Human Capital Management (HCM) ctcLink Resource Overview Document

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Prior to First Week Go-Live

Training

Please review and learn about these two areas as much as you can prior to Go Live.

- ctcLink Reference Center - QRGs (Quick Reference Guides), videos, other training resources
- Canvas Courses

ctcLink Account Activation and Reset

Employees and Students go through the same steps when it comes to activating the ctcLink account. Whether you are an employee or student, prior to Account Activation, you will be given a SID (Student Identification) or a ctcLink ID.

- Activating Your ctcLink Account
- For information on resetting your password, please refer to the QRG titled Resetting Your ctcLink Password

Reporting Tools/Queries

A PeopleSoft query is a tool that extracts institutional information from a database and displays that data via formats such as Excel, HTML or XML. These queries are also used to identify and track student data (and financial accounts) so that the database can operate as intended.

- Most Used and Favorite Queries

Basic Setup

Security Roles

Talent Acquisition Manager (TAM)

- **ZZ Recruiter**
  - Core recruiting role for classic components in TAM. This role contains access to Fluid TAM navigations for Recruiter.
- **ZZ Recruiting Admin Local**
  - Local recruitment administrators have access pertinent recruitment functionality within TAM as well as TAM setup pages available at the local entity level.
- **ZZ Interested Party**
  - Limited permissions for those individuals not officially within a recruiter, hiring manager, interviewer role but that require access to a job opening.
- **ZZ Hiring Manager**
  - Core recruiting role for classic components in TAM. This role contains access to Fluid TAM navigations for Recruiting Manager. Recruiting role for fluid components in Manager Self Service.

- **ZZ PeopleSoft User**
    - This role is automatically assigned to all employees. It provides various access to multiple module functions. As it relates to TAM specifically, the role provides employees with any and all Career and job application access.
- **ZZ External Applicant**
    - This role is automatically assigned to the individual user id used for each entity's career site providing non-employee access to Career and job application functions. There is no need to assign this role to any users.
- **ZZ Careers XXXXX** (Where XXXXX is the specific college/entity)
    - This role in conjunction with the ZZ PeopleSoft user role provides career and job application access for employees. The role also provides employees access to pertinent entity career tiles.

HR Core

- **ZZ Employee Maintenance**
    - Core HR role for classic components in Workforce Administration. This role contains access to Fluid Workforce Administration navigations for HR Core; including but not limited to: Job Data, Personal Information, and Tenure Tracking.
    - The ***ZC Employee Maintenance*** role should be assigned to a very limited number of administrators at the college as it allows the user to Correct History on all Fluid Workforce Administration pages as mentioned above.
    - The ***ZD Employee Maintenance*** role allows the user to view all Fluid Workforce Administration pages mentioned above. Does not have add/update rights.
- **ZZ HR Position Management**
    - Local HR administrators have access to pertinent functionality within HR Core as well as HR setup pages available at the local entity level. This role includes access to the Position Table, and Base Compensation.
    - The ***ZC Position Management*** role should be assigned to a very limited number of administrators at the college as it allows the user to Correct History on the Position Table, as well as the Base Compensation tables, mentioned above.
    - The ***ZD Position Management*** role allows the user to view Position and Base Compensation tables mentioned above. This role does not have add/update rights.
- **ZZ HR Local Configuration**
    - Local HR Administrators will have access to pertinent functionality within HR Core as well as HR setup pages available at the local entity level. This role includes access to the setup pages for Job Codes and HR Departments.
- **ZD_DS_QRY_HRCORE_VACC_HI_SENS**
    - Immunizations/Vaccinations

Benefits

- **ZC Benefits Enrollments**

    - This role grants access to the transactional level data for employees relating to benefits. This includes, but not limited to, Health Benefits, Spending Accounts, Savings Plans, Retirement Plans & Simple Benefits.
    - **ZD Benefits Enrollment Inquiry** role is similar to the above role, but doesn't include the ability to update/correct information. This is a read-only role.
- **ZC Benefits Maintain PrePay**
    - This role grants access to the transactional data related to maintaining prepay setup and balances for employees.
    - **ZD Benefits PrePay Inquiry** role is similar to the above role, but only grants read-only access to the PrePay pages.
- **ZD Benefits Employee Data Inq**
    - This role includes the summary pages related to Benefits as well as read only access to Job Data, Paycheck Details, Dependents.
- **ZD Benefits Reporting**
    - This role grants access to the custom PTF reports as well as the Benefits Eligibility page.
- **ZD HCA Reconciliation**
    - This role grants access to the custom HCA Reconciliation page allowing users to review the billing information sent from HCA.
- **ZZ DRS Processing**
    - This role grants access to the custom DRS Processing pages including but not limited to the DRS Data Load and Redistribution processes.
    - **ZD DRS Processing Inquiry** role is similar to the above role, but only grants read-only access to the DRS related pages.
- **ZD Benefits Config Inquiry**
    - This role grants the administrator read only access to the configuration tables used for Benefits.

Time and Labor

Time and Labor Enrollment and Data

- **ZC Admin Enroll Time Reporters**
        - Allows correction access to enrollment screens: Time Reporter Data, Comp Time Enrollment, and Schedules. At least two (2) people must have this role.
    - **ZD HR Admin View Job Data**
        - Allows view only access to Job Data. All TL Admins are recommended to have this role.
    - **ZD TL Admin View Enrollment**
        - Allows view only enrollment screens. Many people can have this role outside of Time and Labor admins.
    - **ZD TL Admin View Time**

        - Allows TL Admin to view status of unprocessed time and to run some reports. All TL Admins should have this role.

- **Time and Labor Configuration**
    - **ZD TL Admin View Config**
        - Allows TL Admin to view global Time and Labor setup. Recommended but not required for TL Admin.
    - **ZD TL View Local Config**
        - Allows TL Admin to view local Time and Labor setup. Required for TL Admin if they don't have a ZZ role for local config.
    - **ZZ TL Maintain Local Config**
        - Allows TL Admin to maintain local Time and Labor setup. This is high impact and only a couple people with comprehensive knowledge should be able to do this. At least 2 people must have this.

- **Time and Labor Processing**
    - **ZZ TL Process Time**
        - Allows TL Admin to run Time Administration, the core TL process. All TL Admins must have this.
    - **ZZ HCM Manager**
        - Regardless of if a TL Admin has direct reports they must have this if they have ZZ TL Process Time. It allows access to a college's employee timesheets in an edit capacity.
    - **Superuser row security in the User Profile**
        - A Time and Labor Administrator who is expected to maintain timesheets and configuration at their college must have the CTC_XXX_TL_SUPERUSER Row Security. This is distinct from the rest of a college who have CTC_PT_WAXXX_ALL security. This allows 6 months of backdated correction access to timesheets.

