

Benefits Best Practices

HCM SESSION C

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conference 2018 *building bridges*

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FUTURE WITHOUT BOUNDARIES

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Session Topics

- Welcome & Introductions **(5 minutes)**
- Activity: Look at 2 main issues (from HEAT tickets) **(25 minutes)**
 - Issue
 - Evaluation
 - How could this have been avoided?
- Reminders **(25 minutes)**
 - Benefits Processing Reminders
 - Group discussion: Audit Tools and Resources
 - Guest speaker: Keri Wutzke, Lakeside – Payline Adjustments
- Wrap up & Closing **(5 minutes)**


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Activity: Look at 2 main issues from HEAT tickets

25 minutes: Issue, Evaluation
How could this have been avoided?

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ACTIVITY: Look at 2 main issues (from HEAT tickets)

<p>Why did the benefits not deduct during this months payroll processing?</p> <p>What is the cause of the issue?</p> <ul style="list-style-type: none">• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____	<p>Why are the benefits preparing incorrectly in On-Demand?</p> <p>What is the cause of the issue?</p> <ul style="list-style-type: none">• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____• Issue: _____
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ACTIVITY: Review the 2 main issues handout

**How could these issues
have been avoided?**

Reminders

Benefits Processing Reminders
Audit Tools and Resources
Payline Adjustments

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Benefits Processing Reminders

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

Process job data created events rather than creating ADM events on the BAS Activity table.

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Group Discussion: Audit Tools and Resources

- Which audit tools and queries do you find most useful?
- When are you running these queries and performing auditing?
- What do you typically find and need to fix?
- What would happen if you didn't do this?

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Benefits Audit Tools / Resources

Use queries to audit benefit data and troubleshoot or prevent pending issues.

- M_BN_BEN_PROG_JOB_DATA
 - Lists job data information that has benefit eligibility implications
- M_BN_OPEN_BEN_ADMIN_EVENTS
 - Review all pending items for processing requirements
 - Void unnecessary processing (TER of a secondary position that would affect Primary benefits)
 - Process open items previously unprocessed to clear an ensure benefits are correct
- M_BN_TERM_EES_ACTIVE_BENEFIT
 - Review employees who have been inactivated with active benefits
 - Process termination of benefits as applicable to ensure payment for inactive benefits does not occur
- M_PY_CALC_ERROR_MSGS_BY_DIST
 - Lists errors encountered during payroll processing. To be run between the pay calcs prior to confirm.

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M_BN_BEN_PROG_JOB_DATA

M_BN_BEN_PROG_JOB_DATA - Benefit/Job Data Audit

Company 045
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Co	ID	BA5 Group	Name	LN/FN	Job Emp't Record	Ben Record Number	Indicator	Ben Program	Ben Pgm Description	Employee Class	Position	Position Title	Pay Status	Group	Location	Union Code	FTE	Std Hrs/Wk	Full/Part	Elig Fld 1	Elig Fld 2	Elig Fld 3	Elig Fld 4	Elig Fld 5	Elig Fld 6	Elig Fld 7	Elig Fld 8	Elig Fld 9	Elig Type	HR Status	
1	045	BR2			0	45	Primary Job	45C	San Diego CR Conf, Asso Sup	Certificated	10454023	Teacher	Active	45M	045400	T25	1.000000	30.00	Full-Time 11 months	04500-11	-	STRS								S	Active
2	045	BR2			0	45	Primary Job	45I	San Diego Classified PT	Classified Hourly	30000293	Coach - Classified - TPHS	Active	45P	045500		0.000000	1.00	Hourly	04500-RL	-	PERS								H	Active
3	045	BR2			0	45	Primary Job	45K	San Diego MGMT & Supv Pgm	Certificated/Manager	10454003	Assistant Principal - Ms	Active	45M	045400		1.000000	40.00	Full-Time 12 months	04500-12	-	STRS								S	Active
4	045	G2			0	45	Primary Job	45I	San Diego Classified PT	Classified Hourly	10450981	Artist-in-Residence	Terminated	45P	045730		0.000000	1.00	Hourly	04500-RL	-	PERS								H	Inactive
5	045	BR2			0	45	Primary Job	45C	San Diego CR Conf, Asso Sup	Certificated	10452126	Teacher	Active	45M	045120	T25	1.000000	31.25	Full-Time 11 months	04500-11	-	STRS								S	Active
6	045	G2			0	45	Primary Job	45I	San Diego Classified PT	Classified Hourly	30000293	Coach - Classified - TPHS	Active	45P	045500		0.000000	1.00	Hourly	04500-RL	-	PEPRAP-NM								H	Active
7	045	G2			0	0	Primary Job	PSX	Default Benefit Program	Certificated	10450041	Psychologist	Terminated	45M	045100	T25	1.000000	31.25	Full-Time 11 months	04500-11	-	STRS								S	Inactive
8	045	BR2			0	45	Primary Job	45C	San Diego CR Conf, Asso Sup	Certificated	10458052	Sp Ed Teacher Mid/Mod	Active	45M	045800	T25	1.000000	31.25	Full-Time 11 months	04500-11	-	STRS								S	Active
9	045	G2			0	0	Primary Job	45K	San Diego MGMT & Supv Pgm	Classified/Manager	10450126	Director Of Classified Person	Terminated	45M	045100		1.000000	40.00	Full-Time 12 months	04500-12	-	PERS								S	Inactive

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M_BN_OPEN_BEN_ADMIN_EVENTS

M_BN_OPEN_BEN_ADMIN_EVENTS - Lists open Ben Admin events

Company 045

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ID	Last Name	First Name	Ben Record	Empl Record	Event ID	Ben Progrm	Class	Event Date	Event Stat	Proc Stat	Process	HR Status	Pay Status	Indicator	Position Descr
1	45	0	2 45C		TRJ	06/17/2017	Closed to Processing	Prepared	Normal Processing	Inactive	Terminated	Secondary Job	Teacher
2	45	0	1 45A		HIR	06/01/2018	Open for Processing	Notified	Normal Processing	Active	Active	Primary Job	Campus Supervisor
3	45	2	7 45I		MSC	10/26/2017	Open for Processing	Prepared	Normal Processing	Active	Active	Primary Job	Substitute-Classified
4	45	0	1 45C		TRJ	07/01/2017	Closed to Processing	Prepared	Normal Processing	Inactive	Terminated	Secondary Job	Teacher
5	45	1	4 PSX		MSC	12/01/2017	Open for Processing	Prepared	Normal Processing	Inactive	Terminated	Secondary Job	Coach - Classified - CCA
6	45	0	14 45A		PAY	08/28/2018	Open for Processing	Program Elig Assigned	Normal Processing	Active	Active	Primary Job	Bus Driver
7	45	0	17 45A		PAY	03/01/2018	Open for Processing	Program Elig Assigned	Normal Processing	Active	Active	Primary Job	School Bus Attendant
8	45	0	2 45C		TRJ	06/17/2017	Closed to Processing	Prepared	Normal Processing	Inactive	Terminated	Secondary Job	Sp Ed Teacher - Mid/Mod
9	45	3	14 45K		TER	08/08/2018	Open for Processing	Prepared	Normal Processing	Active	Active	Primary Job	Assistant Principal - HS
10	45	2	5 45J		HIR	08/28/2018	Open for Processing	Notified	Normal Processing	Active	Active	Primary Job	Teacher
11	45	0	1 45G		PAY	07/01/2017	Open for Processing	Prepared	Normal Processing	Active	Active	Primary Job	Nutrition Services Assistant I

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M_BN_TERM_EES_ACTIVE_BENEFIT

M_BN_TERM_EES_ACTIVE_BENEFIT - Term EEs w/Active Health-Life

Co 045

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ID	Name	Empl Record	Pay Status	Job Eff Date	Data Entry Date	Action	Action Reason	Plan Typ	Covg Bgn	Covg Elec	Elig Flid 3	Plan	Covg Cd
1	...	0	T	07/01/2018	07/23/2018	Termination	Other	10	06/01/2015	W			
2	...	0	T	07/01/2018	07/23/2018	Termination	Other	11	06/01/2015	W			
3	...	0	T	09/14/2018	09/17/2018	Termination	Resignation	10	07/01/2014	W			
4	...	0	T	09/14/2018	09/17/2018	Termination	Resignation	11	07/01/2014	W			
5	...	2	T	06/17/2017	07/17/2017	Data Change	Job Indicator Update	20	09/01/2016	E	45LF03		
6	...	0	T	05/13/2015	05/13/2015	Termination	Resignation	10	08/01/2014	W			
7	...	0	T	05/13/2015	05/13/2015	Termination	Resignation	11	08/01/2014	W			
8	...	0	T	07/01/2018	06/21/2018	Termination	Other	10	10/01/2014	W			
9	...	0	T	07/01/2018	06/21/2018	Termination	Other	11	10/01/2014	W			
10	...	0	T	09/01/2016	06/14/2017	Termination	Other	10	03/01/2017	W			
11	...	0	T	09/01/2016	06/14/2017	Termination	Other	11	03/01/2017	W			
12	...	0	T	07/01/2018	06/21/2018	Termination	Other	10	01/01/2016	W			
13	...	0	T	07/01/2018	06/21/2018	Termination	Other	11	01/01/2016	W			
14	...	0	T	05/01/2018	07/24/2018	Termination	Other	10	06/01/2016	W			
15	...	0	T	05/01/2018	07/24/2018	Termination	Other	11	06/01/2016	W			
16	...	0	T	07/01/2018	06/21/2018	Termination	Other	10	09/01/2016	W			
17	...	0	T	07/01/2018	06/21/2018	Termination	Other	11	09/01/2016	W			
18	...	1	T	09/12/2018	09/13/2018	Termination	Other	10	10/01/2017	W			
19	...	1	T	09/12/2018	09/13/2018	Termination	Other	11	10/01/2017	W			
20	...	0	T	07/01/2018	06/21/2018	Termination	Other	10	10/01/2017	W			

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M_PY_CALC_ERROR_MSGS_BY_DIST

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
MT11	First Pre-Calc: 527	Second Pre-Calc: 296	Final Calc: 190											
Pay Period End # 2018-09-30														
Off Cycle # N														
Col	ID	Msg Data	Empl Record	Group	Pay Period Eff	Page	Line Nbr	Seq Check	Msg ID	Descr	Descr	Msg Data	Msg Data	Pay Run
	70		0	IM	9/30/2018		375	3	0 000010	Invalid One-Time Deduction	The one-time deduction (displayed below) was n S0PERP	N		M09SEP18
			0	IM	9/30/2018		0	0	0 005019	Employee is terminated.	The employee shown below had an Employment 002	2018-06-01		M09SEP18
			0	IP	9/30/2018		0	0	0 005019	Employee is terminated.	The employee shown below had an Employment 004	2018-07-01		M09SEP18
			0	IP	9/30/2018		0	0	0 005019	Employee is terminated.	The employee shown below had an Employment 001	2018-08-01		M09SEP18
			0	IP	9/30/2018		0	0	0 005019	Employee is terminated.	The employee shown below had an Employment 001	2018-08-01		M09SEP18
			0	IP	9/30/2018		0	0	0 005019	Employee is terminated.	The employee shown below had an Employment 001	2018-08-01		M09SEP18
	2018-06-14		0	IM	9/30/2018		375	3	0 000382	No active Job for Earnings	The employee does not have an active Job record for an Earnings End Date.			M09SEP18
	006		3	IP	9/30/2018		967	1	0 000363	Too Many Primary Jobs	This employee has more than one Primary Job for Benefits in effect as of the Pay End Date, for the indicated Benefit Record.			M09SEP18
	**		3	IP	9/30/2018		216	7	0 000010	State Tax Data Not Found	The state tax data record, for the state displayed below, was not found for the employee.			M09SEP18
	70		0	IM	9/30/2018		375	3	0 000010	Invalid One-Time Deduction	The one-time deduction (displayed below) was n S0PERP	B		M09SEP18
			0	E	9/30/2018		0	0	0 005019	Employee is terminated.	The employee shown below had an Employment 000	2018-09-03		M09SEP18
	72		5	IP	9/30/2018		800	3	0 000010	Invalid One-Time Deduction	The one-time deduction (displayed below) was n S0STRP	N		M09SEP18
			0	IM	9/30/2018		0	0	0 005019	Employee is terminated.	The employee shown below had an Employment 000	2018-06-01		M09SEP18
			0	IM	9/30/2018		0	0	0 005019	Employee is terminated.	The employee shown below had an Employment 001	2018-06-01		M09SEP18
			0	IP	9/30/2018		0	0	0 005019	Employee is terminated.	The employee shown below had an Employment 001	2018-08-01		M09SEP18
	PRIM JOB INCORRECT-NA PAY SYST		1	IM	9/30/2018		341	2	0 008201	Job Data Not Found	The employee displayed below is not found in the Job table Magdata1(Emplid), Magdata2(Paygroup), Magdata3(Pay_End_Dt)			M09SEP18
	009		1	IM	9/30/2018		341	2	0 000362	No Primary Job for Benefits	This employee has no Primary Job for Benefits in effect as of the Pay End Date, for the indicated Benefit Record. A Primary Job			M09SEP18
	2018-08-31		4	IM	9/30/2018		503	5	0 000382	No active Job for Earnings	The employee does not have an active Job record for an Earnings End Date.			M09SEP18
	009		2	IM	9/30/2018		80023	12	0 000363	Too Many Primary Jobs	This employee has more than one Primary Job for Benefits in effect as of the Pay End Date, for the indicated Benefit Record.			M09SEP18
	009		0	IP	9/30/2018		385	2	0 000363	Too Many Primary Jobs	This employee has more than one Primary Job for Benefits in effect as of the Pay End Date, for the indicated Benefit Record.			M09SEP18
	009		5	IP	9/30/2018		800	3	0 000363	Too Many Primary Jobs	This employee has more than one Primary Job for Benefits in effect as of the Pay End Date, for the indicated Benefit Record.			M09SEP18
	009		1	IP	9/30/2018		878	1	0 000363	Too Many Primary Jobs	This employee has more than one Primary Job for Benefits in effect as of the Pay End Date, for the indicated Benefit Record.			M09SEP18
	72		1	IM	9/30/2018		341	2	0 000010	Invalid One-Time Deduction	The one-time deduction (displayed below) was n S0STRS	N		M09SEP18
	70		4	IM	9/30/2018		503	5	0 000010	Invalid One-Time Deduction	The one-time deduction (displayed below) was n S0PERP	B		M09SEP18
	70		4	IM	9/30/2018		503	5	0 000010	Invalid One-Time Deduction	The one-time deduction (displayed below) was n S0PERP	N		M09SEP18
	70		2	IM	9/30/2018		80023	12	0 000010	Invalid One-Time Deduction	The one-time deduction (displayed below) was n S0PERP	B		M09SEP18
	70		2	IM	9/30/2018		80023	12	0 000010	Invalid One-Time Deduction	The one-time deduction (displayed below) was n S0PERP	N		M09SEP18
	72		5	IP	9/30/2018		800	3	0 000010	Invalid One-Time Deduction	The one-time deduction (displayed below) was n S0STRP	B		M09SEP18
	72		0	13M	9/30/2018		1	29	0 000010	Invalid One-Time Deduction	The one-time deduction (displayed below) was n S0STRS	N		M09SEP18

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Guest Speaker: Payline Adjustments

Keri Wutzke, Lakeside, kwutzke@lsusd.net

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Payline Adjustments (Keri Wutzke, Lakeside)


Adjustments on the payline for benefit related deductions.

- You can only input adjustments on the payline for benefit plans in the employees assigned benefit program
 - There may be instances where you may not want to process events in On-Demand that will update an employee's benefit program if adjustments need to be processed
 - Example: EE terminated out of benefit eligible position and has active non-benefit eligible position. If TER event is processed, it would move EE into no benefit program. You would not be able to add adjustments on payline. Instead, leave TER unprocessed and add overrides with a zero flat amount for any deduction you do not want to have process.
- The payline only communicates with benefits during the paysheet creation process, time load and the pre-calcs
- If a paysheet is created for a terminate employee, the earnings period must be when they were active in the position
- One-Time Deductions do not evaluate the earnings period. If making adjustments for multiple months. Lump together into a single entry. If the same entry is listed twice, the paycheck will not generate.


Payline Adjustments (Keri Wutzke, Lakeside)

Understand how to use the One-Time Codes:

- **Override** - Will ignore the current regular monthly deduction for the Employer or Employee portion owed (depending on the Deduction Class selected above) and process only the Flat/Additional Amount entered (instead of processing the regular monthly deduction).
- **Addition** - Will add to the Employer or Employee portion owed (depending on the Deduction Class selected above). The Addition Flat/Additional Amount entered will process in addition to the current regular monthly deduction to be taken.
- **Refund** - Will refund either the Employer or Employee portion owed (depending on the Deduction Class selected above). A Refund Flat/Additional Amount will process along with the current regular monthly deduction to be taken.

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Open Forum / Questions / Information Sharing



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Session Notes

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