

TOPIC 7: ADJUSTING EMPLOYEE BENEFITS

In this topic, the circumstances under which a benefit will be adjusted will be discussed. In addition, the methods for processing the benefit adjustment and correcting the benefit set-up to correct for errors that resulted in the need for a benefit adjustment will be covered.

At the end of this topic, you will be able to:

- Describe the important factors in determining what type of benefit adjustment needs to be made.
- Describe the different benefit adjustment processes.
- Complete the appropriate transactions for benefit adjustments.



FRINGE BENEFITS TYPE (BENT)

Employee Fringe Benefit Type

Deduction Type Effective Date / / Expiration Date / /

Short Description

Long Description Deduction Processing Order #

Valid Input Windows Deduction Acceptance Priority #

Benefit Type Class Sub-class Category

Enforcement Options | Deduction Options

Deduction Registers

<input type="text"/>				
<input type="text"/>				

Employee vs Appointment Employee Appointment Both

Deduction Policy Rule No Restriction Enforce by Type Enforce by Type / Plan

Permanent Deduction Allowed EFT Allowed Automatic Termination Include in Supplemental Pay Cycle

Employment Status

Employee Fringe Benefit Type

Deduction Type Effective Date / / Expiration Date / /

Short Description

Long Description Deduction Processing Order #

Valid Input Windows Deduction Acceptance Priority #

Benefit Type Class Sub-class Category

Enforcement Options | Deduction Options

Deduction Goal Not Goal Oriented Goal Oriented Cyclical Goal Oriented

Federal / State Marital Status No Associated Status Federal State and Local

Deduction Class Use Marginal Tax Tables FICA Deduction Use Alternate Rate Tables No Special Processing

Goal Type Not Applicable Dollar Amount Installments

Recycle Deduction Partial Deduction Report Take Partial Deduction



BENEFIT ADJUSTMENTS

Benefit adjustments need to be made any time a benefit has been set up incorrectly and resulted in an employee either over-contributing or under-contributing their benefit amount. Once this error is discovered, the benefit adjustment needs to be calculated and the number of pay periods required to either refund an employee for an over-contribution or deduct additional money from an employee's paycheck for under-contribution needs to be determined.

Some common scenarios where you might need to process a benefit adjustment include when:

- The employee has the correct benefit type but the wrong plan. Examples where this could happen include being enrolled in the correct dental type but having a single plan instead of a family plan.
- If there was a permanent deduction for a cafeteria plan and it should have been for a non-cafeteria plan (or vice versa), the correct permanent deduction would be established and a 1DED transaction entered for any 'catch up' amount. This catch up could occur over multiple pay cycles. The refund to the employee for the incorrect deduction would be processed through an external adjustment. Refunds must then be received from the vendor and deposited into the State's non-appropriated checking account by OA.

How a benefit adjustment is processed depends upon whether or not a benefit is Auto-Terminating and/or Goal Oriented. To confirm whether a benefit is Auto-Terminating and/or Goal Oriented, you would use the Employee Fringe Benefits Type (BENT) window.

FRINGE BENEFITS TYPE (BENT)

Employee Fringe Benefit Type

Deduction Type Effective Date / / Expiration Date / /

Short Description

Long Description Deduction Processing Order #

Valid Input Windows Deduction Acceptance Priority #

Benefit Type Class Sub-class Category

Enforcement Options | Deduction Options

Deduction Registers

<input type="text"/>				
<input type="text"/>				

Employee vs Appointment Employee Appointment Both

Deduction Policy Rule No Restriction Enforce by Type Enforce by Type / Plan

Permanent Deduction Allowed EFT Allowed Automatic Termination Include in Supplemental Pay Cycle

Employment Status

Employee Fringe Benefit Type

Deduction Type Effective Date / / Expiration Date / /

Short Description

Long Description Deduction Processing Order #

Valid Input Windows Deduction Acceptance Priority #

Benefit Type Class Sub-class Category

Enforcement Options | Deduction Options

Deduction Goal Not Goal Oriented Goal Oriented Cyclical Goal Oriented

Federal / State Marital Status No Associated Status Federal State and Local

Deduction Class Use Marginal Tax Tables FICA Deduction Use Alternate Rate Tables No Special Processing

