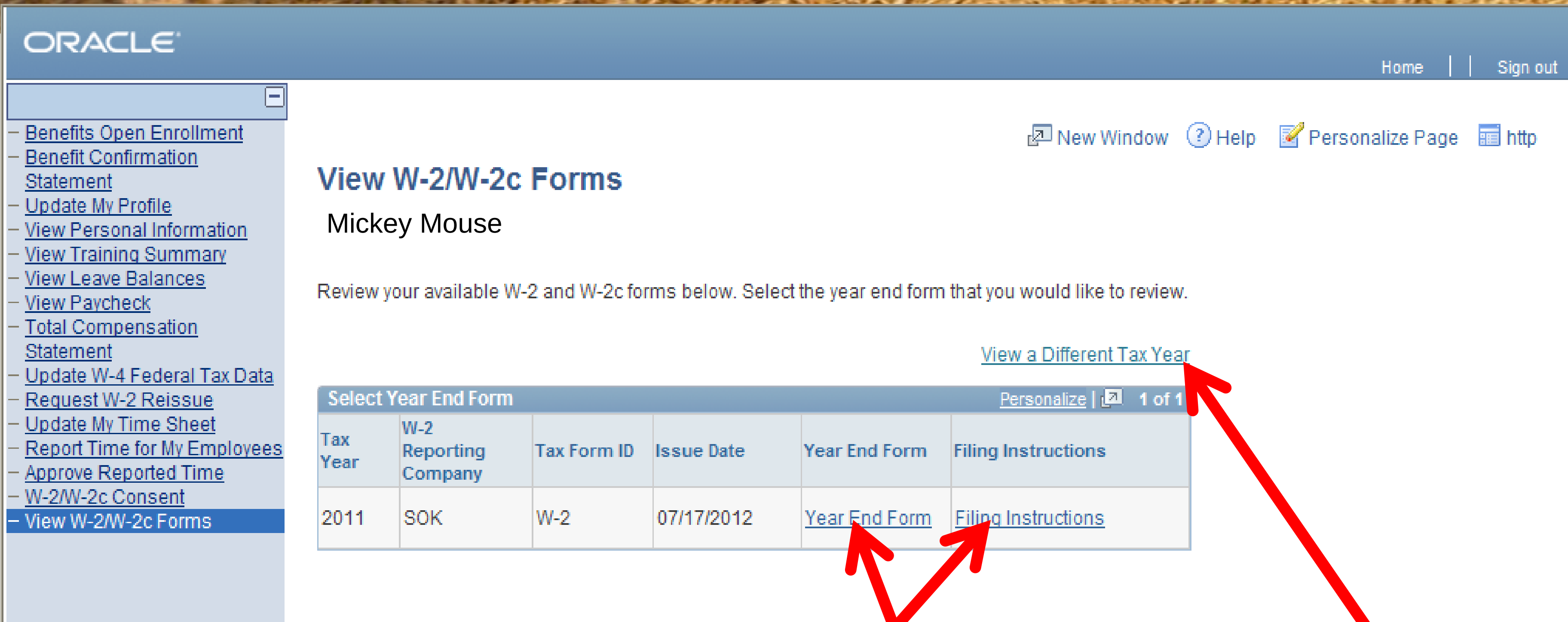
Submit successful. Click OK.

Employee Self Service
9.1 W-2 Options



Consent received. Click Return to Year End Form Selection link to access W-2 forms

Employee Self Service
9.1 W-2 Options


ORACLE
Home | Sign out

- Benefits Open Enrollment
- Benefit Confirmation Statement
- Update My Profile
- View Personal Information
- View Training Summary
- View Leave Balances
- View Paycheck
- Total Compensation Statement
- Update W-4 Federal Tax Data
- Request W-2 Reissue
- Update My Time Sheet
- Report Time for My Employees
- Approve Reported Time
- W-2/W-2c Consent
- View W-2/W-2c Forms

New Window | Help | Personalize Page | http

View W-2/W-2c Forms

Mickey Mouse

Review your available W-2 and W-2c forms below. Select the year end form that you would like to review.

