PAYROLL NETWORK MEETING

June 01, 2021

PLEASE GO ON MUTE UNLESS YOU ARE SPEAKING

THE **UNIVERSITY** OF **NORTH CAROLINA SYSTEM**

SYSTEMS UPDATE

AS OF JUNE 1, 2021

- Banner Tax Updates for 2021
- Banner Software Update & Patch Summary
  - Position Control (including the UNC Position Control Mod)
  - Human Resources
  - Employee Self-Service

Banner HR – 2021 Tax Updates

- **#280** for US FICA + 6 States was released 12/10

  Tax Update 280 will provide the following updates effective for the first pay period of 2021:

  FIOA – FICA Old Age(Social Security)
  KY – Kentucky State Withholding
  NJ – New Jersey State Withholding
  SC – South Carolina State Withholding
  CA – California State Withholding
  ME – Maine State Withholding
  IA – Iowa State Withholding

- **#281** for Canadian Provinces was released 12/10

  Tax Update 281 is the Canadian payroll tax update of federal and provincial/territorial taxes that were effective January 1, 2021.

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Banner HR – 2021 Tax Updates

- ## #282 with FED rates was released 12/17
  Tax Update 282 includes FEDERAL tax rates that were effective January 1, 2021.

- ## #283 for US + 8 States was released 1/07
  Tax Update 283 includes the following updates effective for the first pay period of 2021:

  FD – Federal Taxes (PXAFSTA to align with 2021 W-4 Filing Status descriptions)

  AR – Arkansas (PXACALC Graduated Tax tables, Mid-range cut off, Exemption Amount)

  CA – California (PXATAXS Addt'l Step Amt for Married, 0 or 1 Allowance status)

  IL – Illinois (PXATAXS Exemption Amount)

  MO – Missouri (PXACALC Std. Deduction amount, Graduated Tax tables)

  NY – New York (PXATAXS Graduated Tax tables)

  OR – Oregon (PXACALC Std. Deduction, Personal Exemption, Graduated Tax tables)

  RI – Rhode Island (PXACALC Graduated Tax tables)

  VT – Vermont (PXATAXS Allowance amount, Graduated Tax tables)

Banner HR – 2021 Tax Updates

- ## #284 for 4 states was released 1/21

  Tax Update 284 includes FEDERAL tax rates that were effective January 1, 2021.

  MI – Michigan (PXATAXS Exemption amount)
  MN – Minnesota (PXATAXS Allowance amount and Graduated Tax tables)

  MS – Mississippi (PXACALC Graduated Tax tables)
  NM – New Mexico (PXACALC Graduated Tax tables)

- ## #285 for 4 states was released 2/04

  Tax Update 285 includes the following updates:

  CO – Colorado (PXATAXC Supplemental percent, PXACALC & miscellaneous items)

  MD – Maryland (PXACALC Maximum Standard Deduction amount)

  ND – North Dakota (Moved set up from PXATAXS to PXACALC – see addt'l notes for details)
  NM – New Mexico (PXATXCD Supplemental Percent)

Last Update is #285

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Banner HR – 2021 Tax Updates

- ## #286 to be released 6/17

    Tax Update 286 includes new CANADIAN tax rates effective July 1, 2021.

    NB – New Brunswick

Last Update is #285

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Software Releases

Banner Releases for HR/Payroll/Budget

March 2021

PC .... **8.19* + 9.3.14**
HR .... **8.19 + 9.3.18****
ESS .... **8.19 + 9.14*****

- PC 8.19.0.1 patch is needed as well.
    - after PC 8.19 is installed, can't maintain JOBS w alpha suffix

**HR 9.3.18 Dependencies per Ellucian:
- Banner Admin Common 9.3.24
- Banner General 8.13
- Banner Position Control 8.19 + 9.3.14
- Banner Human Resources 8.19