Absence Management

- **ZZ Abs Events and Adjs**
    - This role gives access to the administrator Absence Events page. Where the administrators can add or update any Absence request for any employee in that institution. This role also gives access to make Absence adjustments.

- **ZD Absence Mgmt Local Config**
    - This Absence role gives access to all the local configuration pages in the read-only mode. The Administrators can review their local configurations and if any change is required then they can create a helpdesk ticket to the ERP Support team.

- **ZZ Abs Off Cycle Processing**

- This role gives access to the Absence Administrators to run the Absence off-cycle process. This is a separate process compared to the centralized Absence run for Takes and Entitlements.

- **ZZ SS ABS Administration**
  - This role gives access to all other administrator privileges to the Absence administrators. So that they can do all the admin related activities related to Absence Management.

Payroll

- **ZZ Payroll Processing**
  - Payroll Processing role for classic components in Payroll for North America. This role contains access to Fluid Workforce Administration navigations for Payroll Administration; including but not limited to: Create Paysheets, Produce Payroll, and CTC Processes.

- **ZZ Payroll Data Maintenance**
  - This role grants access to the transactional data related to maintaining payroll data related to employees. This role contains access to pages such as General Deduction Data, Employee Tax Data, Direct Deposit & Additional Pay Data.
  - The ***ZC Payroll Data Maintenance*** role should be assigned to a very limited number of administrators at the college as it allows the user to Correct History for the transactional data noted above.
  - In addition, some payroll queries may require the following Security Roles:
    - ZD_DS_QRY_PAYROLL
    - ZD_DS_QRY_PAY_SSN_HIGH_SENS
    - ZD_DS_QRY_PAY_GARN_HIGH_SENS
    - ZD_DS_QRY_PAY_BANK_HIGH_SENS

Faculty Workload

- **Roles in CS**
  - **ZC FWL Maintain Config** (**CS**)
    - At least 2 people need this at your college so that Assignment Types can be maintained locally and configuration can be rolled from term to term
  - **ZD FWL View Config** (**CS**)
    - A few people at your college need this to help the person(s) with the ZC role do analysis
  - **ZZ FWL Adjust Class** (**CS**)
    - A number of people at your college could have this if they are allowed to change the number of hours a particular class is meeting for in a particular term in the Class Schedule
  - **ZZ FWL Contract Calc** (**CS**)
    - **This is the core FWL processing role.** All admins that do FWL processing have this role for FWL adjustments and calculations.
  - **ZD FWL View Cnt Calc** (**CS**)

    - Allows some people view only access to the individual FWL calculation results. Typically this would be given to deans or other approvers that shouldn't process but may need to see detailed level calculation information.
  - **ZZ FWL Contract Gen** (**CS**)
    - Allows generation of contracts. Can be given to a few admins or many admins depending on college business process
  - **ZZ FWL Contract Approve** (**CS**)
    - Intended for deans, or other people who are allowed and expected to approve contracts on behalf of deans etc.
  - **ZZ FWL Pay Processing** (**CS**)
    - Intended to be given to very few people. Allows export of FWL pay information to HCM. Only one person should run this process once a pay period.

- **CS Roles that are AWE (Approval Workflow Engine) enabled specific**
  - **ZZ FWL Contract Submit** (**CS**)
    - If AWE is enabled then all FWL admins must have this role so that they can submit contracts into the AWE flow. Mandatory if AWE is enabled.
  - **CTC_FWL_<Institution_Code>ALL_APPROVER** (**CS**)
    - If AWE is enabled then someone must be deputized to be able to approve on behalf of deans or HR outside of the normal workflow. To allow them to do this a college specific role must be created by SBCTC central security admins and then assigned to those User Profiles.

- **Roles in HCM**
  - **ZD FWL HCM View Pay** (**HCM**)
    - All admins that do FWL processing must have this role so that the View Job Data link in Maintain Faculty Workload will function.
  - **ZD DS BIP FWL CONTRACT** (**HCM**)
    - For Batch Contracting Printing of Faculty Workload Contracts (through BI Publisher)

  - **ZZ FWL HCM Pay Process** (**HCM**)
    - Only admin that are expected to help Payroll edit PSHUP information should be given this role. This will often be very few people at a college.

First Week DG6 Go-Live

Who should participate in the HCM Post Go-Live Support WebEx Sessions?

College staff members who actively work with:

- Payroll,
- Absence Management/Leave,
- Faculty Workload,
- Recruiters/Hiring Staff (TAM)/WorkForce Developers,

- Benefits,
- any staff who will be working with Job Data in general

PLEASE NOTE!

The first week of Post Go-Live Support is a structured schedule of validation activities that must be completed to be able to identify any errors or corrections needed for further data processing.

Please use the designated WebEx links below for your college's deployment group for Faculty Workload Sessions (scheduled for the second week of the Post Go-Live Activities. Sessions will run Mon-Fri, 9:00AM - 4:00PM).

- DG6 B Group - WebEx Link
- DG6 C Group - WebEx Link

Further content information that aligns with the separate sessions can be found on page 17 of this document.

HR Core

Enter **Missing Jobs** for employees not converted. *This task should be completed before the first payroll is run.*

The ctcLink Project Team will provide a list of conversion errors, including jobs that were not converted.

- To add employees to PeopleSoft you'll need to follow the steps in these QRGs:
    - Create Job Code (Use this document if there is no existing Job Code for the job you're assigning the employee to.)
        - *Note: be sure to use an effective date that is less than or equal to the effective date (hire date) of the employee being assigned.*
    - Position Management (Fluid) (use this document to create a position number for the employee to be assigned to; applicable to all Full-Time employees)
        - *Note: be sure to use an effective date that is less than or equal to the effective date (hire date) of the employee being assigned.*
    - Run a Search Match (Use this document to ensure no duplicates in records.)
    - Hiring a New Employee (Use this document for hiring a person who does not have an existing person record in PeopleSoft based on search/match results.)
        - *Note: The effective date should be the equal to the Employment Date in PPMS.*
    - Add a New Employment Instance (Use this document for adding an additional job record for an employee who has an existing person record in PeopleSoft, based on search/match results.)