View a Different Tax Year

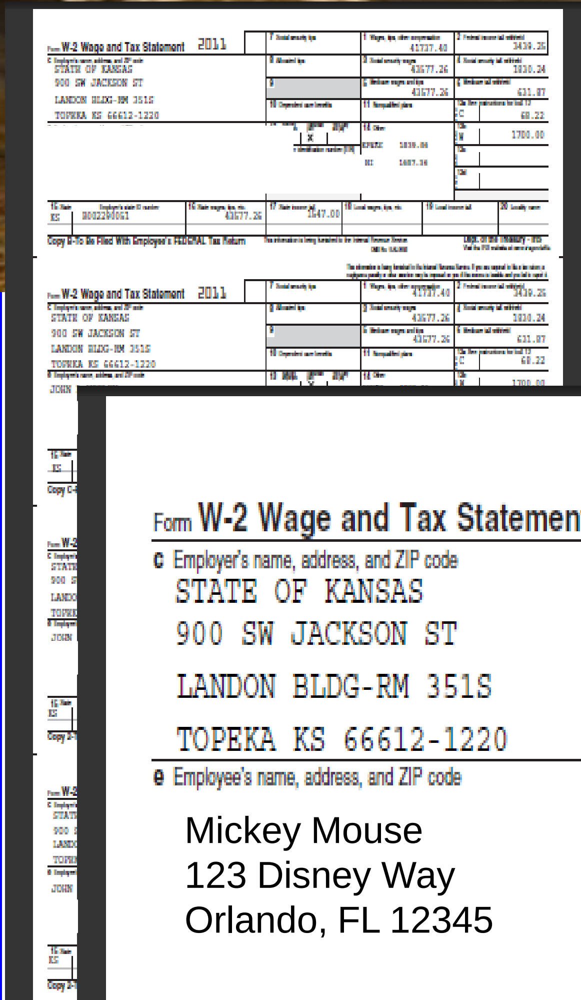
Select Year End Form — Personalize | 1 of 1

Tax Year	W-2 Reporting Company	Tax Form ID	Issue Date	Year End Form	Filing Instructions
2011	SOK	W-2	07/17/2012	Year End Form	Filing Instructions

Most recent Tax Year form/instruction links display. Select View a Different Tax Year link for prior year W-2 information.

Employee Self Service
9.1 W-2 Options

*Form prints on 8 ½" x 11" sheet of paper



Form **W-2 Wage and Tax Statement** 2011

c Employer's name, address, and ZIP code STATE OF KANSAS 900 SW JACKSON ST LANDON BLDG-RM 351S TOPEKA KS 66612-1220	7 Social security tips	1 Wages, tips, other compensation 41737.40	2 Federal income tax withheld 3439.25
	8 Allocated tips	3 Social security wages 43577.26	4 Social security tax withheld 1830.24
	9	5 Medicare wages and tips 43577.26	6 Medicare tax withheld 631.87
	10 Dependent care benefits	11 Nonqualified plans	12a See instructions for box 12 C 68.22
e Employee's name, address, and ZIP code Mickey Mouse 123 Disney Way Orlando, FL 12345	13 Statutory employee / Retirement plan X / Third-party sick pay	14 Other KPERS 1839.86 GHI 1687.36	12b W 1700.00
	b Employer identification number (EIN) 48-6029925		12c
	a Employee's social security number 123-45-6789		12d

15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name
KS	B002290051	43577.26	1547.00			

Copy B-To Be Filed With Employee's FEDERAL Tax Return

This information is being furnished to the Internal Revenue Service.

OMB No. 1545-0008

Dept. of the Treasury - IRS

Visit the IRS website at *www.irs.gov/efile*.

This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it

Employee Self Service 9.1 W-2 Options

ORACLE

Home | | Sign out

- Benefits Open Enrollment
- Benefit Confirmation Statement
- Update My Profile
- View Personal Information
- View Training Summary
- View Leave Balances
- View Paycheck
- Total Compensation Statement
- Update W-4 Federal Tax Data
- Request W-2 Reissue
- Update My Time Sheet
- Report Time for My Employees
- Approve Reported Time
- W-2/W-2c Consent
- View W-2/W-2c Forms

New Window Help Personalize Page http

View W-2/W-2c Forms

Select the tax year that you would like to review.

