



Payroll Services Letter

Number: PS05-18
Date: April 17, 2005
Subject: Reporting Pay and Leave Inquiries
Category: Reporting Inquiries

Purpose

The Payroll Services Division is implementing new procedures for reporting pay and leave inquiries. The new procedures will provide Human Resource (HR) Centers with an improved payroll inquiry reporting and tracking system. The new procedures are being implemented as part of the HHS payroll system conversion to the Defense Finance and Account Services (DFAS) payroll system.

Effective February 9 through April 17, 2005, the Pay Services Division (PSD) will conduct final testing of the changes made to the payroll inquiry process. Human Resource (HR) Centers must follow new procedures for reporting payroll inquiries as part of our test. The payroll inquiry form 411A (Pay) and 411B (Leave) will no longer be accepted in PSD. Currently, the HHS Program Support Center (PSC), Human Resources Service (HRS) utilizes the Peregrine Service Center software application as its incident management solution. DFAS uses a web-based system called the Remedy Action Request System. The Peregrine system has been modified and an automatic bridge developed from Peregrine to Remedy. Listed below are some of the enhancements included in the Peregrine software compared to how tickets are handled now:

- Customers (HR users) will be able to select whether the ticket they are submitting will be routed to HRS Helpdesk or Payroll Services Division (PSD). Once in PSD, tickets will be auto-routed to the appropriate Payroll Customer Service Team, and then assigned to Customer Service Representatives (CSR) for action. Like PSD, the teams in Peregrine will be aligned with the four HR Centers (Atlanta, Baltimore/IHS, NIH and Rockville). Additionally, the HRS Helpdesk and PSD will be able to pass tickets back and forth before and after assignment to a CSR.
- Tickets will be assigned within the teams within four hours of submission. Depending on category, subcategory and completeness of information, some tickets will be researched by PSD, and then bridged to the DFAS Remedy Action Request System. ; Some tickets will be auto-bridged to DFAS immediately upon submission by the HR Center, and then monitored by PSD; and other tickets will be resolved within PSD.

- HR Centers will be able to select the category and subcategory that pertains to their PSD ticket.
- The enhanced version of the Web Portal is also fairly simple. It will look similar to the current screen with the addition of the selection of routing and category and subcategory. Once the category and subcategory are selected, some tickets may contain more required fields. These fields coincide with PSD or DFAS required fields.
- For tickets routed to PSD, status is dependent on the action taken. Action drives status. The CSR (or an outside actor, such as HR Center Helpdesk staff or DFAS) will select an action, and the status of the ticket will automatically be derived from the action selected.
- Tickets will be prioritized and auto-assigned deadlines based on the type of problem.
- Peregrine will be an integral part of the standard work processes in PSD. It will be used as a customer-focused workload management tool. In addition, it will enable real-time quantification and analysis of performance and customer service.

HR Center customers will access Peregrine as they do now through the Peregrine Web Portal. Although the screen will look quite similar, there are some changes to how tickets will be submitted. Since Human Resources issues will still be submitted on tickets through the HRS Helpdesk and Payroll issues will be submitted to the Payroll Services Division, OPDIV users must select the type of ticket they are going to enter. If the ticket is an EHRP system or Time & Attendance file issue, customers will select the **Service Desk** tab. If the ticket is regarding a payroll issue, the customer will select the **Service Desk PSD** tab.

Once the **Service Desk PSD** tab is selected users will see many familiar fields, such as:

- Description
- User Priority
- User Contact Info (which is automatically filled in for you)
- Employee First Name
- Employee Last Name
- Employee ID
- Employee Social Security Number

On the PSD ticket entry screen, two new optional fields which are common to payroll issues have been added. They are:

- Amount
- Hours

In addition, customers are asked to select a Category and Subcategory when entering tickets for payroll issues. Selecting a field will not only greatly expedite tickets, but are necessary in the bridging process if it is necessary to escalate the ticket to DFAS. For

some Category/Subcategory combinations, tickets with validated data in the required fields will automatically be bridged to DFAS upon submission. A complete list of Categories, Subcategories and their definitions can be found below:

If you need to submit a payroll inquiry for an employee with these issues:	Select this Category	Then this Subcategory
Federal Employees Group Life Insurance	BENEFITS	FEGLI
Federal Employees Health Benefits	BENEFITS	FEHB
Thrift Savings Plan	BENEFITS	TSP
Retirement (CSRS/FERS)	BENEFITS	RET/CSRS/FERS
Death Cases	DEATH CASES	DEATH CASES
Agency Debts	DEBT COLLECTIONS	AGENCY DEBTS
Voluntary Bankruptcy	DEBT COLLECTIONS	BANKRUPTCY
Miscellaneous Debt Collections	DEBT COLLECTIONS	DEBT COLLECTIONS
IRS Levies	DEBT COLLECTIONS	IRS LEVIES
Salary Overpayments	DEBT COLLECTIONS	SALARY OVERPAYMENTS
Savings Bond Issues	SAVINGS BONDS	SAVINGS BONDS
Charity Contributions	DEDUCTIONS	CFC
Long Term Care	DEDUCTIONS	LTC
Flexible Spending Account	DEDUCTIONS	FSA
Transportation Subsidies	DEDUCTIONS	TEA
Taxes (Federal, State, City/Local, Medicare, OASDI)	DEDUCTIONS	TAXES
EFT Returns/Non-Receipt of Check	CHECK/EFT NOT RECEIVED	CHECK/EFT NOT RECEIVED
<i>Court-Ordered Alimony</i>	GARNISHMENTS	ALIMONY
<i>Court-Ordered Bankruptcy</i>	GARNISHMENTS	BANKRUPTCY
<i>Court-Ordered Child Support</i>	GARNISHMENTS	CHILD SUPPORT
<i>Court-Ordered Private Debts</i>	GARNISHMENTS	PRIVATE DEBTS
Advanced Sick Leave, Restored Leave	LEAVE	ADV/REST LEAVE
Donated/Family Leave	LEAVE	DONATED LEAVE

Continuation of Pay, Home Leave, Compensatory Time, Religious Compensatory Time, Credit Hours, etc.	LEAVE	LEAVE ADJUSTMENT
If you have an employee with these issues:	Select this Category	Then this Subcategory
Leave Audits (Inquiries which require research and analysis)	LEAVE	LEAVE AUDIT
Leave Buy-Back	LEAVE	LEAVE BUY-BACK
Lump Sum Leave	LEAVE	LSL
Transfer-In Leave	LEAVE	TRANSFER-IN/SF-1150
Requests for Leave and Earnings Statements (formerly OS-340)	PSD_OTHER	LES
Military Deposits	PSD_OTHER	MILITARY DEPOSITS
OPM Inquiries	PSD_OTHER	OPM INQUIRIES
Union Issues	PSD_OTHER	UNIONS
Cash Awards	PAY	CASH AWARD
Consultant Pay Issues	PAY	CONSULTANT
Pay Audits (Inquiries which require research and analysis)	PAY	INQUIRY
Aggregate Limit Issues	PAY	AGGREGATE LIMIT
Defacto Employee Issues	PAY	DEFACTO
Foreign Allowances	PAY	FOREIGN ALLOWANCES
Pay Issues Not Covered in Another Category	PAY	OTHER
Pay Adjustments	PAY	PAY ADJUSTMENT
Physician's Comparability Allowance	PAY	PCA
Physicians Specialty Pay	PAY	PSP
Student Loans	PAY	STUDENT LOANS
SF-50	PERSONNEL UPDATES	SF-50
Report Issues/Questions	REPORTS	REPORTS
Retirements	SEPARATIONS	RETIREMENTS
Miscellaneous Separations Issues	SEPARATIONS	SEPARATIONS/OTHER
Severance Packages	SEPARATIONS	SEVERANCE
Tribal Payments	SEPARATIONS	TRIBAL

VSIP/VERA Payments	SEPARATIONS	VSIP/VERA
Settlement Cases -- MOU	SETTLEMENT	MOU
If you have an employee with these issues:	Select this Category	Then this Subcategory
Settlement Cases -- MSPB	SETTLEMENT	MSPB
Settlement Agreements	SETTLEMENT	SETTLEMENT AGREEMENT
Settlement Cases -- Union Agreement	SETTLEMENT	UNION AGREEMENT
T&A Issues	T&A	T&A INQY
W-2 Inquiries	W-2	W-2 INQUIRY
W-2 Reissues	W-2	W-2 REISSUE
HRS Tickets When First Opened	EHRP WEB	EHRP WEB
PSD Tickets When First Opened	PSD WEB	PSD WEB

