



TO: Chief Financial Officers  
Payroll Coordinators  
Human Resource Staff

FROM: State Personnel Department  
State Auditor's Office

Date: May 17, 2022

RE: State's Disability Plan – Updates for PS9.2 Processes

The integration of HR, Payroll, and Financial operations within the PeopleSoft 9.2 system enables many efficiencies and requires many changes in business processes. One of those changes concerns the process of moving employees in/out of the State's Short- and Long-Term Disability Plan.

#### Overview

For the first 30 days of leave, an employee stays in their agency business unit and must be either using accrued time or placed on leave or a combination of leaves, including family medical leave, authorized unpaid leave of absence, and health leave.

When the employee becomes eligible for short-term disability (STD), the agency will be notified by JWF. The agency will need to place the employee on STD leave (STD/STD), and they will remain in the agency's business unit. Agency Payroll must inactivate the employee in Maintain Time Reporter. The position's Department Budget will remain under the agency's Business Unit. Wages submitted by JWF will be charged to the disability fund. Fringe benefits will continue to be charged to the agency. This is a change to the previous process where both wages and fringes were paid by the disability fund.

When the employee becomes eligible for long-term disability (LTD), the agency will be notified by JWF. The agency will need to place the employee on LTD leave (LTD/LTD) and maintain time reporter will continue to be inactive. SPD will clone the position and move the position's Department Budget to the JWF business unit (8012), assigning funding to SpeedType 0710000001. All wages and fringe benefits will be charged to the disability fund.

If an employee is on LTD but elects Option 3 (using their own accrued time day for day), the agency will place the employee on LTD leave (LTD/LTD) and inactivate the employee in Maintain Time Reporter. SPD will clone the position and move the position's Department Budget to the JWF business unit (8012), assigning funding to SpeedType 0710000001.

For more information about how to enter the leaves in PeopleSoft, please see the [9.2 Data Entry Reference Guide](#).

The 9.2 Data Entry Reference Guide can be found under JAM within SuccessFactors.

Details about procedures and responsibilities for tasks are contained in the attached document.

Procedures

BU = Business Unit  
 TL = Time & Labor  
 ABS = Absence Management System  
 HR = Human Resources

**Days 1-30: Elimination Period**

BU	Employee stays in the home agency's business unit.
TL	Employee stays as an Active Time Reporter.
ABS	Employee or Manager enters Absence Request for the use of paid, unpaid leave. Only employee or absence administrators can enter extended absences (FML or NPL).
Field/Agency HR	If an employee is unpaid for an entire pay period or more, see <a href="#">9.2 Data Entry Reference Guide</a> for appropriate Action/Reason Codes and data entry procedures. Leaves must be entered timely and accurately for benefits billing and coordination of benefit purposes.

**Typically starting Day 31 and continuing up to the next 5 months: Short Term Disability Benefits Period (STD)**

NOTICE: JWF sends notice to Field/Agency HR and SPD's HR Data that an employee is picked up for benefits on [DATE].

Field/Agency HR notifies Agency Payroll and the Manager.

BU	Employee stays in the home agency's business unit.
TL	Agency Payroll should <ul style="list-style-type: none"> <li>• inactivate the employee as a Time Reporter with an effective date of the PPB of the pay period in which JWF picks up the employee for disability benefits and</li> <li>• provide JWF with time EE used in Elimination Period.</li> </ul> JWF will pay STD hours + leave hours, then report leave time hours on interface and create Journal voucher to Financials to charge hours back to agency for wages.
ABS	No timesheet entry or absence requests. JWF Specialty will provide interfaces to PS with wage information, but fringe benefits costs remain with the agency.
HR	See <a href="#">9.2 Data Entry Reference Guide</a> for appropriate Action/Action Reason Codes and data entry procedures. Agency/Field HR – Enter employee on STD/STD in Job Data effective the actual date of the action, not the beginning of the pay period.

