THE STATE OF FLORIDA
JUSTICE ADMINISTRATIVE COMMISSION

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MEMORANDUM HR10-2020

TO: Agency Administrators

FROM: Carolyn Horwich, Esq., Director of Human Resources

THROUGH: Rip Colvin, Executive Director

SUBJECT: **REVISED** New Hire Process and W-4 Selections

DATE: June 23, 2020

Background: January 10, 2020, I issued a memorandum to all Judicial-Related Offices (JRO) advising offices not to send the Justice Administrative Commission W-4 forms. This was done because People First had removed the tab for JAC Human Resources staff to enter W-4 information. In other words, JAC staff had no ability to enter the information on behalf of the JRO.

Update: At a Human Resource Officers meeting June 17, 2020, People First announced it was bringing the W-4 ab back. No date was given at that meeting.

Over the weekend, People First issued a system enhancement (attached) and announced the W-4 tab would be brought back effective Monday, June 22, 2020.

Current Status: What this means is that starting immediately, all new hire paperwork must include a W-4 form. We are unable to enter employees into People First without completing the W-4 page.

Furthermore, the system enhancement states that the employee will receive notification to complete a new W-4 if any personal information is changed. Therefore, please ensure your employees' work email address is entered into People First.

Finally, People First has updated its W-4 page to mimic the filing status choices that are contained in the new form.

Thank you.

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MEMORANDUM HR01-2020 (AMENDED)

TO: Agency Administrators

FROM: Carolyn Horwich, Esq., Director of Human Resources

THROUGH: Rip Colvin, Executive Director

SUBJECT: New Hire Process and W-4 Selections

DATE: January 10, 2020

<u>Issue</u>:

Effective January 1, 2020, People First changed its W-4 page in accordance with changes to the 2020 W-4 Form. However, People First did not have a mock-up of their new page for review nor was the recent change announced. The current W-4 page presents problems for JAC with regard to new hires.

<u>Problem #1:</u>

Previously, when a Judicial-related Office (JRO), or any state agency, submitted paperwork to Human Resources staff to enter a new hire, People First had a tab for HR staff to enter the employee's W-4 selection. Effective January 1, 2020, People First removed that tab in its entirety. People First determined that was appropriate in light of how late the Internal Revenue Service released the final W-4 form and the challenge of programming the system. Consequently, JAC HR staff does not have access to a new hire's W-4 page during the new hire process.

While JAC HR staff could complete the new hire process, close out the employee, and then reenter the employee's file, there is another problem that precludes JAC HR staff from doing so.

<u>Problem #2:</u>

The 2020 W-4 Form has only <u>three</u> options for filing status:

(c) ☐ **Single or Married filing separately**
☐ **Married filing jointly** (or Qualifying widow(er))
☐ **Head of household** (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)

However, People First has <u>four</u> options for filing status:

01 - Single

02 - Married

03 - Married filing at higher single rate

06 - Head of Household

Consequently, if the new hire checks the first box on the 2020 W-4 Form, JAC HR staff will not know whether to click 01 for “Single” or 03 for “Married filing at higher single rate” in People First.

<u>Solution</u>: JAC HR staff cannot risk entering incorrect tax-related options into People First on behalf of an employee. After consultation with People First and internal staff, JAC will no longer enter any new hire’s W-4 information in People First.

Due to the inability to discern the appropriate box to check as described in Problem #2, and as discussions with People First were ongoing, JAC HR staff determined it was prudent not to make W-4 selections for new hires. Therefore, any new employee whose paperwork was submitted to JAC from January 1, 2020, and thereafter, the employee will need to log onto People First themselves to make their W-4 selections.

Please note – according to People First, failure to make a selection will result in the system defaulting to “01 – Single”.

(This change in process for new hires has no impact on the steps to take for a name change. For name changes, please submit a new W-4 Form and the employee’s new Social Security card.)

PLEASE CONTINUE TO SUBMIT THE W-4 FORMS AS PART OF THE NEW HIRE PROCESS SO THAT JAC HAS EMPLOYEES’ ADDRESSES.

People First Team

System Enhancement SE 161 June 20, 2020, Release Summary

Issue Date: June 19, 2020

Audience: Human Resource Offices

Release Item	Description
Tickets and Submit Screens – Ability to Message	Update the Tickets and Submit processes to include messaging functionality. With this update, agencies and service center staff can include additional information concerning a ticket when further clarification is required to complete the action request. When a message is added, the ticket creator will receive an email alerting them a message has been added to the ticket. All message history will be saved on the individual ticket. The Tickets Screen instructional guide was updated to include the new messaging functionality and has been posted to the People First Division website.

