PCGENESIS PERSONNEL SYSTEM OPERATIONS GUIDE

12/17/2018

Section D: Special Functions, V2.15

Revision History

Date	Version	Description	Author
12/17/2018	2.15	18.04.00 – Updated *SHBP Benefit Deduction Option and Tier Report – Example*.	D. Ochala
12/14/2017	2.14	17.03.01 – Updated *SHBP Benefit Deduction Option and Tier Report – Example*. Added Fkey sequence to checklist.	D. Ochala
11/07/2016	2.13	16.03.01 – Updated *SHBP Benefit Deduction Option and Tier Report – Example*.	D. Ochala
06/14/2016	2.12	16.02.00 – Updated *Topic 5: Importing the State Health Option and Tier from the DCH File* to emphasize using a .txt file for import.	D. Ochala
02/01/2016	2.11	15.04.00 – Updated *SHBP Benefit Deduction Option and Tier Report – Example*.	D. Ochala
07/13/2015	2.10	15.02.00 – Update the *Personnel System Master Menu*.	D. Ochala
12/03/2014	2.9	14.04.00 – Updated *Topic 4: Downloading the State Health Benefit Plan (SHBP) Open Enrollment File from the ADP Website* instructions for CY2015. Updated *3A.1. SHBP Benefit Deduction Option and Tier Report – Example* and *6A.3. Benefit Deduction Option and Tier Report – Example* with CY2015 benefit plan and rate screenshot example.	D. Ochala
12/18/2013	2.8	13.04.00 – Updated *3A.1. SHBP Benefit Deduction Option and Tier Report – Example* and *6A.3. Benefit Deduction Option and Tier Report – Example* with CY2013 benefit plan and rate screenshot example.	D. Ochala
12/14/2012	2.7	12.03.01 – Updated *3A.1. SHBP Benefit Deduction Option and Tier Report – Example* and *6A.3. Benefit Deduction Option and Tier Report – Example* with CY2013 benefit plan and rate screenshot example.	D. Ochala
12/09/2011	2.6	11.03.01 – Updated *Downloading the State Health Enrollment File* instructions for CY2012. Added the *State Health Benefit Plan (SHBP) Open Enrollment Processing Checklist*.	D. Ochala
11/29/2010	2.5	10.03.01 – Updated *Downloading the State Health Enrollment File* instructions.	D. Ochala
11/19/2008	2.4	08.03.01 – Updated active employee *Set State Health Deduction* information and instructions to include all GHI deduction codes.	C. W. Jones
09/28/2008	2.3	08.03.00 –Referenced the Payroll System Operations Guide for *Topic 8* and *Topic 9*.	C. W. Jones
05/28/2008	2.2	08.02.00 – Added *Overview* export and import file *SSN* information, and screenshot examples.	C. W. Jones

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Overview

Modify Specific Deduction Amounts: Adjust employee deductions using this procedure when the deduction amount for a specific deduction changes from one amount to another for all employees.

Clear Deduction Amounts for a Specific Deduction for All Employees: Clear current and adjustment deduction amounts for a specific deduction after payroll setup and before performing *F4 – Calculate Payroll and Update YTD – Final* where appropriate. For payroll reporting purposes however, PCGenesis retains the year-to-date (YTD) information for affected employees.

State Health Benefit Plan/Georgia Health Insurance (SHBP/GHI): To facilitate the SHBP file import, PCGenesis provides instructions for downloading the State Health Benefit Plan (SHBP) Open Enrollment File from the ADP website in *Topic 4: Downloading the State Health Benefit Plan (SHBP) Open Enrollment File from the ADP Website*. During the ADP file import discussed in *Topic 5: Importing the State Health Option and Tier from the DCH File*, PCGenesis automatically imports the option and tier codes for the State Health Benefit Plan deductions for active employees, based upon the employees' enrollments for the new plan year. The **Participate in GHI?** flag must be set to ***Y*** *(Yes)* for all employees with an SHBP deduction. The **Participate in GHI?** flag must be set to ***N*** *(N)* for all employees without an SHBP deduction.

The employees' insurance premium amounts are automatically updated for these options and tiers using the procedures in *Topic 6: Setting the State Health Benefit Plan (SHBP) Deduction Amounts for Active Employees*. (Note that the premium amounts in the *Benefit Plan/Option/Tier File (BENEDED)* are automatically updated by installing the appropriate PCGenesis release. No manual maintenance is required for updating the *Benefit Plan/Option/Tier File*.)

Employees' option and tier information may also be manually set or modified on the employees' *Personnel* screen. When the option and tier are manually changed on the *Personnel* screen, PCGenesis automatically updates the employee's deduction information with the correct premium amount.

PCGenesis users should note the following guidelines when making manual changes:

- Tier and Option changes: When changing the tier and option on the *Personnel* screen, PCGenesis automatically updates both, the premium amount and the deduction description on the employee's *Deduction* screen.
- Premium Amount changes: If the premium amount is manually set on the employee's *Deduction* screen however, PCGenesis sets neither the tier nor the option information on the *Personnel* screen. Premium changes should NOT be made in this manner.

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Department of Community Affairs (DCH) State Health Option and Tier File:

- PCGenesis users should download the Department of Community Health's (DCH's) *Open Enrollment* file via a Web browser by following the instructions in *Topic 4: Downloading the State Health Benefit Plan (SHBP) Open Enrollment File from the ADP Website*.
- Users should import the options and tiers into PCGenesis by following the instructions in *Topic 5: Importing the State Health Option and Tier from the DCH File*.
- After importing the DCH's *Open Enrollment* file into PCGenesis, follow the instructions in *Topic 6: Setting the State Health Benefit Plan (SHBP) Deduction Amounts for Active Employees.* This procedure may be initially run in *Trial* mode to verify the premium changes before making the updates permanent by running the procedure in *Final* mode.
- To comply with IRS regulations, if the school district or system pays all or part of an employee's share of a premium only for select employees, the premium share amount must be added to the employees' gross wages. Grossing-up employees' wages and deducting the premium through payroll deduction will correctly report the wages for the employees on their W-2 Statements. Refer to *Topic 7: Grossing-Up Wages for Highly Compensated Employees* where applicable for detailed instructions.
- Refer to the *Payroll System Operations Guide*, *Section D: Monthly/Quarterly/Annual/Fiscal Report Processing, Topic 1: Processing Monthly Reports* for monthly DCH reporting and transmission file processing instructions.

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State Health Benefit Plan (SHBP) Open Enrollment Processing Checklist

Follow these steps in the order presented.		
✓	**Step**	**Action**
	1	Install the PCGenesis release which updates the employee GHI premium rates for the new calendar year. This release is typically sent out at the end of November. The PCGenesis release number is typically *YY*.03.01, where '*YY*' is the current calendar year.
	2	Print the *Benefit Plan/Option/Tier Report* for the new calendar year. Verify the correct SHBP options and tiers have been loaded into the system and verify that the employee premium amounts for each option and tier are correct. (F2, F9, F9) Refer to *PAYROLL: Section F: Description/Deduction/Annuity File Processing, Procedure 4A.4. Printing the Benefit Plan Record File Report.*
	3	Where appropriate, update the Group Health Insurance (GHI) Table with the correct employer contribution share. (F2, F13, F3, F6) Refer to *PAYROLL: Section I: Special Functions, Topic 3: Tax Tables/Withholding/Control Information Processing, Procedure A: Display/Update the Payroll Tax and Pension Tables*.
	4	Verify the State Health Benefit Plan (SHBP) system deduction setup. (F2, F9, F5) Refer to *Procedure 3B: Verify the State Health Benefit Plan (SHBP) Deduction Setup* in this document.
	5	Download the State Health Benefit Plan (SHBP) Open Enrollment File from the ADP Website. Refer to *Topic 4: Downloading the State Health Benefit Plan (SHBP) Open Enrollment File from the ADP Website* in this document.
	6	Import the State Health Option and Tier from the ADP File. (F3, F13, F6) Refer to *Topic 5: Importing the State Health Option and Tier from the DCH File* in this document.
	7	Set the State Health Benefit Plan (SHBP) deduction amounts for active employees. Run the procedure in **Trial** mode first, but don't forget to run in **Final** mode second. Enter the date as **01/01/*yy*** where ***yy*** is the new year. (F3, F13, F8) Refer to *Topic 6: Setting the State Health Benefit Plan (SHBP) Deduction Amounts for Active Employees* in this document.
	8	Gross-up wages for highly compensated employees, when appropriate. Refer to *Topic 7: Grossing-Up Wages for Highly Compensated Employees* in this document.

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Follow these steps in the order presented.		
✓	**Step**	**Action**
	9	Before running the December payroll, make sure to verify the employee and employer SHBP contribution amounts by running the *Payroll Trial Register* and the *Trial Employer Benefit Distribution by Employee* reports. (F2, F3, F3)
	10	Run the December payroll. The December payroll withholds the premiums for January SHBP coverage.

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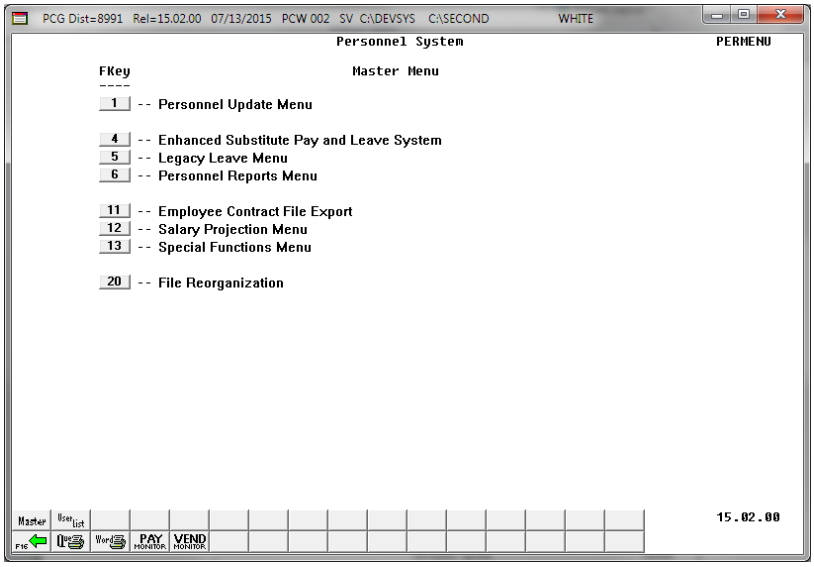
Topic 1: Modify Specific Deduction Amounts

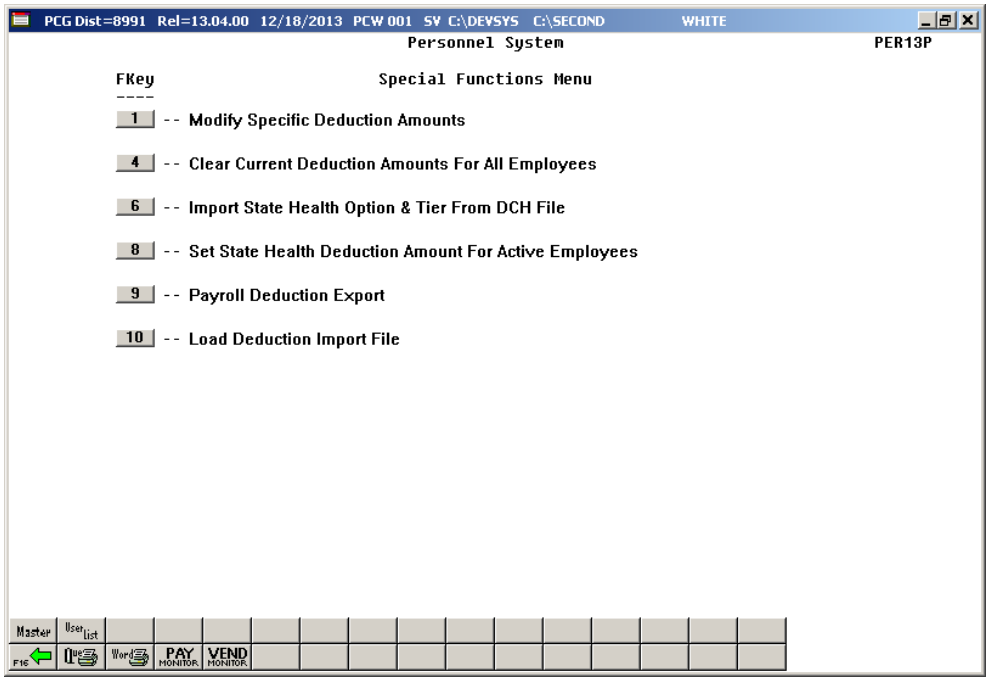
Step	Action
1	From the *Business Applications Master Menu*, select 3 (**F3** - Personnel System).

The following screen displays:



Step	Action
2	Select 13 (**F13** - Special Functions).

The following screen displays:



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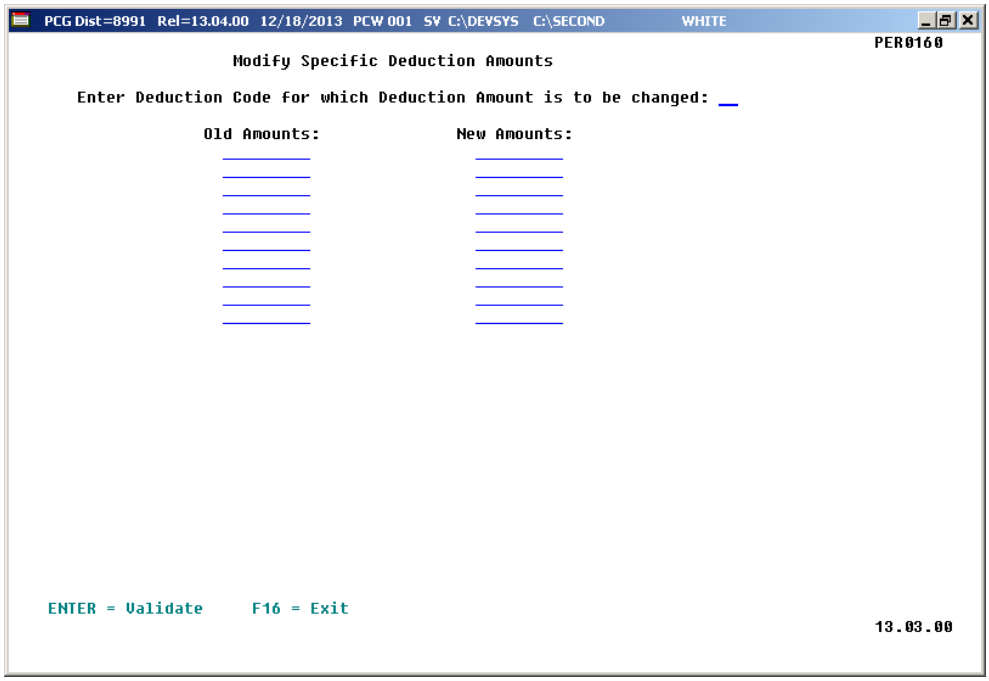
Step	Action
3	Select 1 (**F1** - Modify Specific Deduction Amounts).

The following screen displays:



Step	Action
4	Enter the deduction code in the **Enter Deduction Code for which Deduction Amount is to changed:** field. *For example, users may elect to enter the deduction code for GHI Certified in the field.*
5	Enter the current deduction amount in the **Old Amounts** column and the new deduction amount in the **New Amounts** column. *For example, if GHI Certified increased the employee's share of a premium from $110.00 to $150.00, enter 110.00 in the "Old Amounts" column and 150.00 in the "New Amounts" column.*
6	Verify the entries are correct and select **Enter** (Validate). *Repeat Steps 4 – 6 for <u>each</u> deduction amount, up to ten deductions and amounts.*

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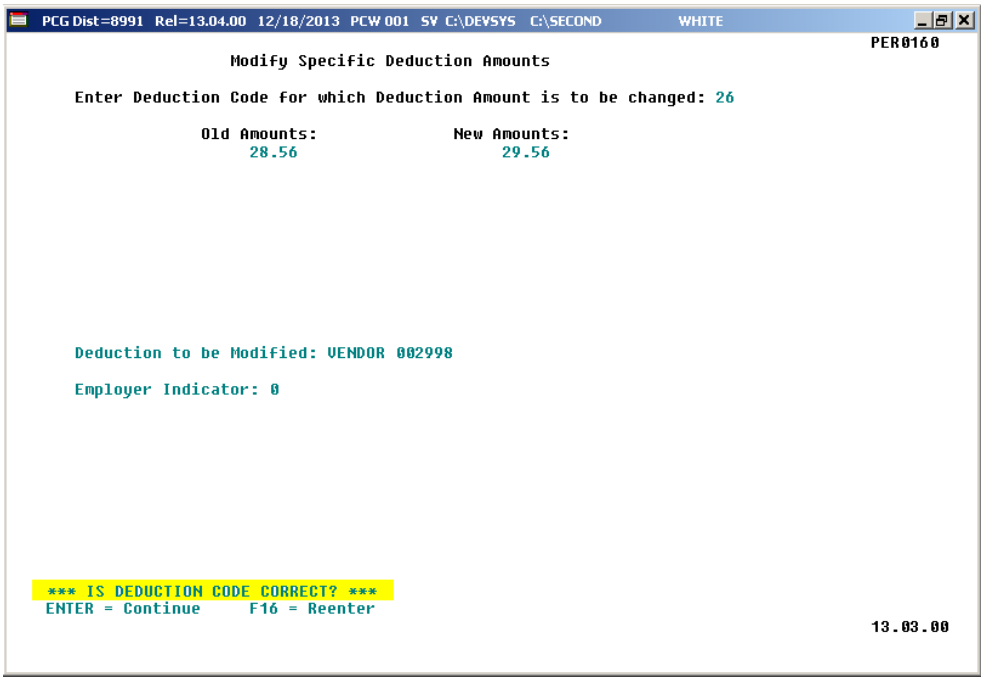
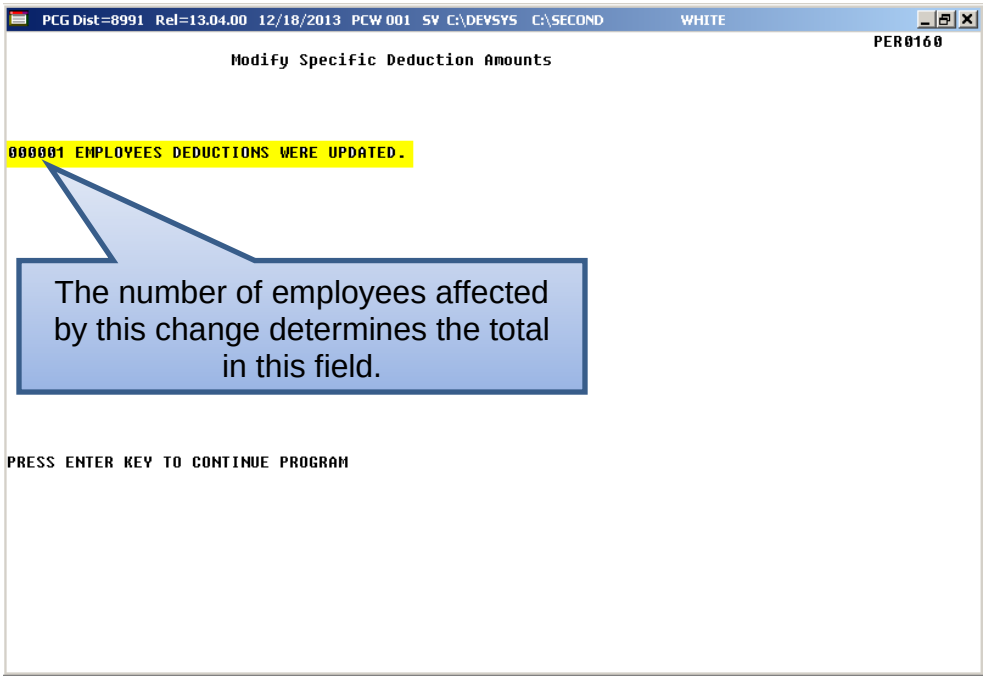
The following screen displays:



