Human Resources/Payroll

Guide to Benefit Administration

INFINIUM
SOFTWARE

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Introduction

Overview

The Benefit Administration Function of PE2000 allows all the benefits offered by the employer to be recorded and maintained. Employees can be enrolled into benefit plans and any employee contribution and/or employer liability can be taken through cycle processing in PY2000.

There are two terms which are used to define the benefits on the system Benefit Identity and Benefit Plans.

A Benefit Identity is set up for each provider, and for each benefit type, i.e., medical, life insurance, car. An identity must be set up for each provider so that premium statements can be generated for them.

Benefit Plans are set up for each Benefit Identity. There may be a number of different plans for each identity. For example, under the Health Insurance ID there may be a family plan, employee only plan and maybe an executive plan. Information about the premiums are held at the plan level, together with information to control enrollment, beneficiaries, cancellation, eligibility and so on.

Once the plans have been established, employees can be enrolled into the benefits and new employees can be enrolled automatically. Benefits can also be set to be cancelled automatically if the employee leaves the organisation.

The rest of this section describes the stages required to establish and administer employee benefits.

Employer Benefit Controls

Overview

This function contains the Employer benefit information. For example, whether PY2000 will be used to make employee contributions to the benefit. The Employer Benefit Controls should not require much maintenance, once they have been created:

Menu Selection

System: Personnel 2000
Menu Level 1: Benefit Administration
Menu Level 2: Benefit Controls
Menu Level 3: Update Employer Benefit Controls

Screen 1 of 2

```
 9/03/95  15:25:30    Update Employer Benefit Controls    PRGKCM     PRDKCM

Type selections, press Enter.

Employer . . . . . . . . .  111 +













 F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Key Information

- Select the *Employer* to be updated.

Required Fields

- Employer

Press Enter↵ *to continue...*

Screen 2 of 2

```
 9/03/95  15:27:14     Update Employer Benefit Controls      PRGKCM      PRDKCM

Type selections, press Enter.

Employer . . . . . . . . :   111 Software 2000 Training Company

PY2000 installed?  . . . .   1  (0/1)
FB2000 installed?  . . . .   0  (0/1)
Use Benefit Enrollments? .   1  (0/1)
Update PY Deductions?  . .   1  (0/1)
Edit for Multiple Plans? .   0  (0/1)
Eligibility Basis  . . . .   1  (1=DOE, 2= Adj DOE)






F3=Exit    F10=QuikAccess    F12=Cancel    F22=Delete
```

Key Information

- *PY2000 installed?* means that if a '1' is entered, payroll deduction codes will be presented at the plan level.

- *FB2000 installed?* is only set to '1' if Flexible Benefits 2000 is installed and being used.

- The *Use Benefit Enrollments* means that if a '1' is entered, the Benefit *Enroll*ments screen is presented as the final screen in the ENTER NEW EMPLOYEE process.

- For *Update Payroll Deductions*, a '1' means that any change in deduction amount should flow automatically to the deduction control record.

- A '1' next to *Edit For Multiple Plans* will mean that as the user attempts to assign a second plan within one benefit identity, an edit message will appear and the transaction will not complete.

- The *Eligibility Basis* field controls when an employee becomes eligible for a benefit plan. A '1' will make the system default the Date of Employment, a '2' will first look at the Adjusted Date of Employment, but if no data is held, it will default to the Date of Employment.

Required Fields

- All fields must be completed.

Press $\boxed{\text{F3}}$ *to exit and save...*

Benefit Identities

Overview

A Benefit Identity is set up for each benefit provider and each benefit type, e.g., Health, Life. If there are two separate providers of health insurance then separate identities should be established. An additional benefit identity would be needed if one organisation was providing more than one benefit type, e.g., Health Insurance and Life Insurance.

Benefit Identities are established by provider so that Premium Statements can be generated for each provider.

Menu Selection

System: Personnel 2000
Menu Level 1:   Benefit Administration
Menu Level 2:   Benefit Controls
Menu Level 3:   Update Benefit Identifies

Screen 1 of 2

```
 9/03/95  15:48:01      Update Benefit Identities      PRGBIM     PRDBIM

Type selections, press Enter.

Employer . . . .   111 +
Benefit ID . . .   PPP +


















 F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Key Information

- Type the *Employer* code and a three character alpha/numeric *Benefit ID* code to describe the benefit.

Required Fields

- Employer
- Benefit ID

Press Enter↵ *to continue...*

Screen 2 of 2

```
 9/03/95  15:48:44     Update Benefit Identities      PRGBIM    PRDBIM

Employer . . . . :  111
Benefit ID . . . :  PPP

Description  . . .  Private Patients Plan - Health Care Scheme

Benefit Type . . .  03        Status . . . .  1  (1= Active 0= Suspend)


Employee multiple plans? . .   0  (0/1)

Plan required? . .  0
Providers name . .  Private Patients Plan
Address  . . . . .  PPP House
                    York Street
Town . . . . . . .  Tunbridge Wells
Postal Code  . . .
Telephone  . . . .  0324 58333



F3=Exit   F10=QuikAccess   F12=Cancel   F22=Delete
```

Key Information

- Type in an appropriate *Description* for the benefit.
- A *Benefit Type* defines what kind of benefit this identity represents. Press the Help key for a list of the benefit types available.

✍ Note: The Type will tailor the screen at the plan level, so that the appropriate information can be recorded.

Benefit Type Codes

Type	Description	Type	Description
01	Life Insurance	08	Retirement/ Profit sharing
02	Accidental Death and Dismemberment	09	Survivor Income
03	Medical/Health Insurance	10	Savings (% of pay)
04	Dental Insurance	11	Company Car
05	Short Term Disability	17	Share Ownership
06	Long Term Disability	18	Miscellaneous
07	Dependent Life	19	Savings Flat Amount

Note: Benefit Types 12, 13, 14 and 20 apply to Flexible Benefits only

- The *Status* field determines whether the identity is active (type a '1') or inactive (type a '0').

- The *Employee Multiple Plan* field will control whether an employee is allowed to be enrolled into more than one plan within an Identity. Entering a '1' will produce an edit message and prevent multiple enrollments.

- The *Plan Required*? field indicates that an employee must be enrolled into a plan when they join the company.

- *Providers name, Address, Telephone* can all be recorded.

Required Fields

- Benefit Type
- Status
- Employee Multiple Plans?
- Plan Required?

Press F3 *to exit and save.*

Benefit Plans

Overview

Benefit Plans are set up within each identity. There may be a number of different plans within one identity, e.g., PPP Family, PPP Employee Only. Details of the benefit including the premium are maintained here. Plans also control employee eligibility, enrollment and cancellation.

Menu Selection

System: Personnel 2000
Menu Level 1: Benefit Administration
Menu Level 2: Benefit Controls
Menu Level 3: Update Benefit Plans

Screen 1 of 2

```
10/03/95  10:44:27       Update Benefit Plans           PRGBPM      PRDBPM

Type selections, press Enter.

Employer . . . .   111 +
Benefit ID . . .   PPP +
Plan Code  . . .   0001  +

















F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Key Information

- Type the *Employer* Code.

- In the *Benefit ID* field, type the pre-established Benefit ID code.

- For the *Plan Code* field, type a five character code to reflect the plan.

✍

Note: The screen that is presented next will vary depending on what type of benefit is being recorded. The *Benefit Type* was defined at the Benefit Identity level. While screens for each *Benefit Type* vary, they do share some characteristics.

Required Fields

- Employer

- Benefit Code

- Plan Code

Press Enter↵ *to continue...*

Type 03 Medical Benefit Plans

Screen 2 of 2

```
13/03/95  14:52:09    Update Health Care Plans        PRGBPM    PRDBPM


Employer . . :  111 Software 2000 Training Company
Benefit ID . :  PPP Private Patients Plan - Health Care Scheme
Plan Code  . :  0001             Effective Date . . .   1011990
Description  .  Married Membership 1991
Controls
Auto entry?  . . . . .  0  (0/1)    Flexible Plan  . . .  0  (0/1)
Beneficiaries? . . . .  1  (0/1)    Status . . . . . . .  1  (0/1)
Auto Cancel? . . . . .  1  (0/1)    Required Plan  . . .  0  (0/1)
Cancel Days  . . . . .  30          Cancel Type  . . . .  2
Premiums
Total Premium  . . . .      350.00  Premium Freq . . . .  A
Employer Premium . . .      250.00
Deductions
Deduction Code . . . .  0001  +     Basis . .  I    Frequency . .  M
Employee Cont  . . . .  8.33
Employer Cont  . . . .  20.83
Eligible in  . . . . .  ___   days from date of hire Type . . .  1
Eligible after . . . .  _____ hours worked of income group  . .  _____  +
Policy number  . . . .  _____

