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**Banner
Human Resources/
Position Control Release Guide**

Release 8.10.1
December 2013



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Prepared by: Ellucian
4375 Fair Lakes Court
Fairfax, Virginia 22033
United States of America

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Introduction

This release guide provides an overview of the Banner® Human Resources 8.10.1 release. The 8.10.1 release includes the updates you need to perform Human Resources year-end processing for 2013.

Special installation instructions based on your current version of Banner Human Resources

Follow the instructions below based on the version of Banner Human Resources you are currently running.

For Puerto Rico

At the time of packaging for the 8.10.1 Year-End Regulatory Release, the specifications for *Form 499R-2/W-2PR (COPY A) Electronic Filing Requirements for Tax Year 2013* had not been published by the Departamento de Hacienda. Change request CR-000106135 has been created to provide a patch in the future as soon as the information and changes are available. The patch will include all required objects for Puerto Rico year-end reporting needs. The Banner HR 8.10.1 release will be required as a minimum release for this future patch.

If you are running Banner HR 8.8 with HR 8.8.1

You must be running both Banner HR 8.8 and 8.8.1 to successfully install and run Banner HR 8.10.1. In addition, you need to have the following minimum versions of each of these applications installed.

Banner General	Position Control
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8.3

8.8

Ensure the following patches are installed prior to installing 8.10.1.

- p1-1bepmrb_pay8080108 - This patch contained updates to the 941 report to support Additional Medicare Tax information and a correction to the W-2 process for Box 12DD.
- p1-1c5ybid_pay8080111 - This patch contained updates to the Form 941 Detail Report (PXR941) because it was not reporting correct Additional Medicare Tax wages.
- p1-1dqf84p_pay8090003 – This patch contained updates for the following issues:

- The performance of the Tax Deposit (PXRTDEP) and Quarter Report (PXR941) was impaired by the last logic added for calculating the Applicable Gross relative to the Additional Medicare Tax deduction.
- Subject Income may not have been reported correctly when Adjustments were entered during the period. In a situation of an employee going over 200K at one point and then adjustments taking the year-to-date back below the 200K, the negative amounts affecting FIMA were not taken into the calculation.
- Tax Deposit (PXRTDEP) report was reporting duplicate Subject Income if multiple distinct Additional Medicare Tax deduction codes were used under separate Employer codes.

If you are running Banner HR 8.9

If you are running Banner HR 8.9, you need to have the following minimum versions of these applications installed.

Banner General	Position Control
8.5	8.9

Ensure the following patch is installed prior to installing 8.10.1.

- p1-1dqf84p_pay8090003 - This patch contained updates for the following issues:
 - The performance of the Tax Deposit (PXRTDEP) and Quarter Report (PXR941) was impaired by the last logic added for calculating the Applicable Gross relative to the Additional Medicare Tax deduction.
 - Subject Income may not have been reported correctly when Adjustments were entered during the period. In a situation of an employee going over 200K at one point and then adjustments taking the year-to-date back below the 200K, the negative amounts affecting FIMA were not taken into the calculation.
 - Tax Deposit (PXRTDEP) report was reporting duplicate Subject Income if multiple distinct Additional Medicare Tax deduction codes were used under separate Employer codes.

If you are running Banner HR 8.10

If you are running Banner HR 8.10, you need to have the following minimum versions of these applications installed.

Banner General	Position Control
8.6	8.10

Refer to the *Banner Human Resources Upgrade Guide 8.10.1* for more information about installing this release.

Upgrading Banner HR after Banner 8.10.1 is installed

During the last several years, we have provided "easy-upgrade" patches that will enable you to quickly and easily reapply any affected modules after you have installed the Year-End Regulatory release. We are continuing that practice with the 2013 release.

Follow the instructions below based on the version of HR you are running.

Upgrading from Banner HR 8.8 to Banner HR 8.9

When upgrading from Banner HR 8.8 to 8.9, perform the following step.