Step	Action
7	Select **Enter** (Continue) in response to the *"*** Is Deduction Code Correct? ***"* message. *"***Processing Request***" briefly displays.* *If the information is incorrect, select F16 to enter the correct information.*

The following screen displays:



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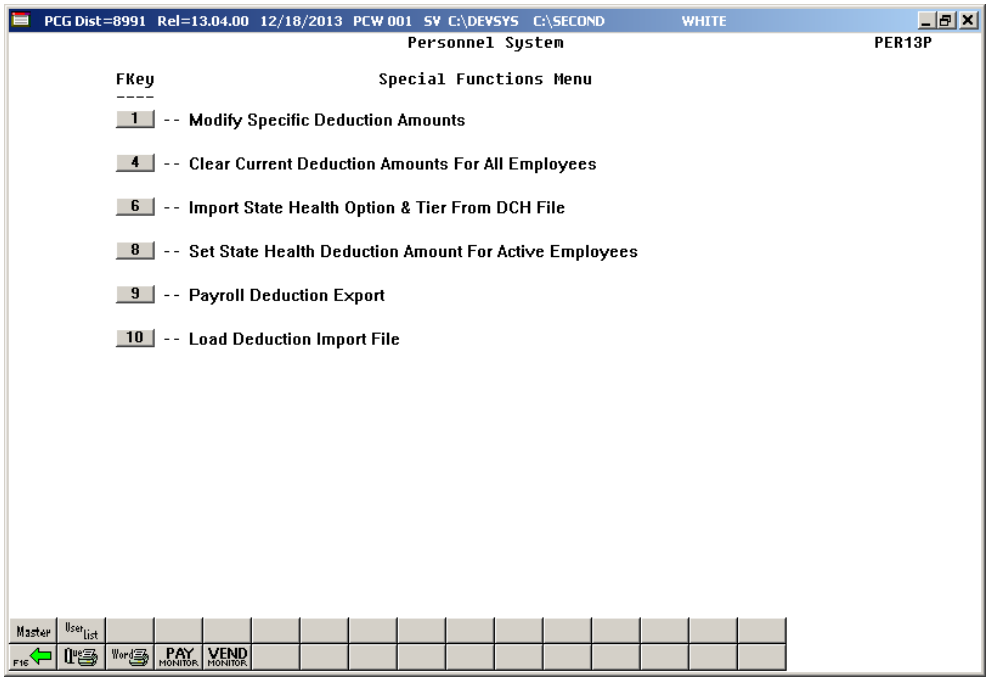
Step	Action
8	Verify the total number of employee records is correct and select **Enter** (To Continue Program). *If the information is incorrect, verify the employee's deduction information is correct by using the instructions in Section B: Payroll Update Processing, Topic 4: Update/Display Payroll Information. If additional assistance is needed, contact the Technology Management Customer Center.*

The following screen displays:



Step	Action
9	Select F16 (**F16 -** Exit) to return to the *Personnel System Master Menu*, or select Master (**Master**) to return to the *Business Applications Master Menu.*

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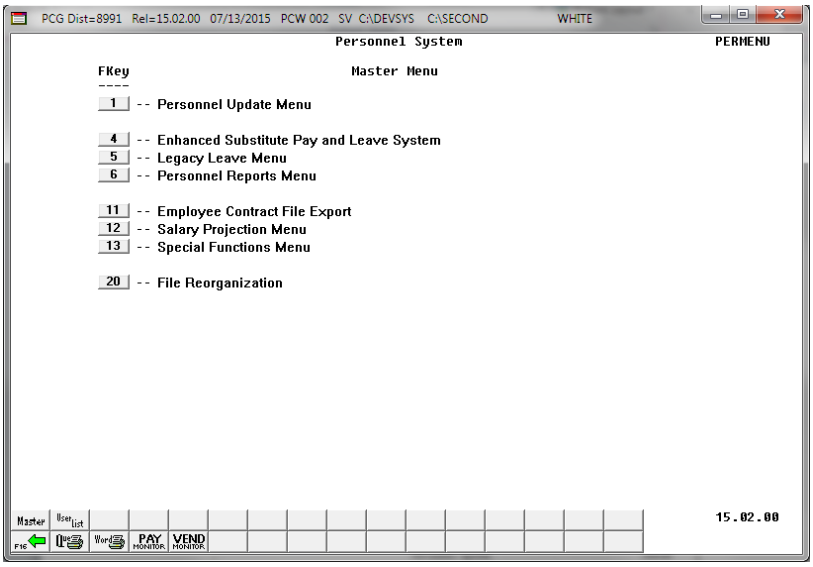
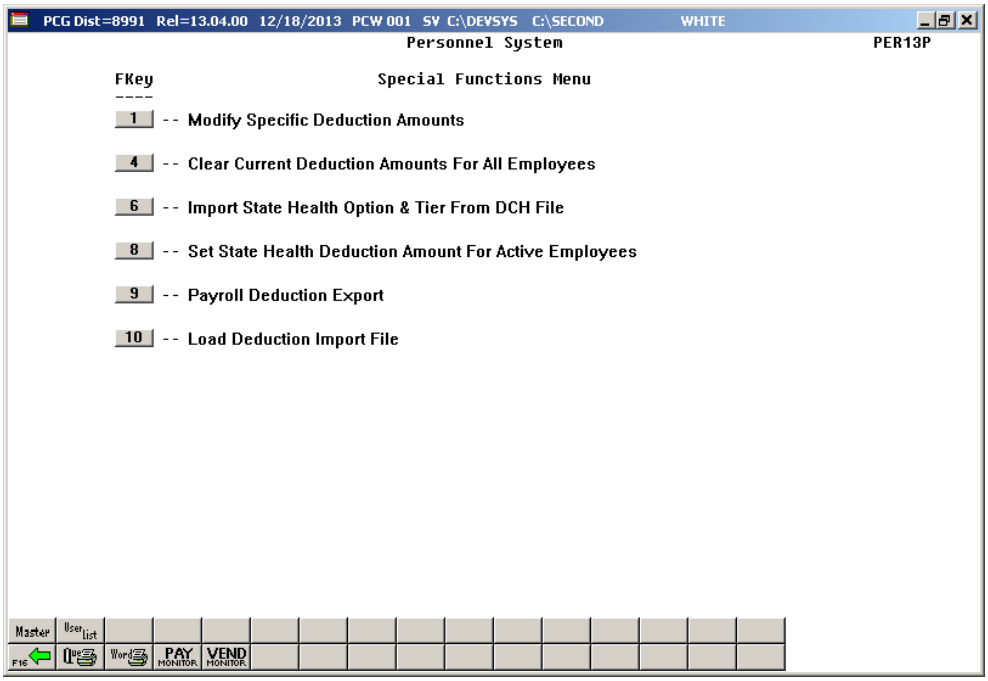
Topic 2: Clear Employees' Current Deduction Amount for a Specific Deduction



Step	Action
1	Select PAY MONITOR (Pay Monitor) to verify payroll has not been set up. After viewing the *Payroll Sequence Monitor*, select **F16** (Exit) to return to the *Personnel System – Master Menu.*
2	Select 13 (**F13 -** Special Functions).

The following screen displays:



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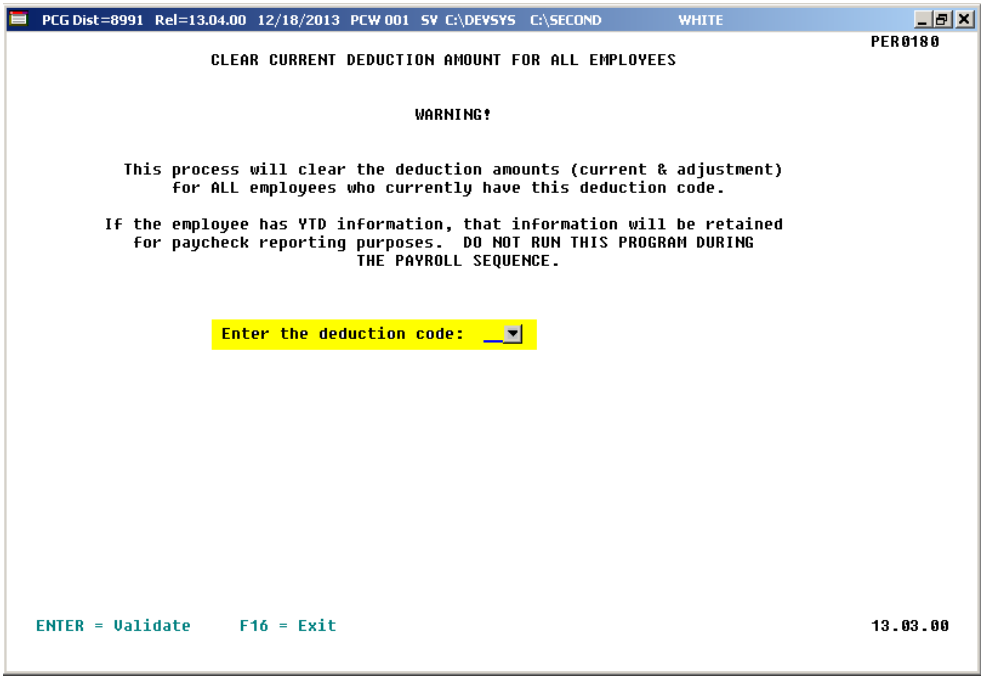
Step	Action
3	Select 4 (**F4** - Clear Current Deduction Amount for All Employees).

The following screen displays:



Step	Action
4	Review the information on the screen, enter the deduction code in the field, and select **Enter** (Validate).

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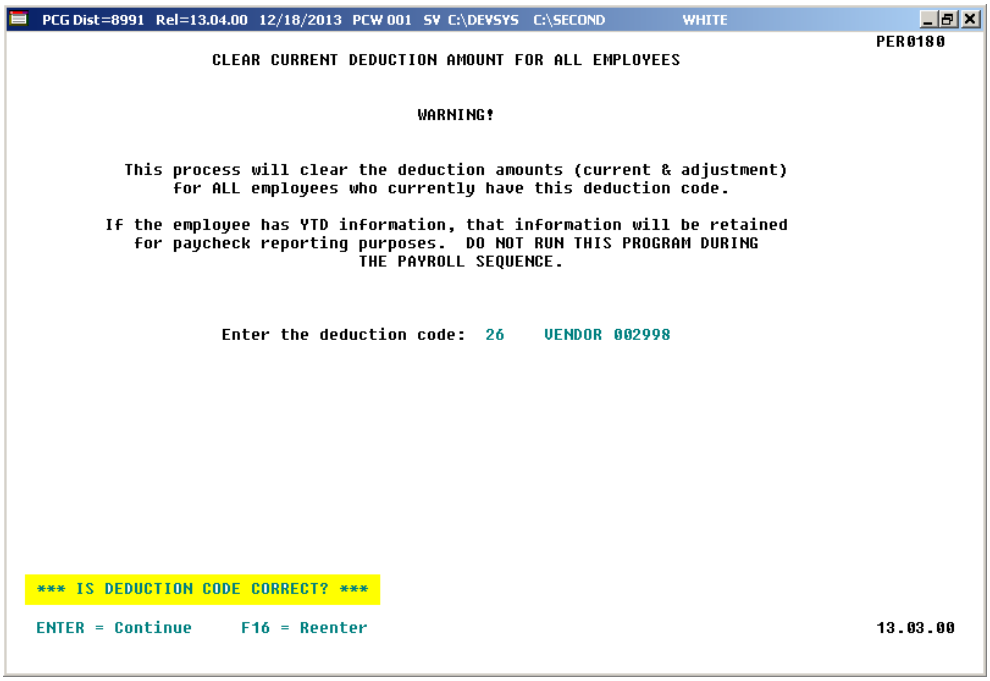
The following screen displays:



Step	Action
5	Verify the defaulting vendor information is correct and select **Enter** (Continue). *If the information is incorrect, select F16 to enter the correct information. "**Processing Request**" briefly displays.*

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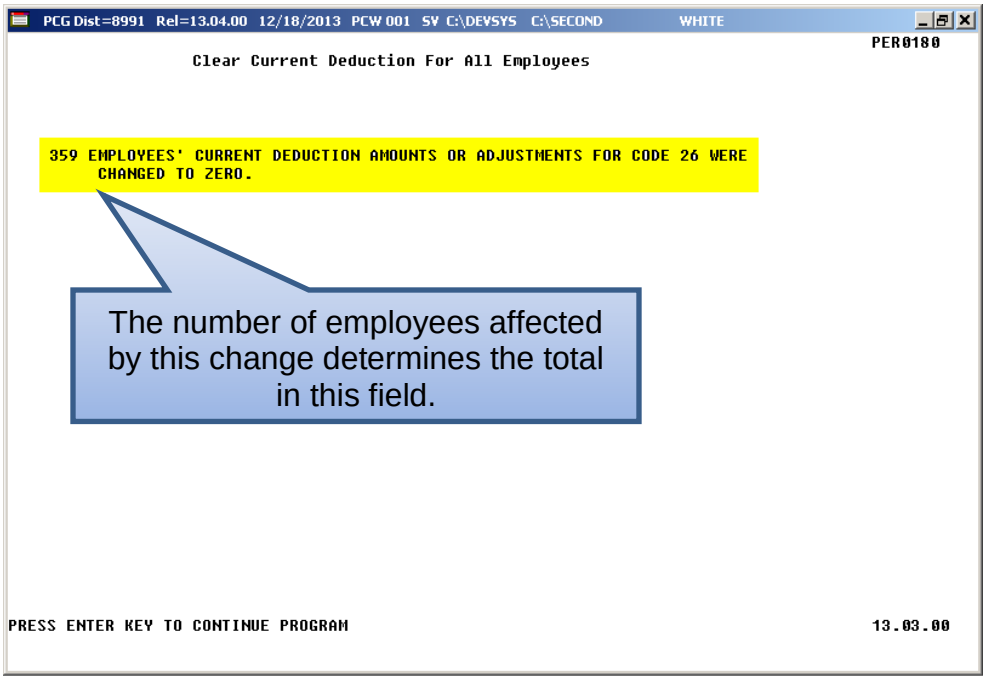
The following screen displays:



Step	Action
6	Verify the total number of employee records is correct and select **Enter** (To Continue Program). *If the information is incorrect, verify the employee's deduction information is correct by using the instructions in Section B: Payroll Update Processing, Topic 4: Update/Display Payroll Information. If additional assistance is needed, contact the Technology Management Customer Center.*

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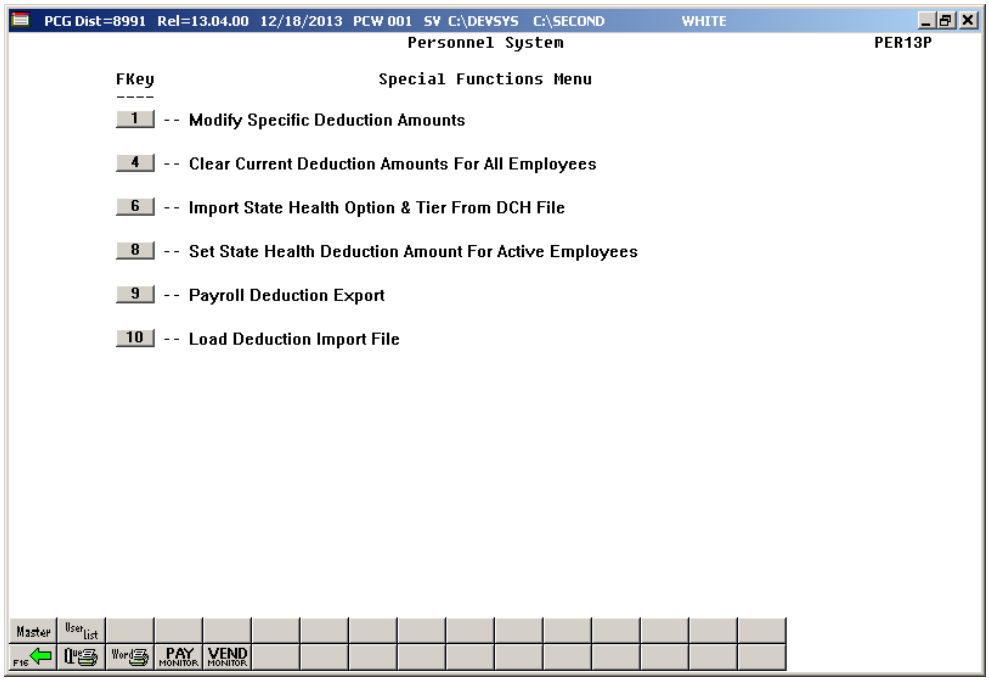
The following screen displays:



Step	Action
7	Select F16 (**F16 -** Exit) to return to the *Personnel System Master Menu*, or select Master (**Master**) to return to the *Business Applications Master Menu.*

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Topic 3: Verify the State Health Benefit Plan (SHBP) Deduction Set Up

Procedure 3A: Verify the State Health Benefit Plan (SHBP) Option and Tier Records

Step	Action
1	Log into PCGenesis.
2	Refer to the *Payroll System Operation Guide*, *Section F: Description/Deduction/Annuity File Processing, Procedure 4A.4. Printing the Benefit Plan Record File Report* to print a listing of the Benefit Plan, options, and tiers.
3	Compare the results of the *SHBP Benefit Deduction Option and Tier Report* to recent changes from the Department of Community Health (DCH). *An example of this report is provided in 3A.1. SHBP Benefit Deduction Option and Tier Report – Example.*
4	If DCH changes have been made, wait for a PCGenesis release to be issued with the GHI premium updates. Contact the *Technology Management Customer Support Center* in order to obtain the PCGenesis release schedule.