Verify **HR and Payroll Status.**

- Run the **CTC_JOB_DATA_DG6_GO_LIVE** query.
    - Filter the data by HR and Payroll Status
    - Navigate to the Job Data page (Navigation: Workforce Administrator Homepage > HR Administrator Tile > Job Data)

        - Enter the Empl ID
        - Select the Correct History box
        - Select Search
        - Select the Work Location tab
        - View the HR and Payroll Status
        - Repeat these steps for all job records (historical and future dated)

Verify **Job Indicator.** (Primary Job)

- Run the **CTC_JOB_DATA_DG6_GO_LIVE** query.
    - Filter the data by Job Indicator
- Navigate to the Job Data page (Navigation: Workforce Administrator Homepage > HR Administrator Tile > Job Data)
    - Enter the Empl ID
    - Select the Correct History box
    - Select Search
    - Select the Work Location tab
    - In the Job Indicator field, enter the correct Primary or Secondary Job
    - Repeat these steps for all job records (historical and future dated)

Enter **Missing Supervisors.** (User must have the ZC Employee Maintenance role to complete this task)

- Run the **CTC_JOB_DATA_DG6_GO_LIVE** query.
    - Filter the data by blank Supervisor ID
- Navigate to the Job Data page (Navigation: Workforce Administrator Homepage > HR Administrator Tile > Job Data)
    - Enter the Empl ID
    - Select the Correct History box
    - Select Search
    - Select the Job Information tab
    - In the Supervisor ID field, enter the Empl ID of the Supervisor
    - Repeat these steps for all job records (historical and future dated)

Validate **Empl Class**. For Full-Time Faculty with a Moonlight job, change the Empl Class for the active Moonlight jobs from PTF Empl Class to FAC Empl Class in all effective dated rows. ***(This will require Correct History access to Job Data)***

- Run the **CTC_JOB_DATA_DG6_GO_LIVE** query.
    - Filter the data by Empl Class
- Navigate to the Job Data page (Navigation: Workforce Administrator Homepage > HR Administrator Tile > Job Data)
    - Enter the Empl ID
    - Select the Correct History box
    - Select Search
    - Select the Job Information tab
    - In the Empl Class field, enter the correct Empl Class

Validate **Standard Hours, Work Period and FTE**.

- Run the **CTC_JOB_DATA_DG6_GO_LIVE** query.
    - Filter the data by Work Period

- Navigate to the Job Data page (Navigation: Workforce Administrator Homepage > HR Administrator Tile > Job Data)
    - Enter the Empl ID
    - Select the Correct History box
    - Select Search
    - Select the Job Information tab
    - In the Standard Hours field, enter the correct Standard Hours, Work Period and FTE.

Validate/Enter **Union Code and Bargaining Unit.**

- Run the **CTC_JOB_DATA_DG6_GO_LIVE** query.
    - Filter the data by Union Code
- Navigate to the Job Data page (Navigation: Workforce Administrator Homepage > HR Administrator Tile > Job Data)
    - Enter the Empl ID
    - Select the Correct History box
    - Select Search
    - Select the Job Labor
    - In the Union Code field, enter the correct Union Code
- Run the **QHC_HR_UNION_MEMBERSHIP_DG6** and verify union code and related bargaining unit details.

Validate **Payroll System and Absence System**. ***(Not every job will be enrolled in an Absence System)***

- Run the **CTC_JOB_DATA_DG6_GO_LIVE** query.
    - Filter the data by Absence System
- Navigate to the Job Data page (Navigation: Workforce Administrator Homepage > HR Administrator Tile > Job Data)
    - Enter the Empl ID
    - Select the Correct History box
    - Select Search
    - Select the Payroll tab
    - Enter correct Payroll System and Absence System

Validate Payroll for **North America Pay Group and Absence System Pay Group**.

- Run the **CTC_JOB_DATA_DG6_GO_LIVE** query.
    - Filter the data by Absence System Pay Group
- Navigate to the Job Data page (Navigation: Workforce Administrator Homepage > HR Administrator Tile > Job Data)
    - Enter the Empl ID
    - Select the Correct History box
    - Select Search
    - Select the Payroll tab
    - In the Absence Management Pay Group field, enter the correct Pay Group

Validate **Holiday Schedule.**

- Run the **CTC_JOB_DATA_DG6_GO_LIVE** query.
    - Filter the data by Holiday Schedule
- Navigate to the Job Data page (Navigation: Workforce Administrator Homepage > HR Administrator Tile > Job Data)

- Enter the Empl ID
- Select the Correct History box
- Select Search
- Select the Payroll tab
- In the Holiday Schedule field, enter correct Holiday Schedule

Validate **Tax Location**.

- Run the **CTC_JOB_DATA_DG6_GO_LIVE** query.
  - Filter the data by Tax Loc
- Navigate to the Job Data page (Navigation: Workforce Administrator Homepage > HR Administrator Tile > Job Data)
  - Enter the Empl ID
  - Select the Correct History box
  - Select Search
  - Select the Payroll tab
  - In the Tax Location field, enter the correct Tax Location

Validate **Salary Plan.**

For Classified and Professional IT staff with a CS and/or ST Salary Admin plan, the Increment Month will need to be updated.

- Run the **CTC_JOB_DATA_DG6_GO_LIVE** query.
  - Filter the data by Salary Plan CS and ST
- Navigate to the Job Data page (Navigation: Workforce Administrator Homepage > HR Administrator Tile > Job Data)
  - Enter the Empl ID
  - Select the Correct History box
  - Select Search
  - Select the Salary Plan tab
  - Enter the correct Sal Plan, Grade, and Step
  - Update the Step Entry Date field using the following format MM/DD/YYYY. The Month should match the "Increment Month" field on screen PS0002 in PPMS. The Day should always be "01," the first day of the month. The year should be the current year minus 1 year.

Validate **Compensation Rate and Frequency.**

- Run the **CTC_JOB_DATA_DG6_GO_LIVE** query.
  - Filter the data by Tax Loc
- Navigate to the Job Data page (Navigation: Workforce Administrator Homepage > HR Administrator Tile > Job Data)
  - Enter the Empl ID
  - Select the Correct History box
  - Select Search
  - Select the Compensation tab
  - Enter the correct Compensation Rate and Frequency

Validate **Earning Distribution. (Earnings Code, Combination Code and Percent of Distribution)**

- Run the **QHC_HR_CTC_EARN_DIST_VALID** query.
  - Filter the data by Earnings Code, Combination Code and Percent of Distribution

    - Run **QHC_HR_CTC_EARN_DIST_VALID_ALL** (this query is similar to the above and includes ALL history in addition to the current effective dated row)
- Navigate to the Job Data page (Navigation: Workforce Administrator Homepage > HR Administrator Tile > Job Data)
    - Enter the Empl ID
    - Select the Correct History box
    - Select Search
    - Select the CTC Earnings Distribution tab
    - Enter the correct Earnings Code, Combination Code and Percent of Distribution.

