

OPA Training Sourcebook

April 2017

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Introduction

The New York City Office of Payroll Administration was established to consolidate and coordinate payroll functions, establish policies, develop uniform procedures, and implement and maintain the Payroll Management System (PMS) that pays the municipal workforce for the City of New York. In order to assist in fulfilling these tasks, the Training Unit of OPA's Citywide Payroll Systems Maintenance Division was created. Specifically, the Training Unit designs, develops and delivers all instructional material pertaining to PMS for New York City agencies.

In March 2015, the agency underwent a re-organization. As part of the re-organization, the training teams for the CityTime project, and CPSM division, were merged into a unified training division, the HR/Payroll Training Unit. The unit is responsible for developing and delivering instructional materials for all of the components of the City's payroll system.

This catalog presents the PMS and CHRMS courses currently offered to NYC personnel by the OPA HR/Payroll Training Unit. These courses have been designed in response to the many needs expressed by managers, supervisors and staff citywide. As needs change, course revisions and updates will be circulated.



The Office of Payroll Administration's HR/Payroll Training Unit is accredited by the International Association for Continuing Education and Training (IACET). OPA HR/Payroll Training complies with the ANSI/IACET Standard, which is recognized internationally as a standard of excellence in instructional practices. As a result of this accreditation,

OPA HR/Payroll Training is authorized to issue the IACET CEU.

While it is not academic credit, the CEU recognizes and documents an employee's efforts to broaden work knowledge, skills and attitudes. The OPA HR/Payroll Training Unit will issue certificates of completion at a course's conclusion and, upon request, will provide a transcript of CEUs earned. Please refer to the individual course listing for information on CEUs awarded for completion of the course.

The HR/Payroll Training Unit hopes you will spend some time reviewing the course offerings. The Request for PMS and CHRMS Training forms are included at the end of this catalog. Finally, suggestions are always welcome. Please submit them via a Remedy ticket.

Transcripts: Personal transcripts are available by contacting OPA HR/Payroll Training at opatrainig@fisa-opa.nyc.gov.

Payroll Management System (PMS) Courses

☞ **Note:** Participants SHOULD NOT register for Basic and Maintenance courses in the same functional area in the same semester (*for example, Basic Timekeeping and Timekeeping Maintenance*).

Basic PMS Courses:

Courses that focus on the basic elements, procedures, and transaction processes of the NYC Payroll Management System by functional area: Personnel, Timekeeping and Payroll.

Employees should attend these courses in conjunction with on-the-job training. Each course concentrates on instruction for preparing specific pay and leave transactions and how to interpret and use system-generated reports.

Course 2A: Basic PMS Personnel

PMS Transaction processing for the Personnel functional area. Entering and updating employee personnel attributes.

Objectives:

- Basic PMS concepts and terms.
- Creating a personnel record for an employee who is new to PMS (New Appointment).
- Create an additional job record for an employee who has an existing recording in PMS (Job Appointment).
- Update an employee personnel record (Employee Update).
- Process a Retro Leave Trigger Transaction.
- Special personnel transactions (Change to an Employee's SSN, Change of Address, Adjustment of Agency TICS Leave, Processing Additions to Gross).
- Access Personnel transaction reports.

Prerequisite:

1. Personnel or Human Resources staff who have less than one year of PMS experience, who are working with, or will work with, NYCAPS/PMS to process employee personnel transactions.
2. Employees with experience in PMS who never attended formal training are also welcome to attend this class.
3. Participants should not register for Course 2A-Basic PMS Personnel, and Course 3A-PMS Personnel Maintenance, in the same semester.
4. All participants must be approved by their agency to attend PMS Training as part of their job responsibilities.

Length: 2 days.

CEUs: 1.0

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, business case analysis and application.

Course 2B: Basic PMS Timekeeping

PMS Transaction processing for the Timekeeping functional area. Entering and adjusting the employee's weekly timesheets; manual adjustment of cumulative leave balances.