	If employee was placed on a paid (PLA) or unpaid (LOA) status in job data during Elimination Period, then Field/Agency HR must return the employee from that leave before placing employee on STD/STD.
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### Transfer to Long Term Disability Benefits Period (LTD) from STD

NOTICE: JWF sends notice to Field/Agency HR and SPD’s HR Data that an employee is picked up for LTD benefits on [DATE].

Field/Agency HR notifies Agency PY and Manager.

BU	Employee is moved to LTD business unit (BU 8012).
TL	Inactive Time Reporter status continues.
ABS	No timesheet entry or absence requests. JWF Specialty will provide interfaces to PS with wage information.
HR	<p>See <a href="#">9.2 Data Entry Reference Guide</a> for appropriate Action/Action Reason Codes and data entry procedures.</p> <p>Using Fluid Job Data, Field/Agency HR enters employee on RFD/RFD effective the actual date of the action, not the beginning of the pay period and adds a note to that row to add the LTD/LTD row.</p> <p>HR Data will clone the employee’s records and place them in BU8012 assigning funding to SpeedType 0710000001. Department Budget Table must be updated using effective date as PPB the pay period the employee is moved to BU8012 and assigned SpeedType 0710000001.</p>

### Return to Work from Disability

NOTICE: JWF sends notice to Field/Agency HR that an employee’s disability benefits end on [DATE].

Field/Agency HR notifies Agency Payroll and Manager.

BU	If on LTD, the employee is returned to their home agency’s business unit from the LTD business unit.
TL	<p>Agency Payroll</p> <ul style="list-style-type: none"> <li>• activates the employee as a Time Reporter with an effective date of the first day of the pay period (PPB) employee returns to the agency,</li> <li>• submits necessary positive adjustments provided by JWF using PSHUP, and</li> <li>• enters leave adjustment(s) for any supplemental usage (Option 2 or 3).</li> </ul>

ABS	Employee and Manager proceed with routine operations for requesting and approving absences.
HR	Using Fluid Job Data, Field/Agency HR returns the employee from leave using RFD/RFD effective the actual date of the action, not the beginning of the pay period.  HR Data will return the employee to the home agency business unit. Department Budget Table must be updated using effective date as PPB the pay period the employee is returned to home business unit.

**TORT Claims for Work Injury related to wrongful actions of, for example, DOC offenders (one year at full pay)**

First 6-months

BU	Employee stays in the home agency's business unit.
TL	Agency Payroll maintains employee as active Time Reporter.
ABS	Employee or Manager enters General Absence Request for the use of Worker's Compensation code.
HR	Using Fluid Job Data, Field/Agency HR places the employee on leave using PLA/TRT effective the actual date of the action, not the beginning of the pay period.

Return to Work within first 6-months

BU	Employee stays on their home agency's business unit.
TL	Employee continues as active Time Reporter.
ABS	Employee and Manager proceed with routine operations for requesting and approving absences. Worker's Compensation code will only be used if employee has absences for follow-up treatments or appointments related to the TORT injury.
HR	Using Fluid Job Data, Field/Agency HR returns the employee from leave using RFL/RPL effective the actual date of the action, not the beginning of the pay period.

Second 6-months, if employee's absence continues

BU	Employee is moved to LTD business unit (BU 8012).
TL	Agency Payroll should inactivate the employee as a Time Reporter with an effective date of the PPB of the pay period in which JWF picks up the employee for tort benefits. JWF will report tort hours on interface and create Journal voucher to FIN to charge hours back to agency for wages, but fringe stays in Agency.

ABS	No timesheet entry or absence requests. JWF Specialty will provide interfaces to PS with wage information.
HR	<p>See <a href="#">9.2 Data Entry Reference Guide</a> for appropriate Action/Action Reason Codes and data entry procedures.</p> <p>Using Fluid Job Data, Field/Agency HR enters employee on RFL/RPL effective the actual date of the action, not the beginning of the pay period and adds a note to that row to add the LTD/LTD row.</p> <p>HR Data will clone the employee's record and place them in BU8012 assigning funding to SpeedType 0710000001.</p>

**Return to work from LTD** (see above)