W-4 Updates – Phase II	The following Phase II updates will be made to the W-4 as a result of the IRS changes to the 2020 form W-4:
	• Add 2020 W-4 to the Appointment PAR process when an employee is hired new to the State (no previous People First ID).
	• Add a “Complete Your Form W-4” task to the Inbox for employees. The task will appear for the employee to complete when personal information changes (i.e. name change, DOB, SSN), employee’s contact mailing or home address changes, or no mailing address is listed.
	• W-4 Filing Statues will change slightly to:
	  ○ Single or Married filing separately, Married filing jointly, or Head of household.
	  ○ Add new field, “Other Tax Credits”, that will allow the employee to add an additional amount to the Annual Dependent Amount.
	• The Employee Verification process that occurs annually in August will include messaging and tasks for the 2020 W-4. If the employee changes any personal information or contact information, he/she will be presented with a message that a new 2020 W-4 is required. If the employee chooses not to create a new 2020 W-4 during the verification process, they will receive a task in their inbox to complete a new 2020 W-4. If no changes are made to personal information or contact information, the employee will be presented with the W-4 information on file and will have the option to complete a New 2020 W-4 but will not be forced to complete a new form.

Release Item	Description
Direct Deposit – Screen Changes	The following updates will be made to the Direct Deposit screen: • For security purposes, the Routing and Account numbers will be hidden in the People First System. Only the last 4 digits of the bank account number on the Overview screen will be visible. • Remove option to edit a Direct Deposit entry. To setup a Direct Deposit record, the New option must be selected. The Stop Direct Deposit option will remain. The entry of a new direct deposit record will automatically end the previous record. • When entering a new direct deposit record, the account number will be completely hidden. There will be an eye icon on the field that once selected will allow the account number to be visible. • The Direct Deposit screen continues to **only be accessible by the employee themselves**.
Miscellaneous Deductions Report – Updates	Update Miscellaneous Deductions Report to allow the selection of one or multiple deduction codes at a time. The Miscellaneous Deductions Report instructional guide was updated to include the instructions for selecting multiple codes and has been posted to the People First Division website.
SAP Report – **Security Role Code Report**	New Security Role Code Report identifies all security role code (except E role code) for all positions within the agency. The report can be accessed from the Manager landing page > Reports > HR Reports. For information on how to process the report, refer to the Security Role Code Report instructional guide posted on the People First Division website.
Shared Savings Rewards Report – Updates	Update Shared Savings Rewards Report to allow users an easier way to follow the date and account of Shared Savings deposits. New report fields include: • Reward Date – Date the reward was sent to People First. • Deposit Date – Date the reward was posted into the member's account. • Reward – Account where reward was posted (FSA, LPFSA, HSA, HRA, PDHRA). • Reward Amount – Amount of the reward. • YTD Reward Amount – YTD cumulative reward amount in the account (resets each new year). • Choice Begin Date – Date member made their Shared Savings selection (which drives reward posting). • Choice End Date – Last date of Shared Savings selection (member must have made a new Shared Savings selection).
New 85 Hour FLSA Period	Create a new 85 hour FLSA period. The implementation of the new FLSA period includes the following: • New timesheet and flex schedule rules for the 14-day, 85 hour schedule. • Leave will be accrued at the end of the 85 hour FLSA period; after the timesheets are approved. • Employee is paid 85 hours by default, unless approved leave without pay is present when payroll runs. • Overtime will not be calculated until the employee exceeds 85 hours worked in the FLSA period. • Schedule is available for both biweekly and monthly agencies.

Release Item	Description
Data Warehouse – **Capturing PAR Actions with Same Effective Date**	Currently, when there is more than one PAR action completed for an employee with the same effective date, only the first action completed is captured in the data warehouse (DW). With this release, all PAR actions will be sent to the DW and will be captured in the DW Employee_Transaction view, Business Objects (BOBJ) Employee Transaction (Independent) view, Employee Transaction Condensed Report and Employee Transaction History Report. **Note:** Only PAR actions completed on or after 06/20/2020 will be captured. Historical PAR actions (completed before 06/20/2020) will not be captured.