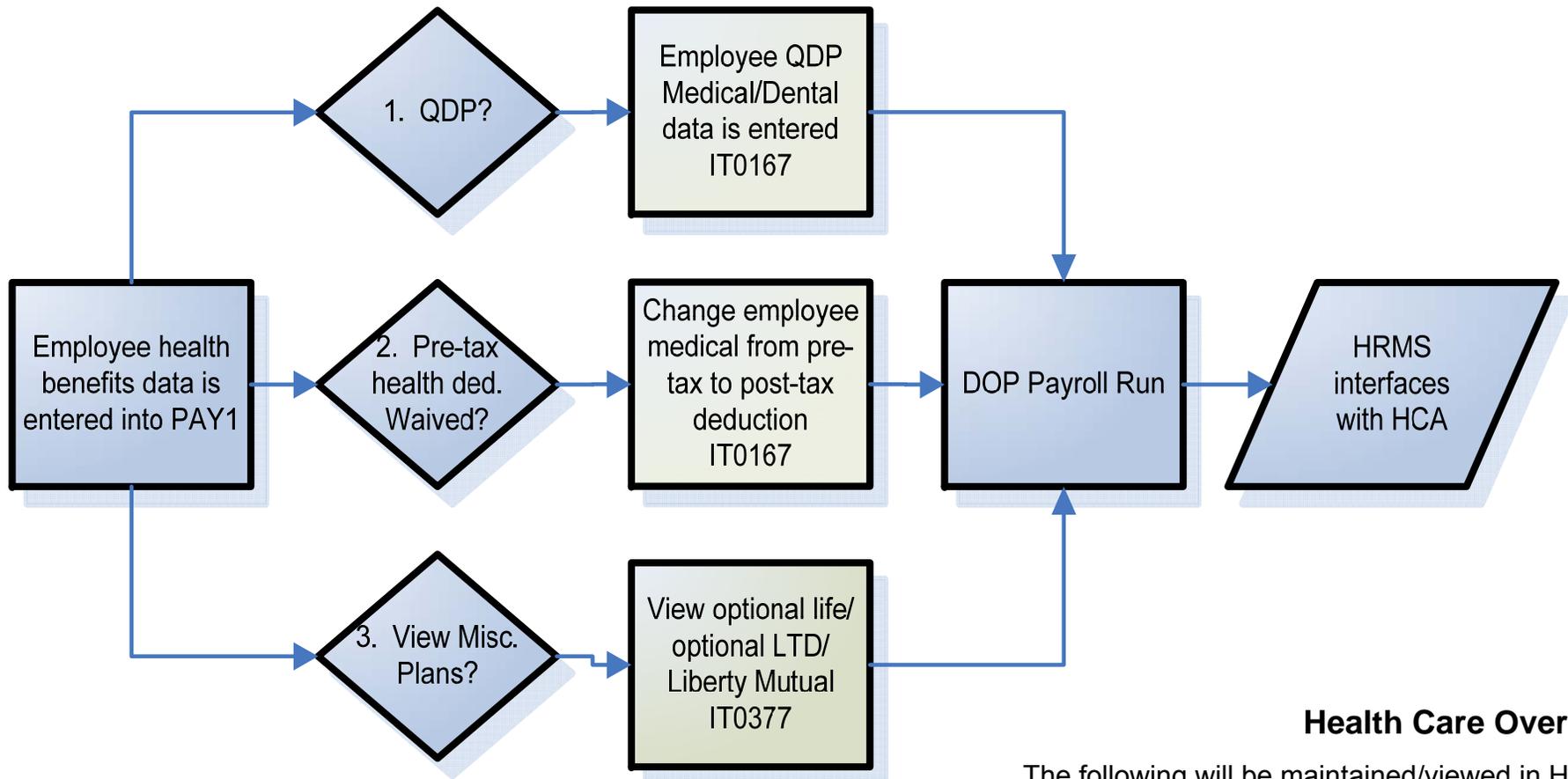


# Health Care Benefits



## Health Care Overview

The following will be maintained/viewed in HRMS:

- ◆ **Health Plans** (0167) stores Medical and Dental information for all employee's
  - Includes Qualified Domestic Partners and their qualified or unqualified dependents
- ◆ **Health Plans** (0167) indicates when an employees wants their medical deductions taken on a post-tax basis
- ◆ **Miscellaneous Plans** (0377) stores Optional Life Insurance and Optional Long Term Disability (LTD)

