

PeopleSoft HCM Configuration Updates: Employee Benefit and Payroll Changes – Plans and Rates

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Benefits

Change Needed	Required Notification	Process
Benefits: Rate Changes		District to update Benefit Rates before first PreCalc.
Benefits: Plan Changes including new vendors, plan designs tier changes	Create a HEAT ticket to notify the CRC as soon as possible for reconfiguration, but at least two months before the month the first deduction is to be taken.	
Benefits: General Deductions; change in vendors	Notify Payroll Audit to set up Vendor; on the same day create a HEAT ticket to notify CRC to ensure remittance to vendor is scheduled and General deduction rates are changed; need one month advance notice.	Vendor has to be set up and vendor remittance needs to be scheduled. Following this, the District will need to add the deduction rates.
Benefits: General Deductions – Rate Changes only		District Benefit or Payroll staff to add row and new effective date in General Deductions to change deductions before first PreCalc

Payroll

Change Needed	Required Notification	Process
Payroll: General Deductions (including union dues)		Prior to paysheets being created, add a row with the new effective date to each General Deduction and change the deduction amount.
Payroll: OPEB rates		Prior to paysheets being created, add a row with the new effective date to the OPEB deduction to both/either flat amount or percentage.