



Programs for American Fidelity WorxTime

There are 3 programs that can be run to create the Employee Upload File:

WRXTM_EMP American Fidelity WorxTime Employee Upload File (UDMS)

W2WAGE W2 Wage Prior Yr Info (AF WorxTime Optional)

WRXTMBASIC AF WorxTime Basic Employee Upload (Optional) SSDT version

These programs are located in the USPS>USPS_LCL menu on the last screen as shown below.

USPS_LCL	Locally Defined Programs and Utilities
Oct 08 15	Local Menu
31. W2WAGE	W2 Wage Prior Yr Info (AF WorxTime Optional)
32. WORKSH	Employee Payroll Worksheet
33. WRXTMBASIC	AF WorxTime Basic Employee Upload (optional)
34. WRXTM_EMP	American Fidelity WorxTime Employee Upload File (UDMS)

The W2WAGE program is optional can be used if you prefer to report the prior year W2 taxable wages. It is our understanding that you can report the **current** Federal taxable wages instead so the WRXTM_EMP program has been updated to include this in the Salary column. The WRXTMBASIC program creates a very Basic employee upload file which should work well if you choose to load the current Federal YTD taxable gross after each payroll.

WRXTM_EMP – American Fidelity WorxTime Employee Upload File

This program can be run after each payroll has been processed if desired. In most cases districts are using this program for their initial employee upload and then loading only new employees or updating employees with termination dates to WorxTime. This program can be used to assist with the updates by making use of the additional fields available on the output file to filter the data.

This is the program that will be used to pull the information for your initial load into WorxTime. It will also be used when new employees are added. This program will create an output file with the default name of AF_EMPLOYEE_UPLOAD.CSV and will need to be transferred to your PC then verified and updated prior to transmitting to American Fidelity’s secure site. Please **DO NOT** email this file as it contains employee SSN. Only one record per employee should be included in the file for upload. All uploads must be a .csv file but can start as Excel files and Save as comma delimited file(.csv).

In the program you can select to include only employees with a specific job number. This works well if your district assigns job 01 as the primary job for all employees. But you can leave this field blank to select all jobs. You can then filter the field in Excel to remove any jobs that should not be included in the file.

The program also contains a prompt to allow you to select only active employees by entering the earliest date paid you want to use. For example, if you enter 01/01/2014 in the program then only employees whose last paid date was 1/1/14 or later will be included in the file.

Note: Per AF – Only need active employees from the start of the first stability period (7/1/15)

Note: Per AF - For the ACA "breaks in service" check, you would use the date of 05/01/2014 to capture those employees who were paid at the beginning of the district's measurement period.

AMERICAN FIDELITY WORXTIME EMPLOYEE UPLOAD FILE

This program will create the Employee Upload file for the American Fidelity WorxTime program. The file will need to be transferred to your PC and submitted through the American Fidelity secure website. Please DO NOT email this file as it contains employee SSN.

Please reference the 'Programs for American Fidelity WorxTime' document located on the META Solutions Fiscal Services website under the payroll link for more details.

Output file:

AF_EMPLOYEE_UPLOAD.CSV

- Selection Options -

Enter Job Number to Select (Blank for All):

___/___/___

Enter Last Paid Date to Select From:

___/___/___

CoFEIN – report your District Federal ID Number in this field.

BenefitElig – value should be Y or N

Country – typically blank, will pull country from employee BIOSCN record.

Employee Type – this field is used to report whether the employee is considered Full-Time (FTE) or Variable Hour (VHE). The **BIOSCN User Defined Fields: Code 1** field can be used to enter a 2-character value to indicate type of employee. The codes FT for full-time and PT for part-time (or VH for Variable Hour) could be used as a suggestion and WorxTime informed that FT equal FTE and PT (or VH) equals VHE. Additional codes that could be used include CO (Cobra), RE (Retiree), ST (Short Term), SN (Seasonal) are other suggestions. If this field has a value it will be pulled into this column. However, each district can determine how they want to populate this column and should contact WorxTime to come to an agreement. Some schools are using the employee pay group and some are using the FTE (full-time equivalency) field.

These fields will be included in the csv file in the Custom Reporting columns named Pay Group and Position FTE respectively and can be copied and pasted into this column if used.

Salary column will automatically populate with the employee's **current Federal YTD taxable wage** value from the 001 DEDSCN record. If you prefer you could report the prior year W2 taxable wage value by running the W2WAGE program and using VLOOKUP to populate the value in this column.

Pay Rate – this is optional to report but the employee **Daily Rate** from JOBSCN Screen 2 will be pulled automatically. You can blank out this column if you do not wish to report these values.

Pay Period Name column will now be populated with the **Pay plan description** of bi-weekly or semi-monthly based on the JOBSCN Screen 1 record **Pay plan** value. You can replace this information with whatever you have agreed with WorxTime to use.

Employee Group Name – this is optional to report but the **Pay group name** will populate this column. You can blank out this information or populate it with whatever you agreed with WorxTime to use. It will match up the Pay group designator on JOBSCN1 with the definition on USPSDAT>PGRPED. The pay group description will be inserted into the column.

On 4/21/2015 the Separation Reason, Separation Date and Terminated fields from JOBSCN1 were added to the spreadsheet. This data can be used to filter out job records that you don't want to include in the upload file. Only one record per employee should be included in the file for upload.