- Apply Banner HR patch pcr-000104901_pay8100101, version 8.10.1.1, after installing Banner HR 8.9. The purpose of this patch is to replace various common HR objects that were delivered in the Banner HR 8.9 release and will overlay the objects that were also delivered with 8.10.1.

Upgrading from Banner HR 8.9 to Banner HR 8.10

When upgrading from Banner HR 8.9 to 8.10, perform the following step.

- Apply Banner HR patch pcr-000104901_pay8100101, version 8.10.1.1, after installing Banner HR 8.10. The purpose of this patch is to replace various common HR objects that were delivered in the Banner HR 8.10 release and will overlay the objects that were also delivered with 8.10.1.

Special installation instructions for upgrading Banner General

If you need to upgrade any of these Banner General releases after applying this Human Resources 8.10.1 release, follow the instructions below based on the version of Banner General you are running.

Upgrading Banner General 8.3 to General 8.4

When upgrading from Banner General 8.3 to General 8.4, perform the following step.

- Re-apply the General patch p1-19sw461_gen8050202. This is because gurnvb.c will be overwritten with the older version.

Refer to FAQ 1-19RX0DR (Article 000013657) for more information.

Upgrading Banner General 8.4 to General 8.5

When upgrading from Banner General 8.4 to General 8.5, perform the following step.

- Re-apply the General patch p1-19sw461_gen8050202. This is because gurnvb.c will be overwritten with the older version.

Refer to FAQ 1-19RX0DR (Article 000013657) for more information.

Upgrading Banner General 8.5 to General 8.6

When upgrading from Banner General 8.5 to General 8.6, you do not need to take any action.

Documentation related to the 8.10.1 release

For more information about Banner Human Resources year-end processing, refer to the *Banner Human Resources Year-End Regulatory Handbook for U.S. and Puerto Rico* in the Documentation Libraries in the Ellucian Support Center.

2013 U.S. W-2 and EFW2 file changes - Functional

A new process, United States W-2 2013 (PXRW213), has been created for the processing of 2013 W-2 forms. This process may also be used to create future year information until the 2014 release.



Note: There were no changes to the Form W-2 Wage and Tax Statement for 2013.

A new process, W-2 2013 EFW2 File (PXPW213), has been created to generate an electronic file for 2013 W-2 records to submit to the Social Security Administration. The EFW2 file layout had minor changes.

The following fields have been added to the RE Record -Employer Record:

- Employer Contact Name (positions 222-248)
- Employer Contact Phone Number (positions 249-263)
- Employer Contact Phone Extension (positions 264-268)
- Employer Contact Fax Number (positions 269-278)
- Employer Contact E-Mail/Internet (positions 279-318)

2013 U.S. W-2c EFW2 file changes - Functional

Existing functionality includes the ability to correct erroneous information that was previously filed with the Social Security Administration for employees on their U.S. W-2s. Corrections to U.S. W-2s can be created in Banner on the W-2c Form (PXAW2CC), and delivered to the employee electronically through Employee Self-Service. An employee's Form W-2 and W-2c can also be viewed and printed from this form using the Options menu. There were no changes to the Form W-2c Corrected Wage and Tax Statement for 2013.

A new process, U.S. W-2c 2013 EFW2C File (PXPWC13), has been created to generate an electronic file for submission of W-2c corrections to the Social Security Administration. The EFW2C file layout had minor changes.

The following fields have been added to the RCE Record - Employer Record.

- Employer Contact Name (positions 228-254)
- Employer Contact Phone Number (positions 255-269)
- Employer Contact Phone Extension (positions 270-274)
- Employer Contact Fax Number (positions 275-284)
- Employer Contact E-Mail/Internet (positions 285-324)

2013 Puerto Rico W-2 file changes - Functional

Changes will be made to the Form W2 Wage and Tax Statement process (PXRW2PR) for the following box refinements on the W-2PR form.