Objectives:

- Basic PMS concepts and terms.
- Processing the employee's weekly timesheet.
- Processing an adjustment to the employee's weekly timesheet.
- Calculate and process timesheet adjustments for Calendar Day Proration of Employee's Regular Gross Pay.
- Calculate and process timesheet adjustments for Supplemental Payroll.
- Timesheet transactions related to WCS (Workers Compensation System).
- When and how to use the Manual Leave Adjustments transaction to adjustment cumulative leave balances.
- Monthly Leave Accrual Processing.
- Access timekeeping transaction reports.

Prerequisite:

1. Timekeeping staff who have less than one year of PMS experience, who are working with, or will work with, CityTime/PMS to process employee timekeeping transactions.
2. Employees with experience in PMS who never attended formal training are also welcome to attend this class.
3. Participants should not register for Course 2B-Basic PMS Timekeeping, and Course 3B-PMS Timekeeping Maintenance, in the same semester.
4. All participants must be approved by their agency to attend PMS Training as part of their job responsibilities.

Length: 3 days.

CEUs: 1.5

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, business case analysis and application.

Course 2C: Basic PMS Payroll

PMS Transaction processing for the Payroll functional area. Entering and updating employee payroll and deduction information; taking action on pending pay details; deductions; pay cycle processes.

Objectives:

- Basic PMS concepts and terms.
- Process a Request for Supplemental Payroll.
- When and how to process a One-time Payment transaction.
- Procedures to LWOP an Employee after Pay Calc.
- Procedures for recoupment of overpayments.
- Analyze and take action on Pending Pay Details.
- Process a Retro Pay Trigger Transaction.
- Process and review elective deductions.
- Review and take action on Direct Deposit of net pay.
- Procedure for payroll reconciliation and pay cycle processes.
- Access the payroll transaction reports.

Prerequisite:

1. Payroll staff who have less than one year of PMS experience, who are working with, or will work with, PMS to process employee payroll transactions.
2. Employees with experience in PMS who never attended formal training are also welcome to attend this class.
3. Participants should not register for Course 2C-Basic PMS Payroll, and Course 3C-PMS Payroll Maintenance, in the same semester.
4. All participants must be approved by their agency to attend PMS Training as part of their job responsibilities.

Length: 3 days

CEUs: 1.5

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, business case analysis and application.

PMS Maintenance Courses:

Courses designed to reinforce the basic elements, procedures, and transaction processes of the NYC Payroll Management System by functional area: Personnel, Timekeeping and Payroll. Specific transactions and system-generated reports will be discussed according to participants' needs.

Who should attend: Employees who **have already attended** Basic PMS training at least **six months prior**; employees with at least one year of work experience in any of the three functional areas of PMS (Personnel, Timekeeping, or Payroll).

Course 3A: PMS Personnel Maintenance

This course reviews the basics of personnel processing in PMS as described in course 2A-Basic PMS Personnel.

Prerequisite:

1. Successful completion of Course 2A-Basic PMS Personnel, or one year of work experience in any of the three functional areas of PMS (Personnel, Timekeeping, or Payroll).
2. Participants should not register for Course 2A-Basic PMS Personnel, and Course 3A-PMS Personnel Maintenance, in the same semester.
3. Employees must be approved by their agency to attend PMS Training as part of their job responsibilities.

Length: 2 days

CEUs: 1.0

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, business case analysis and application.

Course 3B: PMS Timekeeping Maintenance

This course reviews the basics of timekeeping processing in an integrated payroll system, as described in course 2B-Basic PMS Timekeeping. Real-case problem scenarios that present difficulties for participants will be highlighted.

Prerequisite:

1. Successful completion of Course 2B-Basic PMS Timekeeping, or one year of work experience in any of the three functional areas of PMS (Personnel, Timekeeping, or Payroll).

2. Participants should not register for Course 2B-Basic PMS Timekeeping, and Course 3B-PMS Timekeeping Maintenance, in the same semester.
3. Employees must be approved by their agency to attend PMS Training as part of their job responsibilities.

Length: 3 days

CEUs: 1.5

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, business case analysis and application.

Course 3C: PMS Payroll Maintenance

This course reinforces payroll procedures as defined in course 2C- Basic PMS Payroll. Again, the participants' needs will determine special emphasis.