Goal Type Not Applicable Dollar Amount Installments

Recycle Deduction Partial Deduction Report Take Partial Deduction



BENEFIT ADJUSTMENTS

Calculating the Benefit Amount During the Adjustment Pay Period(s)

Once it has been determined that an adjustment needs to be made, the benefit adjustment amount needs to be calculated. This will be dependent upon how much the employee has under/overpaid their benefit and what other benefit plan or type changes are required.

Next, the number of pay periods over which the adjustment will be made needs to be determined. The amount of the benefit adjustment and whether or not the adjustment is positive or negative will impact this decision. Finally, the new (corrected) benefit amount will still need to be taken.

The formula you can use to calculate the Benefit Amount is:

New (Corrected) Benefit Amount ± Benefit Adjustment Amount

Number of Pay Periods

This formula should be used only when replacing permanent deductions (benefits) on the 1DED.



BENEFIT ADJUSTMENTS

EMPLOYEE FRINGE BENEFITS TYPE (BENT)

Employee Fringe Benefit Type

Deduction Type: [] Effective Date: / / Expiration Date: / /

Short Description: []

Long Description: [] Deduction Processing Order #: []

Valid Input Windows: [] [] [] [] Deduction Acceptance Priority #: []

Benefit Type Class: [] Sub-class: [] Category: []

Enforcement Options: [] Deduction Options: []

Deduction Registers:

Employee vs Appointment:

Employee

Appointment

Both

Employment Status: []

Deduction Policy Rule:

No Restriction

Enforce by Type

Enforce by Type / Plan

Permanent Deduction Allowed

EFT Allowed

Automatic Termination

Include in Supplemental Pay Cycle

BENEFITS ENROLLMENT (ENRL)

Benefits Enrollment

Name: []

Employee: [] Appointment ID: []

Selection Date: / /

Deduction Policy: [] [] Pay Frequency: []

Benefit Type Class: []

Benefit Type Sub-Class: []

Benefit Plan Class: []

	Deduction Type	Type Description	Deduction Plan	Plan Description	Effective Date	Expiration Date	Enrollment Date
1							
2							
3							
4							
5							

ONE-TIME DEDUCTION (IDED)

One-Time Deduction

Name: []

Employee ID: [] Appointment ID: []

Agency: [] Document Number: []

Deduction Type: [] Deduction Plan: []

Event Date: / /

Deduction Amount: [] Deduction Rate: []

Number of Installments: [] Recycled Deduction: []

Deduction Transaction ID: [One Time Transaction]

Add / Replace ID:

Add Deduction

Replace Permanent Deduction

Include in Supplemental Run



BENEFIT ADJUSTMENTS

Similar to the deduction adjustments discussed earlier, before you complete the transactions necessary to process the benefit adjustment and to establish the benefit correctly, you need to determine whether the benefit is Auto-Terminating.

Let's review the different processes for adjusting benefits.

Changing the Plan but Not the Type

Step 1 Verify that the Type and Plan is Auto-Terminating on the Employee Fringe Benefits Type (BENT) Table.

Step 2 Process a Benefits Enrollment (ENRL) to establish the benefit correctly. The new benefit would start the first date of the pay period after the benefit adjustment expired. The benefit end date will be dependent upon the benefit type and plan. However, the default is 99/99/99.

Step 3 Calculate how much the benefit adjustment is, determine how many pay periods the benefit adjustment will impact, and calculate the amount to be entered for the benefit during that time period.

Step 4 Process a One-Time Deduction (1DED) for the benefit adjustment for the pay periods through which the adjustment is to be made.



BENEFIT ADJUSTMENTS

EMPLOYEE FRINGE BENEFITS TYPE (BENT)

Employee Fringe Benefit Type

Deduction Type: Effective Date: / / Expiration Date: / /

Short Description:

Long Description: Deduction Processing Order #:

Valid Input Windows: Deduction Acceptance Priority #:

Benefit Type Class: Subclass: Category:

Enforcement Options **Deduction Options**

Deduction Registers:

Employee vs Appointment: **Deduction Policy Rule** Permanent Deduction Allowed

Employee No Restriction EFT Allowed

Appointment Enforce by Type Automatic Termination

Both Enforce by Type / Plan Include in Supplemental Pay Cycle

Employment Status:

BENEFITS ENROLLMENT (ENRL)

Benefits Enrollment

Name:

Employee: Appointment ID:

Selection Date: / /

Deduction Policy: Pay Frequency:

Benefit Type Class:

Benefit Type Sub-Class:

Benefit Plan Class:

	Deduction Type	Type Description	Deduction Plan	Plan Description	Effective Date	Expiration Date	Enrollment Date
1							
2							
3							
4							
5							

ONE-TIME DEDUCTION (1DED)

One-Time Deduction

Name:

Employee ID: Appointment ID:

Agency: Document Number:

Deduction Type: Deduction Plan:

Event Date: / /

Deduction Amount: Deduction Rate:

Number of Installments: Recycled Deduction:

Deduction Transaction ID: **One Time Transaction**

Add / Replace ID: Include in Supplemental Plan

Add Deduction

Replace Permanent Deduction



BENEFIT ADJUSTMENTS

Changing the Type and Plan

Step 1 Process a Benefits Enrollment (ENRL) to expire the current benefit. The benefit expiration date would be the last date of the pay period before the benefit adjustment is to be made.

Step 2 Calculate how much the benefit adjustment is, determine how many pay periods the benefit adjustment will impact, and calculate the amount to be entered for the benefit during that time period.

Step 3 Process a One-Time Deduction (1DED) for the benefit adjustment for the pay periods through which the adjustment is to be made.

Step 4 Process a Benefits Enrollment (ENRL) to establish the benefit correctly. The new benefit would start the first date of the pay period after the benefit adjustment expired. The benefit expiration date will be dependent upon the benefit type and plan. However, the default is 99/99/99.

Let's complete some walkthroughs for different benefit adjustment situations.



NOTES



BENEFIT ADJUSTMENT: CHANGING A PLAN

SCENARIO

An employee was supposed to be enrolled in Blue Choice Member Family plan for Boone County (a deduction of \$64.00 per pay period, or \$128.00 per month). He found out that he was enrolled in the Blue Choice Member Individual for Boone County instead (a deduction of \$1.50 per pay period, or \$3.00 per month). This means that his benefit plan needs to be changed. After researching the issue, he discovered that he had been enrolled in the wrong plan for the last four months (8 pay periods) and had therefore already contributed \$12.00 ($\1.50×8) towards the wrong plan. He should have already contributed \$512.00 to the Member Family plan ($\$64.00 \times 8$). The net effect of the error is an under-contribution of \$500.00 ($\$512.00 - \12.00). He requested that this additional amount be taken from his paycheck over a period of two months (or four pay periods). Process the adjustment over four pay periods, and set up a new benefit for the correct amount to take effect once the adjustment period is completed.

Note: If you were processing an adjustment on deferred compensation you would need to access the Employee Fringe Benefits Type (BENT) window to confirm whether or not the benefit was Auto-Terminating (this is similar to the process you used in topic 4 - Refunding Deductions, except you are checking the BENT table in this case instead of the Deductions Type (DEDT) window). If it is not Auto-Terminating, you would need to complete an ENRL first to expire the benefit. This is similar to the process you used in deductions adjustment for Non Auto-Terminating benefits. The only difference is you use the ENRL window for benefits and not the MISC window. In this case, the health insurance we're dealing with is an Auto-Terminating benefit. This means by entering a new plan you will automatically expire the old plan. Remember that if both the type and plan are changing, the old one must be expired before establishing the new one (i.e., it is Non Auto-Terminating).



EMPLOYEE FRINGE BENEFIT TYPE (BENT)

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File Edit Display Modify Window Help

Employee Fringe Benefit Type

Deduction Type: BLC2E Effective Date: 01 / 01 / 20 Expiration Date: 99 / 99 / 99

Short Description: CP-BL CH HMO

Long Description: CP-MCHCP BLUE CHOICE HMO - EE Deduction Processing Order #: 3

Valid Input Windows: ENRL 1DED Deduction Acceptance Priority #: 3

Benefit Type Class: MCHCP Sub-class: 2HLTH Category: MCH2E

Enforcement Options Deduction Options

Deduction Registers:

HAR4100				

Employee vs Appointment Deduction Policy Rule

Employee No Restriction Permanent Deduction Allowed
 Appointment Enforce by Type EFT Allowed
 Both Enforce by Type / Plan Automatic Termination
 Include in Supplemental Pay Cycle

Employment Status: 12

Messages 11:51 AM 07/13/00



BENEFIT ADJUSTMENT: CHANGING A PLAN

The first step in adjusting the benefit is to confirm that the benefit is Auto-Terminating. You will do this using the Employee Fringe Benefit Type (BENT) window.

Step 1 To open the BENT from the SAM II Desktop Navigator window, click the Go To icon. Type **BENT** in the "CODE" and click the Open button.

Step 2 Populate the following field to narrow your search on the BENT window.

DEDUCTION TYPE - Enter the code that is being reviewed. Type **BLC2E**.

Select **Display: Browse Data**.

Step 3 Review the following field to confirm you have the desired benefit.

LONG DESCRIPTION – Provides a long description of the benefit type.

Step 4 Review the following fields on the Enforcement Options panel to determine if your benefit is Auto-Terminating.

AUTOMATIC TERMINATION – Confirm that Automatic Termination is checked. If it is not checked, you would need to expire the current benefit before processing an adjustment.



BENEFITS ENROLLMENT (ENRL)

Benefits Enrollment

Name: RAY, JOHNNY

Employee: 050 - 71 - 0001 Appointment ID:

Selection Date: 01 / 23 / 01

Deduction Policy: STAND STANDARD DED Pay Frequency: S

Benefit Type Class: MCHCP MCHCP FRNGS

Benefit Type Sub-Class: 2HLTH CAFE HEALTH

Benefit Plan Class:

	Deduction Type	Type Description	Deduction Plan	Plan Description	Effective Date	Expiration Date	Enrollment Date
1	BLDGE	CP-BL CH HMO	010MF	MEMBR/FAMILY	01 16 01	11 15 01	
2							
3							
4							
5							



BENEFIT ADJUSTMENT: CHANGING A PLAN

Now you need to enroll the employee into the correct plan:

Step 1 To open the ENRL from the SAM II Desktop Navigator window, click the Go To icon. Type **ENRL** in the "CODE" and click the Open button.

Step 2 Populate the following fields to access the ENRL transaction you need.

Header

NAME – Inferred. Confirm that this is the employee for whom you need to process a benefit adjustment.

EMPLOYEE ID – Enter the employee's social security number. **SEE STUDENT CARD.**

BENEFIT TYPE CLASS- Type **MCHCP.**

BENEFIT TYPE SUB-CLASS – Type **2HLTH.**

Detail Line Section

DEDUCTION TYPE – Type **BLC2E.**

DEDUCTION PLAN – Type **010MF**

Select **Display: Browse Data.**

The Cafeteria Health type and plan should appear.

Step 3 Select the line with the desired type and plan. Enter the following fields to process the new benefit.

Enter the first day of the pay period for which the new benefit will start to be withheld. Type **FIRST DAY OF CURRENT PAY PERIOD** in the **EFFECTIVE DATE** field, and type **11/15/01** in the **EXPIRATION DATE** field.

Step 4 Blank out the **DEDUCTION TYPE** field on the second line (BLC2E/010MI).

Step 5 Select **Process: Update.** Select *No* in the dialogue box that appears asking if you wish to include both lines.

Note: Blanking out the Deduction Type field (Step 4) is only necessary in situations where you wish to auto-expire a benefit in the same plan, *AND* the record for the benefit to expire is displayed on the window at the time of update.



ONE-TIME DEDUCTION (1DED)

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File Edit Display Process Window Help

➔ [Icons]

One-Time Deduction

Name

Employee ID Appointment ID

Agency Document Number

Deduction Type Deduction Plan

Event Date / /

Deduction Amount Deduction Rate

Number of Installments Recycled Deduction

Deduction Transaction ID

Add / Replace ID Include in Supplemental Run

Add Deduction

Replace Permanent Deduction

Navigator [Icons]

Messages Tran ID: 11:56 AM 07/13/00



BENEFIT ADJUSTMENT: CHANGING A PLAN

You have now enrolled the employee into the Blue Choice Member Family health plan for Boone County. Now, you need to make the necessary adjustment. In doing this, you need to determine how much money would have been contributed if this benefit had been set up correctly from the start. Then divide that number by the number of pay periods over which the adjustment will be made. This will add back the amount already contributed as well as any other adjustments that need to be made.

Remember the scenario situation where the employee had already contributed \$12.00 to the wrong plan over the last eight pay periods (4 months)? He also would have needed to contribute an additional \$500.00 to bring him up-to-date for the new plan (\$512 total). When enrolled in the new plan, the \$12.00 needs to be considered as well as the adjustment for the \$500.00. This adjustment needs to be made over four pay periods. Here is how you would calculate what the total employee amount would be:

The new plan requires a payment of \$64.00 per pay period. Multiplied by 8 pay periods this would equal a total of \$512.00. However, he had already contributed \$12.00 in the past 4 months. This means that he needs to contribute \$500.00 (\$512 – \$12) over the next 4 pay periods to catch up. This calculates to \$125.00 per pay period. In addition, he still needs the new plan deduction of \$64.00 per pay period, for a total of \$189.00 per period for the next 4 pay periods.

Note: For some Goal Oriented benefits and deductions, the 1DED can be used to automatically make the deductions in installments. However, this benefit is not Goal Oriented. Therefore, four 1DED's must be processed (one for each installment). The 1DED's can all be entered at the same time. Using a future date in the Event Date field will accomplish the installments.

Let's process the 1DED's that would take care of this adjustment.



ONE-TIME DEDUCTION (1DED)

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File Edit Display Process Window Help

➔ [Icons]

One-Time Deduction

Name: RAY, JOHNNY

Employee ID: 050 - 71 - 0001 Appointment ID:

Agency: 860 Document Number: 050710001A

Deduction Type: BLC2E Deduction Plan: 010MF

Event Date: 08 / 15 / 00

Deduction Amount: 189.00 Deduction Rate: 0.0000

Number of Installments: 0 Recycled Deduction: N

Deduction Transaction ID: One Time Transaction

Add / Replace ID: Include in Supplemental Run

Add Deduction

Replace Permanent Deduction

Navigator [Icons]

UPDATE WAS SUCCESSFUL Messages Tran ID:000802000122 6:10 PM 08/02/00



BENEFIT ADJUSTMENT: CHANGING A PLAN

Step 1 To open the 1DED from the SAM II Desktop Navigator window, click the Go To icon. Type **1DED** in the "CODE". Click the Open button and begin completing the required fields.

Step 2 Populate the following fields to process the 1DED transaction you need:

EMPLOYEE ID - Enter the employee's social security number. **SEE STUDENT CARD.**

AGENCY – Type **860.**

DOCUMENT NUMBER – **SEE STUDENT CARD.**

DEDUCTION TYPE – Type **BLC2E.**

DEDUCTION PLAN – Type **010ME.**

EVENT DATE – Enter the last day of the current pay period. Type **LAST DAY OF CURRENT PAY PERIOD.**

DEDUCTION AMOUNT – Type **189.00.**

ADD/REPLACE ID – Select **REPLACE PERMANENT DEDUCTION** to replace the current permanent deduction.

Step 3 Select **Process: Update.**

If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that the update was successful. If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors and repeat Step 3.



ONE-TIME DEDUCTION (1DED)

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File Edit Display Process Window Help

➔ [Icons]

One-Time Deduction

Name: RAY, JOHNNY

Employee ID: 050 - 71 - 0001 Appointment ID:

Agency: 860 Document Number: 050710001B

Deduction Type: BLC2E Deduction Plan: 010MF

Event Date: 08 / 31 / 00

Deduction Amount: 189.00 Deduction Rate: 0.0000

Number of Installments: 0 Recycled Deduction: N

Deduction Transaction ID: One Time Transaction

Add / Replace ID Include in Supplemental Run

Add Deduction

Replace Permanent Deduction

Navigator [Icons]

UPDATE WAS SUCCESSFUL Messages Tran ID:000802000123 6:11 PM 08/02/00



BENEFIT ADJUSTMENT: CHANGING A PLAN

Now process the remaining 1DED's for the other 3 installments.

Step 1 Without closing the 1DED window, select **Display: Browse Data** from the pull-down menus.

Step 2 Populate the following fields to process the 1DED transaction you need:

DOCUMENT NUMBER – SEE STUDENT CARD.

EVENT DATE – Enter the last day of the current pay period. Type LAST DAY OF THE NEXT PAY PERIOD.

Step 3 Select **Process: Update.**

If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that the update was successful. If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors and repeat Step 3.

Now process 2 more 1DED's using the steps above for the other 2 installments. In the Event Date fields, enter the last date of the next 2 successive pay periods. See your student card for the document numbers to use.

Using the future dates will ensure that SAM II does not pick up the 1DED's until the correct pay periods.



NOTES



BENEFIT ADJUSTMENT: CHANGING TYPE AND PLAN

SCENARIO

An employee was enrolled in the Blue Choice Member Individual plan for Morgan County but should have been enrolled in the Humana HMO Member Individual plan for Morgan County. He discovered this after he received his first paycheck after the open enrollment period. He has paid \$3 for his Blue Choice individual plan but should have paid \$12 for his Humana HMO plan. You need to expire the Blue Choice type and plan, adjust his benefit one time for \$9 plus his Humana HMO individual plan rate of \$12 and establish the new type and plan.



BENEFITS ENROLLMENT (ENRL)

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File Edit Display Process Window Help

Benefits Enrollment

Name: RAY, JOHNNY
 Employee: 050 - 72 - 0001 Appointment ID:
 Selection Date: 07 / 13 / 00
 Deduction Policy: STAND STANDARD DED Pay Frequency: S
 Benefit Type Class: MCHCP MCHCP FRNGS
 Benefit Type Sub-Class: 2HLTH CAFE HEALTH
 Benefit Plan Class:

	Deduction Type	Type Description	Deduction Plan	Plan Description	Effective Date	Expiration Date	Enrollment Date
1	BLDCE	CP-BL CH HMO	071MI	MEMBR ONLY	07 01 00	07 31 00	07 01 00
2							
3							
4							
5							

UPDATE WAS SUCCESSFUL Messages Tran ID:000713006601 12:13 PM 07/13/00



BENEFIT ADJUSTMENT: CHANGING TYPE AND PLAN

Expiring the employee's current type and plan

Step 1 Open the ENRL from the SAM II Desktop Navigator window, click the Go To icon. Type **ENRL** in the "CODE" and click the Open button.

Step 2 Populate the following fields to access the ENRL transaction you need.

Header

NAME – Inferred. Confirm that this is the employee for whom you need to process a benefit adjustment.

EMPLOYEE ID – Enter the employee's social security number. **SEE STUDENT CARD.**

BENEFIT TYPE CLASS- Type **MCHCP.**

BENEFIT TYPE SUB-CLASS – Type **2HLTH.**

Detail Line Section

DEDUCTION TYPE – Type **BLC2E.**

DEDUCTION PLAN – Type **071MI.**

Select **Display: Browse Data.**

The Group Health Cafeteria Type and Plan should appear. Verify that this is the type and plan you want to expire.

Step 3 Select the line with the desired type and plan. Enter the following fields to process the new benefit.

EXPIRATION DATE –Enter the last day of the pay period. Type **LAST DAY OF PRIOR PAY PERIOD.**

Step 4 Select **Process: Update.**

If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that approvals are ready to be applied. If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors and repeat Step 4.

You have now expired the employee's old health insurance enrollment.



BENEFITS ENROLLMENT (ENRL)

Benefits Enrollment

Name: RAY, JOHNNY

Employee: 050 - 71 - 0001 Appointment ID:

Selection Date: 01 / 23 / 01

Deduction Policy: STAND STANDARD DED Pay Frequency: S

Benefit Type Class: MCHCP MCHCP FRNGS

Benefit Type Sub-Class: 2HLTH CAFE HEALTH

Benefit Plan Class:

	Deduction Type	Type Description	Deduction Plan	Plan Description	Effective Date	Expiration Date	Enrollment Date
1	IBLCP2	CP-BL CH HMO	010MF	MEMBR/FAMILY	01 16 01	11 15 01	
2							
3							
4							
5							



BENEFIT ADJUSTMENT: CHANGING TYPE AND PLAN

Now create an ENRL for the correct type and plan. You can create the new entry now and future-date the transaction.

Step 1 With the ENRL still open, populate the following fields in the detail line section:

DEDUCTION TYPE – Type HUH2E.

DEDUCTION PLAN – Type 071MI.

Select **Display: Browse Data**.

The Cafeteria Health type and plan should appear.

Step 3 Select the line with the desired type and plan. Enter the following fields to process the new benefit.

EFFECTIVE DATE - Enter the first day of the pay period for which the new benefit will be withheld. Type FIRST DAY OF CURRENT PAY PERIOD.

EXPIRATION DATE – Type 11/15/01.

Step 4 Select **Process: Update**.

You have now enrolled the employee into the correct health insurance type and plan.

Step 5 Close the ENRL window.

ONE-TIME DEDUCTION (1DED)



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File Edit Display Process Window Help

One-Time Deduction

Name: RAY,JOHNNY

Employee ID: 050 - 72 - 0001 Appointment ID:

Agency: 860 Document Number: 050720001A

Deduction Type: HUH2E Deduction Plan: 071MI

Event Date: 08 / 15 / 00

Deduction Amount: 21.00 Deduction Rate: 0.0000

Number of Installments: 0 Recycled Deduction: N

Deduction Transaction ID: One Time Transaction

Add / Replace ID Include in Supplemental Run

Add Deduction

Replace Permanent Deduction

Navigator

UPDATE WAS SUCCESSFUL Messages Tran ID:000713000072 12:19 PM 07/13/00



BENEFIT ADJUSTMENT: CHANGING A PLAN

Now make the adjustment to correct the amount for the employee.

Step 1 To open the 1DED from the SAM II Desktop Navigator window, click the Go To icon. Type **1DED** in the "CODE". Click the Open button and begin completing the required fields.

Step 2 Populate the following fields to process the 1DED transaction you need:

EMPLOYEE ID - Enter the employee's social security number. **SEE STUDENT CARD.**

AGENCY – Type **860.**

DOCUMENT NUMBER – **SEE STUDENT CARD.**

DEDUCTION TYPE – Type **HUH2E.**

DEDUCTION PLAN – Type **071MI.**

EVENT DATE – Enter the last day of the current pay period. Type **LAST DATE OF CURRENT PAY PERIOD.**

DEDUCTION AMOUNT – Type **21.00** (\$12.00 represents her new regular benefit and \$9.00 represents the adjustment from the previous pay period).

ADD/REPLACE ID – Select **REPLACE PERMANENT DEDUCTION.**

Step 3 Select **Process: Update.**

If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that the update was successful. If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors and repeat Step 3.

You have now adjusted the incorrect amount from the last pay period and enrolled the employee into the correct type and plan.