F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel  F13=Calc Contrib  F22=Delete
```

Key Information

- For the *Effective Date* field, type the date the plan is/will be offered. A beginning date on the Deduction Control record will override this date.

- In the *Description* field, type a meaningful description. This description will display on reports.

- For *Auto Entry?*, valid codes are:

  '1' means that when selecting this plan during employee enrollment, no plan enrollment screen will be displayed. The employee will be enrolled without further entries being necessary. It does not mean the plan is required, but it is time saving when and if the plan is selected.

  '0' means that the plan enrollment screen will be displayed.

- For *Flexible Plan*, type a '0' unless the Flexible Benefit module is to be used.

- For *Beneficiaries?* field valid codes are:

  '1' means that the plan requires beneficiary/dependent information. In this case, Auto Entry must be set to '0'. At the time of employee enrollment, beneficiary/dependent information will be able to be entered.

  '0' means that no beneficiary information is required.

- For the *Status* field, a '1' means the plan is active and a '0' means that the plan is inactive.

- For *Auto Cancel*, the valid codes are:

  '1' means that this plan will cancel automatically when an employee is terminated.

  '0' means that this plan will not cancel automatically, a cancel date must be entered when an employee is terminated.

- For *Required Plan,* the valid codes are:

  '1' means that the employees are required to enroll into this plan. During employee enrollment this plan will be selected automatically.

  '0' means that the plan is not mandatory.

- In the *Cancel Days* field, type the number of days after an employee has left which the plan will cancel automatically.

- For *Freeze?*, the valid codes are:

  '1' means that the deduction amounts will not update if the plan premium amounts are changed.

'0' means that the premium deduction amounts will update if the plan premium amounts are changed.

- For *Cancel Type,* the valid codes are:

  '1' means that the Cancellation Date is equal to the Termination Date, plus the number of days entered in the *Cancel Days* field.

  '2' means that the Cancellation Date will be the last day of the month following the employee Termination Date.

- For *Total Premium*, type the total premium amount due to the provider. In the *Premium Freq* field, type the frequency at which this premium is paid. For the *Employer Premium* field, type the Employer's portion of the premium. Valid values for *Premium Freq* are:

  M - Monthly

  Q - Quarterly

  A - Annually

- The *Plan Code* will automatically default into the *Deduction Code* field. This can be overridden if another deduction code is to be used. This field allows the employee part of the premium to be deducted during the pay cycle. The deduction control must have been established before this field can be filled. When an employee is authorised into the plan, they will be authorised to the deduction.

- The *Basis* field controls how the payroll deduction amounts will be determined. Type a '1' for using deduction amounts found on the employee's deduction record. Leave BLANK to use the amounts from the deduction control record.

- In the *Frequency* field, the values define how often the payment should be taken from the employee's pay. The valid values are:

  W - Weekly

  B - Biweekly

  S - Semi-monthly

  M - Monthly

- *Employee Cont* and *Employer Cont* represent the employee and employer contributions. Press F13 to have these amounts calculated automatically based on the *Total Premium*, *Employer Premium, Premium Frequency*, and Deduction *Frequency*. Calculated amounts can be overidden.

- In the *Eligible in ___ days from date of hire* field, type the number of days from the Employment date that employees must wait until they are eligible to be enrolled into the plan. The

eligibility *Type* indicates the way eligibility will be calculated. Valid values are:

'1' means that you add the eligible in - days to the employment date to calculate the Eligibility Date.

'2' means that you use the first day of the month following the hire date and add to any eligible in-days.

'3' means that for retirement plans only, the *Eligibility Date* is the plan date.

- For the *Eligible after ____ hours worked of income group* field, type the number of hours, since the Date of Hire that an employee must work in order to become eligible to join the plan and, for *Income Group*, type the income reporting group code that represents the incomes to be used in the calculation of hours worked.

- For the *Policy Number* field, type the policy number.

Required Fields

- Effective Date
- Description
- Auto Entry?
- Flexible Plan
- Beneficiaries?
- Status
- Auto Cancel?
- Required Plan?
- Total Frequency
- Premium Frequency
- Deduction Code
- Type

Press F3 *to exit and update.*

✍   Note: Many of the fields on each screen have common characteristics.

The following sections will show the other available screens and explain any additional fields.

Type 01 Life Insurance Benefit Plans

Screen 2 of 2

```
13/03/95  15:19:02     Update Life Insurance Plans        PRGBPM     PRDBPM

Benefit ID . :  INS LIFE INSURANCES
Plan Code  . :  3X                    Effective Date . . .  31121994
Description  .  3 Times Salary
Controls
Auto entry? .  0 (0/1)   Flexible Plan  .  0 (0/1)   Beneficiaries?  .  0 (0/1)
Status  . . .  1 (0/1)   Auto Cancel? . .  0 (0/1)   Required Plan . .  0 (0/1)
Cancel Days .  ___       Cancel Type  . .  1         Freeze? . . . . .  0 (0/1)
Deductions
Deduction . .  DC005 +   Basis  . . . . .  I         Frequency . . . .  _
Eligible in .  ___    days from date of employment   Type  . . . . . .  1
Eligible after _____  hours worked of income group  _____ +
Employer contribution . . . .  _____    ( as % of premium )
Rate
Rate per 1000 .  2.50000   up to  5_____   of coverage
Excess at . . .  _____   per 1000   Rate freq .  M  OR  Rate Code .  _____
Coverage
Coverage  . . .  _____     Policy number . . .  _____
OR  Base Salary factor . . .  3.0000    Coverage code . . .  _____
    Rounding Type  . . . . .  1         Rounding amount . .  _1000_

F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Key Information

- For *Freeze?*, the valid codes are:

  '1' means that the deduction amounts will not update if the plan premium amounts are changed.

  '0' means that the premium deduction amounts will update if the plan premium amounts are changed.

- For the *Rate* field, type the rate per 1000 of coverage for each employee and type the maximum amount of coverage any employee may receive in the *up to ___ of coverage* field. An entry must be made here even if an age table is set up.

- For the *Excess at ___ per 1000* field, type the amount charged per 1000 (per employee) over the coverage limit.

- In the *Rate Freq* field, type the frequency at which the rate is paid by the employer. This appears on the premium statement and calculates the total premium amount due. If this field is left blank, a *Rate Code* must be entered.