***ESS 9.14..0.1 patch corrects EPAF issue that surfaced in 9.13.

POSITION CONTROL 8.19

Released March 18, 2021

CR-000130657
Banner - Position Control - **Salary Planner**
NBPSPEX hangs/ORA-03114: not connected to ORACLE

CR-000173922
Banner - Position Control - **Salary Planner**
NBPUPSP will not upload job change amounts that are negative

CR-000174261
Banner - Position Control
All references to the Oracle user, keyword USER, be changed to call gb_common.f_sct_user() for
Position Control

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POSITION CONTROL 8.19.0.1 Patch

Released April 19, 2021

CR-000179023

Banner - Position Control - **Compensation**
After installing PC 8.19 upgrade the jobs BPI is preventing creation, deletion, or update of jobs with an alphanumeric suffix

After installing PC 8.19, you may not be able to maintain NBAJOBS that have alphanumeric suffixes without having this PC 8.19.0.1 patch installed.

Other processes that may be affected include: NBPSPUP (Salary Planner Uploads), NBPENCM (Labor Encumbrance Recasting) and NOAAPSM (EPAF processing).

⊘ ellucian. **Customer Center** RESOURCES SUPPORT

Found in Version	Substatus	Created Date
8.19	DELIVERED	04/14/2021

Identifier	Object/Process	Language
nbkjenc1.sql	nbkjenc1.sql	English - US

Affected Languages	Knowledge Article
English - US	-

Description

After installing PC 8.19, the job BPI (Business Process Programming Interface) preventing creation, deletion, or update of jobs records with an alphanumeric suffix. If the suffix is only numeric the package is working appropriately.

This impacts all processes or pages utilizing the nbkjenc1.sql package for create, update, or delete of a Job Assignment record and yields the following error or similar error:
ORA-01722: invalid number
ORA-06512: at "BANINST1.NP_JOB_ASSIGNMENT", line ####

This has occurred with PEPFCAP process, NBAJOBS page, and could also surface in NBPSPUP, NBPENCM, and NOAAPSM which all call the jobs BPI during processing.

UPDATE for FIX to nbkjenc1.sql:

Please see attached SQL File = nbkjenc1.sql with the following reference to PC 8.19

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POSITION CONTROL 9.3.14

CR-000164071
Banner - Position Control - **Electronic Approvals**
In NTRAPTY in the fields area, Banner allows three digits for the sequence number and 9.x only allows two.

CR-000177813
Banner - Human Resources - **Effort Reporting and Labor Redistribution**
Obsoleting the Adobe Flex EFC application

CR-000167872
Banner - Position Control - **Compensation**
BannerAdmin- Error, 'G$_DATE must be declared' when NBAJOBS is called from the Related menu

HR/PAYROLL

HR/PAYROLL 8.19

Released March 18, 2021

CR-000172929   Banner - Human Resources - **Payroll Adjustments History**
PXAW2CC will not create reportable amounts on a W2C for state deductions if there were no state reportable amounts on the original W2.

CR-000176541   Banner - Human Resources - **Regulatory**
Remove de-supported Processes and Views

CR-000174304   Banner - Human Resources - **Regulatory**
Remove gubobjs records for de-supported Processes.

CR-000172544   Banner - Human Resources - **Payroll Adjustments History**
PHRLRAR will not report information if the PHRHIST_POSTING_OVERRIDE_DATE contains a timestamp.

CR-000177382   Banner - Human Resources - **Regulatory**
PXPW220 process may not select the proper employer information when multiple employer codes exist.

CR-000177656   Banner - Human Resources - **Regulatory**
Technical Currency Externalizing SQL for PHPECEX

HR/PAYROLL 8.19

CR-000173150   Banner - Human Resources - **Regulatory**
There are invalid and outdated PXRROEC job parameters

CR-000174109   Banner - Human Resources - **Payroll Processing**
pp_deduction API needs TRUNC added like the employee API has

CR-000163462   Banner - Human Resources - **Benefits Administration**
PDPBDMC fails to update PDADEDN when Deduction Change Reason Exists. ERROR: Life Event Change Date is required if Deduction Change Reason is entered.

