BENEFITS BEST PRACTICES

Tina Peterson (San Dieguito)
Matthew Swartout (SDCOE CRC)

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Session Topics

- Welcome & Introductions (5 min)
- Guest Speaker Panel (35 min)
    - Troubleshooting Tips – HR (Tina Peterson, San Dieguito)
    - Troubleshooting Tips – Payroll (Sharon Pacheco, Lemon Grove)
    - Things I Have Learned Cross-Function (Andy Cannella, Fallbrook High)
    - Data Cleanup (Terri Freepartner, Coronado)
    - MITI's Top Picks (Bruce Roberts/Von Nguyen, MITI)
- Open Discussion (15 min)
- Wrap up & Closing (5 min)

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GUEST SPEAKER PANEL

Tina Peterson, San Dieguito
Sharon Pacheco, Lemon Grove
Andy Cannella, Fallbrook High
Terri Freepartner, Coronado
Bruce Roberts/Von Nguyen, MITI

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Troubleshooting Tips - HR (Tina Peterson, San Dieguito)

Understand how your Action/Reason codes used in Job Data flow into events into On Demand and the date/logic outcome when processed.

- Understand your benefit rules and time line triggers
- New Hire – benefit start date
  - Hire – fill a position
    - HIR – benefits start 1st of month following date of hire
  - Hire – Ben 30-Day WP
    - HR2 – benefits start 1st of second month following date of hire
- Termination – benefit end date
  - Termination – resignation
    - TER – benefits terminate end of month of termination
  - Termination – Terminate Ben Waiting Period
    - TBW – benefits terminate end of month following month of termination
  - Termination – Term-June Termination
    - TRJ – benefits terminate end of September following June termination
- Job data updates that impact benefit eligibility that do not create action items in "on-demand"
  - Position Update - FTE / Standard Hour change
    - BAS activity ADM event necessary

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Troubleshooting Tips - HR (Tina Peterson, San Dieguito)

It is important to understand the Primary/Second jobs and their implications in Job Data.

- Job Assignment change resulting in an Empl Class change
  - Must create a new employment instance
- Primary Position change to secondary position
  - Updating primary position between empl records
    - Must wait for nightly processing to occur before benefit programs update
  - Creates on demand which can result in benefit program changes
    - Important – know which "on demand" event you are processing
- Secondary position terminations
  - Can create an "on demand" event which terminates benefits
    - Important – know which "on demand" event you are processing
    - If secondary position doesn't affect benefit enrollments, VOID "on demand" event to eliminate errors

Troubleshooting Tips - HR (Tina Peterson, San Dieguito)

Understand events in On Demand and their implications.

- Understand the events that are in "on demand"
  - Process the correct event class with the correct effective date
    - Confirm event pertains to primary job (unless your District is configured to assess secondary jobs)
  - Process necessary events in order

Troubleshooting Tips - HR (Tina Peterson, San Dieguito)

We complete all Job Data entry transactions prior to the First Calc.

- Department I manage processes all HR Job Data and benefit information
  - Our business practice in place is to complete all Job Data and benefit transactions the day before first Pre-Calc
    - This allows Payroll to audit and review transactions on the day of first Pre-Calc and subsequent days prior to payroll processing
    - Any urgent processing required on first Pre-Calc day through payroll run day requires communication by HR staff to the Payroll staff
- Proration
  - Proration process runs the night of the first Pre-Calc
    - Any subsequent updates involving proration will require manual override

Troubleshooting Tips – Payroll
(Sharon Pacheco, Lemon Grove)

Understanding what is in Position and Job Data.

- Effective Date
- FTE/Standard Hours
- Employee Class
- Primary/Secondary Job

Troubleshooting Tips – Payroll
(Sharon Pacheco, Lemon Grove)

Ownership of what process through payroll

■ Payroll tickler file
  – All changes that impact employees pay and deductions are monitored through payroll to confirm.
    • TSA updates
    • Benefit updates
    • General deduction updates
■ Data entry done in timely manner prior to 1st calc.
■ Audits are completed during each pre-calc.
■ Recommended queries for auditing
  – M_PY_CALC_ERROR_MSGS_BY_DIST – Run to identify EE's who have issues with their data and will cause a paycheck not to generate
  – M_HR_MORE_PRIMARY_JOB_FLAG – Run to identify EEs who have multiple primary jobs in organization
  – M_HR_NO_PRIMARY_ONEJOB – Run to identify EEs with no primary job in organization

Things I Have Learned Cross-Function
(Andy Cannella, Fallbrook High)

Understand how the total Benefit Administration process works from beginning to end.