Select Tax Year

Tax Year	Company
2011	State of Kansas
2010	State of Kansas
2009	State of Kansas
2008	State of Kansas
2007	State of Kansas

Return to Year End Form Selection

Information for Tax Years of 2007-2012 will be available by late February, 2013

Payroll Calculation Tool

Payroll Calculation Tool

- Excel-based tool available at SOK Employee Service Center at www.kansas.gov/employee/
- Allows employee to model impact of gross pay/tax/deduction changes to paycheck net pay
- Can assist employee in making decisions related to voluntary deductions, retirement payouts, open enrollment options, etc.

Payroll Calculation Tool

- Only represents current year tax rates
  - Does not model future tax rate changes
- Updated each January for changes in tax tables
- Employee uses information from most recent pay advice to enter data and obtain results
- This is only a modeling tool and does not update any information in SHaRP. Any changes desired by employee must be submitted via appropriate HR/Payroll Forms.

Payroll Calculation Tool

http://www.kansas.gov/employee/

Payroll Calculation Tool

First Tab of Calculation Tool is instructions. Click on green button to acknowledge and proceed

This estimating tool was created to assist employees with decisions regarding payroll tax status and benefit deductions. Here are tips for using this tool as well as important items to note.

Assumptions
• The data entered in this tool will be used only for personal calculation scenarios and will not update any actual values for pay or benefit information in the payroll system.
• Since this Payroll Calculation Tool is not linked to your payroll data file, the estimate accuracy depends on the information you enter.

Navigation and Data Entry
• Please enter the items based on your bi-weekly pay and deductions. You may refer to your current pay stub for bi-weekly pay and deduction information.
• Some of the items have pre-defined values from which to choose. To see the pre-defined values, click in the yellow box and if a down arrow appears, click on the down arrow. Select the value from the list to use for the calculation.
• To view the results, click on the green box titled "Click here to see your results."
• You may cycle through this tool multiple times, changing the data each time.
• This tool does not include the calculation of some specialized retirement plans.

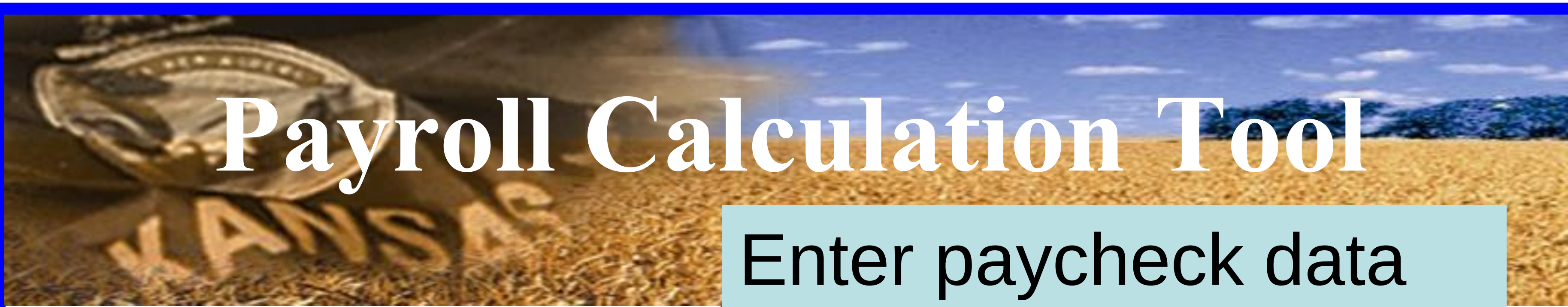
Additional Information
• Please contact your agency's human resource office if you would like to make any changes to your benefit participation or your Kansas tax status.
• You may change your federal tax status by going to the Employee Self Service web site at www.kansas.gov/employee.
• This Payroll Calculation Tool does not represent a legal or binding agreement between you and the State of Kansas.
• You should not make decisions based solely on this calculation tool. All information should be confirmed with your agency's Human Resources Department.
• The State of Kansas is not responsible for any inaccuracies that may occur with this calculator.
• Please consult with a tax adviser to determine the tax status, allowances, and benefit deductions that are appropriate for you.

Questions regarding the use of this tool can be e-mailed to arweb@da.ks.gov.