CR-000177689   Banner - Human Resources - **Regulatory**
PXPWC20 produces same delivery address for everyone in file

CR-000170883   Banner - Human Resources
SQL in DB Procs and Views

CR-000177741   Banner - Human Resources - **Regulatory**
ACA 1095-C Manifest Software Identifier Number for 2020 reporting

HR/PAYROLL 8.19

CR-000177780   Banner - Human Resources
Migrate the Campus Directory C process, bwpredir.pc, to Banner Human Resources product.

CR-000177864   Banner - Human Resources
Provide 2020 regulatory compliance for the Affordable Care Act 1095-C portrait format

CR-000174259   Banner - Human Resources
All references to the Oracle user, keyword USER, be changed to call gb_common.f_sct_user() for Human Resources

CR-000174140   Banner - Human Resources - **Regulatory**
Obsoleting Payroll objects and Remove gubobjs records for these obsoleted processes: Canadian de-supported Processes

HR/PAYROLL 9.3.18

This release includes defect corrections and minor enhancements.

Dependencies:
- Banner Admin Common 9.3.24
- Banner General 8.13
- Banner Position Control 8.19
- Banner Human Resources 8.19

HR/PAYROLL 9.3.18

CR-000169322

Banner - Human Resources - **Benefits Administration**

Update online help for PEAHIRE to outline when benefits/deductions will be automatically set up

CR-000177955

Banner - Human Resources - **Employee and Labor Relations**

Employee Relations Grievance page (PEAGREV) is missing online help information

CR-000177320

Banner - Human Resources - **Payroll Processing**

Fiscal Year on PTRCALN Documentation Clarification

CR-000170518

Banner - Human Resources - **Applicant Tracking**

PAAPDES Shows previous job's description when going from one position to another

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HR/PAYROLL 9.3.18

CR-000176542
Banner - Human Resources - **Regulatory**
Update PXAW2CC year list of values to limit the years available for print after obsoleting years earlier than 2015

CR-000177413
Banner - Human Resources - **Benefits Administration**
PDADEDN, PDABDSU and PEAHIRE pages should bring in system generated Year Indicator field for Option Field 5 when deduction type is '01' and tax code is 'FD'

CR-000177706
Banner - Human Resources - **System Admin and Security**
PTRUSER issues an erroneous error when select None for SP and FLAC Master Org

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Employee Self-Service

Employee Self-Service 8.19

CR-000177063
Banner - Human Resources - **Regulatory**
W-2 Wage and Tax Statement page has misspelling of Employerr

CR-000177447
Banner - Employee Self-Service - **Pay Information**
1095-C page has misspelling of Employerr

CR-000176540
Banner - Employee Self-Service - **Campus Directory**
Migrate the Campus Directory C process, bwpredir.pc, to Banner Human Resources product.

CR-000174637
Banner - Employee Self-Service - **Effort Reporting and Labor Redistribution**
Obsoleting the Adobe Flex EFC application

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Employee Self-Service 9.14

CR-000177832   Banner - Employee Self-Service
Obsoleting the Adobe Flex EFC application

CR-000160145   Banner - Employee Self-Service - **Employee Profile**
Banner 9 EmployeeSelfService Blank Menu Tomcat Only - java.lang.IllegalArgumentException: Invalid character found in the request target. The valid characters are defined in RFC 7230 and RFC 3986

CR-000175106   Banner - Employee Self-Service - **Employee Profile**
Accessibility issues in Employee Self-Service 9.11 using Employee Dashboard

CR-000176959   Banner - Employee Self-Service - **Electronic Approvals**
Issue in EPAF ESS 9.12, Default Value and is Not Enterable, results in [object Object] result is cannot submit transaction

CR-000178188   Banner - Employee Self-Service - **Effort Reporting and Labor Redistribution**
Effort Reporting and Labor Redistribution when acting as superuser search is executing without criteria

Employee Self-Service 9.14.0.1

Released May 20, 2021

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Change Request CR-000178607

Request Details

Summary

ESS 9.x EPAF UI nulls out fields that match exactly to the prior value upon saving or submitting the EPAF.

Product Hierarchy

Banner - Employee Self-Service - Electronic Approvals

Change Request Type	Status	Severity
DEFECT	COMPLETE	2

Found in Version	Substatus	Created Date
9.13	DELIVERED	03/17/2021

Identifier	Object/Process	Language
ESS EPAF UI	EmployeeSelfservice.war	English - US

Affected Languages	Knowledge Article
English - US	-

Description

ESS 9.x EPAF User Interface is nulling out data even if intentionally entered in that exactly matches the prior data. This can cause required fields in an Approval Category to error out upon save or submittal.

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24

Employee Self-Service 9.14.0.1

Released May 20, 2021

Banner Releases for HR/Payroll/Budget
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June 2021

HR ……………………………… 8.19.1 + 9.3.19*
ESS ……………………………….. 9.15

* HR 9.3.19 Dependencies per Ellucian:
   - Banner Admin Common 9.3.24.1
   - Banner General 8.13
   - Banner Position Control 8.19.0.1
   - Banner Human Resources 8.19.1

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HR 8.19.1

Expected June 17, 2021

Release Change Requests (11)

CR-000172356   COMPLETE   Banner - Human Resources - Regulatory

PXRTDEP not pulling in amount over the max for the FICA Additional Medicare Deduction (FIMA) "Adjustments" or "A" mode

CR-000178752   COMPLETE   Banner - Human Resources - Benefits Administration

Modify p_create of package body pdkb_aca_coverage1.sql which contains typical sql injection of the rules override

CR-000179000   IN PROCESS   Banner - Human Resources

Technical Currency change for converting a DECODE statement to a CASE with a NULL check

CR-000179106   IN PROCESS   Banner - Human Resources

Banner 8 release to accompany future ESS release for Texas Connection Consortium

CR-000179151   IN PROCESS   Banner - Human Resources

Obsoleting HR Views, Functions and Synonyms no longer supported

CR-000178889   IN PROCESS   Banner - Human Resources

Banner HR 8.19 upgrade leaves 29 Orphan synonyms

CR-000177657   COMPLETE   Banner - Human Resources - Regulatory

Technical Currency Externalizing SQL for PER4212

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HR 8.19.1 (continued)

CR-000178745   REVIEWED   Banner - Human Resources

BANJSPROXY gurinso and gjrjlis can get ORA-01017 - ORA-01400 errors on certain Oracle userid accounts

CR-000172820   COMPLETE   Banner - Human Resources - Regulatory

PXPACxx may abort with an API error for MEP'd clients.

CR-000177673   COMPLETE   Banner - Human Resources - Payroll Processing

PDPBDMC Inserts 'S' Value for System Generated Defined Option Fields

CR-000178211   COMPLETE   Banner - Human Resources - Effort Reporting and Labor Redistribution

PHPECEX message missing: No Mandatory Certifiers defined for the report. Check configuration and data.

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HR 9.3.19

Expected June 17, 2021

Release Change Requests (5)

CR-000178999   COMPLETE   Banner - Human Resources - Employment Compensation Admin

Accessibility - PEAJCDD return button in comment section is not functioning correctly in accessiblity mode

CR-000179153   IN PROCESS   Banner - Human Resources

Accessibility - Certain buttons are not keyboard accessible

CR-000179161   COMPLETE   Banner - Human Resources - Electronic Approvals

Electronic Approval Type Rule (NTRAPTY) page there is a typo in the error message

CR-000177088   COMPLETE   Banner - Human Resources - Employment Compensation Admin

On PEA1PAY after completing and saving all sections, when a defined Applier uses the Apply Data option, the result is an error notification "ORA-01400: cannot insert NULL into ("GENERAL"."GXRDIRD"."GXRDIRD_DOC_TYPE")

CR-000178718   COMPLETE   Banner - Human Resources - Leave Administration

PHAADJT Documentation references adjusting leave on PEAEMPL instead of PEALEAV

Employee Self-Service 9.15

Expected June 17, 2021

This Change Request provides enhanced Summary/Detail Print Options for Time Approvers.