- For *Rate Code*, type '*AGES' if the system needs to access an Age Rates table. This field can be used to exit to a custom program to perform the calculation.

- In the *Coverage* field, type the coverage amount only if all employees in the plan have the same coverage amount. If it is not the same for all employees, leave this field blank and enter the factor in the *Base Salary Factor* field.

- For *Base Salary Factor*, type the factor to be multiplied by the employee's annual salary to calculate the employee coverage.

Note: If no annual salary is found, the system will use the *Regular Hours* and *Scheduled Periods* fields to calculate the coverage amount.

- The *Coverage Code* field provides a user exit to reference a custom program. The program called will be CUGXXXXX, where XXXXX is the value in *Coverage Code*.

- Rounding is used when the coverage amount is a factor of salary. For *Rounding Type*, the valid codes are:

  '0' means that there is No Rounding

  '1' means that there is Rounding Up

  '2' means that there is Rounding To

  '3' means that there is Rounding Down

- In the *Rounding Amount* field, type the amount that the system will round up to, nearest to, or down to.

Required Fields

- Effective Date
- Description
- Auto entry?
- Status
- Flexible Plan
- Auto Cancel?
- Beneficiaries?
- Required Plan
- Freeze?
- Deduction
- Frequency

- Type

- Rate per 1000

- Rate Frequency

- Rate Code

- Coverage

- Base Salary Factor

- Coverage Code

- Rounding Type

Press F3 *to exit and update.*

Type 08 Retirement/Profit Sharing Benefit Plans

Screen 2 of 2

```
13/03/95  15:29:45      Update Company Pension Plans      PRGBPM      PRDBPM

Employer  . . :  111 Software 2000 Training Company
Benefit ID  . :  PEN PENSION PLAN
Plan Code . . :  AVC1
Description . .  AVC - With Profits

Effective Date.  6041994    Auto entry? .  0  (0/1)     Auto Cancel?. .  0
Beneficiaries .  0  (0/1)   Status . . .  1  (0/1)     Cancel Days . .  ___
Required Plan .  0  (0/1)   Retire Age  .  65           Cancel Type . .  1
Minimum Age . .  21         Maximum Age .  50

Eligible after  ___0    hours worked of income group   ____ +
    and after   0       consecutive months of service
Eligible after   0      days from date of employment    Type  . . . . .  1

Pension Plan .  1         Entry Date 1.  ____  (DDMM)   Entry Date 2 .  ____
Deduction  . .  DC004 +   Basis . . . .  I              Frequency . . .  M

ER Cont %  . .  ____      Plan number .  _____


F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Key Information

- For *Normal Age*, type the normal age at which plan participants receive benefits.

- In the *Minimum Age* field, type the minimum age at which employees become eligible for participation in the plan. For *Maximum Age*, type the maximum age for participation.

- At the *Eligible after ___ consecutive months of service f*ield, type the number of months of consecutive service required in order to be eligible for enrollment. For the *Eligibility Type* field, type a '3'.

- The *Pension Plan* field will determine the calculation of the vesting. A '1' uses the Plan Anniversary date, a '2' uses the Employee Hire date.

- *Entry Date 1* and *Entry Date 2* are used if an employee can only join the plan on a six monthly entry date.

Required Fields

- Description
- Effective Date
- Auto Entry?
- Auto Cancel?
- Beneficiaries
- Status
- Required Plan
- Type
- Pension Plan
- Frequency

Press F3 *to exit and update.*

Type 10 Savings Benefit Plans

Screen 2 of 2

```
13/03/95  15:56:27     Update Savings Plans          PRGBPM      PRDBPM

Employer  . . : 111 Software 2000 Training Company
Benefit ID  . : SPP Stock Purchase Plan
Plan Code . . : 001
Description . .  _____
Effective Date  _____
Controls
Auto entry? . .  0        Flexible Plan . .  0   (0/1)
Beneficiaries .  0        Status  . . . . .  1   (0/1)
Auto Cancel?  .  0        Required Plan . .  0
Cancel Days . .  ___      Cancel Type . . .  1
Deductions
Deduction . . .  001  +   Basis . . . . . .  I        Frequency . .  _
Employer matching contribution . . . .  _____  (express as % of employee cont)
Eligible in  .   ___    days from date of employment   Type  . . . .  1
Eligible after   _____  hours worked of income group  _____ +

Maximum employee contribution % . . . .  _____
Minimum employee contribution % . . . .  _____


F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Key Information

- For the *Employer matching contribution* field, type the
  Employer Matching contribution which is expressed as a
  percentage of the employee contribution. For example, if the
  employee contributes 2% and the company is to match half, then
  1% should be entered in this field.

- In the *Maximum Employee Contribution %* field, type the
  maximum amount an employee can contribute to the plan. At
  the *Minimum Employee Contribution %* field, type the minimum
  amount an employee can contribute to the plan (if applicable).