Prerequisite:

1. Successful completion of Course 2C-Basic PMS Payroll, or one year of work experience in any of the three functional areas of PMS (Personnel, Timekeeping, or Payroll).
2. Participants should not register for Course 2C-Basic PMS Payroll, and Course 3C-PMS Payroll Maintenance, in the same semester.
3. Employees must be approved by their agency to attend PMS Training as part of their job responsibilities.

Length: 2 days

CEUs: 1.0

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, business case analysis and application.

Advanced PMS Courses

Course 4A: Advanced PMS/Retro 160

This half-day seminar focuses on how pending pay details are generated, and how to read and use the 160 Report, Pending Pay Details Awaiting Approval. The is presented as a series of case studies that involve retroactive pay class changes, leave status code changes, and/or ceasing an employee who is out on leave without pay (LWOP). These retroactive transactions require coordination between the three PMS functional areas within an agency: Personnel, Timekeeping and Payroll. Seminar participants will also have the opportunity to discuss pending pay issues of concern to their agency.

Objectives:

- Analyzing information on the PTAPD160 and PTAPW161 Reports to help with processing retroactive pay and leave transactions.
- Processing retroactive changes to an employee's pay class and leave status.
- Detect and correct errors related to retroactive pay class and leave status changes.
- Establishing proper procedures to resolve details that appear on the PTAPD 160 Report.
- Review other related PMS reports to verify that the PTAPD 160 transactions have been processed correctly.

Prerequisite:

1. First-time class participants who did not previously attend course Advanced PMS Training, and responsible for reviewing and resolving problems related to pending pay details.
2. Employees who are experienced in working with pending pay details in PMS, reviewing the 160 Report, and responsible for problem resolution.
3. Employees who work in the Personnel and Timekeeping functional areas who may need to coordinate with the Payroll area to resolve issues related to retroactive pay class and leave status code changes.
4. Participants must be approved by their agency to attend PMS Training as part of their job responsibilities.

Length: ½ day

CEUs: .35

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, business case analysis and application.

CHRMS – Citywide Human Resource Management System Courses

CHRMS stands for CITY HUMAN RESOURCE MANAGEMENT SYSTEM. It is a data warehouse for City employees with records in the Payroll Management System (PMS), and for retirees/beneficiaries with records in the Pension Payroll Management System (PPMS). CHRMS users can access information on employees more easily and efficiently through the use of Canned Queries, which are pre-formatted reports, or by creating their own Ad Hoc (as needed) reports by using Query Studio.

CHRMS Web Canned Query Courses

Course 7H: CHRMS Web Canned Query

Instructor-led course where class participants will use their own CHRMS logon ID and password to learn how to run Canned Query (pre-formatted) reports to retrieve pay, deduction, personnel, or leave data, as currently maintained in the City's payroll systems.

Objectives:

- Logon and navigate through CHRMS.
- Perform an Employee Lookup.
- Generate and output Canned Query reports.
- Use the Set Properties function to customize and save a report with pre-set query parameters.
- Schedule a report to run automatically.
- Analyze written requests for data in order to identify the query needed, and run the query to get the data results from CHRMS.

Prerequisite:

1. Participants should be first-time CHRMS users who did not previously attend this course.
2. Prior to attending training, participants must be authorized to access CHRMS by their agency CHRMS Security Officer. Agency CHRMS Security Officers must ensure that the agency is in security compliance in order for participants to attend CHRMS training, and that their employee(s) have their IDs and passwords in time for training. Requests for access should be sent via a Remedy ticket to OPA's Systems Integrity Unit.
3. Participants must have his/her own valid CHRMS Logon ID and password, and know their CHRMS ID and password when they arrive at the training session.
4. To successfully complete CHRMS training, participants must have basic desktop computer skills, including navigating Windows, using Internet Explorer, MS Office Excel, and Adobe Reader.

Length: 1 day.

CEUs: .5 CEU.

Assessment Methods: Instructor observation, question and answer discussions, oral quiz, completion of hands-on exercises.

Course 8B: CHRMS Web Canned Refresher Session

Instructor-led refresher session for current CHRMS users. Participants will use their own CHRMS logon ID and password to review the basics for running Canned Query (pre-formatted) reports. Participants will also be updated on any recent upgrades to the system.