Validate **Benefit Record Number.**
- Run the **QHC_HR_COMPANY_BENRCD_MISMATCH** query.
    - Filter the data by Ben Record
- Navigate to the Job Data page (Navigation: Workforce Administrator Homepage > HR Administrator Tile > Job Data)
    - Enter the Empl ID
    - Select the Correct History box
    - Select Search
    - Select the Benefits Program Participation Link
    - In the Benefit Record Number field, enter the correct Benefit Record Number (College Number XXX)

Time and Labor

Validate **Workgroup.**
- Run the **QHC_TL_EMPL_WORK_SCHEDULE** query.
    - Filter the data by Work Group
- Navigate to the Job Data page (Navigation: Time and Labor > Enroll Time Reporter > Maintain Time Reporter Data)
    - Enter the Empl ID
    - Select the Correct History box
    - Select Search
    - Enter the correct workgroup

  (For any Empl Class that had more than one possible workgroup, changes need to be made in the Time and Labor enrollment screen so that their Timesheet will contain the correct TRCs.)

Validate **Schedules.**
- Run the **QHC_TL_EMPL_WORK_SCHEDULE** query.
    - Filter the data by Schedules
- Navigate to the Job Data page (Navigation: Time and Labor > Enroll Time Reporter > Assign Work Schedule)
    - Enter the Empl ID
    - Select the Correct History box
    - Select Search
    - Enter the correct employee schedule

  (Validation of project schedule change, and manual changes for people with new schedules need to take place the first day as they impact Absence entry.)

Once validated, colleges notify HCM Customer Support so we can run the dynamic build process. Then colleges can notify their employees to start submitting time for 4/16/2022 - 4/30/2022 (DG6B) and 5/1/2022 - 5/15/2022 (DG6C) in Time and Labor through Employee Self-Service. (ESS)

Absence Management

Validate **Absence Balances.**

- Run the **QHC_AM_CURR_BAL** query.
  - Filter the data by Absence Balance
- Navigate to the Job Data page (Navigation: Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Review Absence Balances)
  - Enter the Empl ID
  - Select the Correct History box
  - Select Search
  - Adjust Absence Balances

  Once validated, colleges notify HCM Customer Support so we can run the dynamic build process. Then colleges can notify their employees to start submitting time for 4/16/2022 - 4/30/2022 (for DG6B) and 5/1/2020-5/15/2022 (for DG6C in Time and Labor through Employee Self-Service. (ESS)

Benefits

Validate **Benefit Program.**

- List of the employees present in a specific Benefit Program:
  - **QHC_BA_EMP_BENEFIT_PROGRAM**
- Navigate to Benefits > Enroll In Benefits > Assign to Benefit Program
  - Enter the Empl ID
  - Select the Correct History box
  - Select Search
  - Verify Effective Date

  - In the Benefit Program field, enter the correct Benefit Program.

Validate **Benefit Record Number.**

- The below query will give the list of employees who have a 0 on their Benefit Rcd Number. Even if an employee is on SB0 – it's imperative to have a Benefit Rcd number as the company number.
  - **QHC_HR_COMPANY_BENRCD_MISMATCH**
- If you don't see any results on the above query – that's great! But if you do please update the Benefit Rcd# on Job Data > Benefit Program Participation Page
- It's good practice to run this query often and before creating paysheets during every payroll processing.

Validate **Benefit Data.** (These include, but not limited to, Health Benefits, Simple Benefits, Spending Accounts, PrePay Overrides/Balances, etc.)

- Manually enter any transactional data related to Benefits that may not have been converted.
- Use below queries to validate employee data

- List of the employees enrolled in Health Benefits (Medical & Dental):
    - **QHC_BA_ENROLLED_HEALTH_BENEFIT**
- List of the employees enrolled in Retirement
    - **QHC_BA_ENROLLED_RETIREMENT**
- List of the employees enrolled in Long term Disability plans
    - **QHC_BA_EE_LTD_ENR**
- List of the employees who have Health Benefits Waived:
    - **QHC_BA_WAIVED_HEALTH_BENEFIT**
- List of employees in Spending A/c
    - **QHC_BA_FSA**
- List of employees who have a Flat Amount Override entered:
    - **QHC_BA_FSA_FLAT_AMNT**
- Beneficiaries/Dep by EMPLID
    - **QHC_BA_DEP_BEN_SUMMARY**

- Navigate to Benefits > Enroll In Benefits > Select the **appropriate** Benefit Data
    - Enter the Empl ID
    - Select Search
    - Enter the correct Benefit Data

Manually update any Spending Accounts that need to have a Flat Amount override entered. This includes reviewing any Health Spending Account enrollments that need to have the Annual Pledge increased to ensure proper deductions are calculated. This is the known issue where the Annual Pledge will be the same as the Contributions YTD.

Assign **ACA Status.**

- Navigate to NavBar > Navigator > Benefits > CTC Custom > Assign ACA Status
- Use query to validate and enter if missing:
    - **QHC_BA_ACA_ACTIVE_PR**

Validate **Employee Prepay Balances.**

- Navigate to NavBar > Navigator > Payroll for North America > CTC Custom > Employee PrePay

OR

- Navigate to Benefits Admin Tile > Employee/Dependent Info > Employee Prepay
    - Employee Prepay Balances:
        - **QHC_CTC_EPREPAY_BAL - CTC_EPREPAY_BAL**
    - Prepay calendars deductions:
        - **QHC_PY_PREPAY_CAL_DED**
    - EE Prepay cycle:
        - **QHC_PY_PREPAY_CYCLE**

Payroll

Validate **Payroll Data**. *(This includes, but not limited to, General Deduction Data, Direct Deposit, Federal Tax Data, etc.)*