For some category/subcategory combinations it will be necessary to complete some additional fields. On the ticket entry screen, these fields are located in clearly marked “sections” directly beneath the fields discussed above. Tickets which fall under the following Category/Subcategory combinations will require completion of additional fields:

Category	Subcategory
BENEFITS	TSP
SAVINGS BONDS	SAVINGS BONDS
CHECK/EFT NOT RECEIVED	CHECK/EFT NOT RECEIVED
LEAVE	DONATED LEAVE
PAY	SPECIAL PAY
W-2	W-2 INQUIRY
W-2	W-2 REISSUE

Immediately upon submission, ticket status can be determined for all PSD tickets. Status is driven by actions in the PSD Peregrine Service Center. Whenever your ticket is acted upon, the status will update. Status codes and their definitions are as follows:

STATUS	Explanation
OPENU	Indicates that a ticket was auto-bridged to DFAS.

STATUS	Explanation
WEB OPEN PSD	Indicates that a ticket was opened in the PSD queue, but not assigned to a CSR.
WEB OPEN EHRP	Indicates a ticket was opened in the HRS Helpdesk queue, but not assigned to an individual.
STATUS	Explanation
OPENR	Indicates a ticket was referred to the Director due to the three-bounce rule. (Tickets may not be passed between HRS Helpdesk more than three times.)
OPEN	Indicates a ticket was assigned to a CSR in PSD for action.
CUST INFO	Requests additional information from customer.
CUST UPDATED	Indicates that customer updated the ticket with requested information, or otherwise added information to the ticket.
DCPS	Indicates that CSR has taken action by entering the appropriate information in DCPS.
HRS-RESEARCH PENDING	Ticket was sent to HRS Helpdesk for research. EHRP Technical team has completed research on a ticket and is returning it to HRS for additional action or HRS has retrieved the ticket from EHRP Technical team.
HRS-RESEARCH COMPLETE	HRS Helpdesk has completed research. Or, PSD has retrieved the ticket from HRS Helpdesk.
EHRP-RESEARCH PENDING	HRS Helpdesk has sent ticket to EHRP for additional information.
EHRP-RESEARCH COMPLETE	EHRP has completed research and is returning the ticket to PSD. Or PSD has retrieved the ticket from EHRP.
IMAGING	Indicates that CSR has sent documents to DFAS via the IMAGING System.
RESEARCH	PSD must analyze and/or research the issue.
SYSTEMS	There is a system change required to resolve the issue.
RESOLVED	Indicates an issue that has been resolved.
RESOLVED-DFAS	DFAS has resolved the ticket and is awaiting closure or rejection of resolution.
RESOLVED-REJ	DFAS has resolved the ticket and PSD disagrees with the resolution.
BRIDGED	Ticket has been bridged to DFAS.

CLOSED	Indicates a ticket whose resolution has been approved by PSD management.
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Certain actions taken upon a ticket will result in an email notification being sent to the originator of the ticket. Anyone who opens a ticket will be notified:

- When the ticket is opened in PSD;
- When the CSR working a ticket needs more information; and
- When the ticket is closed.

These email notifications will contain a very brief description to let you know that you should look at your ticket to see what has changed.

You still have the capability to attach documents to a Peregrine ticket. The DFAS on-line historical payroll data should reduce the need to mail or fax documents to Payroll Services. However, you can mail or fax documents that cannot to electronically attached to:

DHHS PSC/HRS Payroll Services Division
Post Office Box 14950
Silver Spring, MD 20911
Attention: (your Payroll Customer Service Team)

OR

Fax: (301) 504-3589 or (301) 504-3613

You can provide comments on the Peregrine enhancements during the test period by sending an email to Collin Ford at CFord@PSC.gov, or if you have questions, please call him at (301) 504-3249. You will receive a draft Peregrine User Manual the week of April 17, 2005 that will provide more detailed instructions.