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3A.1. SHBP Benefit Deduction Option and Tier Report – Example

REPORT DATE: 11/26/2018 10:22 BENEFIT DEDUCTION OPTION AND TIER REPORT PAGE 1
Program ID: PAY27
Report of EMPLOYEE rates in effect from: 01/01/2019 To: 12/31/2019

Plan: SHBP State Health Benefit Plan
Certified Ded Code: 09 ER flag: Y ER paid amt: $76.10 Classified Ded Code: 08 ER flag: Y ER paid amt: $76.10

Option	Tier	Description	From Date	To Date	Short Desc	Deduction Desc	PayChk Desc	Prem Amt
88		TRICARE SUPPLEMENT	Short Desc	TRICARE				
	10	SINGLE COVERAGE	01/01/2017	12/31/9999	SINGLE	TRICARE SINGLE	TRICARE SGL	60.50
	90	EMPLOYEE & SPOUSE	01/01/2017	12/31/9999	EESP	TRICARE EESP	TRICARE EESP	119.50
	94	EMPLOYEE & CHILD(REN)	01/01/2017	12/31/9999	EECH	TRICARE EECH	TRICARE EECH	119.50
	96	EMPLOYEE & SPOUSE & CHILD(REN)	01/01/2017	12/31/9999	FAMILY	TRICARE FAMILY	TRICARE FAM	160.50
B1		ANTHEM GOLD	Short Desc	ANTHEM GOLD				
	10	SINGLE COVERAGE	01/01/2019	12/31/9999	SINGLE	ANTH GOLD SINGLE	ANTH G SINGL	168.73
	40	SINGLE COVERAGE TOBACCO SURCHARGE	01/01/2019	12/31/9999	SINGLE/T	ANTH GOLD SINGL/T	ANTH G SGL/T	248.73
	90	EMPLOYEE & SPOUSE	01/01/2019	12/31/9999	EESP	ANTH GOLD EESP	ANTH G EESP	418.09
	91	EMPLOYEE & SPOUSE/TOBACCO SURCHARGE	01/01/2019	12/31/9999	EESP/T	ANTH GOLD EESP/T	ANTH G EESP/T	498.09
	94	EMPLOYEE & CHILD(REN)	01/01/2019	12/31/9999	EECH	ANTH GOLD EECH	ANTH G EECH	307.13
	95	EMPL & CHILD(REN)/TOBACCO SURCHARGE	01/01/2019	12/31/9999	EECH/T	ANTH GOLD EECH/T	ANTH G EECH/T	387.13
	96	EMPLOYEE & SPOUSE & CHILD(REN)	01/01/2019	12/31/9999	FAMILY	ANTH GOLD FAMILY	ANTH G FAM	556.50
	97	EMPL & SPOUSE & CHILD/TOBACCO SURCHARGE	01/01/2019	12/31/9999	FAMILY/T	ANTH GOLD FAM/T	ANTH G FAM/T	636.50
B2		ANTHEM SILVER	Short Desc	ANTHEM SILVER				
	10	SINGLE COVERAGE	01/01/2019	12/31/9999	SINGLE	ANTH SILVER SINGL	ANTH S SINGL	110.89
	40	SINGLE COVERAGE TOBACCO SURCHARGE	01/01/2019	12/31/9999	SINGLE/T	ANTH SILVER SGL/T	ANTH S SGL/T	190.89
	90	EMPLOYEE & SPOUSE	01/01/2019	12/31/9999	EESP	ANTH SILVER EESP	ANTH S EESP	296.62
	91	EMPLOYEE & SPOUSE/TOBACCO SURCHARGE	01/01/2019	12/31/9999	EESP/T	ANTH SLVER EESP/T	ANTH S EESP/T	376.62
	94	EMPLOYEE & CHILD(REN)	01/01/2019	12/31/9999	EECH	ANTH SILVER EECH	ANTH S EECH	208.80
	95	EMPL & CHILD(REN)/TOBACCO SURCHARGE	01/01/2019	12/31/9999	EECH/T	ANTH SLVER EECH/T	ANTH S EECH/T	288.80
	96	EMPLOYEE & SPOUSE & CHILD(REN)	01/01/2019	12/31/9999	FAMILY	ANTH SILVER FAMIL	ANTH S FAM	394.54
	97	EMPL & SPOUSE & CHILD/TOBACCO SURCHARGE	01/01/2019	12/31/9999	FAMILY/T	ANTH SILVER FAM/T	ANTH S FAM/T	474.54
B3		ANTHEM BRONZE	Short Desc	ANTHEM BRONZE				
	10	SINGLE COVERAGE	01/01/2019	12/31/9999	SINGLE	ANTH BRNZE SINGLE	ANTH B SINGL	72.45
	40	SINGLE COVERAGE TOBACCO SURCHARGE	01/01/2019	12/31/9999	SINGLE/T	ANTH BRNZE SGL/T	ANTH B SGL/T	152.45
	90	EMPLOYEE & SPOUSE	01/01/2019	12/31/9999	EESP	ANTH BRNZE EESP	ANTH B EESP	215.91
	91	EMPLOYEE & SPOUSE/TOBACCO SURCHARGE	01/01/2019	12/31/9999	EESP/T	ANTH BRNZE EESP/T	ANTH B EESP/T	295.91
	94	EMPLOYEE & CHILD(REN)	01/01/2019	12/31/9999	EECH	ANTH BRNZE EECH	ANTH B EECH	143.46
	95	EMPL & CHILD(REN)/TOBACCO SURCHARGE	01/01/2019	12/31/9999	EECH/T	ANTH BRNZE EECH/T	ANTH B EECH/T	223.46
	96	EMPLOYEE & SPOUSE & CHILD(REN)	01/01/2019	12/31/9999	FAMILY	ANTH BRNZE FAMILY	ANTH B FAM	286.92
	97	EMPL & SPOUSE & CHILD/TOBACCO SURCHARGE	01/01/2019	12/31/9999	FAMILY/T	ANTH BRNZE FAM/T	ANTH B FAM/T	366.92
B6		ANTHEM HMO	Short Desc	ANTHEM HMO				
	10	SINGLE COVERAGE	01/01/2019	12/31/9999	SINGLE	ANTH HMO SINGLE	ANTH H SINGL	135.65
	40	SINGLE COVERAGE TOBACCO SURCHARGE	01/01/2019	12/31/9999	SINGLE/T	ANTH HMO SGL/T	ANTH H SGL/T	215.65
	90	EMPLOYEE & SPOUSE	01/01/2019	12/31/9999	EESP	ANTH HMO EESP	ANTH H EESP	348.63
	91	EMPLOYEE & SPOUSE/TOBACCO SURCHARGE	01/01/2019	12/31/9999	EESP/T	ANTH HMO EESP/T	ANTH H EESP/T	428.63
	94	EMPLOYEE & CHILD(REN)	01/01/2019	12/31/9999	EECH	ANTH HMO EECH	ANTH H EECH	250.90

CY2019 Benefit Plan Rate Updates

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Procedure 3B: Verify the State Health Benefit Plan (SHBP) Deduction Setup

If the school district or system does not contribute to the employee GHI premium, the SHBP deduction code should not be set up to calculate an employer share, and the employer-paid contribution amount should be cleared.

If the school district or system contributes to the employee premium for only selected employees, the premium's amount should be included in the employee's gross wages. This will ensure proper wage reporting to the Department of Audits on the *CS-1 Report*, and for income tax purposes. The deduction for the employee premium should be the regular employee share. Also in this case, the SHBP deduction code should not be set up to calculate an employer share. If the school district or system pays a portion of the employee premium for selected employees such as the superintendent and senior officials refer to *Topic 7: Grossing-Up Wages for Highly Compensated Employees.*

Enter an employer-paid amount on the SHBP deduction code(s) if the employer-paid amount is the same for all employees and, if the school district or system pays a portion of the employee premium above and beyond the required employer share as an extra fringe benefit for all employees.

Do not update the following employee information until after the SHBP import has been run: If the employer-paid amount varies for employees, the employees must be set up with a different deduction code for each different employer-paid amount. In this instance, manually clear the normal SHBP deduction (deduction code '08' for Non-Certified employees or deduction code '09' for Certified employees) for these employees and enter another SHBP deduction code with an employer contribution indicator of '**1**' (Fixed Amount). Enter any remaining portion deducted from the employee's pay as the deduction amount. The employer-paid amount for this deduction and the employee-paid amount must equal the correct premium amount for the GHI Option and Tier selected by the employee.

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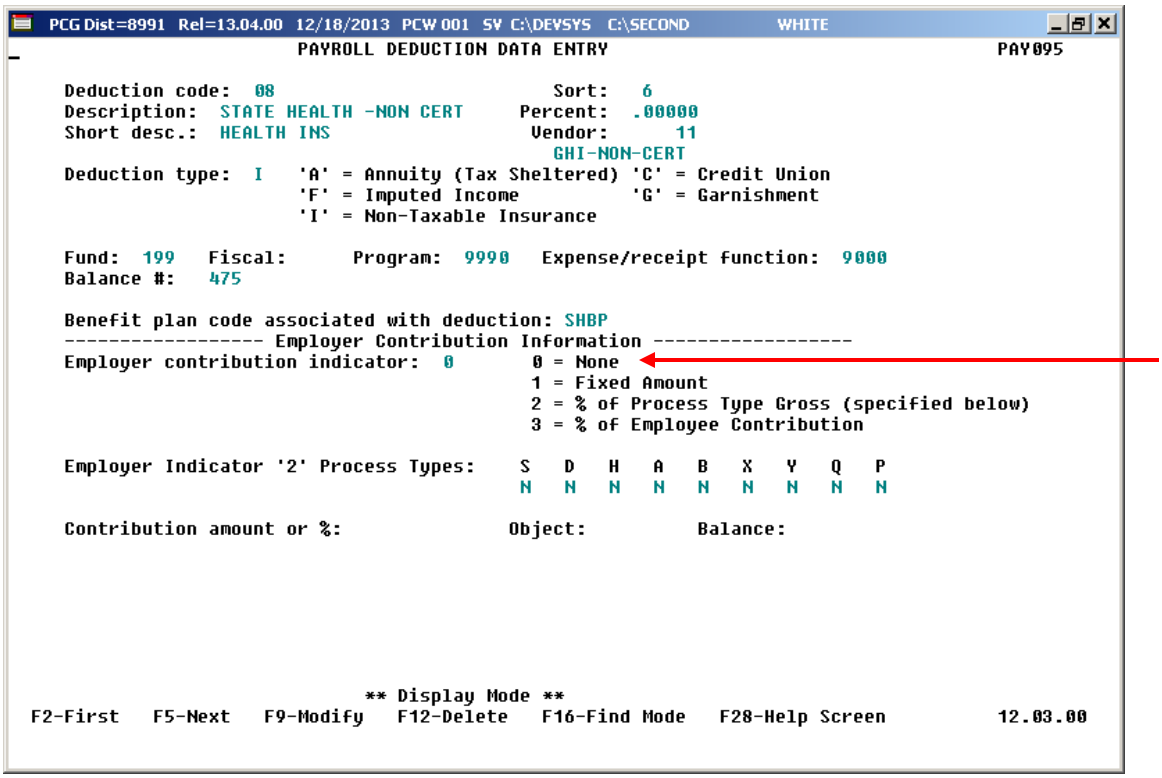
For SHBP deductions <u>without</u> an employer contribution, the deduction screen should be set up as shown below:



```
PCG Dist=8991  Rel=13.04.00  12/18/2013  PCW 001  SV C:\DEVSYS  C:\SECOND          WHITE
                          PAYROLL DEDUCTION DATA ENTRY                                    PAY095

    Deduction code:  08                          Sort:   6
    Description:  STATE HEALTH -NON CERT      Percent:  .00000
    Short desc.:  HEALTH INS                   Vendor:      11
                                                 GHI-NON-CERT
    Deduction type:  I    'A' = Annuity (Tax Sheltered) 'C' = Credit Union
                          'F' = Imputed Income          'G' = Garnishment
                          'I' = Non-Taxable Insurance

    Fund:  199   Fiscal:      Program:  9990   Expense/receipt function:  9000
    Balance #:   475

    Benefit plan code associated with deduction: SHBP
    ------------------ Employer Contribution Information ------------------
    Employer contribution indicator:  0       0 = None
                                              1 = Fixed Amount
                                              2 = % of Process Type Gross (specified below)
                                              3 = % of Employee Contribution

    Employer Indicator '2' Process Types:    S   D   H   A   B   X   Y   Q   P
                                             N   N   N   N   N   N   N   N   N

    Contribution amount or %:               Object:          Balance:

                                  ** Display Mode **
F2-First   F5-Next   F9-Modify   F12-Delete   F16-Find Mode   F28-Help Screen          12.03.00
```

Step	Action
1	**For SHBP deductions <u>without</u> an employer contribution: To clear the employer-paid contribution amounts:** Refer to the *<u>Payroll System Operation Guide</u>, Section F: Description/Deduction/Annuity File Processing, Procedure 3A. Maintaining Deduction Records* to enter the payroll deduction record and to verify that the employer's contribution indicator for deduction codes *'08' (State Health-Non Cert)* and *'09' (State Health-Cert)* is '**0**' (**None**).

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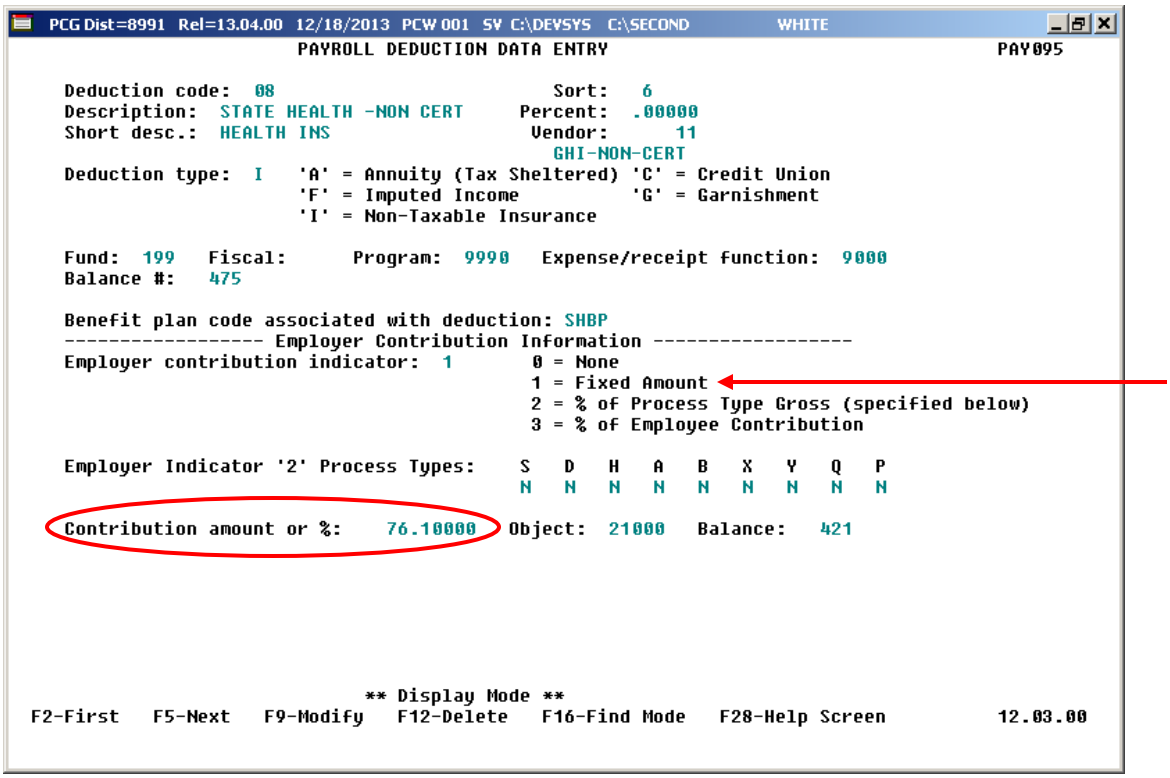
For SHBP deductions <u>with</u> an employer contribution, the deduction screen should be set up as shown below:



*Note that the **Employer Contribution Amount** will be system specific.*

Step	Action
2	**For SHBP deductions <u>with</u> an employer contribution: To set up the employer-paid amount of the employee premium:** Refer to the *<u>Payroll System Operations Guide</u>, Section F: Description/Deduction/Annuity File Processing, Procedure 3A. Maintaining Deduction Records* to enter the payroll deduction record, or to verify that the employer's contribution indicator for deduction codes '08' (State Health-Non Cert) and '09' (State Health-Cert) is '**1**' (**Fixed Amount**) and that the account information and contribution amount is entered correctly. *Note that using a percentage (%) of the employee gross income or of the employee-paid amount will result in incorrect amounts. Repeat these steps at minimum annually, or when the employer-paid contribution amount changes.* *Only use this option if the employer pays a portion of the employee's premium for <u>all</u> employees. If the employer pays <u>only</u> a portion of the employee premium for a <u>select group of employees</u>, adjust the employee gross wages to include the premium's amount, and the employee deduction should be the normal employee share.*
3	Proceed to *Topic 4: Downloading the State Health Benefit Plan (SHBP) Open Enrollment File from the ADP Website*, followed by *Topic 5: Importing the State Health Option and Tier from the DCH File.*

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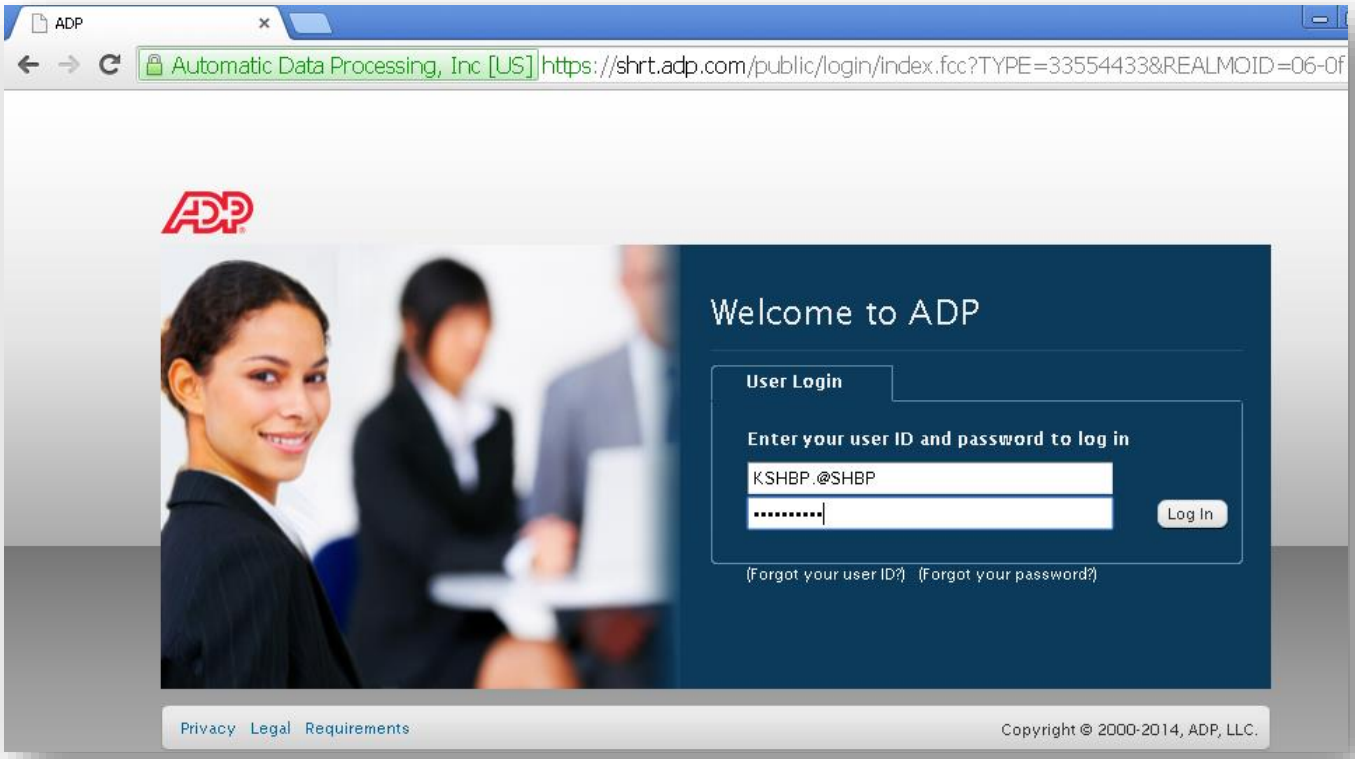
Topic 4: Downloading the State Health Benefit Plan (SHBP) Open Enrollment File from the ADP Website

*These instructions work best when using **Google Chrome** version 39.0.2171.71. Also, the **Aspera** plug-in needs to be installed for downloads to work correctly.*

Step	Action
1	Using **Google Chrome** (Version 39.0.2171.71 or higher), access: https://shrt.adp.com
2	Verify that the **Aspera** plug-in is installed in the web browser.