- Run the appropriate query listed below.
    - Filter the data by **Appropriate** Payroll Data
- Navigate to Employee Pay Data page (Navigation: Payroll for North America > Employee Pay Data USA > Select the appropriate Pay Data)
    - Enter the Empl ID or Name
    - Select the Correct History box
    - Select Search
    - Enter the correct Payroll Data
        - Manually enter any transactional data related to Payroll that may not have been converted. Payroll Data validation queries:
    - To validate Employee Tax Data, run query **PR_EE_TAX_DATA_VAL - EE** Tax Data Validation
    - To validate data on page Create Additional Pay, run query **PR_EE_ADDL_PAY_VAL - EE** Addl Pay Data Validation
    - To validate data on page Request Direct Deposit, run query **PR_DIRECT_DEPOSIT_VAL- EE** Direct Deposit Validation
    - To validate data on page Create General Deductions, run query **PR_EE_GENL_DED_VAL- EE** General Deduction Val
    - For a list of employees who are setup for Garnishment, run query **QHC_PY_GARN_REVIEW** - Garnishment Spec w Rules
    - To review Earnings, Deductions and Taxes balances, navigate to **Payroll for North America > Periodic Payroll Events USA > Balance Reviews**, and select the appropriate balance.
    - Queries for balances validation:
        - **PR_EE_TAX_BAL_VAL - EE** Tax Balance Validation
        - **PR_EE_EARN_BAL_VAL - EE** Earnings Bal Validation
        - **PR_EE_DED_BAL_VAL - EE** Deduction Balances Val
        - **PR_EE_DED_ARREARS_BAL_VAL - EE** Ded Arrears Bal Validation
    - **ADDITIONAL INFORMATION & QUERIES**:
        - For Additional Pay: Run **QHC_PY_ADDL_PAY_DATA** (additional pay detail includes combo code, if any was entered)
        - During Payroll Processing, you should run these queries, which are listed on the Payroll Processing Timeline that the HCM Support Team distributes to all ctcLink colleges:
            - After loading PSHUP files (See Payroll Checklist, Step 20) to check for PSHUP errors, run query **QHC_PY_VALID_COMBOCODE_PSHUP_T** and identify invalid Combo Code entries on the Paysheet Holding Update.
            - As part of Data Validation (See Payroll Checklist, Steps 40-47) to check for Combo Code errors, run query **QHC_PY_VALID_COMBOCODE** to identify invalid Combo Codes in the Paylines.

Faculty Workload

Faculty Workload tasks really started long before the first day. By the time a college is going live the following would have had to be completed in CS Production:

- Person information would have been loaded to CS and HCM
- Instructor/Advisor Table in CS would have been loaded with instructors based on cycle 3 or 4 Job conversion (FAC and PTF EMPLIDs)
    - If Approved Courses was being used and the information was provided in time that would have been loaded by Project, otherwise it would have been manual entry by a college SME
    - If the Advisor information was provided it would have been loaded by Project, otherwise it would have been manual entry by a college SME
- Assignment Types would have been moved to allow entry in the Schedule of Classes
- The Schedule of Classes for the anticipated term after Go Live would have been filled out to 90% completion with Instructors and Assignment Types
    - The current term that colleges will be in the middle of for Go Live will have been filled out with Instructor and an Assignment Type of Unassign for CS grading purposes
- The Payroll PSHUP will have been started to get through the remaining Payroll periods in the Go Live term
- The Absence adjustment(s) for the PTF accrual(s) will have been started

Tasks for FWL, given that all work above is complete, would be the following (these tasks will be ongoing for the week and after):

- Any **NEW spring quarter contracts** must be set up/calculated/generated and approved for **4B Payroll processing (2223 term) no later than Friday, April 29 for DG6B and DATES HERE FOR DG6C** (this applies to new spring quarter contracts only as majority of existing spring quarter contracts will be paid to faculty through manual PSHUP file).
- Begin work to assess Combo Codes and Earn Codes in CTC Earn Distribution in Job Data to confirm that budget information is correct for all PTF in HCM.
- Begin work to correct Empl Rcds in Schedule of Classes for any record that cannot be paid from the Empl Rcd 0 for a PTF or FTF instructor in CS
- Add newly hired instructors to the Instructor/Advisor Table in CS
    - Make sure these instructors are added to Schedule of Classes with the correct Empl Rcd in CS
- Complete/Update Approved Courses tab of Instructor/Advisor Table in CS, for added newly hired faculty.
- Add additional Empl Rcds to existing instructors if they do not have appropriate Department information to add them in CS (joint CS and HCM work) refer to QRG, Add a New Employment Instance, listed above in HR Core.

Make sure your CS SMEs know their point of contact for Job Data corrections and additions in HR. Make sure the HR resource can remedy these corrections in a timely manner in the first week. This is the heaviest HR load for FWL in the beginning. Once Jobs are stable, HR should only need to make minimal corrections for CS going forward.

(Separate Faculty Workload) Spring Processing

PLEASE NOTE: THE FOLLOWING INFORMATION IS FOR DG6B COLLEGES

Spring Quarter Adjunct and Moonlight Pay Processing:

- **PSHUPs for Payroll – must be completed prior to 4B, 5A, 5B, 6A payroll processing periods – (this work is done by College SMEs with help from Project and Customer Support)**
    - **As spring term is not being fully built in FWL, 4B-6B payrolls must be planned out inside a manual PSHUP file and then loaded into PeopleSoft as part of Payroll processing. A template will be provided to the HCM Payroll SMEs to help support this activity. We will be working with the Payroll SMEs to help load this file as part of the normal Payroll processing.**
    - **4B PSHUP file must be ready no later than 4/29/2022.**
- **Files for Absence Management Accruals – must be completed prior to April, May, and June Entitlement run (this work is done by College SMEs with help from Customer Support)**
    - **As spring term is not being fully built in FWL, May and June Entitlements for PTF must be loaded through an Absence adjustment. Customer support will be working with the HCM Absence SMEs to get this entitlement data loaded.**
    - **February Entitlement file should be ready no later than 5/2/2022.**
- **Any NEW spring quarter contracts that need to be calculated/generated through FWL must be calculated/generated and approved for 4B Payroll processing (2223 term) no later than Friday, April 29, 2022 (this applies to new spring quarter contracts only as majority of existing spring quarter contracts will be paid to faculty through manual PSHUP file as stated above).**

Summer Quarter Part-Time Faculty Pay Processing in FWL:

1. **Summer term (2225) needs instructors added – should be completed by 5/20/22– (College SMEs)**
    1. **EMPLID, Assignment Type, and Workload % need to be accurate. The Empl Rcd defaults to 0 for all class schedule entries and must be corrected after go live to reflect employee's correct record number (see more information under bullet 3 below).**
2. **Job Data needs to be adjusted – should be completed by 5/20/22, but it will also be ongoing as we run through the process – (HR SMEs with analysis help from Customer Support)**
    1. **For full-time faculty who are teaching outside of their contracted timeframe during summer term additional part-time faculty job data records will need to be created. When creating these job data records, please use 5/16/22 as hire date.**
    2. **Moonlight jobs must show FAC Employee Class. (Moonlight jobs showing Part-Time Faculty Employee class must be corrected to FAC Empl Class before FWL Calculation occurs.)**

    3. **Missing Salary Plans, Grade, and Steps need to be added to moonlight and part-time faculty employee records.**
    4. **Combo Codes and Earn Codes need to be validated for correct budget information inside PTF and moonlight jobs.**
    5. **More jobs will need to be added, likely, to support contracted work in various departments (often Continuing Ed).**
    6. **Customer Support is available to provide help regarding HCM job data changes.**
3. **Empl Rcds must be corrected in the Schedule of Classes (concurrent work with job data additions/changes) – should be completed by 5/20/22 – (College SMEs with analysis help from Customer Support)**
    1. **Adjunct/moonlight faculty may not be setup under the defaulted Empl Rcd 0 for your college or employee may have more than one employee record number. Employee record must be reviewed/corrected before FWL Calculation runs.**
4. **FWL Calculation is run and errors are corrected – Calculation should be run on 5/23/22 – (Customer Support will be scheduling a webex to help Colleges to help run this process and address any questions)**
    1. **Errors will be evaluated. Some of them will be a result of Job Data issues, others will be a result of missing configuration. Customer Support will work College SME's to resolve calculation issues.**
5. **Calculation/Recalculation results will need to be validated– this should be taking place 5/23/22-6/8/22 – (College SMEs)**
    1. **QCS_FW_CAL_RSLT_FTE_PAY query provides help with validation of calculated data.**
    2. **Contracts are built on the quality of the calculation, so if the calculation is correct the contracts will also be correct.**
    3. **Any needed contract formula adjustments will be addressed during timeframe to resolve calculation issues.**
6. **If Calc results are acceptable, then contracts will be generated – this should be taking place 6/9/22-6/10/22 – (College SMEs; Customer Support will be scheduling a webex to help Colleges to help run this process and address any questions)**
    1. **QCS_FW_CONTRACT_STAT_ALL query provides help with validation of generated contracts.**
7. **When contracts have been generated then they will need to be Approved – this should be taking place 6/13/22-6/17/22 – (College SMEs/Deans)**
    1. **As contracts are approved, emails will trigger to show the contracts to the instructors for signature/rejection.**
    2. **At this time, backtracking is expected for contracts that "look wrong" which means heading back to calculation and validation for some portion of the population based on Dean's feedback.**
8. **After contracts have been approved, pay lines will need to be evaluated for Combo Code completeness and correctness – 6/13/22-6/24/22 – (College SMEs with analysis help from Customer Support)**
    1. **QCS_FW_PAYLINE_CLEAN query will help with this validation.**

2. **Some manual changes may be needed (combo code evaluation can also be done at the time of calculation, but if there wasn't time earlier here is where it needs to happen.)**
3. **There will be more backtracking and cleanup at this step.**

9. **Payroll Ok to Pay and HCM Extract will be run (6B or 7A payrolls) – this should be performed two days before payroll processing cutoff: for 6B payroll processing this date is 6/30/22; for 7A processing this date is 7/15/22. This is for Payroll cutoff and this date is not very flexible. (College HR SMEs with help from Customer Support).**

PLEASE NOTE: THE FOLLOWING INFORMATION IS FOR DG6C COLLEGES

Spring Quarter Adjunct and Moonlight Pay Processing:

- **PSHUPs for Payroll – must be completed prior to 5A, 5B, 6A, 6B payroll processing periods – (this work is done by College SMEs with help from Project and Customer Support)**
  - **As spring term is not being fully built in FWL, 5A-6B payrolls must be planned out inside a manual PSHUP file and then loaded into PeopleSoft as part of Payroll processing. A template will be provided to the HCM Payroll SMEs to help support this activity. We will be working with the Payroll SMEs to help load this file as part of the normal Payroll processing.**
  - **5A PSHUP file must be ready no later than 5/17/22.**
- **Files for Absence Management Accruals – must be completed prior to May and June Entitlement run (this work is done by College SMEs with help from Customer Support)**
  - **As spring term is not being fully built in FWL, May and June Entitlements for PTF must be loaded through an Absence adjustment. Customer support will be working with the HCM Absence SMEs to get this entitlement data loaded.**
  - **May Entitlement file should be ready no later than 6/2/2022.**
- **Any NEW spring quarter contracts that need to be calculated/generated through FWL must be calculated/generated and approved for 5A Payroll processing (2223 term) no later than Tuesday, May 17, 2022 (this applies to new spring quarter contracts only as majority of existing spring quarter contracts will be paid to faculty through manual PSHUP file as stated above).**

Summer Quarter Part-Time Faculty Pay Processing in FWL:

1. **Summer term (2225) needs instructors added – should be completed by 5/20/22– (College SMEs)**
   1. **EMPLID, Assignment Type, and Workload % need to be accurate. The Empl Rcd defaults to 0 for all class schedule entries and must be corrected after go live to reflect employee's correct record number (see more information under bullet 3 below).**
2. **Job Data needs to be adjusted – should be completed by 5/20/22, but it will also be ongoing as we run through the process – (HR SMEs with analysis help from Customer Support)**

    1. **For full-time faculty who are teaching outside of their contracted timeframe during summer term additional part-time faculty job data records will need to be created. When creating these job data records, please use 5/16/22 as hire date.**
    2. **Moonlight jobs must show FAC Employee Class. (Moonlight jobs showing Part-Time Faculty Employee class must be corrected to FAC Empl Class before FWL Calculation occurs.)**
    3. **Missing Salary Plans, Grade, and Steps need to be added to moonlight and part-time faculty employee records.**
    4. **Combo Codes and Earn Codes need to be validated for correct budget information inside PTF and moonlight jobs.**
    5. **More jobs will need to be added, likely, to support contracted work in various departments (often Continuing Ed).**
    6. **Customer Support is available to provide help regarding HCM job data changes.**
3. **Empl Rcds must be corrected in the Schedule of Classes (concurrent work with job data additions/changes) – should be completed by 5/20/22 – (College SMEs with analysis help from Customer Support)**
    1. **Adjunct/moonlight faculty may not be setup under the defaulted Empl Rcd 0 for your college or employee may have more than one employee record number. Employee record must be reviewed/corrected before FWL Calculation runs.**
4. **FWL Calculation is run and errors are corrected – Calculation should be run on 5/23/22 – (Customer Support will be scheduling a webex to help Colleges to help run this process and address any questions)**
    1. **Errors will be evaluated. Some of them will be a result of Job Data issues, others will be a result of missing configuration. Customer Support will work College SME's to resolve calculation issues.**
5. **Calculation/Recalculation results will need to be validated– this should be taking place 5/23/22-06/01/22 – (College SMEs)**
    1. **QCS_FW_CAL_RSLT_FTE_PAY query provides help with validation of calculated data.**
    2. **Contracts are built on the quality of the calculation, so if the calculation is correct the contracts will also be correct.**
    3. **Any needed contract formula adjustments will be addressed during timeframe to resolve calculation issues.**
6. **If Calc results are acceptable, then contracts will be generated – this should be taking place 6/2/22-6/3/22 – (College SMEs; Customer Support will be scheduling a webex to help Colleges to help run this process and address any questions)**
    1. **QCS_FW_CONTRACT_STAT_ALL query provides help with validation of generated contracts.**
7. **When contracts have been generated then they will need to be Approved – this should be taking place 6/6/22-6/10/22 – (College SMEs/Deans)**
    1. **As contracts are approved, emails will trigger to show the contracts to the instructors for signature/rejection.**
    2. **At this time, backtracking is expected for contracts that "look wrong" which means heading back to calculation and validation for some portion of the population based on Dean's feedback.**