■ Coming from a payroll background, benefits were just a deduction on a payline. With benefit responsibilities in PeopleSoft, had to grasp the concepts of a fully integrated human capital management system.
■ Had to understand how things entered the BAS Activity table.
  – Automatically through Job Data.
  – Manually entered Life and ADM events on the BAS Activity table.
■ Had to understand how to use On-Demand to process correct events.
■ Had to understand how to verify the enrollments processed properly with the correct date rules logic.
  – Benefits that are effective today or prior – use Current Benefit Summary screen.
  – Benefits that are future dated – use the Enrollment screens.

Things I Have Learned Cross-Function
(Andy Cannella, Fallbrook High)

Communication between departments and functional areas is key to success in a fully integrated system.

- Collaborated within our organization to ensure each functional area understands how their area impacts the other functional areas.
  - This collaboration ensures that employees are set-up correctly and process properly through payroll.
- In our organization; HR, Payroll and Benefits collaborated to build a new hire setup form that mirrors our business practices and guarantees all responsibilities are completed successfully.
  - This is a fluid document that we update as needed to improve the hire process.

Things I Have Learned Cross-Function
(Andy Cannella, Fallbrook High)

Ownership of your employee's enrollments.

- Created a master Benefit Census excel spreadsheet to managed our employee's benefits.
  - This is a live document that is updated as events are processed in On-Demand.
- 4-way validation/reconciliation
  - Benefit Census audited against enrollments in PeopleSoft.
  - Benefit Census audited against the employee hard copy benefit files.
  - Benefit Census audited against the Vendor Remittance report.
  - Benefit Census audited against the vendor statements.

Data Cleanup (Terri Freepartner, Coronado)

Understanding the state of affairs.

■ Shortly after I was hired in September of 2015, I realized I had some work ahead of me.

– My initial audits of the current enrollments in PeopleSoft did not match the vendor statements.

– We had a big overpayment in July and August as those months processed when we should not have.

– Employees enrolled in correct plans and coverage where charged wrong rates.

– Employees were being charged extra due to the proration process running when EE worked enough hour to be 1 FTE on secondary positon.

– The variance had not been reconciled on the payline so these variance continued month to month.

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Data Cleanup (Terri Freepartner, Coronado)

Knowing where to start. Eating an elephant one bite at a time.

1. Started by auditing what employee's were enrolled in PS and on the vendor statements. Verified against paper documents as needed.
2. Assessed the employee's paychecks to ensure the correct deduction amounts are processing against the correct plans and coverage levels.
3. Completed auditing and reconciliation against the vendors variance report and adding adjustments on the payline accordingly.
4. Fixed the rates on the rate table.
5. Input all missing override deductions on the SDCOE Custom Deduction Override (employee) screen for July and August.
6. Added "NO PRORATE" to elig config 5 for employees whose benefits were being prorated when they should not have been.

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Data Cleanup (Terri Freepartner, Coronado)

Once purified, how to stay on track.

1. Monthly audits and reconciliations. Avoid carrying variance longer than a month. If issue in payroll, make adjustment to correct in next payroll.
2. Process pending transactions in a timely manner to avoid payline adjustments.

MITI's Top Picks (Bruce Roberts, Von Nguyen)

MITI would like to highlight these 4 specific talking points made by the guest speakers.