The following window displays:



Step	Action
3	Enter the **User ID** and **Password** in the **User Login** fields, and select Log In (**Log In**).

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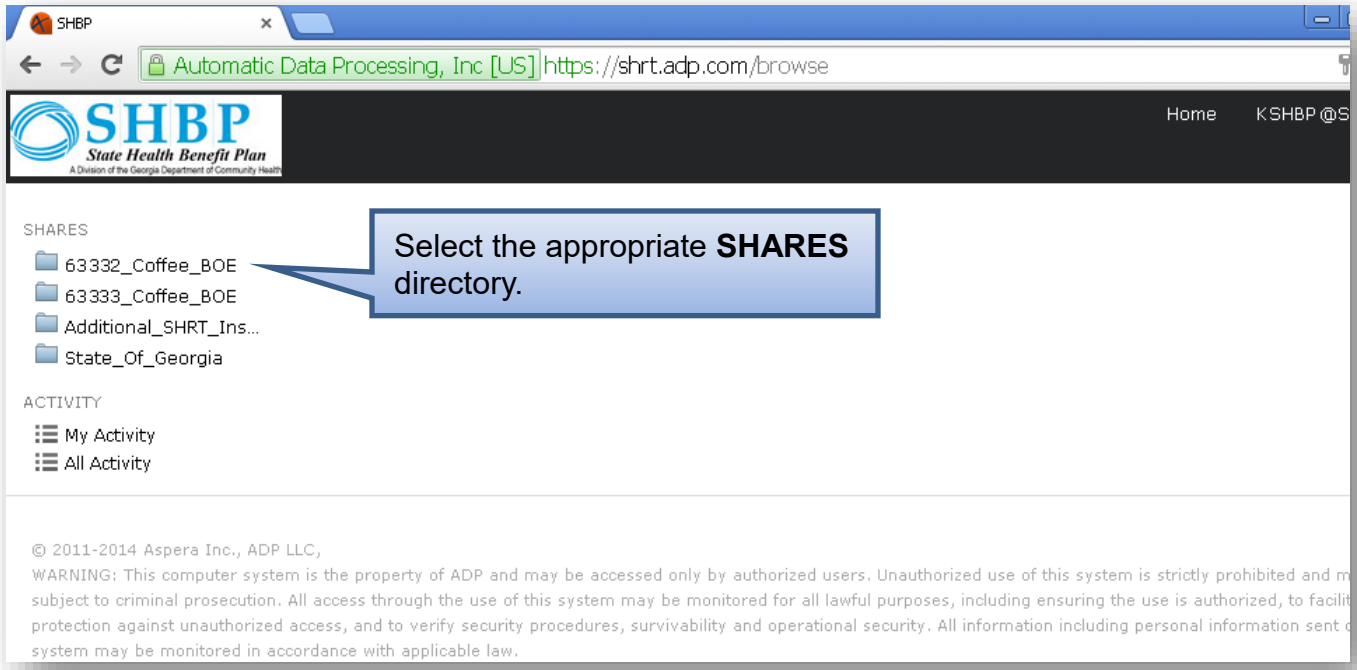
The screenshot examples provided from this point forward are for display purposes only. The responses will be system-specific and will be completely dependent on the user's environment.

The following window displays:



Step	Action
4	Select the appropriate **SHARES** directory. In the example above, 63332_Coffee_BOE (63332_Coffee_BOE) is selected.

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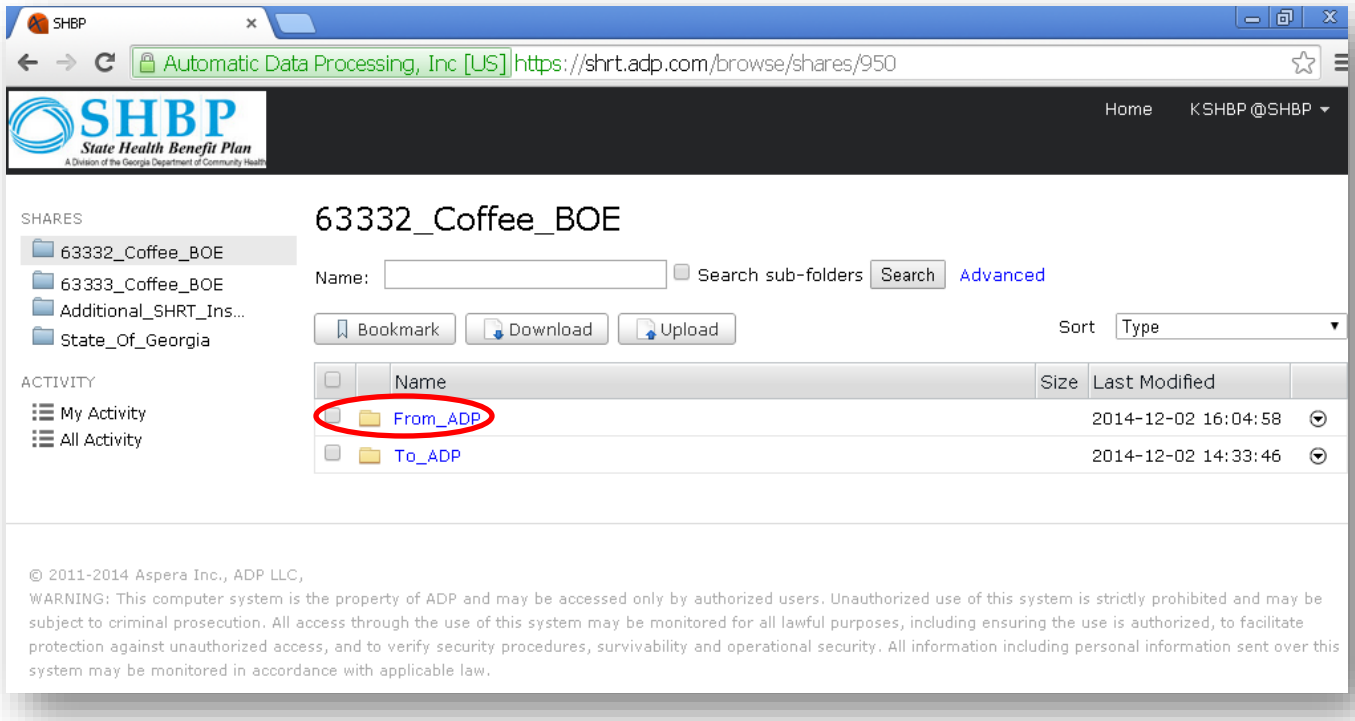
The following window displays:



Step	Action
5	Open the **From_ADP** directory. **To select the directory:** Enter ☑ in the check box to the left of the directory and click the directory folder icon (🗀). **To deselect the download directory:** Verify that a ☑ does NOT appear in the check box to the left of the directory (☐).

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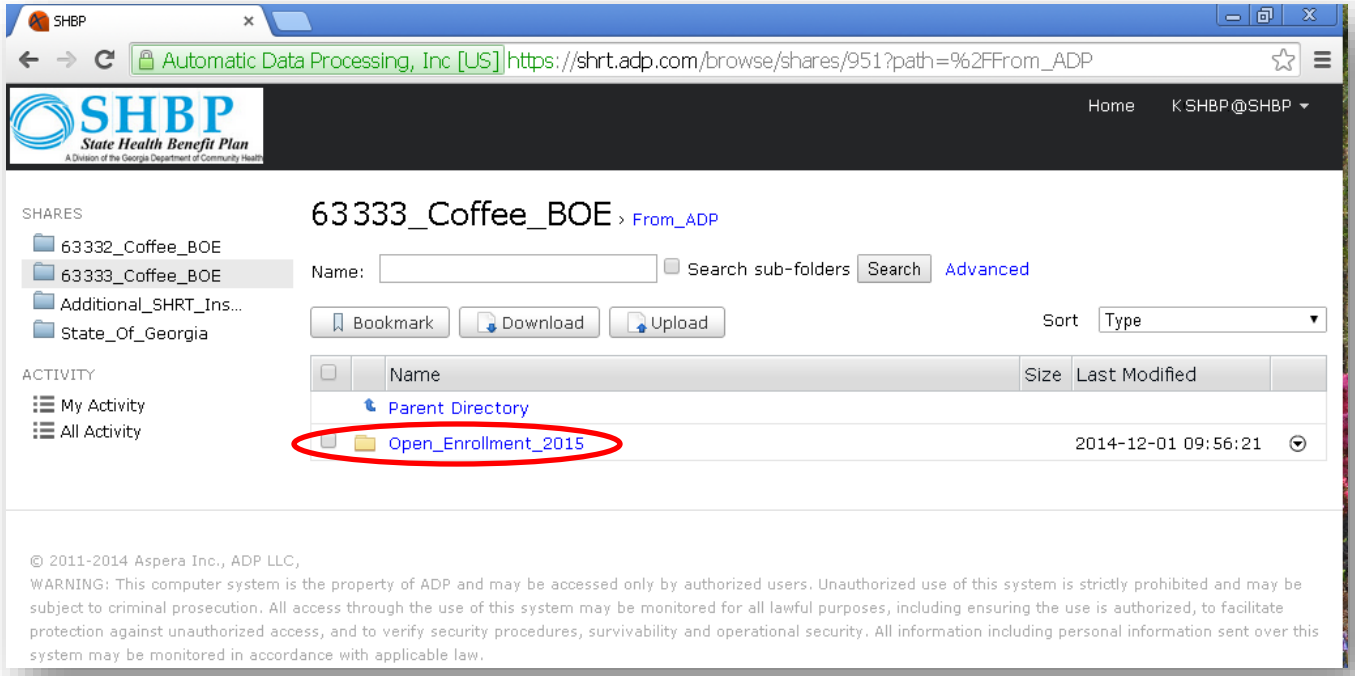
The following window displays:



Step	Action
6	Open the **Open_Enrollment_ccyy** directory. **To select the directory:** Enter ☑ in the check box to the left of the directory and click the directory folder icon (🗀). **To deselect the download directory:** Verify that a ☑ does NOT appear in the check box to the left of the directory (☐).

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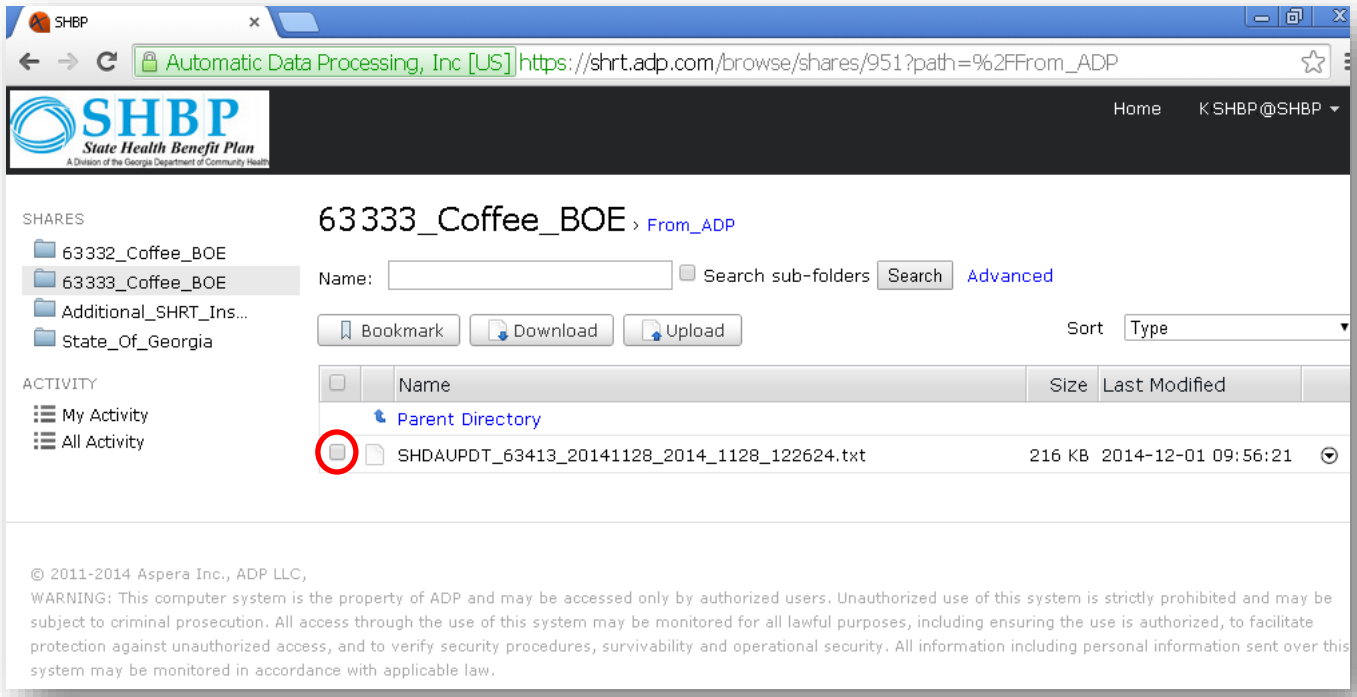
The following window displays:



Step	Action
7	Select the correct **Open Enrollment Download File** as specified by SHBP. **To select the download file:** Enter ☑ in the check box to the left of the file. **To deselect the download file:** Verify that a ☑ does NOT appear in the check box to the left of the file (☐).

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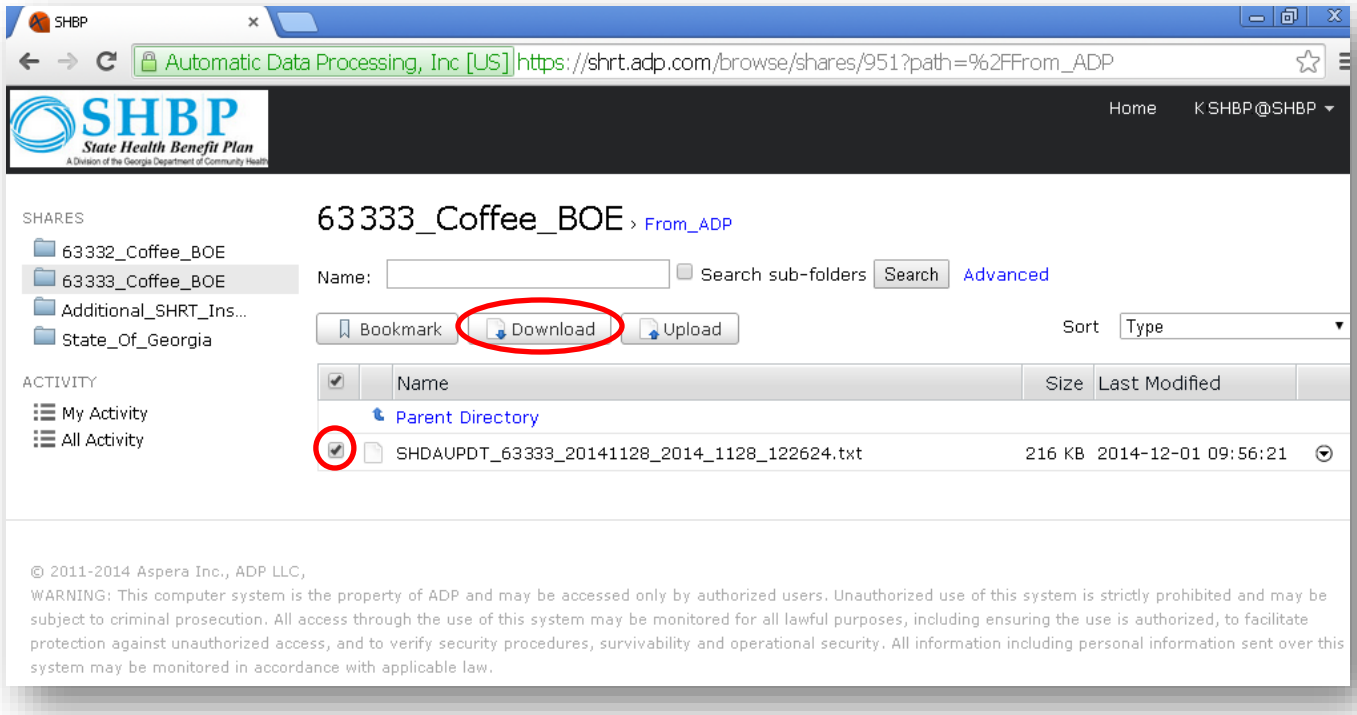
The following window displays:



Step	Action
8	Select the Download (**Download**) button.