I have read the information above and would like to proceed to the calculation tool.

Information | Data Entry | Estimated Payroll Calculation

Payroll Calculation Tool



Enter paycheck data on data entry tab

2012 Estimated Bi-Weekly Payroll Calculation Tool

Regular Bi-Weekly Wages	$ 1,150.00	Format should be 9999.99	Enter your regular bi-weekly wages in this box.
Additional Pay		Format should be 9999.99	Enter any additional pay you want to include that is not included in your base pay, such as longevity pay, overtime, or payouts for vacation or sick leave. Enter the amount in this bo if the wages are subject to KPERS or if you participate in a different retirement program.
Additional Pay Not Subject to KPERS		Format should be 9999.99	Enter any additional payments that are not subject to KPERS in this box. This could includ payouts for vacation, sick leave, or comp time if you are terminating employment and you started working for the State of Kansas after June 30, 1993.
Federal Tax Status	M	Enter S or M	Enter your federal tax status as S for Single or M for Married. Please use S if you are claiming Married but want your withholding to be at the higher Single rate. Then enter the number of allowances you claim for federal withholding tax purposes.
Federal Tax Allowances	1	Enter a number between 0 and 99	
Federal Arbitrary Amount		Format should be 9999.99	Enter any additional amount that you would like to have withheld from your paycheck for federal withholding tax. Please enter the bi-weekly amount.
Kansas Tax Status	J	Enter S or J	Enter your Kansas tax status as S for Single or J for Joint. Please use S if you are claimin Married but want your withholding to be a the higher Single rate. Then enter the number o allowances you claim for Kansas withholding tax purposes.
Kansas Tax Allowances	1	Enter a number between 0 and 99	
Kansas Arbitrary Amount		Format should be 9999.99	Enter any additional amount that you would like to be withheld from your paycheck for Kansas withholding tax. Please enter the bi-weekly amount.
Social Security Status	S	Enter S, M, or E	Enter your Social Security status. Please enter S if your wages are subject to Social Security and Medicare taxes. Most employees are subject to these taxes. Enter M if your wages are subject to only Medicare tax. Enter E if you are exempt from both taxes.
Death and Disability Insurance	Y	Enter Y or N	Are you covered by the State's Death and Disability Insurance? Please enter Y or N. If yo answered yes, and your earnings are more than $33,333 annually, you are subject to having the cost of this benefit included in your income. This tool will use your regular wages and your age to determine the benefit amount. This benefit is referred to as Taxab Group Term Life Insurance.

