JDE E1 HCM SIG Conference Call

# Meeting Information

Please join our monthly conference call to learn more about topics of interest, current issues, and workarounds/resolutions, and participate in our Open Forum.

**Board Members:**

* Karla Pappas @ Henkels &McCoy (kpappas@henkels.com)
* Katie Lewis @ Brasfield & Gorrie (KLewis@BrasfieldGorrie.com)
* Evelyn Bian @ Port of Portland (evelyn.bian@portofportland.com)
* Trina Patterson @ Jackson County (PatterTM@jacksoncounty.org)

**Oracle Representative:**

* Angelin Isaac

**Education Coordinator**

* Manisha Chukpue-Padmore

## If you would like items added to our next agenda, please contact KLewis@BrasfieldGorrie.com and Evelyn.Bian@portofportland.com.

# 2023 Goals:

1. Team Goals 2023!!
	1. Contact List – In Process
		1. New link coming soon!
		2. Working on new Smartsheet for our team to input contact and usage information
	2. Demos
		1. Expand demos – specific for JDE functionality
		2. Any non-JDE related demos to be scheduled outside of monthly meeting
		3. Contact Trina Patterson if you have a demo idea
	3. Enhancements
		1. Refresher on how to enter and vote (see meeting recording from April 2023 meeting)
		2. Increased collaboration with Oracle to achieve at least 3 enhancements
	4. Bug/Open Issue tracking
		1. Succinct listing with status

# Monthly Updates:

1. HCM SIG Board Positions:
	1. Continue to expand the team – looking for 1-3 additional members
2. 401k Focus Group
	1. Recurring Meeting, 3rd Wed of the month – 2 PM EST

Microsoft Teams meeting

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[Click here to join the meeting](https://teams.microsoft.com/l/meetup-join/19%3Ameeting_ZGVlMjhhY2EtYmNjMi00Y2U2LWFlOTEtOGNiNTVlNjZjNWY4%40thread.v2/0?context=%7b%22Tid%22%3a%2268f5b4cd-deb9-4979-a5ca-35871d734a22%22%2c%22Oid%22%3a%2259492c28-5cf2-40d5-9c5c-a0f565ae3b93%22%7d)

Meeting ID: 263 604 440 158
Passcode: knC7e2

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1. Demo Request: Identifying/applying/testing system updates
	1. Request submitted to Angelin
	2. Goal: include demo in June session
2. Enhancement Tool
	1. Still working on coordinating with Oracle representative
	2. Noticed enhancements already been added – THANK YOU!!
	3. Rank the enhancements
	4. Walk through/discussion of current enhancements

# Open Forum New

1. Annie @ Granite Construction: Created mobile app to create time entry, MCU and MCUO, shows who is paying for the activity and where it occurred. They were doing fetch on union type and step based on where they were working (from MCUO), but when it gets into payroll, payroll is trying to fetch the fringe benefits based on the charge-to instead of the site. They are told that MCU is what they use to fetch the fringe benefits. Doesn’t make sense when you look at MCUO. Using Record Code (RCCD) = 1. But often MCU is not set up because they are all over the place so they may not always be working in one location so they need to capture that. MCU is representing the charge to, MCUO is representing the physical site. To get the charging correct they do a fetch of data and create a journal entry to charge correctly. Certified Payroll uses the MCUO.
	1. SIG member confirmed that this is also how they have it set up and their fringe benefits calculates correctly.
	2. Martin Thomas @ Balfour said they only use MCU.
	3. Is it possible the use of MCU and MCUO is an outdated design that should be re-evalulated?
	4. Katie Lewis—they use prevailing wage and it works properly; RCCD 2 uses GMCU; Katie believes they use MCU and not MCUO.
	5. SIG member overrides their home business unit to represent where they are working. They use Record Type 2 and Record Type 3. RCCD 1 is pay only. RCCD 2 pays as well as bills. RCCD 3 is bill only.
2. Danielle @ Turner Industries in Louisiana: AZ has voluntary residence tax and JDE is finally pulling the right AZ tax but now it isn’t pulling the Louisiana tax—cannot figure out how to pull both state’s taxes
	1. Martin Thomas @ Balfour Beatty Construction can connect their BA with Danielle
3. Dawn Perry @ Leadcor: How are companies handling employees who cross state lines? They are currently taxing just based on their primary residence but now they have employees who have jobs in several states and their exec wants to start taxing once employee is there for 10 days. They have customized time entry so some of the suggestions using standard job functionality may not work for them. Also concerned about the impact on the employee having to file taxes in many states.
	1. Martin @ Balfour Beatty: is set up to tax based on the charge-to job
	2. Phil Herd @ Hoffman: there is a job site address book record that can be associated with Job Master; set up Group Code
	3. SIG member has exception report that shows job sit and union code to determine what didn’t work correctly using Speed Time Entry; has a bug entered
	4. SuzAnne Garcia @ Pinal County: they follow the state’s rules on when you need to start charging the tax (ex: Florida is 90 days)
	5. Katie Lewis: Job Master has payroll tax area, most of their field employees do not pull their tax area from employee master and pulls from job instead
4. SuzAnne Garcia @ Pinal County in AZ: Still trying to figure out the group limits for the IRS last three years deferred comp. They have regular def comp, age 50+ def comp, the ‘last three years before retirement’ def comp (something like $45K limit). They don’t have any way of setting it up. They have tried the benefits side and the PDBA side. The reg and age 50+ works, but they can’t get the limit of the ‘last three years’ to work.
	1. Nobody had this situation. SuzAnne will contact Oracle.
5. 05/08/23 Update:
	1. Martin @ Balfour: Check the flag in ‘Total Time and Accounting’. TTAR field