CR-000166516 Details

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Affected Languages   Knowledge Article

English - US   -

Description

We are early adopters for the new Banner Time Entry app. We would like to see a couple improvements to the timesheet preview for timesheet approvers and payroll. When the approver goes to the Approvals - Timesheet view and selects action preview for a timesheet, the preview window displays a summary of the earn code, shift, and total hours. There is also a weekly summary to show total hours by week. The approver can also click details to view the timesheet by day. This view displays total hours by day only and the approver needs to click on the day to see a break-down of the earn codes used for that day. This is a lot of steps to view if an employee entered the correct earning (such as sick or vacation) on the correct day. We would like a summary view option to show more details at a summary/or preview level. These details are:

Date
Earning
Hours

We also found that there is not a print view to show these details on one page for the supervisor, employee, or payroll to print. The ability to print these details on one page is a critical need for payroll as they work through adjustments, questions, verifications, troubleshooting, etc... It is also an important summary for approvers to have to quickly verify employee's entered their hours/earnings on the correct day before they approve. We recommend that a more detailed summary be available on the Timesheets-Approval page with a 1 page printable view.

Business Purpose

To have the option to provide the necessary details to approvers ensuring that they verifying the accuracy of employee timesheets. To provide the required tools to payroll to efficiently process payroll and adjustments.

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Banner UNC Position Control Mod

Current Operational Release is unc_001_933p_20190510.trz

Continues to perform successfully in all release baseline configurations through:

- ✓ Position Control 8.18 and 9.3.13
- ✓ Human Resources 8.18.2 and 9.3.17
- ✓ Admin Common 9.3.23

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Banner UNC Position Control Mod

NOW AVAILABLE: UNC_001_9317p_20210317.trz

Was developed and tested in these baseline Banner versions:

- ✓ Position Control 9.3.13
- ✓ Human Resources 9.3.17

Fixes an NBAPBUD issue raised by ASU whereby a position that had been transferred from one organization to another could not be un-transferred.

Banner UNC Position Control Mod

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BEING TESTED: UNC_001_819p_20210525.trz

- This update to the nbkbudg modification for UNC Position Control Mod is needed when a campus upgrades to baseline HR/POS 8.19.

- The baseline package was updated with this release.

- Primarily affects those campuses that have the mod installed and are using Salary Planner but NHPFIN1 can be affected as well.

- We are in the process of having this one installed in GADEV1 for testing.

Banner UNC Position Control Mod

Work is also being done with Ellucian to accommodate a "safe" way to uninstall the Mod if a campus chooses to do so.

More news on this at a future meeting.

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QUESTIONS?

For Dave: dpbeach@northcarolina.edu
(919) 843-9168

Flexible Work Arrangements

- UNC System Office President Peter Hans approved "Regulation on Flexible Work Arrangements and Remote Work" (Section 300.8.6[R] of the UNC Policy Manual), which became effective April 29, 2021.

- Chancellors have the flexibility to decide what type of work arrangements are best suited for their campus needs.

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Reference: Ellucian

Flexible Work Arrangements

- The Flexible Work Arrangement (FWA) provide a common framework for setting requirements and guidelines for employees and their managers, but the specific arrangements on each campus will reflect operational needs and are subject to the Chancellors discretion.

Reference: Ellucian

Flexible Work Arrangements

- As the University is intended in part to contribute to the economy of the state, it is the University's official position that to the greatest extent practicable, the University will principally employ individuals who reside within or in close proximity to the state of North Carolina.