Objectives:

- Review how to logon and navigate in CHRMS Web.
- Run Employee Lookup and Canned Query Reports.
- Output data for a canned query report.
- Set Properties on a Canned Query.
- Schedule a report to run automatically.

Prerequisite:

1. Participants should be current CHRMS canned query users who need a refresher on how to use the system.
2. Prior to attending training, participants must be authorized to access CHRMS by their agency CHRMS Security Officer. Agency CHRMS Security Officers must ensure that the agency is in security compliance in order for participants to attend CHRMS training, and that their employee(s) have their IDs and passwords in time for training. Requests for access should be sent via a Remedy ticket to OPA's Systems Integrity Unit.
3. Participants must have his/her own valid CHRMS Logon ID and password, and know their CHRMS ID and password when they arrive at the training session.
4. To successfully complete CHRMS training, participants must have basic desktop computer skills, including navigating Windows, using Internet Explorer, MS Office Excel, and Adobe Reader.

Length: ½ day.

CEUs: .35 CEU.

Assessment Methods: Instructor observation, question and answer discussions, oral quiz, completion of hands-on exercises.

CHRMS Web Ad Hoc Courses

Course 7J: CHRMS Web Ad Hoc

Instructor-led course where class participants will use their own CHRMS logon ID and password to create customized Ad Hoc (as needed) reports using the Query Studio package in CHRMS. The reports generated by participants contain pay, deduction, personnel or leave data, as currently maintained in the City's payroll systems.

Objectives:

- Logon and navigate in CHRMS Web and the Query Studio package for ad hoc reports.
- Select tables and columns for an ad hoc query.
- Add data filters to an ad hoc query.
- Format and change the report layout.
- Insert calculations into an ad hoc query.
- Run an ad hoc query to get the report output.
- Employ best practices for preparing an effective ad hoc query, and data relationships between ad hoc tables.

Prerequisite:

1. Participants should be first-time CHRMS Ad Hoc users who did not previously attend this course.
2. Prior to attending training, participants must be authorized to access CHRMS Ad Hoc by their agency CHRMS Security Officer. Agency CHRMS Security Officers must ensure that the agency is in security compliance in order for participants to attend CHRMS training, and that their employee(s) have their IDs and passwords in time for training. Requests for access should be sent via a Remedy ticket to OPA's Systems Integrity Unit.
3. Participants must have his/her own valid CHRMS Logon ID and password with access to CHRMS Query Studio, and know their CHRMS ID and password when they arrive at the training session.
4. To successfully complete CHRMS training, participants must have basic desktop computer skills, including navigating Windows, using Internet Explorer, MS Office Excel, and Adobe Reader.

Length: 1 day.

CEUs: .5 CEU.

Assessment Methods: Instructor observation, question and answer discussions, oral quiz, completion of hands-on exercises.

Course 8C: CHRMS Web Ad Hoc Refresher Session

Instructor-led refresher session for current CHRMS Ad Hoc users. Participants will use their own CHRMS logon ID and password to review the basics for running Canned Query (pre-formatted) reports. Participants will also be updated on any recent upgrades to the system, and can ask specific questions on creating an ad hoc report based on their business needs.

Objectives:

- Review how to logon to CHRMS Web, and access the Query Studio package for ad hoc reports.
- Select tables and columns to create an ad hoc query.
- Add data filters, format, and insert calculations to an ad hoc query.
- Change report layout.
- Run an ad hoc report, and save the query.

Prerequisite:

1. Participants should be current CHRMS Ad Hoc users who successfully completed Course 7J—CHRMS Web Ad Hoc.
2. Prior to attending training, participants must be authorized to access CHRMS Ad Hoc by their agency CHRMS Security Officer. Agency CHRMS Security Officers must ensure that the agency is in security compliance in order for participants to attend CHRMS training, and that their employee(s) have their IDs and passwords in time for training. Requests for access should be sent via a Remedy ticket to OPA's Systems Integrity Unit.
3. Employees whose access to CHRMS Ad Hoc is currently disabled must contact their agency CHRMS Security Officer to have access re-instated prior to attending this course.
4. Participants must have his/her own valid CHRMS Logon ID and password with access to Query Studio, and know their CHRMS ID and password when they arrive at the training session.
5. To successfully complete CHRMS training, participants must have basic desktop computer skills, including navigating Windows, using Internet Explorer, MS Office Excel, and Adobe Reader.

