

Benefits – Health for Same Gender Marriage

PA30

Purpose Use this procedure to update an employee’s dental and/or medical plan for Same Gender Marriages.

Trigger Perform this procedure for employees who have a same-gender spouse, and whose dependent coverage in HRMS was originally set up using the domestic partner codes (MED5, MED6, MED7, MED8, DEN1, DEN2, DEN3, or DEN4).



Note: Effective January 2014, The Office of Financial Management (OFM) has determined that the employee’s and spouse’s signature on the marriage certificate is sufficient to change the spouse from **post-tax** deductions to **pre-tax** deduction and the declaration of Tax Status form is no longer required.

Prerequisites

- The dental and/or medical plan must be already set-up on the *Health Plans* (0167) infotype.

End User Roles In order to perform this transaction you must be assigned the following role:
Benefits Processor

Change History	
Date	Change Description
9/19/2013	New procedure created.
11/6/2013	Added note of pre or post tax deduction to page 6
1/14/2014	Note added to the Trigger and Helpful Hints of OFM determination of employee’s and spouse’s signature sufficient.

Menu Path Human Resources → Personnel Management → Administration → HR Master Data → Maintain

Transaction Code PA30

Helpful Hints	<p>As of September 16, 2013, the IRS ruled that the costs for health insurance are no longer considered taxable income in cases where employees in same gender marriages have spouses and/or the spouse’s children covered on their health coverage. Therefore, if an employee in a same-gender marriage currently has dependent coverage set up in HRMS with domestic partner codes (MED5, MED6, MED7, MED8, DEN1, DEN2, DEN3, or DEN4), these codes will need to be changed to marriage codes (MED2, MED3, MED4, DNT2, DNT3, or DNT4). This change needs to be done in the current payroll period, and should not be done for any prior payroll period.</p>
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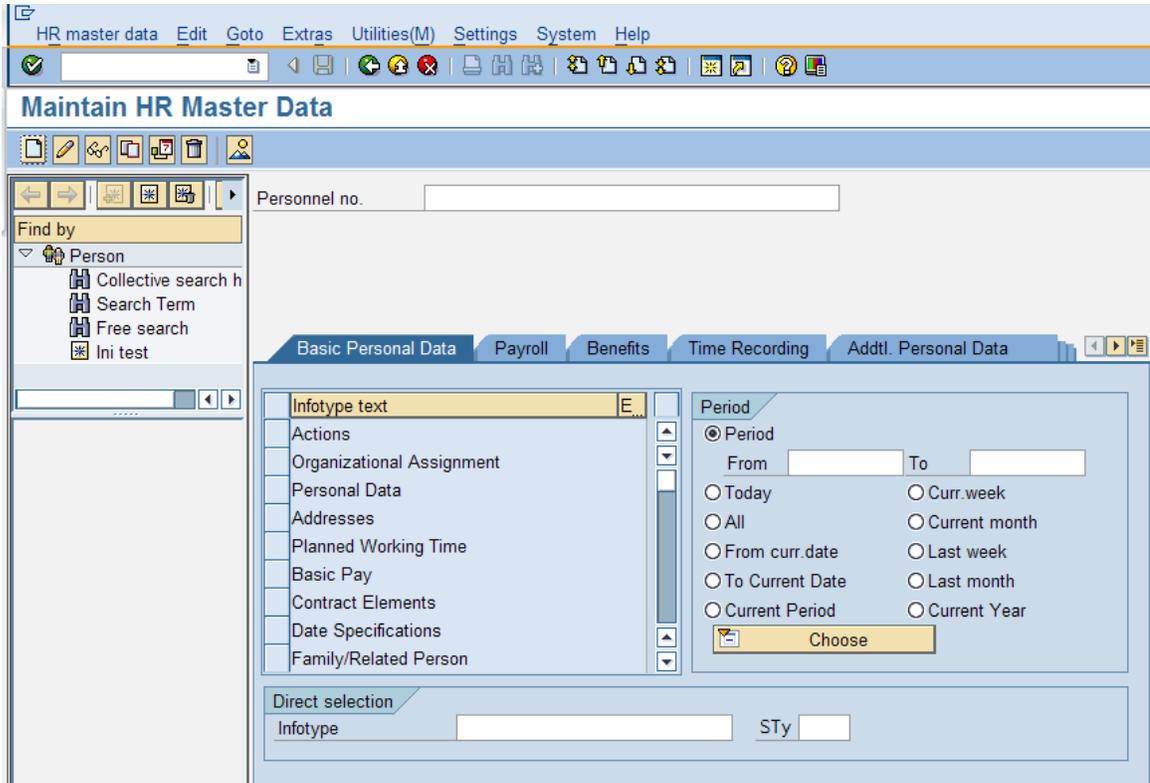
	 Note: Effective January 2014, The Office of Financial Management (OFM) has determined that the employee's and spouse's signature on the marriage certificate is sufficient to change the spouse from post-tax deductions to pre-tax deduction and the declaration of Tax Status form is no longer required.
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The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error 	Example:  Make an entry in all required fields. Action: Fix the problem(s) and then click  (Enter) to validate and proceed.
Warning 	Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed.
Confirmation  or 	Example:  Save your entries. Action: Perform the required action to proceed.