Once you open the output file in Excel, you will need to manually enter data in the MeasurementGroup column and any other columns that you wish to report a different value such as PayPeriodName and EmployeeGroupName.

Additional columns are included in the file beginning in column W: Hours in Day; Retire Hours, Last Date Paid, Job No, Job Status, Position FTE, Pay Unit Amount, Pay Unit Code, Pay Group, Job Term Date, Sep Reason, and Sep Date. **Please delete these columns** unless you want to load that information into the WorxTime system. If you want to load any of the extra columns please label them CustomReporting1, CustomReporting2, etc.

SAFARI ODBC – For those of you familiar with Safari ODBC to pull your data directly into Excel, you can use the **MEC_EMP_FED** table to pull the same information as the WRXTM_EMP program. The fields selected from this table for the WRXTM_EMP program are: EMPLOYEE_ID, TRUE_SSN, LAST_NAME, FIRST_NAME, MIDDLE_NAME, SUFFIX_NAME, STREET, STREET2, CITY, STATE, COUNTRY, ZIP_CODE, HIRE_DATE, TERMINATION_DATE (from BIOSCN), USER_DEFINED_CODE_1 (for employee type code, if you use this field in BIOSCN),

YTD_TAXABLE_GROSS (current YTD taxable gross from employee 001 DEDSCN record), UNIT_AMOUNT, PAY_PLAN_DESC, GROUP_DESCRIPTION, HOURS_IN_DAY, RETIRE_HOURS, LAST_PAID_DATE, JOB_NO:JOB_POS_REC, JOB_STATUS, POSITION_FTE, UNIT_AMOUNT, PAY_UNIT, PAY_GROUP, SEPARATION_REASON, SEPARATION_DATE and DATE_TERMINATED (from JOBSCN). Records were selected that matched the following criteria:
LAST_PAID_DATE >= mm/dd/yyyy (date of your last payroll)
JOB_NO = xx (job number if you want to select specific jobs, skip if you want all)

Hours Upload File – AFFORD Program

As of the March 2015 SSDT (State Software Development Team) State Software Release, the AFFORD program now includes the employee Social Security Number. We recommend that this program’s CSV output file be used for the WorxTime Hours Upload file.

****Please note: The AFFORD program looks at the Calendar Start Date on JOBSCN 1. This date should be the hire date. This date should not change as new contracts are entered. If it is, employees will be excluded.**

If an employee was terminated (termination date entered in BIOSCN – Screen 2), then was rehired (rehired date entered in BIOSCN – Screen 2: User Defined Fields - Date 2 field and it is after the termination date) and is within the selection dates entered, then the employee should be included on the AFFORD report. This information applies if the ‘Exclude based on termination date?’ flag in AFFORD is set to ‘Y’.

Below is an example of a screenshot of the AFFORD program options. For more details on the AFFORD program options please review the AFFORD chapter in the SSDT USPS Reference Manual at <https://wiki.ssd-t-ohio.org/display/usps/AFFORD-reporting+for+Affordable+Care+Act>

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AFFORD - Affordable Care Act Reporting

Report File Specifications:
  Print options page? (Y/N):  Y

Sort Options:
  Sort:                        ID

Selection Criteria:
  Beginning Date:              02/06/2015
  Ending Date:                 02/20/2015

Exclude based on termination date? (Y/N):  N
Exclude employees with insurance? (Y/N):   N
Calculate based on number of weeks or months? (W/M): W
Calendar for calculating breaks:            001

Retrieve retire hours from history 1 of 2
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NOTE: Some jobs (such as coaches) get paid once over a stretch period. Therefore, the period begin and end dates could stretch over many months and may not have been included if the period end dates do not fall inside the measurement period. To accommodate this, AFFORD will include those checks where the period end date is greater than or equal to the input measurement start date (or calendar start dates if after measurement start date) and the period end date is less than or equal to the input measurement stop date or termination date.

Transfer the AFFORD.CSV file to your PC.

CoFEIN (District Federal ID number)(Column A – WorxTime, Column M - AFFORD) - Required

EIN (this is the SSN)(Column B – WorxTime, Column B - AFFORD) - Required

LastName(Column C – WorxTime, Column C - AFFORD) - Required

FirstName(Column D – WorxTime, Column C - AFFORD) - Required

PayPeriodEndDate(Column E – WorxTime, Column G - AFFORD) - Required

HoursWorked(Column F – WorxTime, Column H - AFFORD) - Required

Location(Column G) – Not Required

Paycod(Column H) – Not Required

Pay Per Earnings Period(Column I – WorxTime, Column O - AFFORD) – Not required, however cannot claim safe harbor choices if not uploaded

Hourly Rate(Column J – WorxTime, Column P - AFFORD) - Not required, however cannot claim safe harbor choices if not uploaded

Annual Salary(Column K – WorxTime, Column Q - AFFORD) - Not required, however cannot claim safe harbor choices if not uploaded

Upload to WorxTime after each payroll or monthly based on your policy.

*****Update*** - According to Gail Briggs, WorxTime Implementation Team, the AFFORD program spreadsheet can be sent “as is”. There is no need to change the headers or to make changes to the columns. WorxTime will make these changes for each district.*******