Original Issue: helping a payroll team that uses autopay for salary EEs; one EE that used to be hourly weekly, now salary bi-weekly (Deanna Johnston)

* 1. Tried:
		1. no other pay types calculating to offset
		2. no interims
		3. setup to prorate – could this be an issue?
		4. EE master looks identical to other EEs that are working
		5. Did have a lockout in the F07300 that was cleared
		6. Effective dating?
	2. Comments:
		1. Try a new payroll ID (test one) with just that employee - curious if it still occurs?
		2. Jude Ejimakor: You are not to suppose to have two records in the job master
			1. Is there any message in the employee que? No
			2. Be sure that F060116 and F060118 have the same number of records. If not, do a comparison to see who is the extra record. This sometime leads to unexpected result.
		3. Don Long: F060118 – confirm no issues
1. 05/08/23 Update:
	1. Dawn Perry @ Leadcor--Probably will use SQL to update the data that is incorrect. >>

Original Issue: Any Canadian payroll? (Tina Andrews)

* 1. Issue:
		1. Had a lot of issues – GTL stopped being included in the wages; did receive a fix for it
		2. Wondering how people are handling the correction
		3. New F5 calculation – not doing anything but calculating and storing it. Is that the intent?
			1. New functionality offered in 2023
	2. Comments:
		1. Has notes, reach out if desired- Christine Keenan
		2. E1: 77: Leg/Reg Enh - Support Canadian F5\_prev in Vertex Release 4.4.7 for 2023 (Aka Canada 2023 Cpp Enhancement Phase 1) (Doc ID 2913997.1)
1. Update 05/08/23:
	1. Evelyn Bian—set up a group of PDBAs to calculate gross wages, exempted deductions, then a third PDBA that has the rate to multiply against the taxable wages. Set up a set of PDBAs for every employee group because they may negotiate a different rate for the Port of Portland to pay the employee portion.
	2. Is there an enhancement to handle multi-state paid family leave? Ask Oracle.
	3. Vertex says they are tracking this, suggest that Vertex provide the solution.

Original Issue: PFML reporting: being required by various states – becoming laborious as more and more states are jumping on this (Tina Andrews)

* 1. No current functionality with Oracle to support this
	2. Looking for solutions to support the new taxes
1. Update 05/08/23:
	1. Phil Herd—you have to choose the state that the employee will have the SUI in, so if employee is bouncing back and forth between the states on the Employee Master specify which state to calculate the SUI against, just pay one state (either the Work Tax Area or the Residence Tax Area)
	2. Cade @ Amalgamated Sugar: They have employees who work for Oregon but live in Idaho so they do not withhold OR State Tax but they do withhold OR Transit Tax; can show Karla the setup if it would be helpful

Original Issue: with WA/OR SUI taxes (Karla Pappas)

* 1. Issue:
		1. Hard coded employee master to a single SUI state (using “W”)
		2. Between WA and OR, certain G and H types that are calculating with the SUI state incorrectly
			1. OR: G1 – Statewide Transit Tax - should follow state withholding, not SUI state
			2. WA: G2/H2 – PFML – should follow work state withholding, not SUI state
		3. Documenting the issue – will be putting in an SR
	2. Comments:
		1. We are having the same issue and would love to hear more if you found a workaround! (Diana Rambler) Drambler@irex.com
1. 05/08/23 Update:
	1. No update.

Original Issue: Gross to net issues (Trina Patterson)

* 1. Issue/Question:
		1. Has anyone done a changes only instead of resetting payroll?
		2. Had a gross to net error caused by leave without pay
	2. Comments:
		1. Recommend setting up in lower environment and testing
		2. Karla Pappas: Gross to nets we’ve encountered were due to timecards being deleted. The payment was generated (see proper gross to net – working 40 hours), but the timecards are no longer in the F06116. Due to missing timecards, we are forced to reset the payment.