8. **After contracts have been approved, pay lines will need to be evaluated for Combo Code completeness and correctness – 6/3/22-6/10/22 – (College SMEs with analysis help from Customer Support)**
    1. **QCS_FW_PAYLINE_CLEAN query will help with this validation.**
    2. **Some manual changes may be needed (combo code evaluation can also be done at the time of calculation, but if there wasn't time earlier here is where it needs to happen.)**
    3. **There will be more backtracking and cleanup at this step.**
9. **Payroll Ok to Pay and HCM Extract will be run (6A, or 6B, or 7A) – this should be performed two days before payroll processing cutoff: for 6A payroll processing, this date is 6/15/22; for 6B payroll processing this date is 6/30/22; for 7A processing this date is 7/15/22. This is for Payroll cutoff and this date is not very flexible. (College HR SMEs with help from Customer Support).**

First Month Tasks

Talent Acquisition Manager (TAM)

First month tasks include the following:

- Run reporting metrics as defined by the college/entity.
- Review the Recruitment Analytics within TAM and disseminate the detail internally where pertinent.

HR Core

First month tasks include the following:

- Bio Demo Cleanup_**Adding Preferred Names**.This task can be done by the HR Administrator at any time.
- The HR Administrator can update employees' preferred names in Modify A Person. By selecting the Preferred Name Format.
- Once the Preferred Name has been added, send a request to your local Security Administrator to update the Name Description in the User Profile.
- Run the **Automated Step Increment** (run this after the 15th of the current month in order for the New Step Increment to be paid on the **A Payroll** for the upcoming month). Users must have the ***ZZ HR Position Manager*** role in order to complete this task.
    - Follow the steps in this QRG to run this process; Automated Step Increment

Benefits

First month tasks include the following:

- Review enrollments entered into HCA (PAY1) post-conversion ensuring the data has been loaded into ctcLink (PeopleSoft)
- Review DRS Calendars associated with Employees in DRS administered plans in CTC Job Data for accuracy.
- Use Query **QHC_BA_DRS_CAL_EE - DR**S Calendar by emplid/paygrp
- Run the Monitor Savings Plan Extensions process prior to the first Payroll cutoff. ***Note: This process needs to be run prior to each payroll to ensure employees that need to have the extension amount added are processed as expected.***
- Review any messages provided by ERP Production Support related to the custom processes related to benefits (i.e. HCA Enrollment, Benefits Auto Enrollment, etc) and make any updates as necessary.

Time and Labor

Once the first day enrollment corrections take place, Time and Labor enters into its normal cycle of data management for the months ahead.

- Enrollments/Inactivation

    - Determine if HR Core Job creators or Time & Labor Admins are managing enrollment/inactivation of Time Reporter Data, primarily as this can be done from Job Data as well as TL enrollment pages
    - Determine who is the Absence Management point of contact as Time and Labor and Absence have a lot of impact on one another (i.e. don't inactivate Time and Labor until Absence has finished processing)
    - Determine the point of contact in HR Core for new hires that need a Comp Time Enrollment, or if that also falls under HR Core as well.
    - Determine who is responsible for ongoing Schedule questions. Schedules can be updated for an employee by supervisors in Manager Self Service, but corrections to an existing effective dated row have to be handled by a TL Admin.
- Reports and Data Management
    - Decide who is running the **queries** for Time and Labor and how often
    - Decide who is running the **reports** for Time and Labor and how often
- Exceptions
    - Exceptions should be cleared for each pay period prior to the Time and Labor cutoff for Payroll processing
    - This can be monitored periodically through the pay period it doesn't need to be left until the last day only
    - They will populate/clear nightly at least, or when the problem is resolved and then Time Admin runs or is run
- Configuration
    - Someone needs to manage the local Time and Labor configuration, which primarily means determining how many days after the last day of the pay period people are allowed to enter/approve time. Typically it's 1, but this can fluctuate based on the Payroll schedule and should be planned for ahead of time
- Processing
    - Someone needs to be responsible for manually running Time Administration hourly on the last day of the pay period (or a day that could be considered the "last day" when the true last day falls on a Saturday or Sunday) as well as the day after the pay period ends in which many managers do their approval for last minute time submissions.
    - Manual entry of prior period timesheets should be done twice a month prior to the Time and Labor cutoff for Payroll. ***Cutoff is final***. Late submissions will have to wait until the following pay period for processing as once Payroll takes the Time and Labor data they will be deep in processing and cannot take "late" manual timesheets
    - A query should be run by noon (12:00PM) on approval day to see what time is pending approval. If possible, someone should be messaging out to those tardy supervisors about approvals needed.
        - Have an escalation plan. Some decision points to consider: If a supervisor doesn't approve do you contact their supervisor to get approval? Does the approval sit until the next pay period? What if a supervisor has a pattern of non-approval?
        - Is Mass Approval part of your process? Who runs it and when?
    - As the fiscal year rolls around, Comp Time Payoff needs to be processed. A decision will need to be made as to who will enter the CTP in employee timesheets. Also for who will enter CTP when employees separate throughout the year.

Absence Management

The first month with have the following Absence Runs:

- Absence Take processing for **A Payroll (Period 01st of month till 15th of month).**
  - Make sure that all the employees put their leave request in the ctcLink PeopleSoft system for all leaves taken from 01st of month till 15th of month.
  - All the leave requests for this period should be approved by their supervisors.
  - As a back-up, the Leave Administrators can also enter the Absence request and Approve absence requests on behalf of the approvers.
  - Only the approved Absence requests will be processed by the Absence process and sent to payroll.
  - The Administrators need to validate the Absence data after the SBCTC Central Payroll Team runs the Absence process. (Absence Validation is done in the **Results by Calendar Group** page Absence Tab). QRG: Using Results by Calendar Group
  - Run the Unpaid Leave report to make sure you review all the leaves which are unpaid because the employee DOES NOT have sufficient leave balance.
  - Make sure all the Absence take validations are completed prior to the Payroll cut-off date for finalizing the Absence run. The SBCTC Central Payroll team is responsible for finalizing the Absence run and pushing the Absence data to Payroll.
- **Absence Take processing for B Payroll (Period 16th of the month till 31st or last day of month).**
  - Make sure that all the employees put their leave request in the ctcLink PeopleSoft system for all leaves taken from 16th of the month till 31st or last day of the month.
  - All the leave requests for this period should be approved by their supervisors.
  - As a back-up the Leave Administrators can also enter the Absence request and Approve absence requests on behalf of the approvers.
  - Only the approved Absence requests will be processed by the Absence process and sent to Payroll.
  - The Administrators need to validate the Absence data after the SBCTC Central Payroll team runs the Absence process. (Absence Validation is done in the **Results by Calendar Group** page Absence Tab).
  - Run the Unpaid Leave report to make sure you review all the leaves which are unpaid because the employee DOES NOT have sufficient leave balance.
  - Make sure all the Absence take validations are completed prior to the Payroll cut-off date for finalizing the Absence run. The SBCTC Central Payroll team is responsible for finalizing the Absence run and pushing the Absence data to Payroll.
- **Absence Accrual/Entitlement processing for month end (Period 01st of the month till 31st or last day of the month).**
  - Leave Accrual/Entitlement process is not linked to any payroll run. This is a separate process which is run after the B payroll run every month.
  - The Administrators need to validate the Absence data after the SBCTC Central Payroll team runs the Absence process. (Absence Validation is done in the **Results by Calendar Group** page).
  - Review all the different classification of employees and make sure all the employees are getting their leave accruals correctly. Validate at least a couple of employees from each employee classification.

- Make sure all the Absence accruals validations are completed prior to the cut-off date for finalizing the Absence Entitlement run. The SBCTC Central Payroll team is responsible for finalizing the Absence Entitlement run.
- The Absence accrual data updates the Absence Balances for all the employees and does not need to be sent to payroll.

Payroll

First month activities for Payroll are related to the actual processing of the semi-monthly Payroll. The Payroll Checklist is used to guide you through the payroll process. **Payroll Checklist QRG**

In addition to the Payroll Checklist, a Payroll Plan should be created every pay cycle to list the tasks outside of the payroll checklist (i.e. HR cutoff times, Absence cutoff times, TL cutoff times, etc.). As part of the implementation process, an initial payroll plan will be provided for the first payroll after go-live and can be used as a base for subsequent payrolls.

Use the link below to be directed to the **ctcLink PeopleSoft Reporting** page located on the SBCTC Website. Select the **+** sign to expand the **ctcLink PeopleSoft Query Supporting Documentation section**, then select **Most Used and Favorite Queries**. (Feel free to review other documents!)

- **ctcLink PeopleSoft Reporting**

Faculty Workload

All the data to prepare FWL to be fully run the first time will need to be cleaned, calculated, and then turned into contracts which in turn need approval. The entire goal is to have a smooth payroll the first pay period of the new term.

- Payroll PSHUPs will be loaded to finish out the current term contracts
  - This could be one or two pay periods, depending on the Go Live term
- Absence adjustment for the next month's accrual will need to be finalized and loaded to Absence Management as the current term will not have FTE from contracts to draw from in PeopleSoft
- Job Data needs to be adjusted – this work is first day/week but ongoing as well
  - MLC jobs all come over in conversion as PTF Empl Class. All rows must be corrected to FAC Empl Class before FWL Calculation occurs
  - Combo Codes and Earn Codes need to be validated for correct budget information inside PTF jobs
  - More jobs may need to be added to support contracted work in various departments (often Continuing Ed)
- Empl Rcds must be corrected in the Schedule of Classes for all non-0 entries
  - ***Many people will not be paid under their Empl Rcd 0 job, and this must be corrected before FWL Calculation runs***
- FWL Calculation is run and errors are corrected
  - Errors must be evaluated. Some of them will be a result of Job Data issues, others will be a result of missing configuration. Initial calculation will therefore be done under project/SME supervision.
- Calculation results will need to be validated

    - If UAT has been performed thoroughly, this should go quickly
- If Calc results are acceptable, then contracts will be generated and validated
    - Again, if UAT has been performed thoroughly then this should go quickly
- When contracts have been generated then they will need to be Approved
    - This can be done through Mass action or through contacting approvers to evaluate
    - The turnaround will need to be fast for this, so planning will be needed about the Approval process for this first term
- After contracts have been approved, Paylines will need to be evaluated for Combo Code completeness and correctness
    - If the Job Data was sufficiently cleaned at the beginning, this should go quickly. Some manual changes will probably be needed for uniquely funded faculty or splits
- Payroll Ok to Pay and HCM Extract will be run
    - At this point, Payroll will receive the FWL data and Payroll will use it to insert pay into paysheets
    - Payroll will need to make sure all Earn Codes are correct (again, Job Data cleanup should account for this)
    - Payroll will need to make sure there is no double payment (i.e. something is being paid in FWL that was also entered into Additional Pay in Payroll)

Additionally it would be a good idea to have conversations about the FWL lifecycle and business practice internally. If these questions don't yet have an answer then they should have an answer by mid-term. From the listing below, you can see how many (repeating) tasks need attention.

HCM Support Staff at SBCTC can be consulted as well to determine best practice.

Some decisions to be made include the following:
- Decision made on how to time the next lifecycle/cutoff.
- Decision made on who is responsible for changes to HR data.
- Decision made on who is responsible for monitoring the progress of the Schedule of Classes/FWL Calculation.
- Decision on who is responsible for communications regarding the contracts that should be generated and when generation should take place.
- Decision on who will run the processes to send the HR payline data to Payroll
- Decision on who is the Payroll contact when there are negative paylines. Also, who will inform (from FWL to Payroll) that pay calendars for the calendar year have been built.
- Decision on who is responsible for contacting the service desk to make changes to FWL configuration.
- Decision on who will manage the local pieces of FWL configuration that don't require service desk tickets and when they will roll the term.

Resources

ctcLink Reference Center – Quick Reference Guides (QRGs), videos, other resources.

Most Used and Favorite Queries