Length: ½ day

CEUs: .35

Assessment Methods: Instructor observation, question and answer discussions, oral quiz, completion of hands-on exercises.

CityTime Courses

CityTime is a secure, web-based timekeeping application that most City agencies use to manage their employees' time and attendance. Employees can electronically submit their time entries, leave, overtime, other time-related requests and timesheets for approval.

Course 11B: CityTime User/Approver for Timekeepers

This is an instructor-led training course to understand and consider how the basic CityTime User (an employee and the employee's Supervisor), views and uses CityTime to submit, edit, review and approve time entry, overtime, leave and other requests on employees' timesheets.

Objectives:

- Sign into CityTime; Changing CityTime Password.
- Enter Time and Meal Punches; using Web Clock to enter punches.
- Enter Leave and Overtime Requests; enter and void a Time Punch Request.
- Preview and Submit a Timesheet; Edit submitted Timesheets and Requests.
- Search for Timesheets, Leave and Overtime Requests; Timesheet Workflow.
- Approve leave, overtime requests and timesheets.
- Assign a Backup Approver.
- Override an Employee's Schedule.

Prerequisite:

1. Participants should be agency Timekeepers or CityTime Agency Administrators.
2. To successfully complete CityTime training, participants must have basic computer skills, including navigating Windows, using Internet Explorer.
3. Participants must be approved by their agency to attend CityTime Training as part of their job responsibilities.

Length: ½ day

CEUs: .35

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, students' completion of hands-on exercises.

Course 11C: CityTime Timekeeper 1

Instructor-led training course for Agency Timekeepers to introduce the fundamentals of using the Timekeeper functions and features in CityTime.

Objectives:

- Overview of CityTime, and the responsibilities of the agency Timekeeper.
- Navigating the Timekeeper functions.
- Identify Pay-To Types; how to use the ETR Timeline, and Timesheet Workflow.
- Create, modify and approve leave/over requires and timesheets
- Time Entry Methods (DCD and Web Clock), and how to correct a Time Entry.
- Assign a Backup Approver.
- Working with Shift and Schedule Types; Override to an Employee's Schedule.
- Payroll and Timekeeping Best Practices.

Prerequisite:

1. Participants should be Timekeepers or CityTime Agency Administrators who may perform some timekeeping functions.
2. Prior to attending the training session, participants should have the CityTime Timekeeper role already assigned to their profiles, along with access to the relevant CityTime Reports.
3. To successfully complete CityTime training, participants must have basic computer skills, including navigating Windows, using Internet Explorer.
4. Participants must be approved by their agency to attend CityTime Training as part of their job responsibilities.

Length: 1 day

CEUs: .5

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, students' completion of hands-on exercises.

Course 11D: CityTime Timekeeper 2

This is an instructor-led training course for Agency Timekeepers that addresses advanced timekeeping functionality in CityTime and well as working with other Payroll and Human Resource systems that interface with CityTime.

Objectives:

- Enter LWOP on the Anticipatory Week.
- Identify and process mid-week changes involving 0150/0180 transactions.
- Process Manual Event Entry/Online Event Entry transactions.
- Procedural processing of Manual Leave Adjustments.
- Labeling timekeeping events for Supplemental Payroll.
- Payroll and Timekeeping Best Practices.

Prerequisite:

1. Participants should be Timekeepers or CityTime Agency Administrators who may perform some timekeeping functions.
2. Prior to attending the training session, participants should have the CityTime Timekeeper role already assigned to their profiles, along with access to the relevant CityTime Reports.
3. To successfully complete CityTime training, participants must have basic computer skills, including navigating Windows, using Internet Explorer.
4. Participants must be approved by their agency to attend CityTime Training as part of their job responsibilities.

CEUs: .5

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, students' completion of hands-on exercises.