Required Fields

- Description
- Effective Date
- Auto Entry?
- Beneficiaries
- Auto Cancel?
- Flexible Plan
- Status
- Required Plan

- Deduction

- Type

Press $\boxed{\text{F3}}$ *to exit and update.*

Benefit Groups

Overview

A benefit group is a code used to group together benefit plans. The benefit group is then assigned to each employee. Only those plans associated with the employee will appear at enrollment. The benefit group code can also be entered on the Position Control record in which case the benefit group will default to the employee basic data record when an employee is hired into the position.

Several benefit groups may be necessary, e.g., full time employees may have different benefits to part time. If all employees are eligible for all benefits, then only one group is required.

Setting up Benefit Groups is a two stage process:

1. Define a benefit group.

2. Assigning benefit plans to the group.

Menu Selection

System: Personnel 2000
Menu Level 1: Benefit Administration
Menu Level 2: Benefit Controls
Menu Level 3: Update Benefit Group Controls
Menu Level 3: Update Plans in Benefit Groups

Screen 1 of 2

```
13/03/95  16:34:30     Update Personnel Benefit Groups     PRGMBG     PRDMBG

Type selections, press Enter.

Employer . . . . . . . . .  111 +
Benefit Group  . . . . . .  EXEC____  +

















F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Key Information

- Type the *Benefit Group* code or press F4 to display exiting groups and select. The *Benefit Group* code can be alpha/numeric or numeric.

Required Fields

- Employer

- Benefit Group

Press Enter↵ *to continue...*

```
13/03/95  16:41:47     Update Personnel Benefit Groups     PRGMBG     PRDMBG

Employer . . . . . . . . :   111
Benefit Group  . . . . . :   EXEC

Enter Benefit Group description.

Description  . . . . . . .  Executive Benefits




F3=Exit    F10=QuikAccess    F12=Cancel
```

Key Information

- In the *Description* field, type a description for the benefit group.

Required Fields

- Description

Press F3 *to exit and save.*

Update Plans In Benefit Group

This option is used to attach the benefit plans to the benefit group codes.

Screen 1 of 2

```
13/03/95  16:48:35    Update Benefits In Benefit Group   PRGBAM    PRDBAM

Type selections, press Enter.

Employer  . . . .  111 +
Benefit Group . .  EXEC     +














F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Key Information

- Type the *Employer Code* and *Benefit Group Code* or press F4 to display groups and select.

Required Fields

- Employer

- Benefit Group

Press Enter← to continue...

Screen 2 of 2

```
13/03/95  16:52:45      Update Benefits In Benefit Group    PRGBAM      PRDBAM

Employer  . . . . :  111  Software 2000 Training Company
Benefit Group . . :  EXEC       Executive Benefits

Mark below the plans you wish to include in this group.
Opt Benefit ID                      Plan  Description
 _  BUPA                             HEALT HEALTH
 X  LIFE INSURANCES                  3X    3 Times Salary
 X  PENSION PLAN                     AVC1  AVC - With Profits
 X  Private Patients Plan - Health   0001  Married Membership 1991












F3=Exit   F10=QuikAccess   F12=Cancel
```

Key Information

- All the available Benefit Plans will be displayed.

- Mark with an 'X' all the plans which should be included in the Benefit Group.

Required Fields

- None

Press F3 *to exit and save.*

Life Insurance Age Rate Tables

Overview

If Life Insurance rates are based on the age of the employee, use the Update Insurance Age Rates function to build the tables. Remember that in this situation, the code *AGES should be entered into the *Rate Code* field of the *Benefit Plan* record.
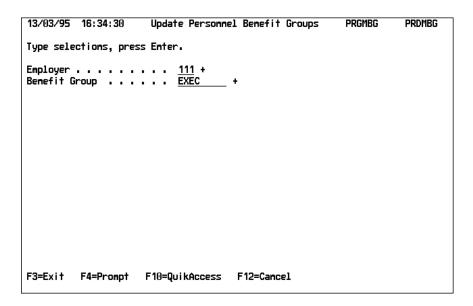
Menu Selection

System: Personnel 2000
Menu Level 1: Benefit Administration
Menu Level 2: Benefit Controls
Menu Level 3: Update Insurance Age Rates

Screen 1 of 2

```
13/03/95  16:59:36      Update Insurance Rates By Age     PRGBDM     PRDBDM

Type selections, press Enter.

Employer . . . .  111 +
Benefit ID . . .  PPP +
Plan Code. . . .  0001  +


















F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Key Information

- Type the Employer Codes, Benefit ID and Benefit Plan code.

Required Fields

- Employer Codes

- Benefit ID

- Plan Code

Press Enter↵ *to continue...*

Screen 2 of 2

```
13/03/95  17:03:30      Update Insurance Rates By Age      PRGBDM      PRDBDM

Employer . . . . :  111   Software 2000 Training Company
Benefit ID . . . :  PPP   Private Patients Plan - Health Care Scheme
Plan Code  . . . :  0001  Married Membership 1991
Up to Age  . . . .  ___            Rate per 1000 . . .  _____
Coverage Limit . .  _____      Excess rate . . . .  _____

Type options, press Enter.
  2=Change   4=Delete
Opt   Age         Rate          Limit      Excess rate
  _     25       1.7500        50,000
  _     50       2.0000        75,000