- Employee's Mailing Address
- Employer's Name
- Employer's Mailing Address
- Employer's Telephone Number
- Cease of Operations Date
- Control Number box

In addition, a new box was added for Numero Confirmacion de Radicacion Electronica (Electronic Filing Confirmation Number).

A new parameter has been added to the PXRW2PR process, which enables the printing of a value in the new box, Numero Confirmacion de Radicacion Electronica (Electronic Filing Confirmation Number).

Parameter	Name	Description/ Values	Required?	Default	Vaidation
09	Electronic Filing Confirmation Number	Numerical value	No	None	None

Changes will be made to the Puerto Rico W-2 MMREF-1 File (PXPW2MP).

2013 1042-S changes - Functional

There were no changes to the Foreign Person Form 1042-S layout. Therefore, no changes have been made to the 1042-S Form (PXR1042) or 1042-S Media Transmission (XPMT42) processes for 2013.

2013 1099-R changes - Functional

There were no changes to the 1099-R Form for 2013. However the description of Code D on the 1099-R Distribution Code Validation form (PTV1099) was changed from, "Excess Contributions taxable two years ago," to "Nonqualified annuity payment (Section 1411)."

There were changes identified in Publication 1220 Specifications for Filing Forms 1097, 1098, 1099, 3921, 3922, 5498, 8935 and W-2G Electronically as follows:

- Combined Federal/State Filing program - additional participating states
 - Michigan (code 26)
 - Vermont (code 50)
- Form 1099-R, Distributions from Pensions, Annuities, Retirement or Profit- Sharing Plans, IRAs, Insurance Contracts, etc.
 - Code D, Record for Annuity payments from non-qualified annuity payments and distributions from life insurance contracts that may be subject to tax under section 1411, has been added to the Payee B Record, Field Positions 545-546, Distribution Code: Valid with codes 1,2,3,4 or 7.

The 2013 changes do not require modifications to the 1099-R Print Report (PXR1099) media file for the following reasons:

- State reporting is not supported by the Banner product;
- Distribution codes are selected from the payroll history and not produced within the process.

2013 U.S. W-2, W-2c, and EFW2 file changes - Technical

This section lists the technical updates for the 2013 U.S. W-2, W-2c, and EFW2 file changes.

New packages

The following packages have been created to generate the 2013 W-2 tax document.

pxk13ts.sql and pxk13t1.sql

This package contains common functions and procedures to create the 2013 U.S. W-2.

New Business Process Integration (BPI)

The following BPI has been created for 2013 U.S. W-2s.

BPI Object Name	BPI Entity Name	Associated BPI Package	Associated BPI Scripts	Associated BPI Packages	Associated Table	Affected Objects
pp_w2_2013	W2_2013	pp_w2_2013	pxkp_w2_20130.sql pxkp_w2_20131.sql	pb_w2_state	PXRW2ST	PXAW2CC Employee Self-Service W-2 Statement PXPW213 PXRW213 PXPWC13
				pb_w2_state_rules		
				pb_w2_state_strings		
				pb_w2_local	PXRW2LC	
				pb_w2_local_rules		
				pb_w2_local_strings		
				pb_w2_federal	PXRW2FD	
				pb_w2_federal_rules		
				pb_w2_federal_strings		

Changed Business Process Integration (BPI)

The following BPI has been modified for 2013 U.S. W-2s.

pxkp_w2_common1.sql

This package is modified to update the CONST_W2_CURRENT_TAX_YEAR to 2013.