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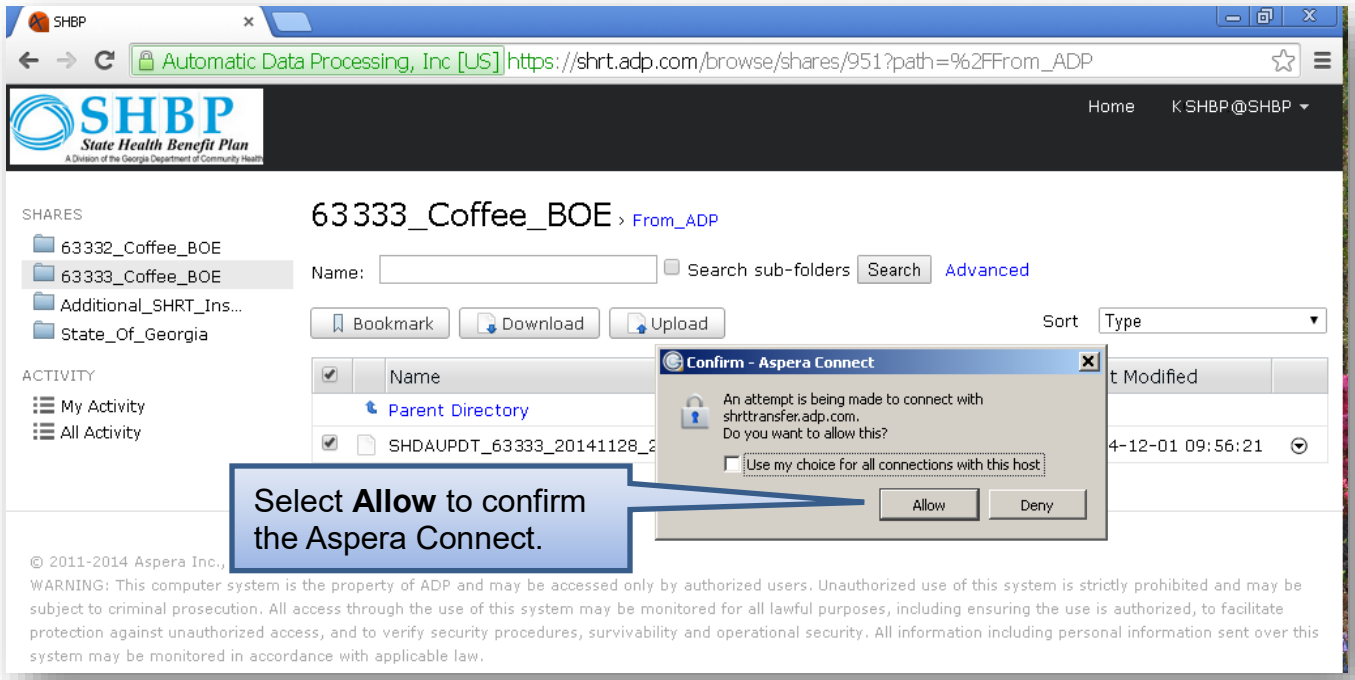
The following window displays:



Step	Action
9	To confirm the Aspera Connect, select the Allow (**Allow**) button. *If you check the box (☐) in the security pop-up and click **Allow**, you should not have to perform this task the next time you download a file; however, if prompted in the future, just check the box (☑) in the grey dialog box.*

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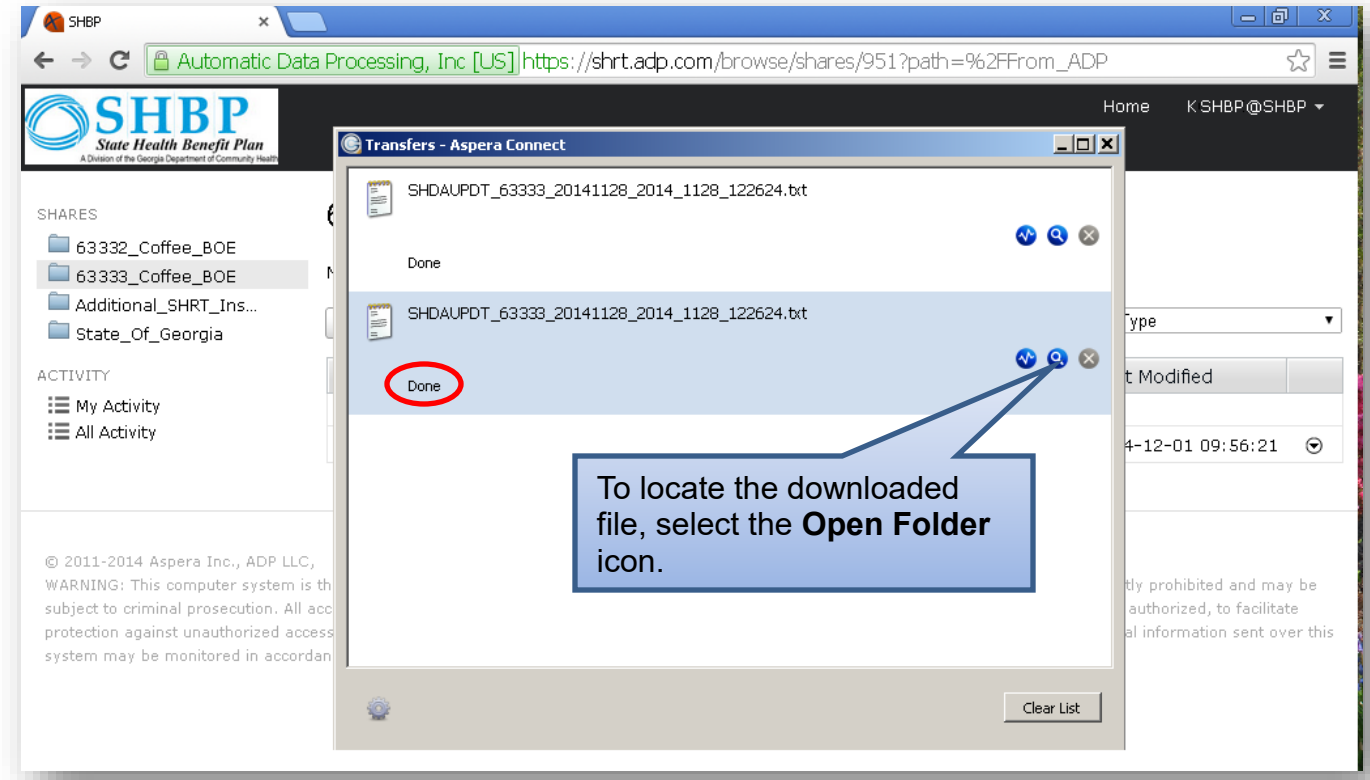
The following window displays:



Step	Action
10	A **Transfers** window will appear showing the status of the download. When the file has downloaded successfully, the status appears as **Done**. The file will appear in the **Downloads** folder specified in your profile. Do not close the window until you see the word **Done** and until you complete the next step. Once the download is complete, verify the status as **Done**. To locate the downloaded file, select (**Open Folder**) icon.

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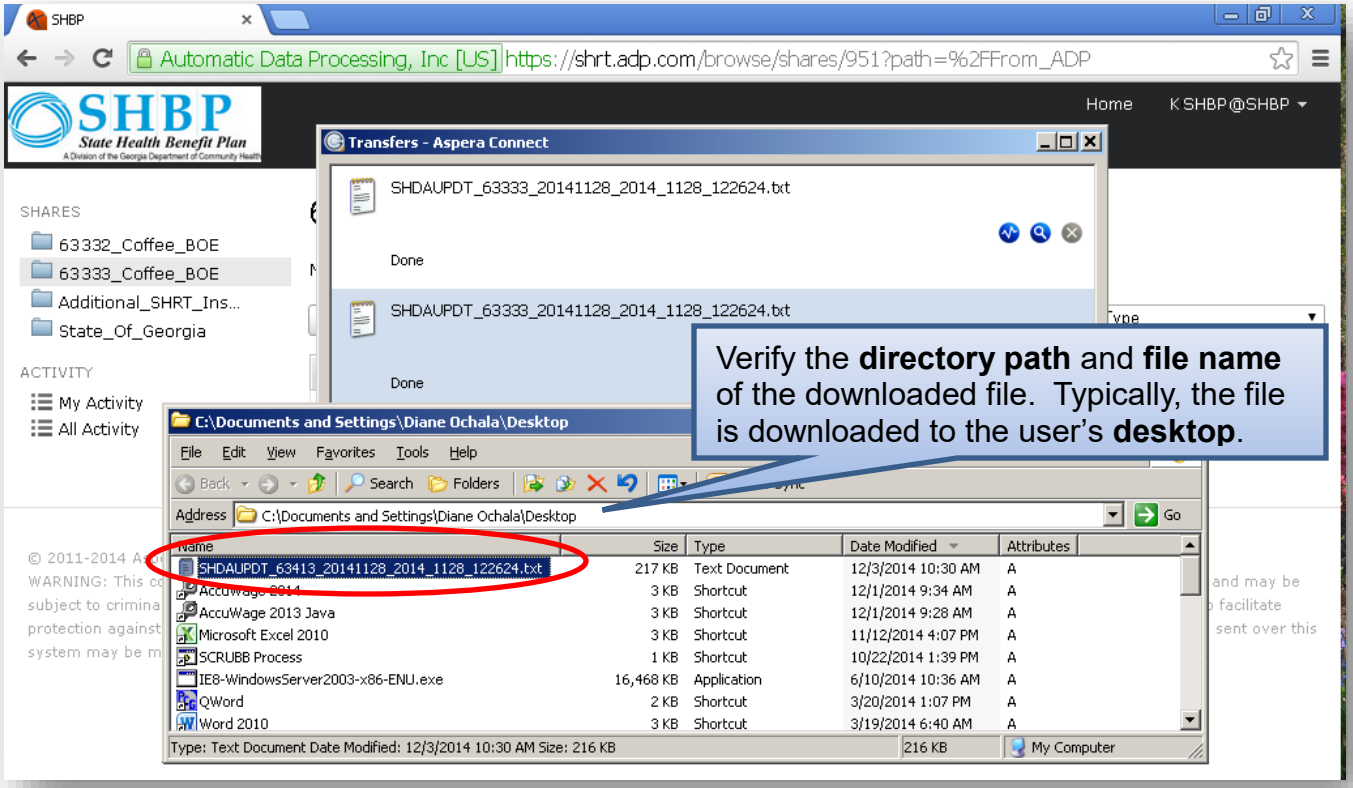
The following window displays:



Step	Action
11	Verify the **directory path** and **file name** of the downloaded file. Typically, the file is downloaded to the user's **desktop**. Record the directory path and file name for use in *Topic 5*.
12	Close the Web browser.
13	Proceed to *Topic 5: Importing the State Health Option and Tier from the DCH File*.

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4A. Downloaded Open Enrollment File – Example

Enroll2012.csv - Notepad

File Edit Format View Help

```
"Report_Record"
"89990SHBP999087069          PA4RIS                          DI4LON                  M
"89990SHBP999087070          PR3SSLEY                        JA3I
"89990SHBP999087071          SC2REIBER                       TH2NH                   L
"89990SHBP999087072          WH9ATLEY                        JE9LENE                 P
"89990SHBP999087073          BU8DEN                          FR8NCES                 J
"89990SHBP999087074          HE7M                            M3LL7E                  S
"89990SHBP999087075          LA6GHLIN                        EL8ZA3ETH               D
"89990SHBP999087076          MC5REGOR                        M9LO7Y
"89990SHBP999087077          OG4E                            TO5D                    R
"89990SHBP999087078          BE3MAN                          CE4ES0INA
"89990SHBP999087079          BO2IE                           KA1HLE8N                B
"89990SHBP999087080          BR9SCOE                         NA7MA                   A
"89990SHBP999087081          PA8IS                           JE8NI5ER                D
"89990SHBP999087082          SN7WDEN                         SA3A                    E
"89990SHBP999087083          WA6EFIELD                       SU2AN                   E
"89990SHBP999087084          BA5KSDALE                       MA8ION                  E
"89990SHBP999087085          BE4ULIEU                        PA3RI6IA                A
```

NOTE: *Do NOT edit the open enrollment file in Microsoft Excel®. Editing the file in Excel causes the formatting of the file to change. If editing the file is required, use Notepad to make changes. In order to be a valid import file, the file should look as shown above.*

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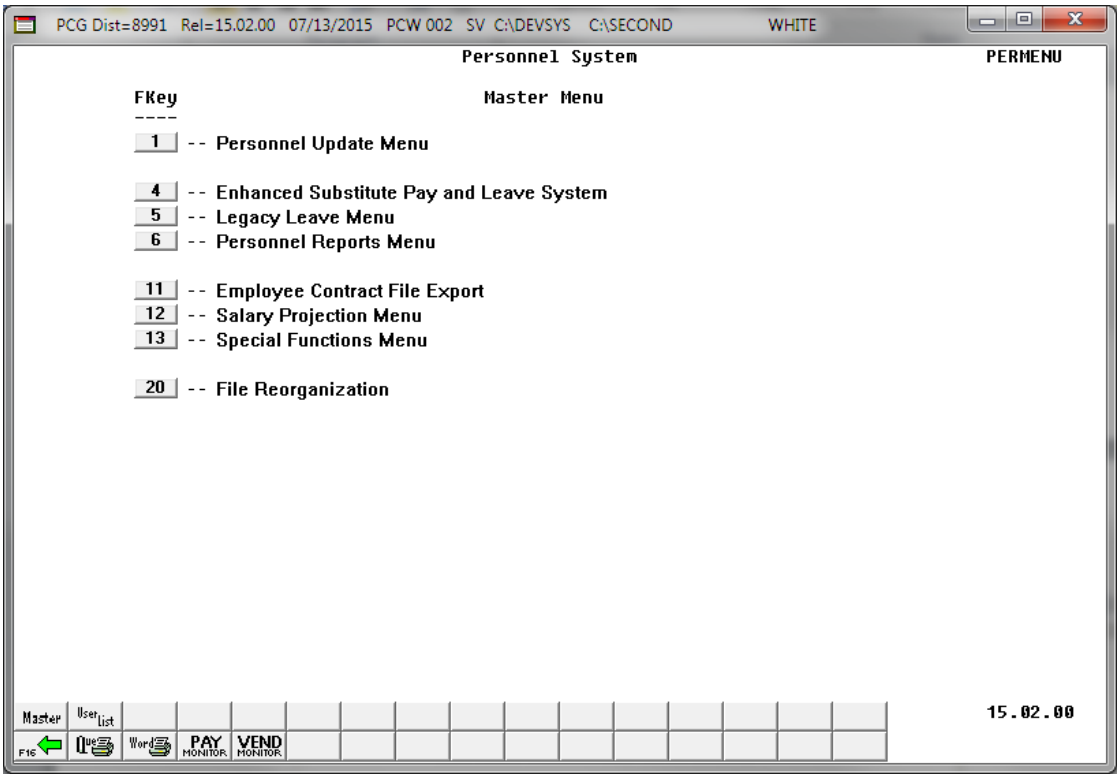
Topic 5: Importing the State Health Option and Tier from the DCH File

Importing the SHBP option and tier information from the ADP website into PCGenesis processes the SHBP downloaded file. This procedure sets the GHI Option and Tier in the employees' personnel information. Using this function will save the time-consuming steps of manually editing employees' information to make the deduction change. PCGenesis users must perform this function after open enrollment is complete.

NOTE: *Do NOT edit the open enrollment file in Microsoft Excel®. Editing the file in Excel causes the formatting of the file to change. If editing the file is required, use Notepad to make changes. In order to be a valid import file, the file should look as shown above.*



Step	Action
1	Select 13 (**F13 -** Special Functions).

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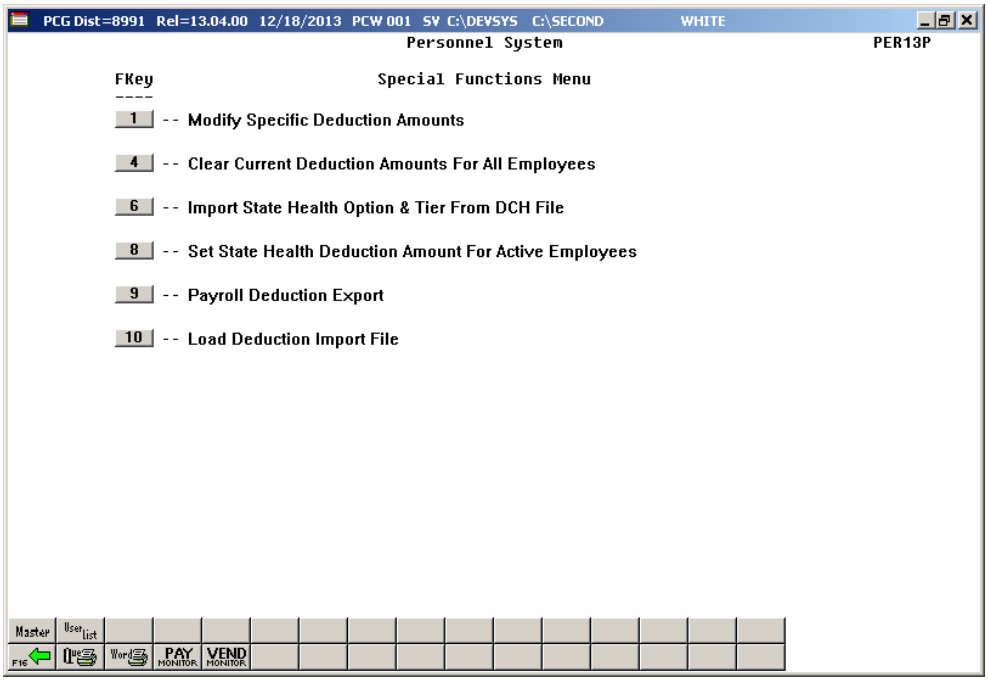
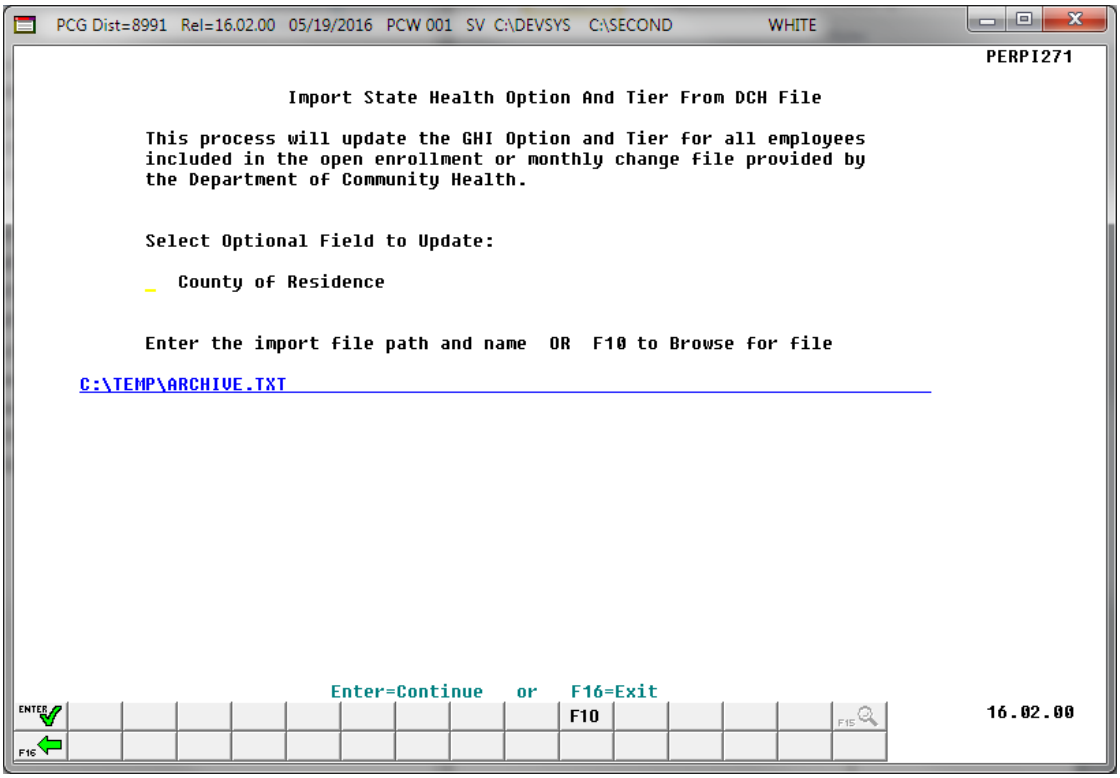
The following screen displays:



Step	Action
2	Select **6** (**F6** - Import Health Option and Tier from DCH File).