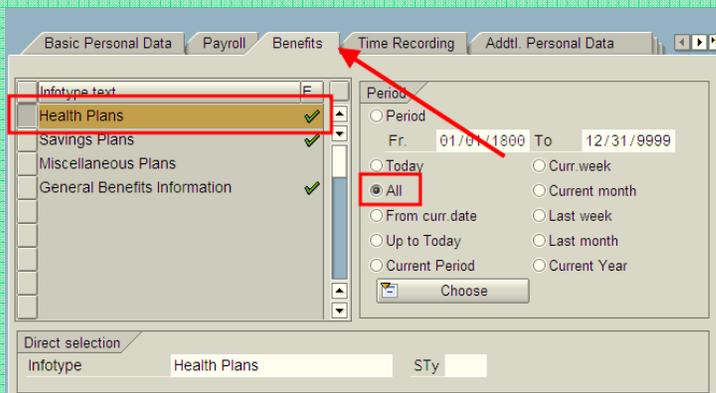
# HRMS Benefits - Resources

## Common Transactions Codes

PA20	Display Infotype ( <i>display one infotype for one employee</i> )
PA30	Maintain Infotype
PA40	Personnel Actions

## Health Care Overview

1. Use transaction code **PA20**
2. Click the Benefits tab
3. Click the grey box to the left of *Health Plans* (0167) to select
4. Click  (**Overview**) for an overview of all actions associated with *Health Plans* infotype (0167)



## Available Resources

Customer Support website:

<http://www.dop.wa.gov/HRMS/Customersupport>

OLQR:

<http://win-shrweb.dis.wa.gov/olqr/nav/index.htm>

Health Care Authority

[www.pebb.hca.wa.gov](http://www.pebb.hca.wa.gov)

[www.perspay.hca.wa.gov](http://www.perspay.hca.wa.gov)

DCAP / FSA

Application Software Inc (ASI) – (800) 659-3035

[www.asiflex.com/pebb](http://www.asiflex.com/pebb)

Department of Retirement Systems

[www.drs.wa.gov](http://www.drs.wa.gov)

Deferred Compensation – (888) 327-5596

Office of Financial Management

[www.ofm.wa.gov](http://www.ofm.wa.gov)

# HRMS Benefits - Reconciliation

## PA40 Actions

Performing New Hire, Appointment Change and Separation actions may require hand-offs to other roles (personnel administrator to payroll processor and /or benefits processor) depending on the structure of your agency and your role at your agency. As the Benefits Processor, it is critical that the transaction code **PA40** is used and the  **Execute info group** "execute info group" process is used. This is explained further in the procedures located on the Online Quick Reference (OLQR). Using **PA40** will validate that all required infotypes are completed and/or end dated.

- Once the Info Group is executed, using  **(Next Record)** to advance to *General Benefits* (0171).

## Health Care – Reconciliation

Deductions occur on the 10<sup>th</sup> and 25<sup>th</sup> to cover the employee's current month's premium. Depending on the timing of health care entry in PAY1 and the employee's hire date, an additional deduction may need to be created.

**For example** – When an employee is hired on the 1<sup>st</sup> of the month and the insurance is entered by the employee's 1<sup>st</sup> paycheck (25<sup>th</sup>), the employer will create a one-time deduction using *Additional Payments* (0015) to cover the entire premium.

**Another example** – Using the same scenario above but insurance was not entered prior to 1<sup>st</sup> paycheck (25<sup>th</sup>), a one-time deduction will be created to take the previous month's premiums and a regular deduction will be taken for the first half of current month's premium.

As the next payroll is being processed, the records in PAY1 and HRMS will synchronize and may want to collect the missing medical premium for the prior month as it does not recognize the manual adjustment that has already been made. Another one-time payment as a "credit" will need to be set-up to offset the deduction in arrears.

Wage Types	2550 – Employer HI Share	2983 – Employee HI Pre-tax	2984 – Employee HI Post-tax
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**NOTE:** Run a Payroll Simulation (PC00\_M10\_CALC\_SIMU) to verify the medical deductions for the pay period. Also to identify a deduction in arrears, run the Preemptive Compensation Data Check report (ZHR\_RPTYPN08) on DAY 1 and 2.