New seed data

The following new scripts are delivered with this release

Script	Reason
pgjbjobsi_081001.sql	Adds the new processes (pxrw213, pxrwc13 and pxpw213) records to the GENERAL.GUBOBSJ General Object Base table.
pgjbpdefi_081001.sql	Adds job submission parameter definitions for the new processes (pxrw213, pxrwc13 and pxpw213) to the GENERAL.GJBPDEF Jobs Parameter Definition table.
pgjbpdfi_081001.sql	Adds job submission parameter default values for the new processes (pxrw213, pxrwc13 and pxpw213) to the GENERAL.GJBPDEF Default parameter table.
pgjbpvali_081001.sql	Adds valid values for the job submission parameters of the new processes (pxrw213, pxrwc13 and pxpw213) and the existing processes (pxrw212, pxrwc12 and pxpw212) to the GENERAL.GJBPVAL General Jobs Parameter Value table.
pgobfeobi_081001.sql	Adds the new processes (pxrw213, pxrwc13 and pxpw213) to the GENERAL.GOBFEOB FGAC objects excluded from FGAC processing rules table.
pgubobjsi_081001.sql	Adds the new processes (pxrw213, pxrwc13 and pxpw213) to the GENERAL.GUBOBSJ General Object Base table.
pguroptmi_081001.sql	Adds missing three options for the PXAMTAP Magnetic Tape Rules form.
ptv1099u_081001.sql	Updates description for the Code D in PTV1099 1099 Distribution Code Validation table.



Note: Unless otherwise noted, new scripts are run as part of the upgrade process for a release.

New processes

The following processes were added for this enhancement.

U.S. W-2 2013 EFW2 file (pxpw213.pc)

Added a new process creating W-2 2013 file in EFW2 format. The following five new fields were added into RE records, which are different from the 2012 W-2 layout.

- Employer Contact Name (positions 222-248)
- Employer Contact Phone Number (positions 249-263)
- Extension (positions 264-268)
- Employer Contact Fax Number (positions 269-278)
- Employer Contact Email/Internet (positions 229-318)

U.S. W-2c 2013 EFW2C file (pxpwc13.pc)

Added a new process creating EFW2C file for 2013 U.S. Wage and Tax Statement Correction. The following five new fields are added into RCE records.

- Employer Contact Name (positions 228-254)
- Employer Contact Phone Number (positions 255-269)
- Employer Contact Phone Extension (positions 270-274)
- Employer Contact Fax Number (positions 275-284)
- Employer Contact E-Mail/Internet (positions 285-324)

U. S. W-2 2013 (pxrw213.pc)

Added a new process creating Form W-2 2013 Wage and Tax Statement for United States.

2013 Puerto Rico W-2 file changes - Technical

This section lists the technical updates for the 2013 Puerto Rico W-2 file changes

Changed processes

The following processes were modified for this enhancement.

Form W2 Wage and Tax Statement (pxrw2pr.pc)

Added logic to this process for a new parameter (09 Electronic Filing Confirmation Number).

Puerto Rico W-2 MMREF-1 file (pxpw2mp.pc)

Added logic to this process for a new parameter (06 Electronic Filing Confirmation Number).

Resolutions

For details about the specific defects associated with the 8.10.1 Banner Human Resources release, refer to the *Banner Human Resources 8.10.1 Resolution Report*. The Resolution Report can be found in the Documentation Libraries under Banner Human Resources in the Ellucian Support Center.

Along with the Problem, Impact, and Resolution statements for each defect, you will find a Link. By copying and pasting the link into a web browser, you will be redirected to the Ellucian Support Center and the specific details of the change request.

Problem resolutions - Technical

This section provides the detail on technical changes for defect corrections that require further explanation than what is included in the Resolutions Report.

Modify PXR941 report process for international standards (1-15496QT)

The following technical changes were made for this defect correction.

Form 941 Detail Report (pxrp941.pc)

These changes were made to the pxrp941.pc process.

- Renamed the variable quarter_desc to quarter and the variable month_desc to month.
- Created two array variables to store the month and quarter translated descriptions, as per the international standards.
- Procedures sel_validate_parm_quarter and sel_month_dates were modified to retrieve the correct data for month and quarter.

Modify PXP1099 process for international standards (1-15496QP)

The following technical changes were made for this defect correction.

1099-R Load Process (pxp1009.pc)

Modified the variables control_report, header, and print_error to convert the strings, as per the international standards.