The following screen displays:



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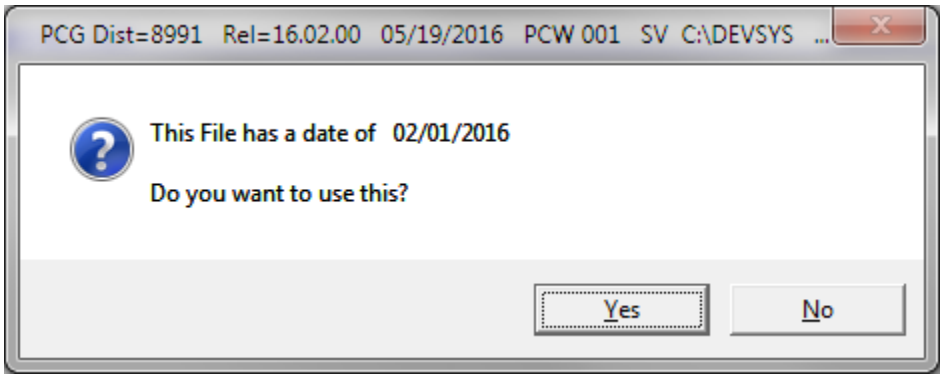
Step	Action
3	**To update DCH-provided County of Residence information:** Enter **Y** (Yes) in the **County of Residence** field.
4	Enter the import file name in the **Enter the import file path** field, or select F10 (**F10** - to Browse for file) to locate the file manually. Verify the file name displays from *Topic 4, Step **11*** in the file name field.
5	Select ENTER (**Enter**) twice. *When the downloaded file's date differs from the current date, a "This File has a date of MM/DD/CCYY – Do you want to use this?" dialog box displays after selecting Enter for the first time. In this instance, verify the file's date is correct and select* Yes *(Yes). If the information is incorrect, select* No *(No) and return to Topic 4: Downloading the State Health Benefit Plan (SHBP) Open Enrollment File from the ADP Website for the instructions to download a more recent file.* *When selecting **Enter**, PCGenesis validates the information and produces a report of its findings. If errors are detected an exceptions report will also be generated.*

If the downloaded file's date differs from the current date, the following dialog box displays:



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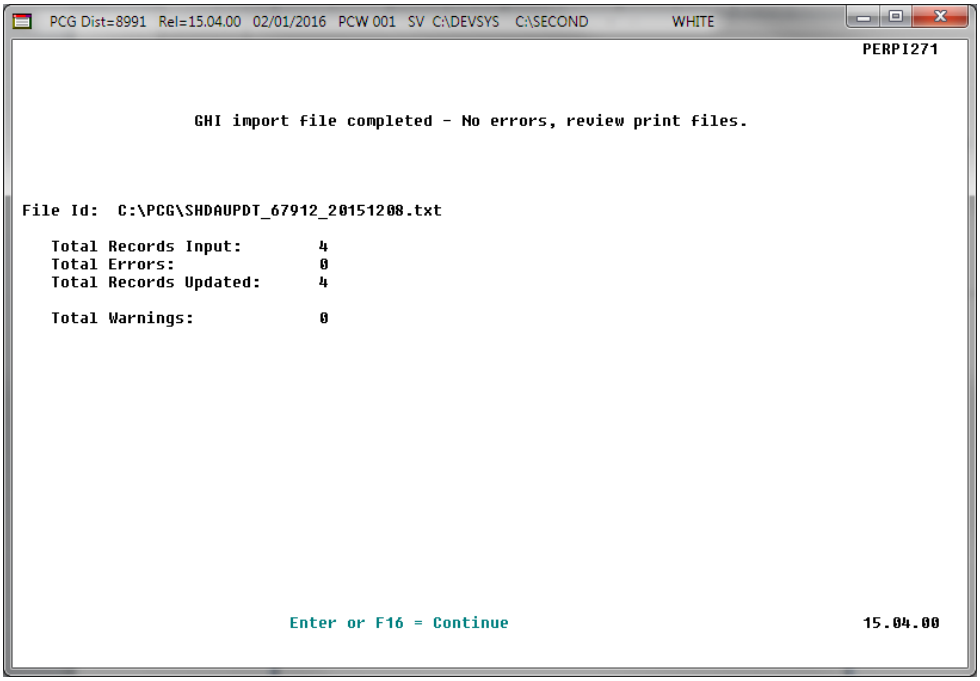
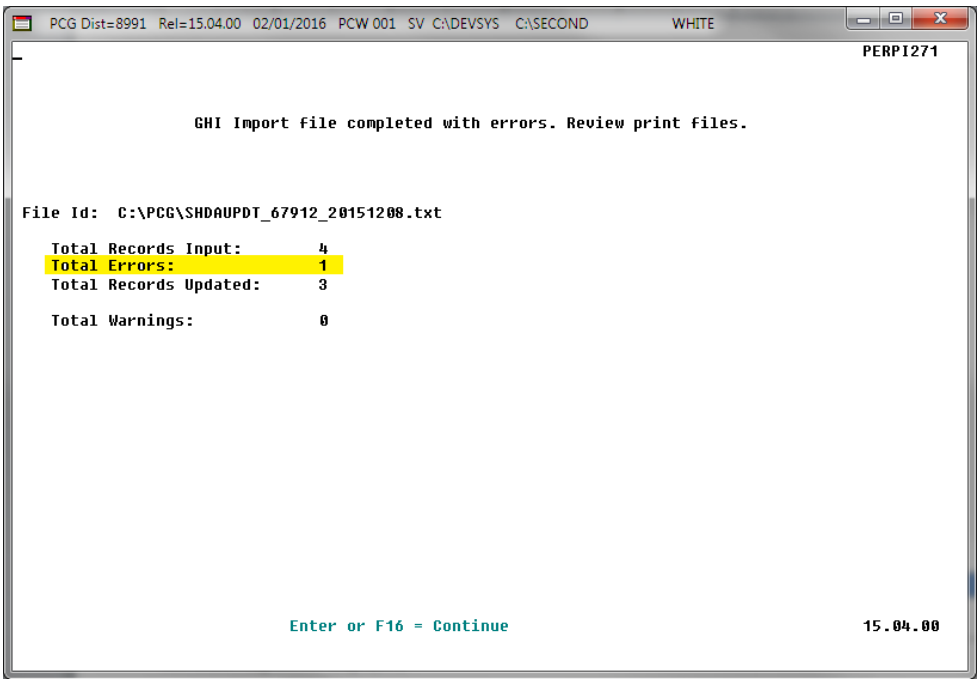
For a successful file import, a screen similar to the screenshot example below displays:



For errors, a screen similar to the screenshot example below displays:



All Rights Reserved.

Step	Action
6	**If there are errors:** For example, the option and tier selected by the employee and supplied by DCH, could not be loaded into PCGenesis because no employee record matching the *SSN* and a **GHI Eligible?** flag of ***Y*** *(Yes)* could be found. Usually this occurs when the employee was terminated between the time that the files were submitted to the DCH, and when they were received by the district for open enrollment processing. The **GHI Eligible?** flag is automatically set to ***N*** *(No)* when an employee is terminated. The wording for the *"ERROR - No Update Performed - No Participating Record"* message is generated because the data supplied by DCH has an SSN, but a corresponding employee number does not exist in PCGenesis. Because school districts and systems may terminate an employee several times under different employee numbers and an employee can have multiple PCGenesis active employee records, PCGenesis locates the "best" payroll record by SSN until the [first] record containing a **GHI Eligible?** flag of "**Y**" is found. PCGenesis attempts to update the option and tier on that payroll record. If no payroll record is found which contains a **GHI Eligible?** flag of "**Y**", PCGenesis generates the error message. If the employee was terminated since the enrollment eligibility data file was submitted to the DCH, the error may be fixed by removing the offending row from the DCH import file. Do NOT make changes to the DCH file using Microsoft Excel. Instead use a text editor to make the necessary changes to the DCH import file. An error may also be indicated if the employee has an active payroll/personnel record and is eligible for GHI participation, but the employee's **GHI Eligible?** flag is "**N**". The error indicates that the employee's **GHI Eligible?** flag is not set correctly and the GHI Eligibility indicator must be manually set by following the instructions in *Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 3: Update/Display Personnel Information.* It would be faster to manually update the option and tier on the *Display/Update Personnel Data* screen instead of rerunning the upload and deduction set procedure. *If there are errors, update the employee information as indicated on the Exceptions Report and proceed to Step 8.*
7	**If there are no errors:** If the employer-paid amount is the same for all employees and if the school district or system pays a portion of the employee premium for selected employees such as the superintendent and senior officials, or pays a portion of the employee premium above and beyond the required employer share as an extra fringe benefit, the amount should be added to the employee gross wages and the regular employee deduction should be taken. By adding the amount to the gross wages, the information on the *CS-1 Report* is subsequently correct. Additionally, PCGenesis correctly calculates the amount for income tax purposes. *Refer to Topic 7: Grossing-Up Wages for Highly Compensated Employees for instructions.*
8	Select **Enter** (Continue).

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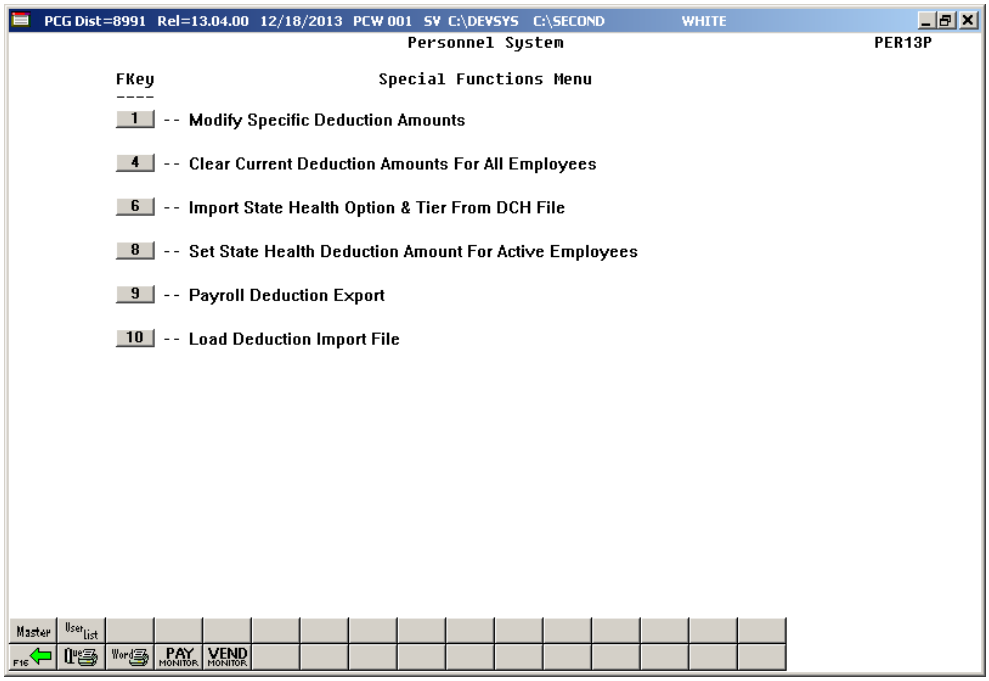
The following screen displays:



Step	Action
9	**To print the report via the Uqueue Print Manager:** Select (**Uqueue**). **To print the report via Microsoft® Word:** Select (**MS WORD**). Follow the instructions provided in the *Technical System Operations Guide*, *User Interface Procedures, Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing* to create the macro necessary to use the feature where appropriate.
10	Select (**F16 -** Exit) to return to the *Personnel System Master Menu*, or select (**Master**) to return to the *Business Applications Master Menu.*
11	Review the *State Health Benefit Plan Changes Report* and the *State Health Benefit Plan Import Exception Report.* *State Health Benefit Plan Import Exception Report*: Review *Section 5B.1. Problem/Cautionary Warning/Action Table* in this document as an aid in resolving messages generated on the report.
12	Proceed to *Topic 6: Setting the State Health Benefit Plan (SHBP) Deduction Amounts for Active Employees.*

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5A. State Health Benefit Plan Changes Report – Example

Date: 02/01/2016 09:55 State Health Benefit Plan Import Changes Page 1
Program: PERPI271

			Before				After			
Empno	Name	CERT	OPTN	TIER	Participate	County	OPTN	TIER	Participate	County
86424	AI9SWORTH, CO9NELL	Y	B3	10	Y	160	B2	96	Y	160
88966	AL3CEA, DU3TI	Y	B6	96	Y	160	B3	10	Y	160
88389	AL4RECHT, KE4NITH	Y	B6	96	Y	160	B6	96	Y	160
89386	AN7ERS, AU7USTINE	Y	NC	00	N	160	B6	90	Y	160

Total Records In: 4
Total Errors: 0
Total Records Updated: 4

Total Warnings: 0

The State Health Benefit Plan Import Exception Report contains records processed, errors, records updated, and warning error totals.

Date: 02/01/2016 09:55 State Health Benefit Plan Import Exception Report Page 1
Program: PERPI271

SSN or Empno	Name	Exception Message	Import Data Values

Total Records In: 4
Total Errors: 0
Total Records Updated: 4

Total Warnings: 0

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5B. State Health Benefit Plan Import Exception Report – Example

In addition to the message in the screenshot example, PCGenesis will also display the "Error – No Update Performed – Missing PAYROLL Record" message when no employee information is found for an SSN.

The final page of the report contains records processed, errors, records updated, and warning error totals.

Date: 02/01/2016 09:49 State Health Benefit Plan Import Exception Report Page 1
Program: PERPI271

SSN or Empno	Name	Exception Message	Import Data Values
999994747		ERROR - No Update Performed - Missing PAYROLL Record	OPTION/TIER B2/96
999997257		ERROR - No Update Performed - Missing PAYROLL Record	OPTION/TIER B3/10
999991917		ERROR - No Update Performed - Missing PAYROLL Record	OPTION/TIER B6/96
999992484		ERROR - No Update Performed - Missing PAYROLL Record	OPTION/TIER B6/90
999991280		ERROR - No Update Performed - Missing PAYROLL Record	OPTION/TIER B3/96
999994541		ERROR - No Update Performed - Missing PAYROLL Record	OPTION/TIER B3/91
999990569		ERROR - No Update Performed - Missing PAYROLL Record	OPTION/TIER B3/94
999998731		ERROR - No Update Performed - Missing PAYROLL Record	OPTION/TIER B3/94
999993845		ERROR - No Update Performed - Missing PAYROLL Record	OPTION/TIER B2/94
999994016		ERROR - No Update Performed - Missing PAYROLL Record	OPTION/TIER B2/96
999992286		ERROR - No Update Performed - Missing PAYROLL Record	OPTION/TIER B6/94
999993488		ERROR - No Update Performed - Missing PAYROLL Record	OPTION/TIER B2/10
999998813		ERROR - No Update Performed - Missing PAYROLL Record	OPTION/TIER B3/10

Total Records In: 13
Total Errors: 13
Total Records Updated: 0

Total Warnings: 0

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5B.1. Problem/Cautionary Warning/Action Table

Although the message types displayed depend on the file's data, the following table lists resolutions to a few of the potential error messages.

Problem/Cautionary Warning	Action
SHBP reports data for an SSN not recorded in your payroll file.	Check with DCH/SHBP to verify the employee's employment by the school district or system. Where appropriate, correct the Payroll records.
Mismatch between the PCG Payroll and Personnel files and the employee's personnel information is missing.	Correct by editing the employee's Personnel record and saving the changes in PCGenesis. In this instance, reenter the employee's GHI eligibility, plan, option, and other information such as emergency contact information.
Personnel data cannot be updated because the employee is coded as ineligible for SHBP.	When terminating employees, PCGenesis automatically codes the employee as ineligible for GHI. If DCH/SHBP returns data for this type of employee, no updates occur and the employee records will display on the *State Health Benefit Plan Import Exception Report.*
Invalid county – Warning	When selecting the County of Residence update option during the DCH file import, the SHBP-provided county information will be validated in PCGenesis. Verify and correct the information where appropriate.

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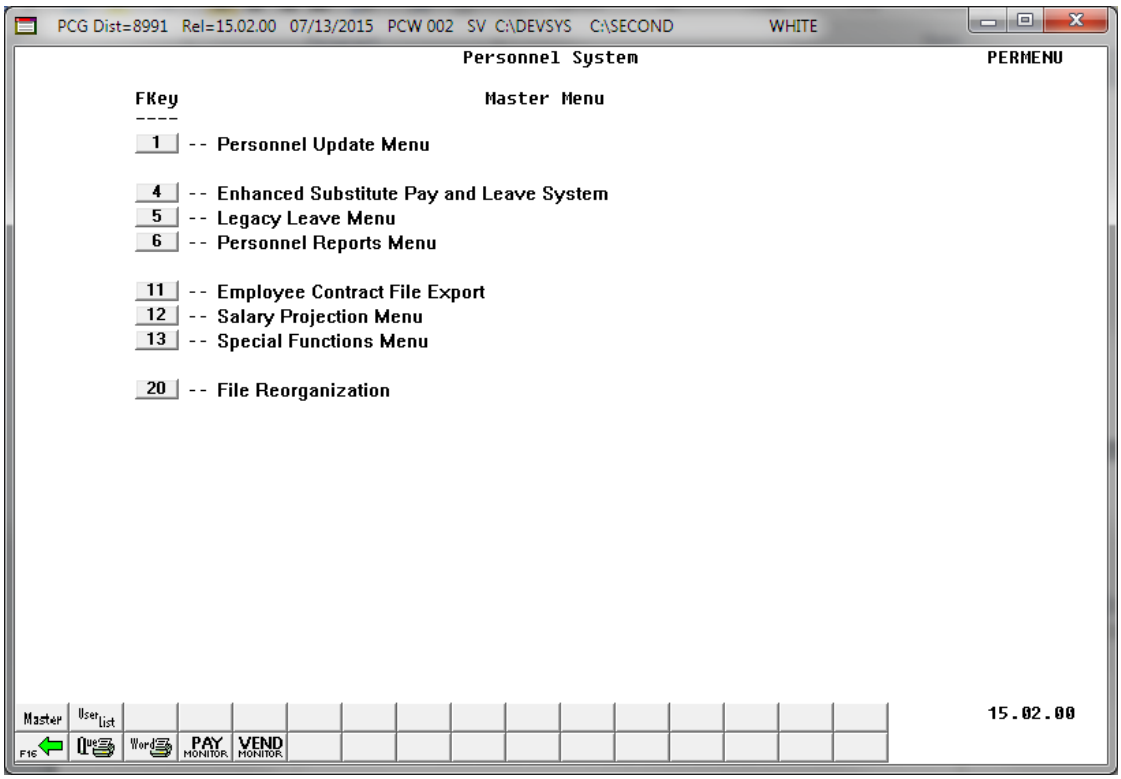
Topic 6: Setting the State Health Benefit Plan (SHBP) Deduction Amounts for Active Employees

Setting the SHBP deduction amounts for active employees excluding substitutes, sets the SHBP employee deduction amount based on the GHI options and tiers. PCGenesis performs this function for SHBP deductions that were set manually in PCGenesis or were included in the *SHBP Open Enrollment File Import* from the Department of Community Health (DCH). Using this function will save the time-consuming steps of editing employee payroll information to make the deduction change and should be used after *Open Enrollment*.

When performing the function in *Trial* mode, PCGenesis automatically produces a report of pending modifications to affected employees' deductions. If not selecting the *Trial* mode, PCGenesis produces a report of the deduction modifications.



Step	Action
1	**To verify payroll has been set up:** Select PAY MONITOR (**Pay Monitor**). Verify or enter **Y** (**Yes**) in the **Setup payroll for new pay period** field. Select **Enter** (Validate), and **F8** (Update).
2	Select 13 (**F13 -** Special Functions).

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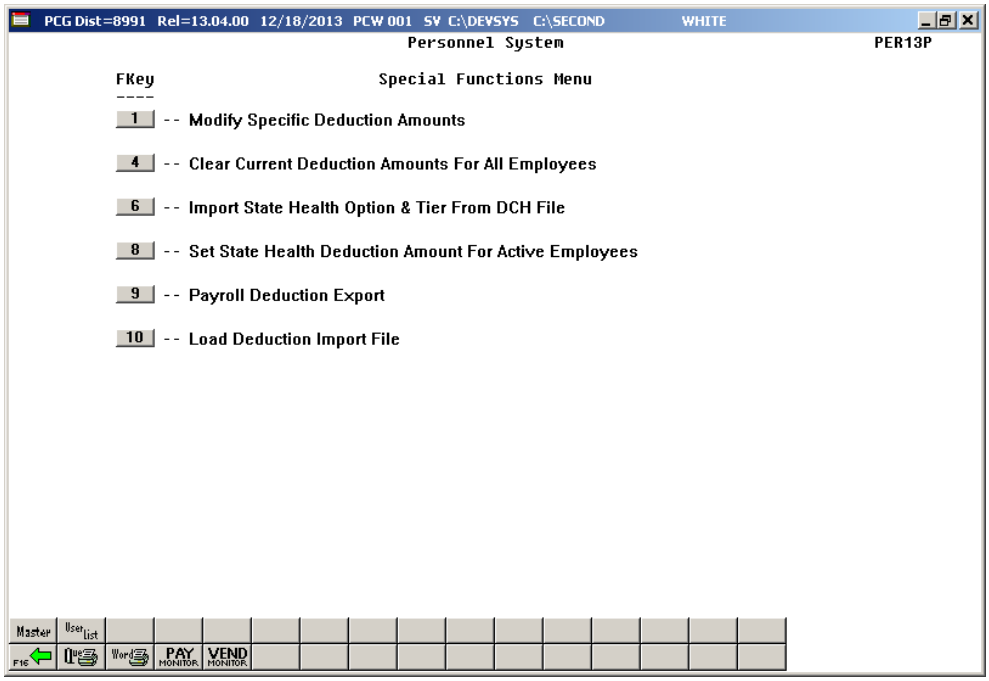
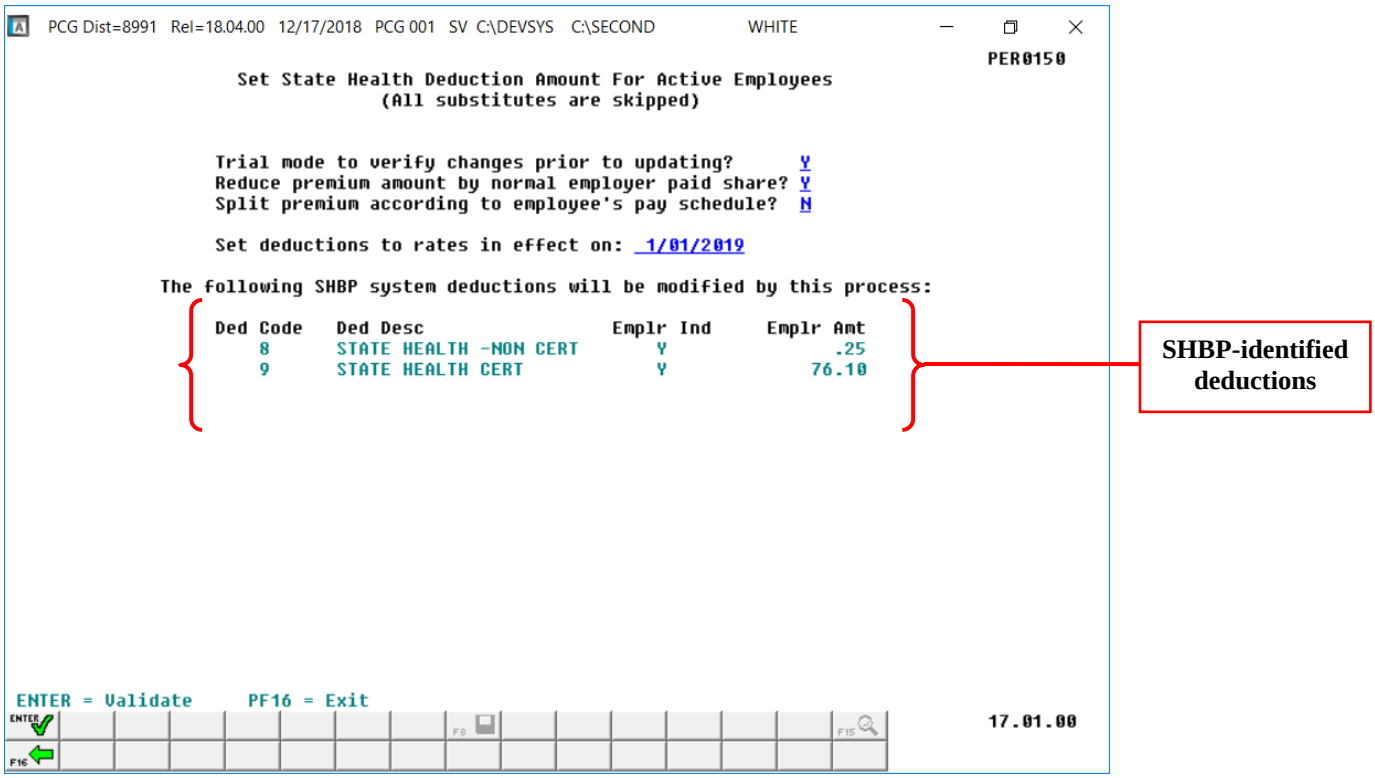
The following screen displays:



Step	Action
3	Select 8 (**F8 -** Set State Health Deduction Amount for Active Employees).

The following screen displays:



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Step	Action
4	**To run in Trial mode:** Enter **Y** (Yes) in the **Trial mode to verify changes prior to updating?** field. *If the function has already been run and the results have been verified, enter N (No) in the field to run the process in **Final** mode.*
5	Enter the appropriate response in the **Reduce premium amount by normal employer paid share?** field. *SHBP-identified deduction codes were identified as such using the instructions provided in Payroll System Operations Guide, Section F: Description/Deduction/Annuity File Processing. The "Benefit plan code associated with deduction" switch within the deduction record has been identified as "SHBP". Enter N (No) if employee-paid premium amounts should not be adjusted.*
6	**If N (No) was entered in Step 5:** Enter the appropriate response in the **Split premium according to employee's pay schedule?** field. *When the school district or system has more than one payroll, the option to split the normal premium according to each employee's pay period is available. Enter N (No) to deduct the full premium amount in one payroll per month. Enter Y (Yes) to split the premium between pay periods. If the school district or system pays bi-weekly or weekly, PCGenesis divides the premium by twenty-six (26) for biweekly payrolls and by fifty-two (52) for weekly payrolls respectively.* *If the school district or system has an employer-paid portion that applies to all employees, splitting the premium is not currently an option in PCGenesis. Contact the Technology Management Customer Support Center for additional assistance with this matter.*
7	Enter the date (MM/DD/CCYY) in the **Set deductions to rates in effect on** field. *The effective date allows PCGenesis to retrieve and use the rates from the benefit deduction file in effect for the date selected. Although PCGenesis defaults to the current date, enter the appropriate date, such as the next payroll period's date or the new calendar year's beginning date in most cases. For example, the December payroll withholds the premiums for January SHBP coverage, so when setting up for the December payroll, specify the date field as **01/01/CCYY**, where CCYY is the **new calendar year**.*
8	Verify the (Certified) and (Classified) benefit plan entries are correct. *These entries default from the Benefit configuration record. If the information is incorrect, refer to the results of the Benefit Deduction Option and Tier Report to determine the discrepancy. Follow the steps necessary to correct the error(s) before attempting to add the deduction information to PCGenesis. (This report will be generated and printed in Steps 13 - 16.)*

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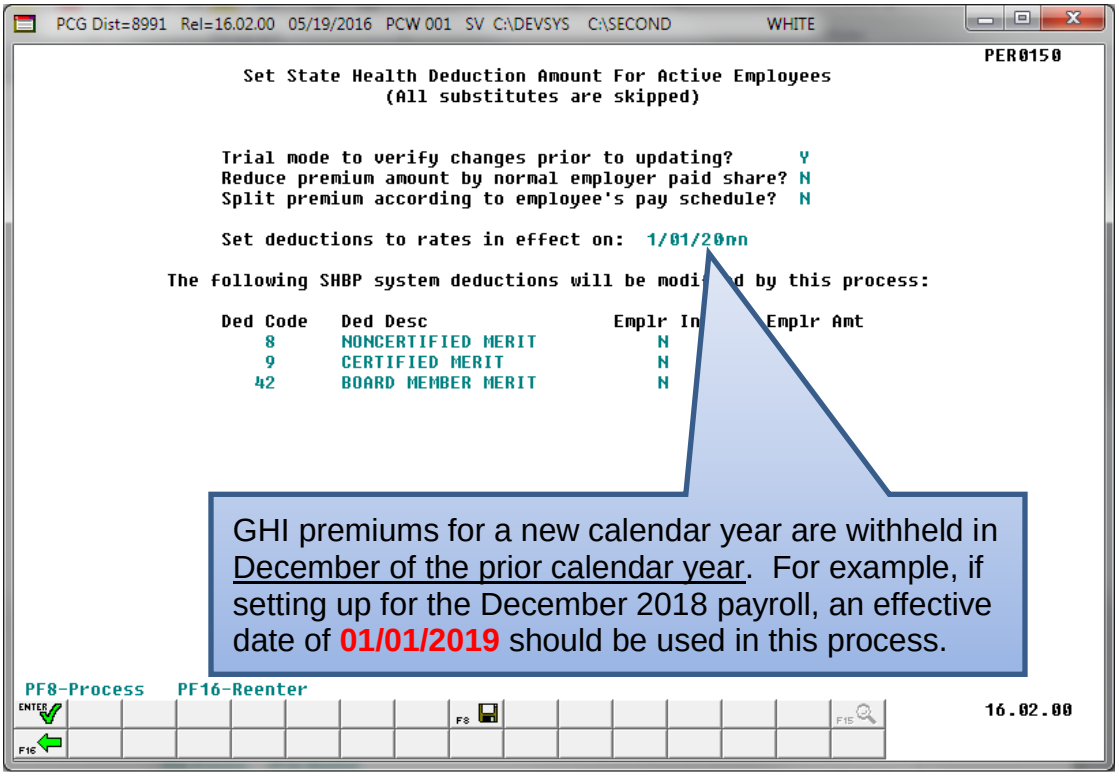
Step	Action
9	Select (**Enter**) to validate. *Error messages display where appropriate, as in the case of rates not being found for a specific date. In this instance, correct the errors, and repeat the procedure beginning at Step 1.* *PCGenesis users should bypass cautionary messages at the user's discretion.*

The following screen displays:



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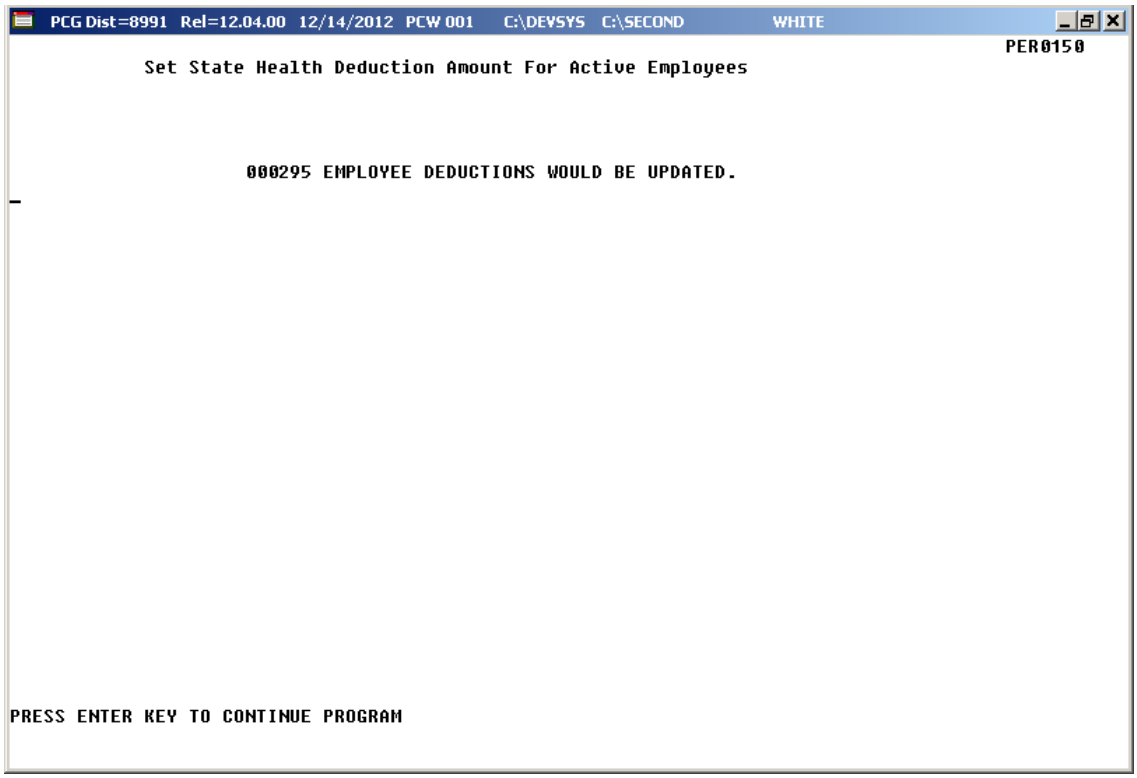
Step	Action
10	Select F8 (**F8**) to process. *"* * * Processing Request * * *" briefly displays.* *For errors and cautionary messages: Verify the dates entered are correct and refer to the SHBP Benefit Deduction Option and Tier Report to verify all benefit plan options and tiers have been entered. If the information is incorrect, refer to the results of the Benefit Deduction Option and Tier Report to determine the discrepancy. Follow the steps necessary to correct the error(s) before attempting to add the deduction information to PCGenesis. (This report will be generated and printed in Steps 13 - 16.)* *Although PCGenesis permits bypassing cautionary messages, consider correcting as many records as possible to ensure data quality.*

The following screen displays:



Step	Action
11	Select **Enter** (to Continue Program). *If selecting "Trial" in Step 4, repeat this procedure beginning at Step 2. Enter N (No) in the Trial mode to verify changes prior to updating? field at Step 4.*

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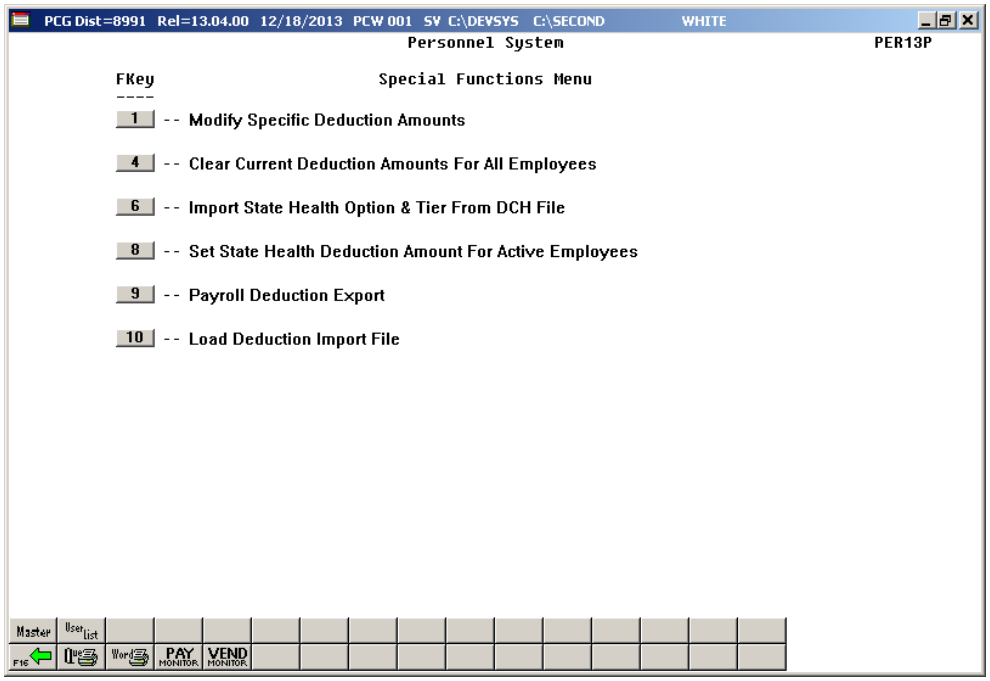
The following screen displays:



Step	Action
12	Select Master (**Master**) to return to the *Business Applications Master Menu.*
13	From the *Business Applications Master Menu*, select 2 (**F2 –** Payroll System Master Menu).
14	From the *Payroll System Master Menu*, select 9 (**F9** – Update/Display Description/Deduction/Annuity Menu).
15	On the 9 (**F9** – Print Benefit Plan/Option/Tier Records)**.**
16	**To print the report via the Uqueue Print Manager:** Select (**Uqueue**). **To print the report via Microsoft® Word:** Select (**MS WORD**). Follow the instructions provided in the *Technical System Operations Guide*, *User Interface Procedures, Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing* to create the macro necessary to use the feature where appropriate.
17	Select F16 (**F16** - Exit) to return to the *Payroll System Master Menu*, or select Master (**Master**) to return to the *Business Applications Master Menu.*

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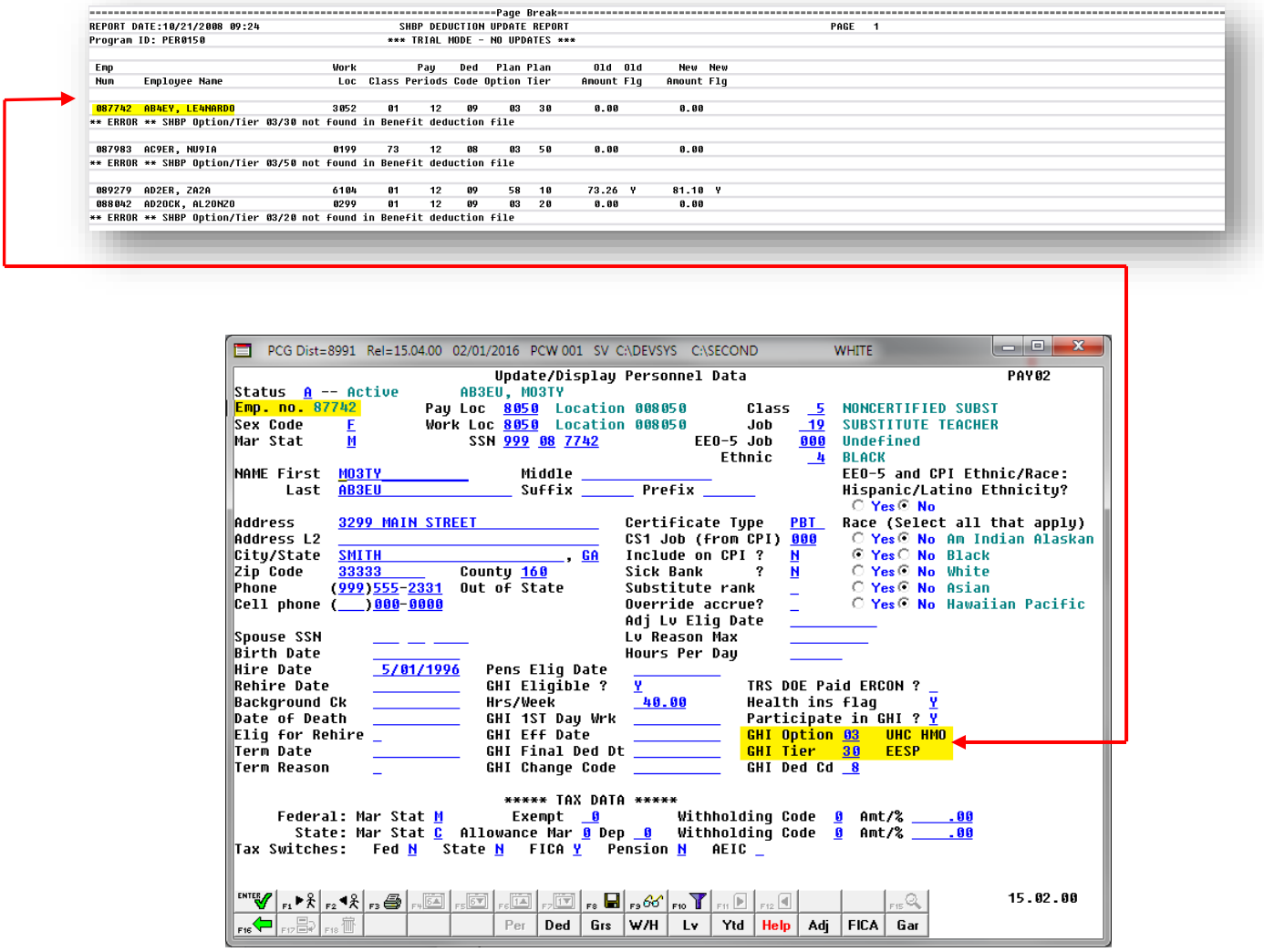
6A. (Trial Mode – No Updates) – Errors Encountered - Example

If errors are encountered, specific error messages displays for affected records. In our example, the correction was made by modifying the employee's GHI option and tier and deduction information.