Course 11E: CityTime Agency Administrator

Hands-on, instructor-led training for Agency Administrators that addresses how to set up, modify, realign, and maintain the organizational hierarchy, user profiles, access and system configurations for an agency and its employees.

Objectives:

- Overview of CityTime, and the responsibilities of the Agency Administrator.
- Navigate the Agency Administrator functions; identify Pay-To Types.
- Set up new employees/users/consultant in CityTime; link a User to an Approver.
- Assign additional roles to a User; manage user devices and Web Clock settings.
- Work with Shifts and Schedule Types; work with the agency Approval Organization Tree; process a mass transfer of employees between Approval Organization.
- Expire Employee and Consultant profiles; handle ceased employees in an Approval organization; view Inactive employees in an organization chart.
- Enable/disable User access to CityTime Reports; Labor Allocation Validation

Prerequisite:

1. Participants should be current CityTime Agency Administrators, or experienced CityTime users who will be assigned as an Agency Administrator.
2. Prior to attending the training session, participants should have the CityTime Administrator role already assigned to their profiles, along with access to the relevant CityTime Reports.
3. To successfully complete CityTime training, participants must have basic computer skills, including navigating Windows, using Internet Explorer.
4. Participants must be approved by their agency to attend CityTime Training as part of their job responsibilities.

Length: 1 day

CEUs: .5

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, students' completion of hands-on exercises.

WCS Courses

The Workers' Compensation System (WCS) is a sub-system of the Payroll Management System (PMS). It is a computerized method of processing an agency's Workers' Compensation claims. With WCS, your agency and the New York City Law Department have on-line access to claims as they move through the Workers' Compensation process.

Course 8A1: WCS Overview

Instructor-led training to introduce new users to WCS.

Objectives:

- Overview of WCS.
- How to logon and exit WCS, and access the Claim Processing Menu.
- Enter information from the Workers' Comp claim forms into WCS.
- Processing a WCS claim occurrence.
- WCS claim occurrence correction.
- How to administer grants.
- Importance of coordinating WCS transactions with the agency PMS Payroll, Personnel and Timekeeping areas to ensure prompt and accurate payments.

Prerequisite:

1. Participants should be new or current users of the Workers' Compensation System who are responsible for entering claims, but have never attended formal WCS training.
2. Participants must be approved by their agency to attend WCS Training as part of their job responsibilities.

Length: 1 day

CEUs: None.

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, business case analysis and application.

Course 8A2: WCS Processing Interface Transactions

Instructor-led training that focuses impact of WCS transactions on the agency Payroll, Personnel, and Timekeeping areas. The session will also review special WCS situations and Best Practices for effective WCS processing.

Objectives:

- Identify instances when the agency WCS liaison must coordinate with agency Payroll, Timekeeping, and Payroll areas.
- Review the transactions that need to be entered into PMS, NYCAPS, and/or CityTime, and when they should be entered.
- How to avoid common errors in processing and coordinating between agency WCS and the agency Payroll, Timekeeping, and Personnel areas.
- Special scenarios, and best practices for effective processing of WCS claims.

Who should attend: Current users of the Workers' Compensation System who need a refresher on the procedural activities related to processing WCS claims.

Prerequisite:

1. Employees responsible for entering or reviewing WCS claims, and previously attended Course 8A1 – WCS Overview.
2. Employees with experience in processing Personnel, Payroll and/or Timekeeping transactions who are responsible for coordinating with the agency WCS Liaison are also welcome to attend.
3. Participants must be approved by their agency to attend WCS Training as part of their job responsibilities.

Length: ½ day

CEUs: None.

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, business case analysis and application.

NYCAPS-Payroll Courses

The following NYCAPS-Payroll courses focus on the review, verification, and approval of certain pay-related transactions in NYCAPS. The courses incorporate policy and procedure, best practices, on-the-job scenarios, and the use of NYCAPS Vista Plus Reports.

Note: Courses in this series are not offered on a regular basis. Courses are schedule based on demand.

Course 4G: Mass Pay Rate Change Processing in NYCAPS

Processing of employees' collective bargaining increases that are generated through a mass pay rate change.

Objectives:

- Review eligible lists of employees via NYCAPS screens and the Vista Plus reports.
- Verify, select, and deselect employees who should or should not be paid, based on specific criteria identified in the reports.
- Process and approve retroactive pay rate transactions for multiple employees.
- How to submit a service request to NYCAPS Central related to Mass Pay Rate Changes.

Prerequisite:

1. Participants should be agency staff members who are responsible for the review and approval of pay details generated by mass pay rate change for collective bargaining increases.
2. Prior to attending the training session, participants should already have access to the appropriate NYC_MASSPAYRATE_BU edit or view only role(s) in NYCAPS.
3. Participants must be approved by their agency to attend NYCAPS Payroll Training as part of their job responsibilities.

Length: ½ day

CEUs: None.

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, business case analysis and application, completion of hands-on exercises.

Course 4UA2: Uniform Allowance Processing in NYCAPS

Processing of Uniform Allowance payments for eligible employees.

Objectives:

- Access NYCAPS screens and Vista Plus reports to review report lists of eligible employees.
- Work with the UA Employee Selection and UA Employee Exclusion lists.
- Verify, select and deselect employees should or should not paid, based on specific criteria identified in the reports.
- Process and approve Uniform Allowance transactions.
- Best Practices for coordinating agency review and approval of Uniform Allowance payments.

Prerequisite:

1. Participants should be agency staff members who are responsible for reviewing and approving annual Uniform Allowance payments to eligible employees.
2. Prior to attending the training session, participants should already have access to the appropriate AGY_SUBMITTER or AGY_APPROVER role(s) in NYCAPS.
3. Participants must be approved by their agency to attend NYCAPS Payroll Training as part of their job responsibilities.

Length: ½ day

CEUs: None.

Assessment Methods: Instructor's observation, question and answer discussions, oral quiz, business case analysis and application, completion of hands-on exercises.

**APPENDIX:
TRAINING REQUEST
FORMS**

**These are “master” copies.
Agencies should make
photocopies of these forms.**



REQUEST FOR CHRMS TRAINING



FROM: CHRMS Security Ofcr/Training Contact (Name): _____

PYRL NO.: _____ AGENCY NAME: _____

PHONE NO.: _____ FAX NO.: _____

E-MAIL ADDRESS: _____

PARTICIPANT'S NAME AND EMPL NUM (Please Print or Type)	COURSE(S) REQUESTED:			MANAGER APPROVAL REQUIRED!! BY SIGNING THIS FORM, THE MANAGER AGREES TO THE FOLLOWING:			
	Course No./Name: NEW USERS: 7H-Canned Query 7J-Ad Hoc CURRENT USERS: 8B-Canned Refresher 8C-Ad Hoc Refresher			1. THE AGENCY SECURITY OFFICER WILL SUBMIT A "REQUEST FOR CHRMS ID" via REMEDY TO CPSM-SECURITY TO OBTAIN A CHRMS ID. 2. EMPLOYEE IS REQUIRED TO ATTEND CLASS AS SCHEDULED. IN EVENT OF CANCELLATION, AGENCY MUST NOTIFY OPA TRAINING TWO (2) WEEKS PRIOR TO CLASS DATE, EXCEPT IN CASES OF ILLNESS OR PERSONAL EMERGENCY.			
	COURSE NO./NAME	TRAINING DATE	ALT DATE	MANAGER'S SIGNATURE	PRINT NAME	DATE APPROVED	MANAGER'S TELEPHONE NO.
1. Name: Empl Num:							
2. Name: Empl Num:							
3. Name: Empl Num:							
4. Name: Empl Num:							
5. Name: Empl Num:							
COURSE DESCRIPTIONS: (REFER TO OPA TRAINING SOURCEBOOK FOR FULL COURSE INFO.) CANNED QUERY: Introduction to CHRMS and running pre-formatted (canned) query reports. AD HOC: Create your own reports using CHRMS Ad Hoc.				Please submit the completed Request for Training form via a Remedy ticket. Thanks and we look forward to seeing your employees at CHRMS Training.			



REQUEST FOR PMS TRAINING



Agency Name: _____

Agency Training Contact: _____ Phone No: _____

Agency Payroll No.: _____ Date: _____

PARTICIPANT'S NAME AND EMPL NUM <i>(Please Print or Type)</i>	COURSE(S) REQUESTED: Refer to Course Criteria on second page of this form.						In order to ensure a good match between participant and course, please answer the following questions.			
	BASIC			MAINTENANCE			ADVANCED PMS:	1. Does employee currently work on PMS?	2. If Yes to #1, how long has employee worked on PMS?	3. In what capacity(ies) does the employee use PMS?
	PER (2A)	TK (2B)	PAY (2C)	PER (3A)	TK (3B)	PAY (3C)	180 / RETRO (4A)			
1. Name: Empl Num:										
2. Name: Empl Num:										
3. Name: Empl Num:										
4. Name: Empl Num:										
5. Name: Empl Num:										

Submitted by: _____ Tel. No.: _____

Approved by: _____ Tel. No.: _____

Please submit the completed Request for Training form via a Remedy ticket.

We look forward to seeing your employees at PMS Training.



REQUEST FOR CITYTIME TRAINING

Agency Name: _____

Agency Training Contact: _____ Phone No: _____

Agency Payroll No.: _____ Date: _____

PARTICIPANT'S NAME AND EMPL NUM <i>(Please Print or Type)</i>	In order to ensure a good match between participant and course, please answer the following questions.					
	11B User/ Approver	11C TK1	11D TK2	11E Agency Admin	1. Is the employee currently a CityTime Timekeeper or Administrator?	2. If Yes to #1, how long has employee worked on CityTime?
1. Name: Empl Num:						
2. Name: Empl Num:						
3. Name: Empl Num:						
4. Name: Empl Num:						
5. Name: Empl Num:						

Submitted by: _____ Tel. No./Email: _____

Approved by: _____ Tel. No./Email: _____
CityTime Training Coordinator

Please submit the completed Request for Training form via a Remedy ticket.

We look forward to seeing your employees at CityTime Training.



REQUEST FOR WCS TRAINING



Agency Name: _____
 Agency Training Contact: _____ Phone No: _____
 Agency Payroll No.: _____ Date: _____

PARTICIPANT'S NAME AND PMS EMPLOYEE NUMBER <i>(Please Print or Type)</i>	In order to ensure a good match between participant and course, please answer the following questions.				
	WCS New Users: 8A1-WCS Training Current Users: 8A2-Processing Interface Transactions	Training Date (state one):	1. Does employee currently work on WCS?	2. If Yes to #1, how long has employee worked on WCS?	3. In what capacity does the employee use WCS?
1. Name: Empl Num:					
2. Name: Empl Num:					
3. Name: Empl Num:					
4. Name: Empl Num:					
5. Name: Empl Num:					

Submitted by: _____ Tel. No.: _____

Approved by: _____ Tel. No.: _____

Please submit the completed Request for Training form via a Remedy ticket.
 We look forward to seeing your employees at WCS Training.



REQUEST FOR TRAINING: NYCAPS - Payroll



Agency Name: _____

Agency Training Contact: _____ Phone No: _____

Agency Payroll No.: _____ Date: _____

PARTICIPANT'S NAME AND PMS EMPLOYEE NUMBER <i>(Please Print or Type)</i>	In order to ensure a good match between participant and course, please answer the following questions.			
	Course 4G— Mass Pay Rate Change Processing	Course 4UA2— Uniform Allowance Processing	Please state which NYCAPS role is assigned to the Employee:	In what capacity does the Employee use NYCAPS-VISTA Plus Reports?
1. Name: PMS Empl Num:			1. NYC_MASSPAYRATE_BU 2. NYC_MASSPAYRATE_BU_VIEWONLY 3. AGY_SUBMITTER (Uniform Allowance) 4. AGY_APPROVER (Uniform Allowance)	
2. Name: PMS Empl Num:				
3. Name: PMS Empl Num:				
4. Name: PMS Empl Num:				
5. Name: PMS Empl Num:				

Submitted by: _____ Tel. No.: _____

Approved by: _____ Tel. No.: _____

Please submit the completed Request for Training form via a Remedy ticket.

We look forward to seeing your employees at NYCAPS Payroll Training.