Information | Data Entry | Estimated Payroll Calculation

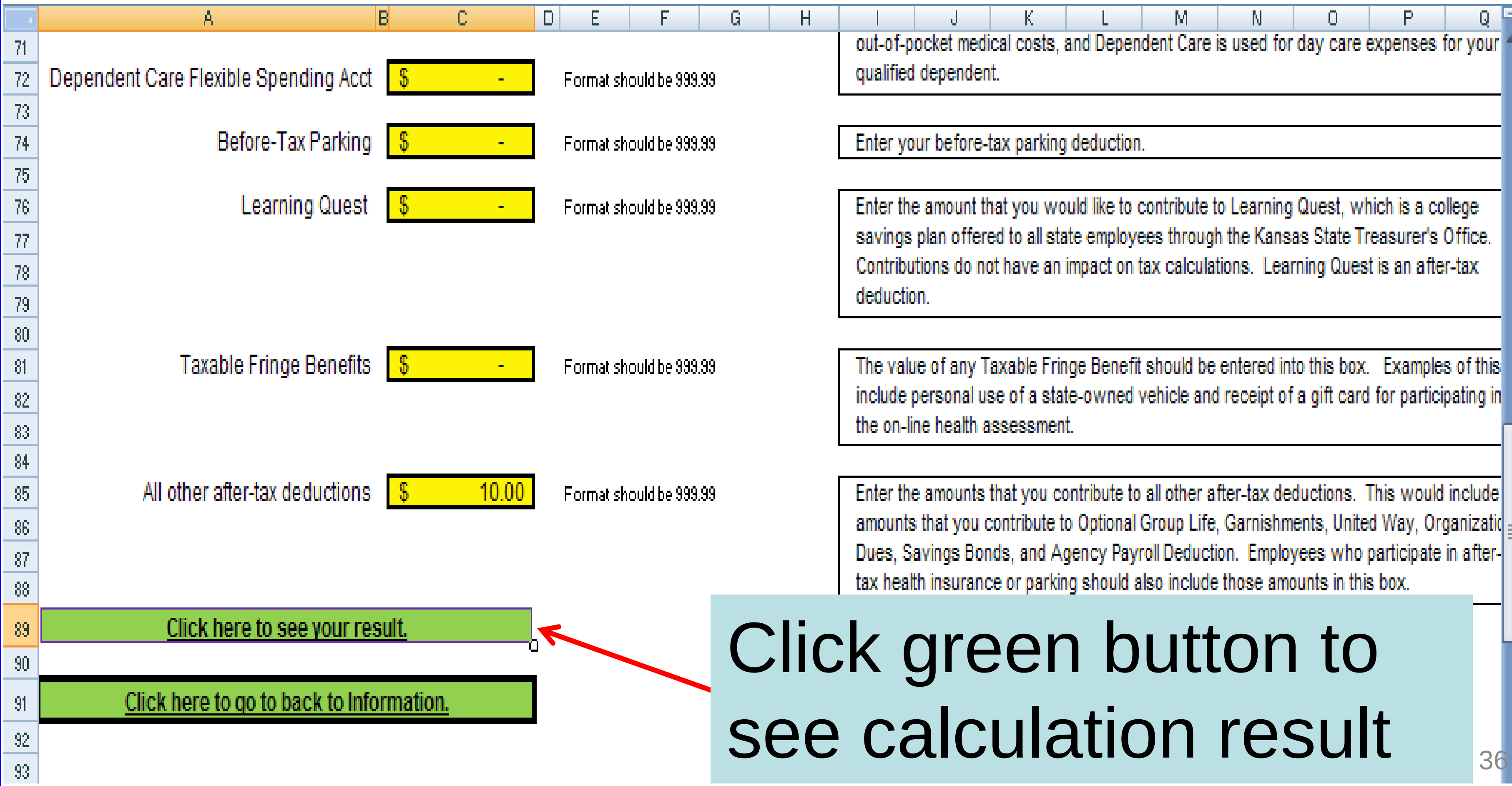
Payroll Calculation Tool

Enter paycheck data on data entry tab

Year of Birth	1968	Format should be 999	to calculate your taxable group life amount based on your age and the regular pay you entere above, please enter your year of birth.
KPERS	Y	Enter Y or N	Do you participate in a KPERS (Kansas Public Employees Retirement System) plan? Please enter Y or N and the number that represents your deduction percentage if you are a participant. Common percentage levels are: 4 % for normal employees hired prior to July 1 2009; 6% for normal employees hired after July 1, 2009,
KPERS Percent	4.00%	Format should be 9.99.	
KPERS Buy Back Percent		Enter as 9.99	KPERS Buy Back is a program that allows employees to buy back eligible time periods of service credit. Partipants should enter the applicable deduction percentage. For more information about this program and eligibility, contact your agency's human resource office
Tax Sheltered Annuity		Enter Y or N	Do you participate in the retirement plan TSA (Tax Sheltered Annuity)? This is a plan that offered mostly to employees of educational institutions. Employees who participate in KPERS do not qualify to participate in this plan. Please enter Y or N and the number that represents your deduction percentage if you are a participant.
Tax Sheltered Annuity Percent		Format should be 9.99.	
Deferred Comp Amount	$ 25.00	Format should be 9999.99	Enter the amount of Deferred Compensation that you would like to use in this calculation. Enter either the bi-weekly amount OR a percentage.
	Or		
Deferred Comp Percent		Enter as 9.99	
VTSA Amount		Format should be 9999.99	Voluntary Tax Sheltered Annuity is similar to Deferred Compensation, but is only available employees at certain educational institutions. If you are eligible, enter an amount OR percentage.
	Or		
VTSA Percent		Enter as 9.99	
Before-Tax Group Health Medical	$ 104.12	Format should be 999.99	Enter your before-tax group health insurance deductions for medical, dental, and vision amount separately based on the semi-monthly rates.
Before-Tax Group Health Dental	$ 7.85	Format should be 999.99	
Before-Tax Group Health Vision	$ -	Format should be 999.99	
Heath Care Flexible Spending Acct or Heath Savings Acct		Format should be 999.99	Enter the amounts that you contribute to a Flexible Spending Account or Health Savings Account. There are two types: Health Care and Dependent Care. Health Care is used fo out-of-pocket medical costs, and Dependent Care is used for day care expenses for your qualified dependent.
Dependent Care Flexible Spending Acct	$ -	Format should be 999.99	

Information | Data Entry | Estimated Payroll Calculation

Payroll Calculation Tool



Click green button to see calculation result

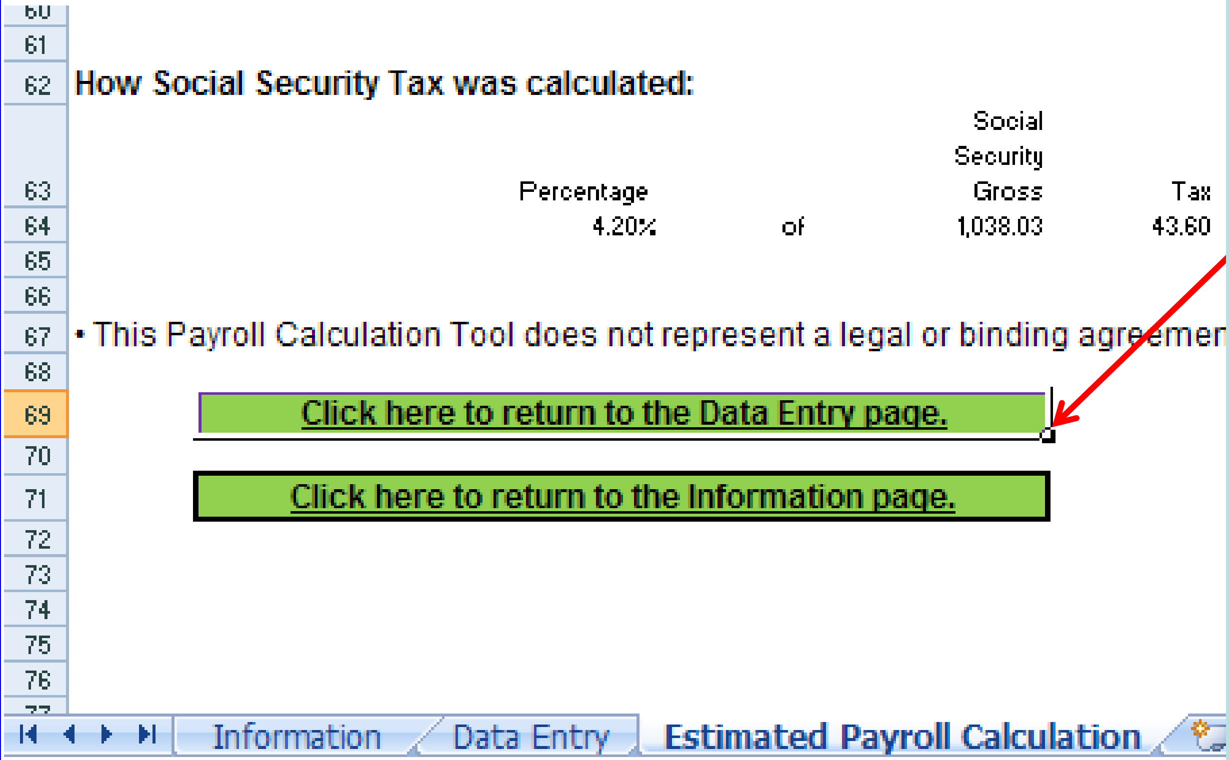
Payroll Calculation Tool

	A	B	C	E	F	G
1						Esti
2						
3						
4	Calculated Paycheck					
5		Regular Pay				1,150.00
6		Additional Pay				0.00
7		Additional Pay Not Subject to KPERS				0.00
8		**Gross Wages**				**1,150.00**
9		**Total Taxes**				**133.58**
10		Before-Tax Group Health Medical				104.12
11		Before-Tax Group Health Dental				7.85
12		Before-Tax Group Health Vision				0.00
13		Health Care Flexible Spend Acct or Health Sa				0.00
14		Dependent Care Flexible Spend Acct				0.00
15		KPERS				46.00
16		KPERS Buy Back				0.00
17		TSA				0.00
18		Voluntary Tax Sheltered Annuity				0.00
19		Deferred Compensation				25.00
20		Before-Tax Parking				0.00
21		Learn Quest				0.00
22		Other After-tax Deductions				10.00
23		**Total Deductions**				**192.97**
24		**Net Pay**				**823.45**

Results tab shows calculations for:

- Gross Wages
- Total Taxes
- Total Deductions
- Net Pay
- Taxes
- Taxable Grosses
- Summary of data used for calculations

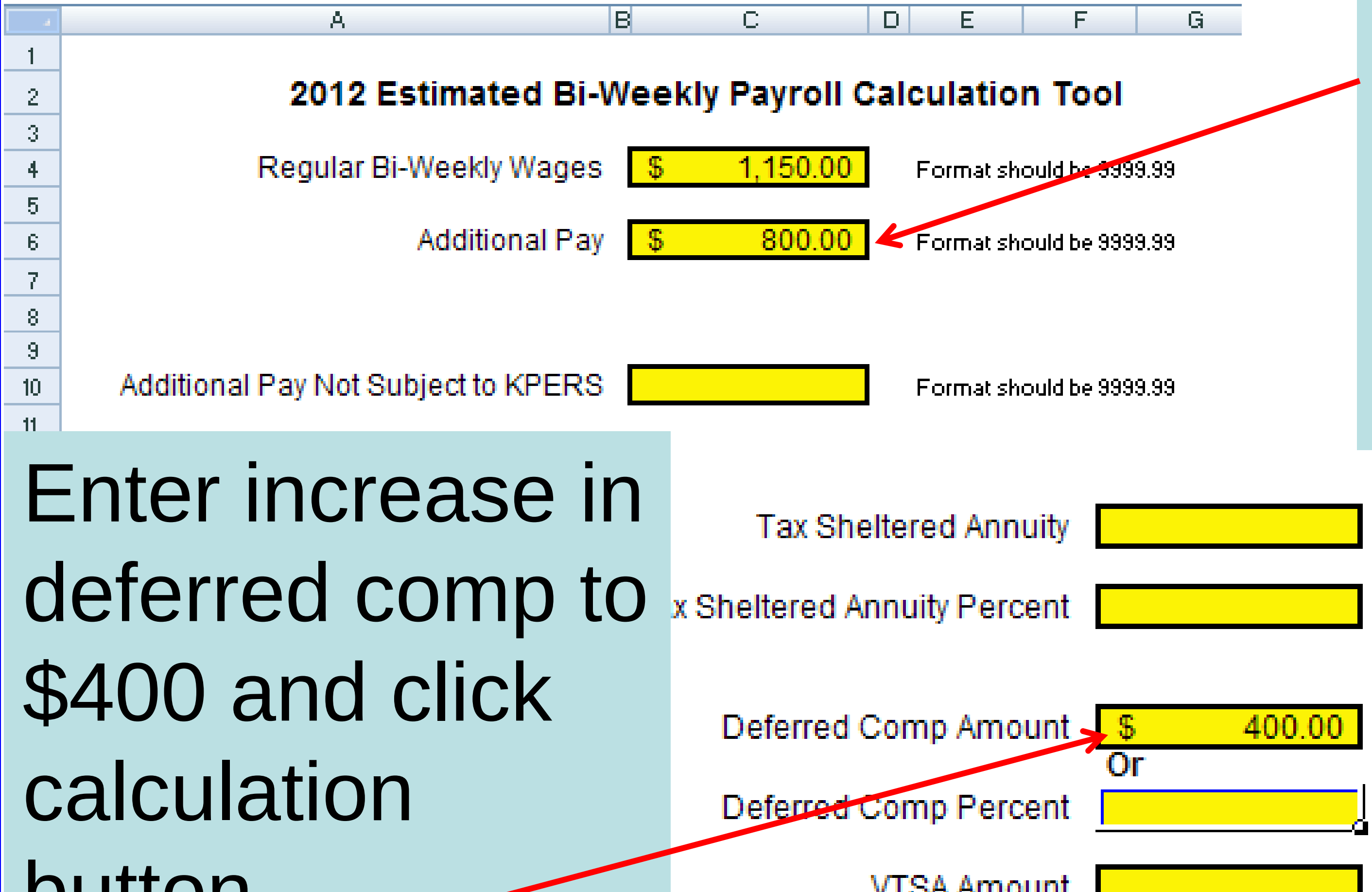
Payroll Calculation Tool



Click green button at bottom of the page to return to Data Entry Page and make changes to pay, deductions, or taxes

Payroll Calculation Tool

Enter $800 for upcoming longevity bonus



Enter increase in deferred comp to $400 and click calculation button

Payroll Calculation Tool

		Est
Calculated Paycheck		
	Regular Pay	1,150.00
	Additional Pay	800.00
	Additional Pay Not Subject to KPERS	0.00
	Gross Wages	**1,950.00**
	Total Taxes	**244.74**
	Before-Tax Group Health Medical	104.12
	Before-Tax Group Health Dental	7.85
	Before-Tax Group Health Vision	0.00
	Health Care Flexible Spend Acct or Health Sa	0.00
	Dependent Care Flexible Spend Acct	0.00
	KPERS	78.00
	KPERS Buy Back	0.00
	TSA	0.00
	Voluntary Tax Sheltered Annuity	0.00
	Deferred Compensation	400.00
	Before-Tax Parking	0.00
	Learn Quest	0.00
	Other After-tax Deductions	10.00
	Total Deductions	**599.97**
	Net Pay	**1,105.29**

Calculated results show updates resulting from the changes to the input data.

**Results are based on data entered by employee – review data entry carefully

Payroll Contacts

Electronic W-2 Questions:

Kathy Ogle, Payroll Systems Team

Kathy.Ogle@da.ks.gov (785) 296-2290

Payroll Questions:

Nancy Ruoff, Payroll Services Manager

Nancy.Ruoff@da.ks.gov (785) 296-2853

Next Steps

Next Steps

- Enroll and track agency staff who need to attend SMART training related to Project Costing, Grants or Customer Contracts
- Attend Final Implementation Meeting on January 10, 2013
- Develop a plan for communicating with employees in your agency that will begin entering their time via Employee Self-Service in February of 2013.

Next Steps

- Access Time and Labor on-line Training Materials when they become available.

- Agencies Allowing Employees to Enter their own Time: Share the link of the following on-line Employee Self-Service Training Video with your employees.   File location: http://www.da.ks.gov/sharp/WebCBT/CBT_Main_Menu.htm

Next Steps

Time and Labor/Time and Leave SHARP Courses

Time and Labor (Version 8.9)
Learn about Time and Labor procedures and entering transactions. Current Time and Labor agencies: Adjutant General, Board of Regents, KHPA, Commerce, KDHE, Agriculture, KDOL, KBI, Aging, KDW&P, KCC, and CURB.

- TL370: Time and Labor for Self Service
- TL371: Time and Labor for Timekeepers
- TL372: Time and Labor for Human Resource Administrators
- TL373: Time and Labor for Finance Maintenance

Preview of SHARP 9.1 Time and Labor
(Available in February 2013)

- Demonstration of Employee Entering Time Via Employee Self-Service - Video with Narration (avi) 7:43 - Click to play with your default program or right click and click Save Target As to download to your computer to play.)

---OR---

Time and Leave (Version 8.9)
Learn about Time and Leave procedures and entering transactions. All Agencies not listed under Time and Labor.
(Last Updated: 11/17/08)

Contacts

Contacts

- Existing SHARP help desk phone number (785-368-8000) with options for Time and Labor. Payroll/funding related to TL is via the Payroll option.
- Brent Smith, Office of Human Resources: brent.smith@da.ks.gov or 785-296-1432
- Heather DeBusk, Office of General Services: heather.debusk@da.ks.gov or 785-296-2434
- Sarah Tongier, Office of General Services:

  Sarah.Tongier@da.ks.gov or 785/291-0556

Questions?