The final page of the report lists the number of employee records updated and the number of errors and/or exceptions (cautions) encountered where appropriate.



```
==========================================================Page Break==========================================================
REPORT DATE:10/21/2008 09:24                    SHBP DEDUCTION UPDATE REPORT                                    PAGE   1
Program ID: PER0150                           *** TRIAL MODE - NO UPDATES ***

 Emp                                  Work          Pay    Ded   Plan Plan       Old  Old      New  New
 Num     Employee Name                 Loc  Class Periods Code Option Tier     Amount Flg    Amount Flg

 087742  AB4EY, LE4NARDO              3052     01     12    09     03   30       0.00          0.00
** ERROR ** SHBP Option/Tier 03/30 not found in Benefit deduction file

 087983  AC9ER, NU91A                 0199     73     12    08     03   50       0.00          0.00
** ERROR ** SHBP Option/Tier 03/50 not found in Benefit deduction file

 089279  AD2ER, ZA2A                  6104     01     12    09     58   10      73.26  Y      81.10  Y
 088042  AD2OCK, AL2ONZO              0299     01     12    09     03   20       0.00          0.00
** ERROR ** SHBP Option/Tier 03/20 not found in Benefit deduction file
```

```
PCG Dist=8991  Rel=15.04.00  02/01/2016  PCW 001  SV  C:\DEVSYS  C:\SECOND          WHITE
                          Update/Display Personnel Data                                   PAY02
Status  A -- Active        AB3EU, MO3TY
Emp. no. 87742          Pay Loc  8050  Location 008050        Class  _5  NONCERTIFIED SUBST
Sex Code      F         Work Loc 8050  Location 008050        Job   _19  SUBSTITUTE TEACHER
Mar Stat      M              SSN 999 08 7742            EEO-5 Job   000  Undefined
                                                            Ethnic   _4  BLACK
NAME First  MO3TY_________        Middle _______________              EEO-5 and CPI Ethnic/Race:
      Last  AB3EU_______________  Suffix ______ Prefix ______          Hispanic/Latino Ethnicity?
                                                                        ○ Yes ◉ No
Address     3299 MAIN STREET_____________     Certificate Type   PBT_   Race (Select all that apply)
Address L2  ________________________________  CS1 Job (from CPI) 000     ○ Yes ◉ No Am Indian Alaskan
City/State  SMITH_____________________, GA    Include on CPI ?   N       ◉ Yes ○ No Black
Zip Code    33333_____      County 160        Sick Bank      ?   N       ○ Yes ◉ No White
Phone      (999)555-2331  Out of State       Substitute rank    _       ○ Yes ◉ No Asian
Cell phone (___)000-0000                     Override accrue?   _       ○ Yes ◉ No Hawaiian Pacific
                                             Adj Lv Elig Date   __________
Spouse SSN      ___ __ ____                  Lv Reason Max      __________
Birth Date      __________                   Hours Per Day      ______
Hire Date       _5/01/1996   Pens Elig Date  __________
Rehire Date     __________   GHI Eligible ?  Y          TRS DOE Paid ERCON ? _
Background Ck   __________   Hrs/Week        _40.00     Health ins flag      Y
Date of Death   __________   GHI 1ST Day Wrk __________ Participate in GHI ? Y
Elig for Rehire _            GHI Eff Date    __________ GHI Option 03   UHC HMO
Term Date       __________   GHI Final Ded Dt __________ GHI Tier   30   EESP
Term Reason     _            GHI Change Code __________ GHI Ded Cd _8

                          ***** TAX DATA *****
     Federal: Mar Stat M        Exempt  _0        Withholding Code  0  Amt/%  ____.00
       State: Mar Stat C  Allowance Mar 0 Dep _0   Withholding Code  0  Amt/%  ____.00
Tax Switches:   Fed N   State N   FICA Y   Pension N   AEIC _

ENTER F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12 F15                                  15.02.00
F16 F17 F18          Per  Ded  Grs  W/H  Lv  Ytd  Help  Adj  FICA  Gar
```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6B. (Live Mode – Employee Updates) – Error Free – Example

REPORT DATE:02/01/2016 11:04 SHBP DEDUCTION UPDATE REPORT PAGE 1
Program ID: PER0150 *** LIVE MODE - EMPLOYEES UPDATED ***

Emp Num	Employee Name	Work Loc	Class	Pay Periods	Ded Code	Plan Option	Plan Tier	Old Amount	Old Flg	New Amount	New Flg
087893	AB4EY, LE4NARDO	5050	04	12	08	NE	00	0.00		0.00	
088728	AD9ISON, IS9IAH	5050	13	12	08	B3	10	56.28	N	66.28	N
086328	AD9ISON, TR9CEY	6000	11	12	08	NE	00	0.00		0.00	
088464	AG9ILERA, JO9UE	0194	13	12	08	NC	00	0.00		0.00	
086424	AI9SWORTH, CO9NELL	5050	03	12	09	B2	96	369.74	N	369.74	N
088824	AI9SWORTH, XA9IER	0195	04	12	08	B3	10	56.28	N	66.28	N
088966	AL3CEA, DU3TI	5050	03	12	09	B3	10	56.28	N	66.28	N
087189	AL4RECHT, CH4RELLE	8012	06	12	08	B3	90	190.96	N	195.96	N
088389	AL4RECHT, KE4NITH	0194	03	12	09	B6	96	440.44	N	440.44	N
087928	AL9ARD, BR9CE	8012	06	12	08	NE	00	0.00		0.00	
089386	AN7ERS, AU7USTINE	6001	03	12	09	B6	90	325.99	N	330.99	N
088072	AN9REW, JE9LENE	8012	06	12	08	NC	00	0.00		0.00	
087633	AP8LEGATE, SH8QUANA	0101	03	12	09	B2	10	109.33	N	105.33	N
087807	AR2ENAULT, EL2IN	0195	13	12	08	B2	10	109.33	N	105.33	N
087568	AS9BY, JO9NSIE	6000	11	12	08	NC	00	0.00		0.00	
087343	AV2LOS, AZ2LEE	8014	32	12	08	B3	97	340.40	N	340.40	N
088967	AY2ES, VI2ENTE	0195	03	12	09	B2	94	197.12	N	197.12	N
089095	BA2CLAY, BU2	5050	30	12	09	NE	00	0.00		0.00	
088447	BA2LEY, RE2NA	8014	36	12	09	NE	00	0.00		0.00	
087558	BA3N, FR3DERIC	6001	04	12	08	NC	00	0.00		0.00	
086358	BA3N, ZA3E	6000	11	12	08	NC	00	0.00		0.00	
089236	BA5FIELD, JO5EFINE	0194	04	12	08	B3	10	56.28	N	66.28	N
087204	BA5GETT, DA5N	5050	03	12	09	B3	91	275.96	N	275.96	N
086338	BA7NHART, AR7EL	5050	11	12	08	NE	00	0.00		0.00	
088361	BA8ON, MI8CHEL	0195	03	12	09	B2	94	197.12	N	197.12	N
087161	BA8ON, YE8ETTE	5050	03	12	09	B3	96	260.40	N	260.40	N
088393	BA8TH, ER8N	0194	03	12	09	B1	90	390.23	N	390.23	N
087512	BA9B, EM9RY	0101	33	12	08	B2	94	197.12	N	197.12	N
086464	BA9BOSA, JO9UE	0195	03	12	09	NC	00	0.00		0.00	
089632	BA9BOUR, DE9NY	0195	03	12	09	B3	96	260.40	N	260.40	N
088432	BA9BOUR, GE9ARO	5050	17	12	08	B6	10	130.58	N	130.58	N
088320	BA9M, MO9AMMED	0194	03	12	09	B2	96	369.74	N	369.74	N
087503	BE2AY, BI2LI	8010	27	12	08	NE	00	0.00		0.00	
086503	BE2LEY, BI2LI	0195	13	12	08	B2	96	369.74	N	369.74	N
086511	BE2UCHAMP, CA2LEE	0101	03	12	09	B3	10	56.28	N	66.28	N
088278	BE3MAN, NO3UKO	0101	03	12	09	B3	10	56.28	N	66.28	N
087301	BE4ERRA, TE4PLE	0195	03	12	09	NC	00	0.00		0.00	
088739	BE6AVIDES, RO6Y	0101	03	12	09	B3	10	56.28	N	66.28	N
088187	BE6TY, FR6TZ	5050	03	12	09	NE	00	0.00		0.00	
088538	BE7EDICT, DO7NETTA	5050	03	12	09	B6	96	440.44	N	440.44	N
089720	ZE9EDA, LO9D	8010	02	12	08	B3	94	130.74	N	130.74	N

NUMBER OF ERRORS ENCOUNTERED 0

NUMBER OF EMPLOYEES UPDATED 491

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6C. Benefit Deduction Option and Tier Report – Example

```
REPORT DATE: 11/26/2018 10:22                BENEFIT DEDUCTION OPTION AND TIER REPORT                                PAGE   1
Program ID:  PAY27
                          Report of EMPLOYEE rates in effect from: 01/01/2019  To: 12/31/2019

Plan: SHBP  State Health Benefit Plan
            Certified Ded Code: 09  ER flag: Y ER paid amt:    $76.10   Classified Ded Code: 08  ER flag: Y ER paid amt:   $76.10

Option Tier Description                          From Date   To Date  Short Desc    Deduction Desc    PayChk Desc    Prem Amt

88          TRICARE SUPPLEMENT                   Short Desc: TRICARE

       10   SINGLE COVERAGE                      01/01/2017 12/31/9999 SINGLE        TRICARE SINGLE    TRICARE SGL       60.50
       90   EMPLOYEE & SPOUSE                    01/01/2017 12/31/9999 EESP          TRICARE EESP      TRICARE EESP     119.50
       94   EMPLOYEE & CHILD(REN)                01/01/2017 12/31/9999 EECH          TRICARE EECH      TRICARE EECH     119.50
       96   EMPLOYEE & SPOUSE & CHILD(REN)       01/01/2017 12/31/9999 FAMILY        TRICARE FAMILY    TRICARE FAM      160.50

B1          ANTHEM GOLD                          Short Desc: ANTHEM GOLD

       10   SINGLE COVERAGE                      01/01/2019 12/31/9999 SINGLE        ANTH GOLD SINGLE  ANTH G SINGL     168.73
       40   SINGLE COVERAGE TOBACCO SURCHARGE    01/01/2019 12/31/9999 SINGLE/T      ANTH GOLD SINGL/T ANTH G SGL/T     248.73
       90   EMPLOYEE & SPOUSE                    01/01/2019 12/31/9999 EESP          ANTH GOLD EESP    ANTH G EESP      418.09
       91   EMPLOYEE & SPOUSE/TOBACCO SURCHARGE  01/01/2019 12/31/9999 EESP/T        ANTH GOLD EESP/T  ANTH G EESP/T    498.09
       94   EMPLOYEE & CHILD(REN)                01/01/2019 12/31/9999 EECH          ANTH GOLD EECH    ANTH G EECH      307.13
       95   EMPL & CHILD(REN)/TOBACCO SURCHARGE  01/01/2019 12/31/9999 EECH/T        ANTH GOLD EECH/T  ANTH G EECH/T    387.13
       96   EMPLOYEE & SPOUSE & CHILD(REN)       01/01/2019 12/31/9999 FAMILY        ANTH GOLD FAMILY  ANTH G FAM       556.50
       97   EMPL & SPOUSE & CHILD/TOBACCO SURCHARGE 01/01/2019 12/31/9999 FAMILY/T   ANTH GOLD FAM/T   ANTH G FAM/T     636.50

B2          ANTHEM SILVER                        Short Desc: ANTHEM SILVER

       10   SINGLE COVERAGE                      01/01/2019 12/31/9999 SINGLE        ANTH SILVER SINGL ANTH S SINGL     110.89
       40   SINGLE COVERAGE TOBACCO SURCHARGE    01/01/2019 12/31/9999 SINGLE/T      ANTH SILVER SGL/T ANTH S SGL/T     190.89
       90   EMPLOYEE & SPOUSE                    01/01/2019 12/31/9999 EESP          ANTH SILVER EESP  ANTH S EESP      296.62
       91   EMPLOYEE & SPOUSE/TOBACCO SURCHARGE  01/01/2019 12/31/9999 EESP/T        ANTH SLVER EESP/T ANTH S EESP/T    376.62
       94   EMPLOYEE & CHILD(REN)                01/01/2019 12/31/9999 EECH          ANTH SILVER EECH  ANTH S EECH      208.80
       95   EMPL & CHILD(REN)/TOBACCO SURCHARGE  01/01/2019 12/31/9999 EECH/T        ANTH SLVER EECH/T ANTH S EECH/T    288.80
       96   EMPLOYEE & SPOUSE & CHILD(REN)       01/01/2019 12/31/9999 FAMILY        ANTH SILVER FAMIL ANTH S FAM       394.54
       97   EMPL & SPOUSE & CHILD/TOBACCO SURCHARGE 01/01/2019 12/31/9999 FAMILY/T   ANTH SILVER FAM/T ANTH S FAM/T     474.54

B3          ANTHEM BRONZE                        Short Desc: ANTHEM BRONZE

       10   SINGLE COVERAGE                      01/01/2019 12/31/9999 SINGLE        ANTH BRNZE SINGLE ANTH B SINGL      72.45
       40   SINGLE COVERAGE TOBACCO SURCHARGE    01/01/2019 12/31/9999 SINGLE/T      ANTH BRNZE SGL/T  ANTH B SGL/T     152.45
       90   EMPLOYEE & SPOUSE                    01/01/2019 12/31/9999 EESP          ANTH BRNZE EESP   ANTH B EESP      215.91
       91   EMPLOYEE & SPOUSE/TOBACCO SURCHARGE  01/01/2019 12/31/9999 EESP/T        ANTH BRNZE EESP/T ANTH B EESP/T    295.91
       94   EMPLOYEE & CHILD(REN)                01/01/2019 12/31/9999 EECH          ANTH BRNZE EECH   ANTH B EECH      143.46
       95   EMPL & CHILD(REN)/TOBACCO SURCHARGE  01/01/2019 12/31/9999 EECH/T        ANTH BRNZE EECH/T ANTH B EECH/T    223.46
       96   EMPLOYEE & SPOUSE & CHILD(REN)       01/01/2019 12/31/9999 FAMILY        ANTH BRNZE FAMILY ANTH B FAM       286.92
       97   EMPL & SPOUSE & CHILD/TOBACCO SURCHARGE 01/01/2019 12/31/9999 FAMILY/T   ANTH BRNZE FAM/T  ANTH B FAM/T     366.92

B6          ANTHEM HMO                           Short Desc: ANTHEM HMO

       10   SINGLE COVERAGE                      01/01/2019 12/31/9999 SINGLE        ANTH HMO SINGLE   ANTH H SINGL     135.65
       40   SINGLE COVERAGE TOBACCO SURCHARGE    01/01/2019 12/31/9999 SINGLE/T      ANTH HMO SGL/T    ANTH H SGL/T     215.65
       90   EMPLOYEE & SPOUSE                    01/01/2019 12/31/9999 EESP          ANTH HMO EESP     ANTH H EESP      348.63
       91   EMPLOYEE & SPOUSE/TOBACCO SURCHARGE  01/01/2019 12/31/9999 EESP/T        ANTH HMO EESP/T   ANTH H EESP/T    428.63
       94   EMPLOYEE & CHILD(REN)                01/01/2019 12/31/9999 EECH          ANTH HMO EECH     ANTH H EECH      250.90
```

CY2019 Benefit Plan Rate Updates

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Topic 7: Grossing-Up Wages for Highly Compensated Employees

IRS Publication 15-B, Employer's Tax Guide to Fringe Benefits, located at http://www.irs.gov/pub/irs-pdf/p15b.pdf requires employees receiving extra benefits (benefits beyond what regular employees receive), to have those benefits recorded as wages. The following is a quote from IRS Publication 15-B: *"If your plan favors highly compensated employees as to eligibility to participate, contributions, or benefits, you must include in their wages the value of taxable benefits they could have selected."*

To comply with this regulation, if the school district or system pays all or part of an employee's share of a premium only for select employees, add the premium amount to the employees' gross wages, and take the deduction for the benefit through payroll processing. Grossing-up employees' wages and deducting the premium through payroll deduction will correctly report the wages for the employees on their W-2 Statements.

If paying all or a portion part of an employee's share of a premium for all participating employees, it is not necessary to gross-up the wages. In this instance, the employer contribution flag on the deduction screen should be set to *Y (Yes)*. Employees' wages should be grossed-up only if the employer contributes for a select group of employees.

Example: The school district or system pays all health insurance premiums for the superintendent, but all other employees pay the regular employee's share. The superintendent's monthly salary is $10,000.00 and the employee's share for the insurance is $400.00. To report this information correctly, increase the superintendent's monthly gross pay to $10,400 per month and enter the employer share premium on the superintendent's deduction screen. PCGenesis will in turn deduct the premium from the employee's gross pay when running payroll. If the *SEC125 flag* on the deduction screen is marked with 'Y' (Participating in section 125), PCGenesis deducts the premium pre-tax, and subsequently, there is no affect on the superintendent's net pay.

Refer to the *Payroll System Operations Guide*, *Section B: Payroll Update Processing, Topic 4: Update/Display Payroll Information, Procedure B: Updating/Displaying Deduction Data* for the instructions to change employees' premiums. *Procedure C: Updating/Displaying Gross Data* of the same document provides the instructions to change employees' gross pay.

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Topic 8: Exporting the Payroll Deduction Export File from PCGenesis

Refer to the *Payroll System Operations Guide*, *Section I: Special Functions, Topic 8: Payroll Export and Import File Processing, Topic 8B: Payroll Deduction Data Export and Import File Processing* for instructions.

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Topic 9: Importing the Deduction File into PCGenesis (Not for use with the State Health Benefit Plan)

Refer to the *Payroll System Operations Guide*, *Section I: Special Functions, Topic 8: Payroll Export and Import File Processing, Topic 8B: Payroll Deduction Data Export and Import File Processing* for instructions.

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