WSD Personnel

# HRMS Benefits - Effective Dating

	Transaction Code PA40	Transaction Code PA30	Start / End Dates	PAY1
New Hire	<p><i>General Benefits</i> (0171)</p> <p><i>Savings Plan</i> (0169)</p>	<p>Qualified Domestic Partner</p> <p>OLQR: Dental &amp; Medical for Non-Qualified SSDP Dependent</p>	<p>HRMS: Start Date = Hire Date</p>	<p>PAY1: Eligibility Date = Hire Date in HRMS</p> <p>If the employee's first day is the 2<sup>nd</sup>, then the 2<sup>nd</sup> should be keyed on the A.41 screen in PAY1 when establishing insurance. Another example is that the 1<sup>st</sup> falls on Saturday and the new person starts Monday (3<sup>rd</sup>), the 3<sup>rd</sup> would be entered in PAY1.</p>
Separation	<p><i>Health Plans</i> (0167)</p>	<p><i>Savings Plan</i> (0169)</p>	<p><i>Health Plans</i> (0167) – Last day of working month</p> <p><i>Savings Plan</i> (0169) – Last day of Pay Period (15<sup>th</sup> or 30<sup>th</sup>/31<sup>st</sup>)</p>	<p>Terminate Optional Plans – Auto, Home, Life and Long-term disability (if applicable)</p>
Appointment Change or Benefits Maintenance	<p><i>General Benefits</i> (0171)</p>	<p>Deferred Compensation</p> <p>OLQR: Maintain Deferred Comp</p> <hr/> <p>Life, Auto, Home and LTD (Adjustments per HCA)</p> <hr/> <p>Post-tax Deduction</p> <p>OLQR: Benefits – Post-tax Premiums</p>	<p>Not Applicable</p>	<p>A.41</p> <p>Losing Agency – 401 transfer out code and last day of month</p> <p>Gaining Agency – 201 transfer in code and first day of month</p>

**Note:** Read table from right to left. The far left column indicates the Personnel Action and the top columns represent the transaction and effected infotypes<sub>4</sub> or screens.

# HRMS Benefits Reports

Report Name	Transaction Code	Use
<b>Run Prior to Payroll being Released and Prior to Payroll Exiting</b>		
Preemptive Compensation Data Check	<b>ZHR_RTPYN08</b>	Use to verify that all payroll master data is complete and no exceptions prior to running a simulation. Uses data from a prior payroll period.
Payroll Journal Voucher	<b>ZHR_RTPY376</b>	Use to display a record of money being transferred between agencies via Journal Voucher.
Plan 3 Age Banded Rate Changes	<b>ZHR_RPTBNN30A</b>	Use to identify employees in the PERS3 (Option B and C) who have a rate increase.
<b>Run After Payroll is Released for Corrections and Prior to Payroll Exiting</b>		
Wage Type Reporter	<b>PC00_M99_CWTR</b>	Use to identify transactions automatically recorded in the Agency State Payroll Revolving Account 035.
Active Employees With No Retirement Deductions Taken Report	<b>ZHR_RTPY024</b>	Use to identify employees that did not have retirement subtracted from their pay during a particular payroll period.
EEs with No Retirement Contribution	<b>ZHR_RPTBNN29</b>	Use to identify employees that are set-up with a retirement plan, but no percentage rate has been entered.
Identify Type Code / Retirement System Mismatches	<b>ZHR_RPTBNN03</b>	Identifies any retirement mismatches.
Preemptive Payroll Threshold Check	<b>ZHR_RTPYN08</b>	Use to identify any deductions in arrears.

# HRMS Benefits Reports

Report Name	Transaction Code	Use
<b>Run After Payroll is Exited</b>		
Payroll Posting Report	ZHR_RPTPY126	Use to display employees that have cancelled warrants for a selected pay period.
<b>Run anytime during the month</b>		
Payroll Simulation (Process)	PC00_M10_CALC_SIMU	Use to simulate results for a payroll run prior to payroll being run by DOP.
Agency 70-day Report / 90-day default	ZHR_RPTBNN28A	This report is used to identify employees in the 2N plan during the 90-day choice period. (Run the report prior to DAY 1 to view employees before they have defaulted)
Preemptive Basic Data Check	ZHR_RPTPYN06	By including <i>Savings Plan</i> (0169) in the selection criteria, it will provide a list of employee's who do not have retirement set-up.
Movement/Turnover – Report	ZHR_RPTPYU26	Use to identify employees who have been hired or left for a new agency; or moved within the same agency. This can also help identify mid-period transfers.