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Reference: Ellucian

Flexible Work Arrangements

- While a defined reasonable commuting distance may cross state lines, particularly for institutions that are located close to the North Carolina border, institutions should avoid long-term flexible work arrangements for employees who reside outside a reasonable commuting distance.

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Reference: Ellucian

Multi-State Reporting

- Out-of-State Compliance Issues. Employees with remote work arrangements outside of North Carolina may be subject to the laws and regulations of other states or countries with respect to the employee/employer relationship.

- Institutions are required to ensure good faith compliance with such laws and regulations if granting approval for remote work arrangements outside of North Carolina.

41

Reference: Ellucian

Multi-State Reporting

- What does this mean when employees have been approved by your HR Department to work remotely in a state other than North Carolina?

- As Payroll Practitioners, we have a responsibility to ensure our intuitions are in compliance with ALL State rules.

Multi-State Taxation Concerns

- Residency

- Reciprocity Agreements

- Resident / Non-Resident Rules

- Evaluating taxation for multiple states

- What wages are subject to taxation?

- Withholding Compliance Issues

- State Unemployment Insurance

- Administrative Concerns

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Reference: Ellucian

Multi-State Reporting

- Every employee working out of state must have a Flexible Work Agreement in place and approved by your institution's HR Dept.

- A Multi-State Committee has been created under the leadership of Quita Loflin, CPA, Director of Accounting and Controller University of North Carolina System Office.

Reference: Ellucian

Multi-State Reporting

- The committee is in the process of creating a Matrix of where each institution has active State Withholding Accounts and will be located on the Controllers ShareFile.

- This Matrix will as serve a source for campuses opening new accounts to understand State requirements i.e. Does the state require a Workers Comp account issued by their state.

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Reference: Ellucian

Residency

- Generally Residency is determined by:

  ▪ Being domiciled in the state or

  ▪ Spending more than a certain number of days in the state

- Domicile – the place where an individual has a true, fixed, permanent home and principle establishment. (Place where person intends to return.)

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Reference: Ellucian

Domiciled

- Common indicators that an individual is domiciled in a particular location include:
    - Property ownership
    - Bank accounts
    - Drivers license and vehicle registration
    - Voter registration
    - Presence of family
    - Club and church memberships

Reciprocal Agreements

- Agreements generally exempt a nonresident from tax in the state where services are performed.

- Agreements may not require the employer to withhold tax in resident state.

- Agreements do not generally apply to local taxes.

- **NOTE: North Carolina does not have Reciprocity agreements with any other state.**

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Reference: Ellucian

Resident/Non-Resident Withholding Rules

- Employer is still liable even if a facility is not located in state but services are performed in state. (Facility often referred to as "brick and mortar")

- If the employer has a Nexus with the state in which the employee resides, then the employer is subject to the laws of that state

Evaluating Taxation for Employees Working in <u>Multiple States</u>

- Each state residency/non state residency laws needs to be considered.

- Reciprocal agreements need to be reviewed for all states involved.

- Domiciled and Nexus need to be considered.

- Time of work performed in each state needs to be considered.

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Reference: Ellucian

Multi-State Reporting

- Do not wait until W2s are issued to report employee works in a state other than North Carolina.

- Tax Accounts must be setup in advance of withholding or reporting wages to another state – and this sometimes can be a lengthy process.

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Reference: Ellucian

Multi-State Reporting

- Determine who in your Finance Department will be responsible for due diligence on requirements and opening accounts.

- NOTE: SSC does not have Power of Attorney to open accounts for your institution; however, we do need to be in the loop when it is determined a new state withholding account is required.

52

Reference: Ellucian

State Unemployment Accounts

- If a state unemployment account is required in the state where a new state withholding tax account is being established ALWAYS choose REIMBUSRSEMENT and not Contributory.

- This is equivalent to NC Unemployment Accounts.

Reference: Ellucian

QUESTIONS?

On any of the presentation?