F3=Exit    F10=QuikAccess    F12=Cancel
```

Key Information

- You can type new table entries in the top portion of the screen.

- Entered rates are displayed in the bottom portion of the screen. These can be changed by selecting with '2', or deleted by selecting with '4'.

- For the *Up To Age* field, type the upper age limit for which the rate applies.

- In the *Rate Per 1000* field, type the rate per 1000 of coverage.

- At the *Coverage Limit* field, type the amount representing the upper limit of coverage.

- In the *Excess Rate* field, type the rate to apply for coverage which exceeds the *Coverage Limit*.

Required Fields

- None

Press F3 *to exit and save.*

Employee Benefit Enrollments

Overview

Two methods enable an employee to be enrolled into a benefit plan:

The first method uses the Enter New Employee function. To process enrollments through this function you must have set *the Use Benefit Enrollment* field in Update Employer Benefit Controls to '1'.

In Update PC User Security, the *Update Employee Benefit Enrollments* field must be set to '1'.

The second method uses the Update Employee *Enroll*ments function.

Method 1 - Enter New Employee

In this first method, the benefit enrollment screen will be presented automatically after the basic employee data has been entered. All the Benefit Plans associated with the employee's benefit group will be displayed.

Menu Selection

System: Personnel 2000
Menu Level 1: Employee Recordkeeping
Menu Level 2: Create New Employee Records
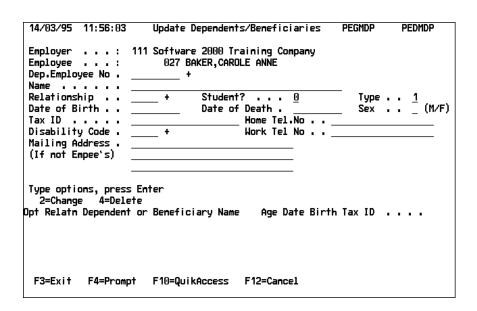Menu Level 3: Enter New Employee

Screen 1 of 2

```
14/03/95  11:52:25   Update Employee Benefit Enrollments   PRGBE10     PRDBE10


Employer  . . :  111 Software 2000 Training Company
Benefit Group :  EXEC     Executive Benefits  Status . . :  PERM
Employee  . . :        027 BAKER,CAROLE ANNE

2= Change or add; current enrollments highlighted below
Opt      Benefit ID            Plan  Description
  _  LIFE INSURANCES            3X    3 Times Salary
  _  PENSION PLAN               AVC1  AVC - With Profits
  _  Private Patients Plan - Health 0001  Married Membership 1991










F3=Exit   F10=QuikAccess   F12=Cancel   F13=Update dependents/beneficiaries
```

Key Information

- Before enrolling the employee in any benefits, Update any
  dependent or beneficiary information using F13.

Press F13 to update dependents/beneficiaries...

Screen 2 of 2

```
14/03/95  11:56:03     Update Dependents/Beneficiaries   PEGMDP     PEDMDP

Employer  . . . :  111 Software 2000 Training Company
Employee  . . . :        027 BAKER,CAROLE ANNE
Dep.Employee No .  _____ +
Name  . . . . . .  _____
Relationship  . .  ____ +     Student? . . .  0           Type . .  1
Date of Birth . .  _____   Date of Death .  _____   Sex  . . _ (M/F)
Tax ID  . . . . .  _____ Home Tel.No . . _____
Disability Code .  ____ +          Work Tel No . . _____
Mailing Address .  _____
(If not Empee's)   _____
                   _____

Type options, press Enter
  2=Change   4=Delete
Opt Relatn Dependent or Beneficiary Name   Age Date Birth Tax ID . . . .




 F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Key Information

- Type the dependent information in the top portion of the screen.

- Press ⌈Enter ←⌋ to update. This entry will then be shown in the lower portion of the screen. Select with '2' to change or '4' to delete.

- Continue entering all dependents until completed.

Required Fields

- Name

- Relationship

- Sex

Press ⌈F3⌋ *to exit, save and return to the previous screen...*

Screen 1 of 2

```
14/03/95  11:58:25   Update Employee Benefit Enrollments   PRGBE10    PRDBE10

Employer  . . :   111 Software 2000 Training Company
Benefit Group :  EXEC     Executive Benefits  Status . . :  PERM
Employee  . . :        027 BAKER,CAROLE ANNE

2= Change or add; current enrollments highlighted below
Opt      Benefit ID            Plan  Description
 _  LIFE INSURANCES            3X    3 Times Salary
 _  PENSION PLAN               AVC1  AVC - With Profits
 2  Private Patients Plan - Health 0001  Married Membership 1991













F3=Exit   F10=QuikAccess   F12=Cancel   F13=Update dependents/beneficiaries
```

Key Information

- All benefit plans within the selected benefit group are displayed.

- Plans in which the employee is currently enrolled will display highlighted.

- Select with '2' any plan to which the employee is to be enrolled, or to change the employee's enrollment details.

- Select with '4' to delete the employee from current enrollment in the plan.