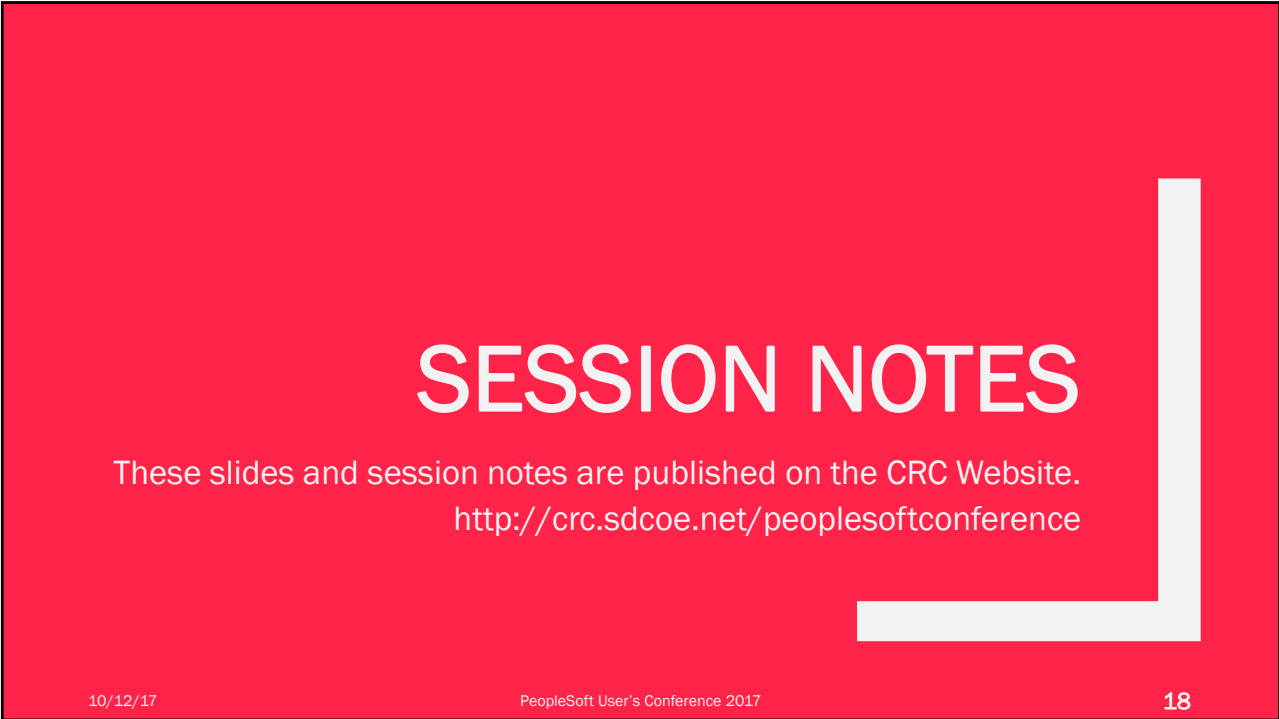| We complete all Job Data entry transactions prior to the First Calc (Tina Peterson, San Dieguito)	Ownership of what process through payroll (Sharon Pacheco, Lemon Grove)
Ownership of your employee's enrollments (Andy Cannella, Fallbrook High)	Once purified, how to stay on track (Terri Freepartner, Coronado)

OPEN DISCUSSION

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SESSION NOTES

These slides and session notes are published on the CRC Website.
http://crc.sdcoe.net/peoplesoftconference

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Fallbrook Union High School District
New Employee

Completed by_____
Date forwarded to Payroll_____
Effective Date_____

Section 1 – New Hire-Personal Data

Job Classification
❏Management ❏Certificated ❏Confidential ❏Classified ❏Substitute ❏Student ❏Limited Term

Name:	Job Title	Position #

Social Security	Employee ID#	Date of Birth:

Address: | Phone Number:

❏Personnel Action Request (PAR)
❏Application
❏Reference Check 1
❏Reference Check 2
❏Reference Check 3
❏Board Approval Date_____
❏Notice of Personnel Action (NOPA)

❏Credentials
❏CBEST
❏Transcripts ❏ Units after BA _____
❏Verification of Experience/Verification of Sick Leave
❏Salary Placement_____
❏Masters Degree
❏Doctorate Degree
❏SEID#

Section 2 – Clearance & Forms to be Completed and Returned

❏New Hire Packet given to employee_____ ❏New Hire Packet returned by employee_____
❏Fingerprints Cleared: ATI_____ SID_____
Drug Screen: ❏Negative   Physical: ❏Pass   TB Test: ❏Negative   If positive, Chest Xray: ❏Yes
                ❏Positive   ❏Fail   ❏Positive   ❏No

❏I-9
❏STRS ❏Declined
❏3121
❏PERS
❏SEIU
❏SSA-1945
❏SKILLS

❏Mandated Reporting
❏Workers' Compensation
❏Staff Emergency Information
❏Oath of Allegiance
❏Employment Ethnicity
❏Hepatitis B Vaccine Memo Yes/No
❏Payroll Beneficiary

❏W-4
❏Direct Deposit
❏Electronic Resources Agreement
❏Blood Borne Pathogen
❏Employee Handbook
❏Substitute Skills

Section 3 Enter Employee Data in Following Files/Data base

❏PERSONAL INFORMATION ❏JOB DATA ❏RETIREMENT(ARS ONLY) ❏TIME REPORTER ❏MCOP
❏SDCOE (PERS 20 hours or more) ❏HEALTH CARD ❏EMERGENCY CONTACT   ❏DIRECTORY
❏AESOP ❏AERIES ❏NOPA ❏MATRICULATION ❏SENIORITY LIST   ❏EVALUATION/PROBATIONARY
LIST ❏

Section 3 –Payroll & Benefits

General Deductions
❏Workers Comp
❏Federal Taxes
❏State Taxes
❏MCOP
❏AESD-2 (PERS)
❏Direct Deposit
❏AESOP
❏Retirement Plan

❏Adjust Late Start/Early TER

Benefits Yes/No
❏Packet Issued
❏Packet Received
 ❏On Demand Event Maintenance
 ❏Override Deductions
 ❏Providers
 ❏Census

Comments: