Statewide Payroll Meeting

2011 Calendar Year End
November 21, 2011

Welcome!
Introductions

- Stu Wilbur
- Tracey Cappuccio
- Karen Turner
- Sam Tekien
- Lalita Farr
- Vahn Vo
- Sonya Polee
- Kia Goudy
- Marla Grossman, RASL
- Jennifer Verhelst, Projects
Contact Information

- Central Payroll contact list
- Complete the Agency contact form
  - Leave it here
  - Fax it to Central Payroll
    - (602) 364-2215
  - Scan & e-mail
    - Central.Payroll@azdoa.gov
Register for Payroll Updates
Recent Accomplishments

- **Employee Time Entry - Update** [Ongoing]
  - 8,000 employees in 72 Agencies onboard
  - 10,400 employees in 26 Agencies in process
  - 7 Agencies working labor distribution functionality

- **Cell Phone Usage - 3 Types** [11/2/2011]
  - State Owned Device
  - Employee Owned Device Actual Reimbursement
  - Employee Owned Device Standard Reimbursement
    - IRS Released Notice and Interim Guidance allowing that, under certain conditions, reimbursements for employee-owned cell phone usage to be non-taxable
  - HRIS Setup:
    - Use Paycode 650 (same as before)
    - Setup standard time record ($25 voice, $25 data, $50 total per month)
      - Enter *weekly* amounts on ZR30 and select only cycles 1 and 2
    - Must be monitored and turned off when employment change occurs
Cash Pay Sign-Ups

- **GAO-65 Processing Issues**
  - **Employee Address**
    - Bank of America will not allow PO Boxes
      - A physical address must be provided with the application
      - HRIS does not have to be updated with this address
    - Work address absolutely should not be used
  
- **Country of Citizenship / Country of Residence**
  - Required by the Patriot Act to create an account

- **Amount to Deposit / Times Per Year**
  - These are required fields

- **Agency Sign Up**
  - Provide notation on the Employee Signature line, such as “Agency Issued,” to authorize Central Payroll to create an account on employee’s behalf
Cash Pay Sign-Ups

- **Employee Receipt and Usage Issues**
  - **Mailing**
    - When sent by Bank of America, it should arrive in 7-10 business days after the account is created
    - Creation date will be the start date on XR12
  - **Address**
    - HRIS address is used unless provided with the GAO-65
    - Please advise employees to validate that their address is correct.
    - Employees can update their address in real time through the YES website at [http://yes.az.gov](http://yes.az.gov)
  - **Card Not Received**
    - Employee should contact Bank of America at 866-213-4074 to resolve
  - **Schedule of Fees**
    - Mailed by GAO to employee’s HRIS address of record

<table>
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<tr>
<th>Cash Pay Card Implemented</th>
<th>December 2009 - May 2011</th>
<th>452</th>
<th>26.58 per month avg</th>
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<td>May 5, 2011 - Director Smith Memo</td>
<td>May 2011 - Current</td>
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<td>Total EE with Cash Pay Cards</td>
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Coming Months

- System Pay Date changes to Thursday January 1
  - Does not impact employees

- Mandatory Direct Deposit
  - Reached high of 98.3% Direct Deposit participation
  - Down to under 1,000 warrants per pay period

- HRIS Non-Payroll Week Pre-Note [TBD]
  - Send file to bank on non-payroll week Wednesday to allow accounts needing validation to be Pre-Noted before the next payday. Should help further increase direct deposit %
Coming Months

- Absence Management Replacing Time Accrual [Early 2012]

- Several job roles will be affected by this implementation. These job roles are: Payroll Initiator, Payroll Approver, HR Initiator, and HR Approver.

- Classroom training will be available at ADOA in early 2012. Please ensure that the appropriate staff attends these training sessions.

- HRIS Agency Cleanup Project
  - Leave Balances
Annual Leave Roll Back

For the pay day of January 12, 2012, an employee's annual leave balance will be adjusted to show the following:

- **Deduct**: Annual leave used during the 12/24/2011 to 1/6/2012 pay period
- **Forfeiture**: Annual leave hours in excess of the maximum (240 hours for covered employees, 320 hours for uncovered employees)
- **Addition**: Annual leave accrued during the 12/24/2011 to 1/6/2012 pay period.

- Holiday leave balances will not be included in the calculation of determining excess leave
- Family Sick leave balances will be reset to 40 hours December 30, 2011
Time Record Adjustments

- Current Calendar Year Time Record Adjustments
  - Recovery of current year overpayments may be offset against current year wages
  - Adjustments for 2011 should be entered by the compute deadline on 12/27/11
  - Prior Fiscal Year Time Record Adjustments
    - If the retirement rates are different, you must submit a OTD request for the rate difference – ASRS requires this
    - Must detail the pay periods that are affected in the comments

- Prior Calendar Year Time Record Adjustments
  - Must be completed on GAO70a and submitted to Central Payroll
  - Be cautious about Tax (reduced SS rate 2011) & Retirement Rates
  - Only processed by GAO Payroll on a quarterly basis
Canceled Warrants & Overpay Deadlines

- **December 16, 2011** - Overpays and warrants to be canceled for payments through December 2, 2011 and prior

- **December 21, 2011** - Overpays and warrants to be canceled for payments from December 2 through December 21, 2011

- **After December 21, 2011** - Any overpays that are submitted will require the employee to return the amounts withheld for Federal and State income taxes in addition to the net pay
Final Payments in 2011

- Direct Deposit file will be released to B of A on 12/28/11 effective 12/29/11 (no change from a normal payroll)

- To ensure employees have constructive receipt of their pay in 2011, warrants for December 30, 2011 will be mailed directly from the GAO to the HRIS address of record
  - Message on warrants 12/2 & 12/16
  - No 12/30 payroll warrant pickup allowed
  - AFIS Vendor Warrants and/or Reports still need to be picked up
  - Please advise employees to validate that their address is correct.
    - Employees can update their address in real time through the YES website at http://yes.az.gov

- Handwrites will not be processed on December 30 or 31, 2011
We are expecting changes to the Federal and State rates for 2012 and will communicate these when they are available by the IRS and DOR.

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<th>PAYROLL TAX TABLES AND EMPLOYEE AND EMPLOYER RELATED EXPENSE RATES</th>
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*Not Yet Available*
A-4s and W-4s

- Employees can change non-exempt A-4 and W-4 elections anytime thru YES
  - Filing “exempt” for Federal and State withholding must be done with **paper**
  - Reports listing the employees who may be impacted by these requirements will be sent electronically in mid-December

- The 2011 DOR Form A-4 which indicated an employee is “Exempt” from paying State income taxes expires on **December 31, 2011**
  - Employees **must** file a new 2012 DOR Form A-4 to claim exempt status for the 2012 calendar year
  - If the employee does not provide a new Form A-4, agencies must change the tax status on PR14 to withhold tax at the default 2.7% (Formula 13)

- The 2011 IRS Form W-4 which indicated an employee is “Exempt” from paying Federal income taxes expires on **February 16, 2012**
  - Employees **must** file a new 2012 IRS Form W-4 to claim exempt status for the 2012 calendar year
  - If the employee does not provide a new Form W-4, agencies must change the tax status on PR13 to Single with Zero withholding allowances
Social Security and Medicare Deductions

Social Security:

- Effective January 1, 2012, the maximum amount of earnings subject to Social Security will increase from $106,800.00 to $110,100.00

- The Social Security withholding tax for employees was temporarily lowered from 6.2% to 4.2% just for 2011. President Obama has sent legislation to Congress (American Jobs Act) that would lower the Social Security tax rate for both employers and employees from 6.2% to 3.1% in 2012
  - If the legislation is not enacted, both employee and employer tax will be at the 6.2% rate

Medicare Tax:

- Medicare tax is scheduled to remain at 1.45% for both employee and employer for all applicable wages
W-2s for 2011

Schedule for Availability of 2011 W-2s
- Jan 13 – Available online to those who consent
- Jan 30 – Mailed to those not consenting to electronic delivery
- Feb 1 – Available to everyone

Please encourage employees to:
- Consent to receive W-2 electronically
  - Visit [http://yes.az.gov](http://yes.az.gov), click “Log in to YES”
  - Enter the YES username (EIN) and password
    - Click “Pay”
    - Click “W-2 Tax Statements”,
      - Enter the YES username (EIN) and password
    - Click “Authorize Electronic W-2”
    - Then click “Agree”.

- Obtain W-2s and any needed duplicates from YES
  - Central Payroll will still provide duplicate paper W-2s, but will not accept requests until March 1st, 2012
  - 2006 – 2010 W-2s will continue to be available online
GAO Statewide Payroll Key Dates

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- **29 December** (Monday): Compute pay for the November pay period.
- **30 December** (Tuesday): Compute pay for the November pay period.
- **1 January** (Wednesday): Pay day for the November pay period.
- **2 January** (Thursday): Pay day for the November pay period.
- **3 January** (Friday): Pay day for the November pay period.

- **4 January** (Monday): Pay period begins.
- **5 January** (Tuesday): Pay period begins.
- **6 January** (Wednesday): Pay period begins.
- **7 January** (Thursday): Pay period begins.
- **8 January** (Friday): Pay period begins.
- **9 January** (Saturday): Pay period begins.
- **10 January** (Sunday): Pay period begins.
- **11 January** (Monday): Pay period begins.
- **12 January** (Tuesday): Pay period begins.
- **13 January** (Wednesday): Pay period begins.
- **14 January** (Thursday): Pay period begins.
- **15 January** (Friday): Pay period begins.
- **16 January** (Saturday): Pay period begins.
- **17 January** (Sunday): Pay period begins.
- **18 January** (Monday): Pay period begins.
- **19 January** (Tuesday): Pay period begins.
- **20 January** (Wednesday): Pay period begins.
- **21 January** (Thursday): Pay period begins.
- **22 January** (Friday): Pay period begins.
- **23 January** (Saturday): Pay period begins.
- **24 January** (Sunday): Pay period begins.
- **25 January** (Monday): Pay period begins.
- **26 January** (Tuesday): Pay period begins.
- **27 January** (Wednesday): Pay period begins.
- **28 January** (Thursday): Pay period begins.
- **29 January** (Friday): Pay period begins.
- **30 January** (Saturday): Pay period begins.
- **1 February** (Sunday): Pay period ends.
- **2 February** (Monday): Pay period ends.
- **3 February** (Tuesday): Pay period ends.
- **4 February** (Wednesday): Pay period ends.
- **5 February** (Thursday): Pay period ends.
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<td>Target Date: W-2’s Mailed</td>
<td>2011 W-2’s Online for ALL</td>
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<td>PAY PERIOD BEGIN</td>
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<td>IF EE didn’t file W-4 for 2012 by 2/16/12, set to Single/Zero</td>
<td>PAY PERIOD END</td>
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Employees wanting duplicate W-2’s should be directed to YES. W-2 paper duplicate requests will not be accepted until March 1.
Retirement Plan Update – PSPRS

Deferred Retirement Option Plan change

- **DROP Changes** [January 1, 2012]
  - Employee contribution will continue for Retirees entering DROP with < 20 years of service
  - Working on file exchange process to identify DROP Participants

- **Once Identified:**
  - HR: Update Retirement User Field Value on HR 11 through Personnel Action on XP52
    - New Retirement User Field Value: H
  - Benefits: Establish a new benefit plan
    - PSRS: 8.65%
    - Deduction Code: 7957
ASRS Contributions – No waiting period

Employees must make ASRS contributions IMMEDIATELY if:

- Employee’s Adjusted Hire Date is before 7/20/11
  - Employees rehired within 2 years of their prior termination date with the State require an Adjusted Hire Date.

OR

- Employee is already an ASRS member
  - Must have monies currently on account with ASRS, such as from contributions through another ASRS employer or a State employee with contributions from years ago.
  - If they withdrew their funds, they are no longer an ASRS member.
  - Use ASRS Member Eligibility Tool at https://www.azasrs.gov/web/BasicLogin.do
ASRS Missed Contributions

Agency HR:
- Correct the "Current ASRS Member" User Field on HR11 – This requires a Personnel Action on XP52 - USERFLDCHG to update the flag "Y". Also, validate that the correct dates are populated for the Hire Date and Adjusted Hire Date fields.
- Email Central Benefits at BenefitsIssues@azdoa.gov to enroll the employee in the ASRS & ASRS LTD Plans effective their most recent date of hire.

Central Benefits:
- Enroll the employee in the ASRS & ASRS LTD Plans effective their most recent date of hire.
- Notify Agency HR when the plans are setup.

Agency HR:
- Contact Agency Payroll to have them review the employee’s pay history for arrears.

Agency Payroll:
- Review the employee’s pay history for missed contributions.
- Submit GAO 73a (One Time Deduction Request) to Central.Payroll@azdoa.gov before the Tuesday 2:00 PM compute deadline to have additional amounts deducted for both the employee & employer contributions for any pay periods that contributions have been missed.
- Notify Agency HR when completed

Agency HR (or Payroll):
- Contact employee to let them know additional amounts are being deducted.
We’re Done!

Next Meeting:
2012 Fiscal Year End
Statewide Payroll Meeting
Monday, May 21, 2012
ADOA Conference Room 300