- For each selected plan an Update Employee Benefit Plan Enrollment screen will appear sequentially. The exception will be any Auto Entry plan, as an enrollment record is automatically created and the plan highlighted on the display.

- Refer to Method 2 below for details.

- Use F13 to enter or update beneficiary details.

Press Enter← *to continue...*

Method 2 - Update Employee Enrollments

In this second method, you can enroll any current employees into a plan or change the detail of their enrollments.

Menu Selection

System: Personnel 2000
Menu Level 1: Benefit Administration
Menu Level 2: Benefit Enrollments
Menu Level 3: Update Employee Enrollments

Screen 1 of 4

```
14/03/95  12:12:16        Update Employee Enrollments    PRGBE05    PRDBE05

Type selections, press Enter.

Employer . .  111 +    Software 2000 Training Company
Employee . .      027 + BAKER













F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Key Information

- Type in or select using F4 the *Employer* and *Employee*.

Required Fields

- Employer
- Employee

Press Enter⏎ *to continue...*

Screen 2 of 4

```
14/03/95  12:26:03        Update Employee Enrollments    PRGBE05    PRDBE05

Employer . . . . . :  111      Software 2000 Training Company
Employee . . . . . :       027 BAKER,CAROLE ANNE

Benefit Group  . . .  EXEC      +












F3=Exit   F4=Prompt   F10=QuikAccess   F12=Cancel
```

Key Information

- Type the *Benefit Group* code which contains the benefit plans to which the employee is to be enrolled.

Required Fields

- Benefit Group

Press Enter⏎ *to continue...*

```
14/03/95  12:36:12   Update Employee Benefit Enrollments   PRGBE10    PRDBE10


Employer  . . :  111 Software 2000 Training Company
Benefit Group :  EXEC     Executive Benefits  Status . . :  PERM
Employee  . . :       027 BAKER,CAROLE ANNE


2= Change or add; current enrollments highlighted below
Opt      Benefit ID           Plan  Description
█ LIFE INSURANCES            3X    3 Times Salary
_ PENSION PLAN               AVC1  AVC - With Profits
_ Private Patients Plan - Health 0001  Married Membership 1991










F3=Exit   F10=QuikAccess   F12=Cancel   F13=Update dependents/beneficiaries
```

Key Information

- All benefit plans within the selected benefit group are displayed.

- Plans in which the employee is currently enrolled will display highlighted.

- Select with '2' any plan to which the employee is to be enrolled, or to change the employee's enrollment details.

- Select with '4' to delete the employee from current enrollment in the plan.

- For each selected plan an Update Employee Benefit Plan Enrollment screen will appear sequentially. The exception will be any Auto Entry plan, as an enrollment record is automatically created and the plan highlighted on the display.

- Refer to Method 2 below for details.

- Use F13 to enter or update beneficiary details.

Select '2' against the plan and press Enter↵ *to continue...*

```
14/03/95  12:46:56      Employee Benefit Enrollment        PRGBE10     PRDBE10

Employee . . . :        027 BAKER,CAROLE ANNE
Benefit ID . . :  PPP       Private Patients Plan - Health Care Scheme
Plan . . . . . :  0001      Married Membership 1991
Deduction Code :  DC004     Frequency  . . :  M  Hours to date . . :        .00
Freeze?  . . . :  0 (0/1)  Basis  . . . . .  I
Eligibility
Eligible after .  _____   hours worked of income group _____ +
Eligible Date  .  21091972  Status . . . . .  1  (0/1)
Coverage
Coverage Amount   _____       Policy Number  .  _____
Contributions
Employer Amt . .  _____20.83     Employer % . . .  ____
Employee Amt . .  _____8.33     Employee % . . .  ____
Dates
Enrollment . . .  _____       Cancelled  . . .  _____
Mark with an 'X' or use a percentage to identify beneficiaries
Opt  Relat  %   Name                       D.O.B.     Effective Cancelled



F3=Exit  F4=Prompt  F10=QuikAccess  F12=Cancel  F14=Enrollment hist  F22=Delete
```

Key Information

- This screen will vary depending on the Benefit Type this plan relates to. The fields are similar to those of the plan.   Here you define values that are specific to this employee's enrollment in the plan.

- At this point you can override any values that have been defualted from the benefit plan.

- Do not enter a date in the *Enrollment* field. The system assigns the enrollment date for you. If an enrollment date is entered, the system will not enroll the employee in the plan.

- If the enrollment is terminated, enter the date the termination will become effective in the *Cancelled* field.

Required Fields

- Freeze

- Basis

- Eligible Date

- Status

- Employer Amount

- Employee Amount

Press F3 *to exit and save.*

Press F14 *for enrollment history (see next section).*

Employee Enrollment History

Overview

Each time a change is made to an enrollment, a historical record is kept by the system.

Changes include:

- Addition of an enrollment

- Cancellation of an enrollment

- Changes to the premium amounts

- Changes to the Dependent/Beneficiary information

Press F14 at the *Employee Benefit Enrollment* screen to display the enrollment history.

Menu Selection

System: Personnel 2000
Menu Level 1: Benefit Administration
Menu Level 2: Benefit Enrollments
Menu Level 3: Update Employee Enrollments

Screen 4 of 4

```
14/03/95  15:27:39      Employee Benefit Enrollment        PRGBE10      PRDBE10

Employee . . . :         027 BAKER,CAROLE ANNE
Benefit ID . . :  PPP       Private Patients Plan — Health Care Scheme
Plan . . . . . :  0001      Married Membership 1991
Deduction Code :  DC004     Frequency  . . :  M  Hours to date . . :       .00
Freeze?  . . . :  0 (0/1)   Basis  . . . . . I
Eligibility
Eligible after .  _____   hours worked of income group _____ +
Eligible Date  .  21091972  Status . . . . .  1  (0/1)
Coverage
Coverage Amount   _____        Policy Number  . _____
Contributions
Employer Amt . .      20.83    Employer % . . .  ____
Employee Amt . .       8.33    Employee % . . .  ____
Dates
Enrollment . . .  _____        Cancelled  . . .  _____
Mark with an 'X' or use a percentage to identify beneficiaries
Opt  Relat  %  Name                        D.O.B.    Effective Cancelled




F3=Exit  F4=Prompt  F10=QuikAccess  F12=Cancel  F14=Enrollment hist  F22=Delete
```

Key Information

- A summary of changes/history is displayed in the bottom portion of the screen.

- By pressing the ⏎Enter⤶ key, a detailed history of each change will be displayed in the top portion of the screen. The fields that were changed are shown in reverse image.

Press F3 to exit and save.

Mass Update Enrollments

Overview

Executing this function is the first of two stages of the interface between the Benefits Administration module of Personnel 2000 and Payroll 2000.

A Trial Mass Update Enrollments function is available and you should run this prior to executing the Mass Update Enrollments.
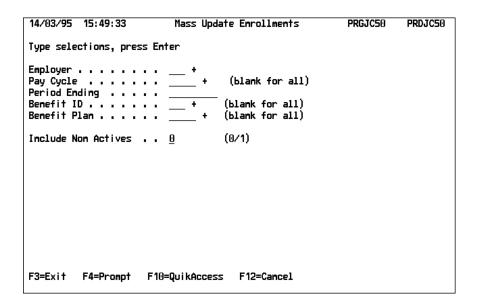
This mass update will enroll employees to funds that meet eligibility requirements for the period selected. Once enrolled, the payroll deduction details are available to the Enrollment to Deduction function within the payroll, which commences the relevant deduction processing for the employee.

Menu Selection

System: Personnel 2000
Menu Level 1: Benefit Administration
Menu Level 2: Benefit Enrollments
Menu Level 3: Mass Update Enrollments

Screen 1 of 1

```
14/03/95  15:49:33          Mass Update Enrollments          PRGJC50    PRDJC50

Type selections, press Enter

Employer . . . . . . . . .  ___ +
Pay Cycle  . . . . . . .   ____ +     (blank for all)
Period Ending  . . . . .   _____
Benefit ID . . . . . . .   ___ +     (blank for all)
Benefit Plan . . . . . .   ____ +    (blank for all)

Include Non Actives  . .   0         (0/1)








F3=Exit    F4=Prompt    F10=QuikAccess    F12=Cancel
```

Key Information

- Type the *Employer* code.

- You can run the mass update for all cycles or a specific cycle. For all cycles, leave *Pay Cycle* blank. For a specific cycle, type the *Pay Cycle* code or press F4 to view and select.

- Type the *Period Ending* date to which the mass enrollments relate.

- You can process all Benefit Identities and Benefit Plans or just those selected. To select specific Identities and Plans, type the codes in *Benefit Id* and *Benefit Plan*, or press F4 to view and select.

- To include non-active employees in processing, type '1' for *Include Non Actives*.

- This function runs in batch.

Required Fields

- Employer
- Period Ending

Press Enter↵ *to submit the job.*

Mass Cancellation Enrollments

Overview

The Mass Cancellation of Enrollments function is used to cancel employee enrollments to benefits en masse.

Menu Selection

System: Personnel 2000
Menu Level 1: Benefit Administration
Menu Level 2: Benefit Enrollments
Menu Level 3: Mass Cancellation of Enrollments

Screen 1 of 1

```
14/03/95  16:01:43    Mass Cancellation of Enrollments    PRGJC50    PRDJC50

Type selections, press Enter

Employer . . . . . .  __  +
Cancellation Date  .  _____
Benefit ID . . . . .  __  +
Benefit Plan . . . .  _____  +


















F3=Exit    F4=Prompt    F10=QuikAccess    F12=Cancel
```

Key Information

- Type the *Employer* code or press [F4] to view and select. You can leave *Employer* blank to process all employers.

- Type the *Cancellation Date* that you want employee enrollments terminated.

- You can process all Benefit Identifies and Benefit Plans or just those selected.

- To select specific Identities and Plans, type the codes in *Benefit Id* and *Benefit Plan*, or press [F4] to view and select.

- This function runs in batch.

Required Fields

- Employer
- Period Ending

Press [Enter ↵] *to submit the job.*