Procedure

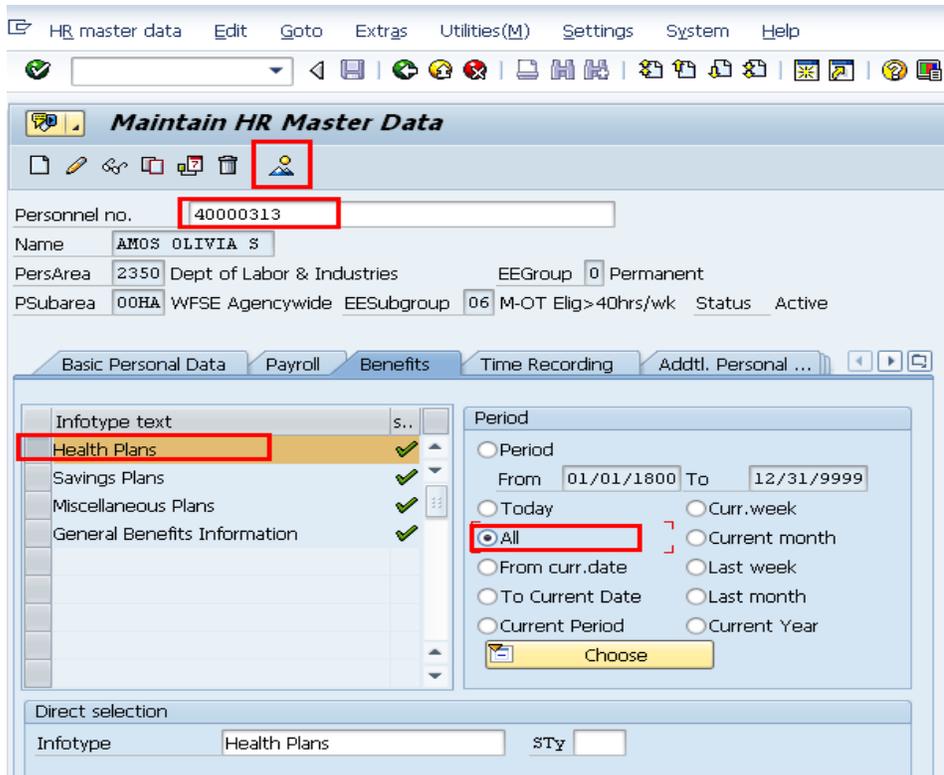
1. Start the transaction using the above menu path or transaction code **PA30**.



2. Complete the following fields:

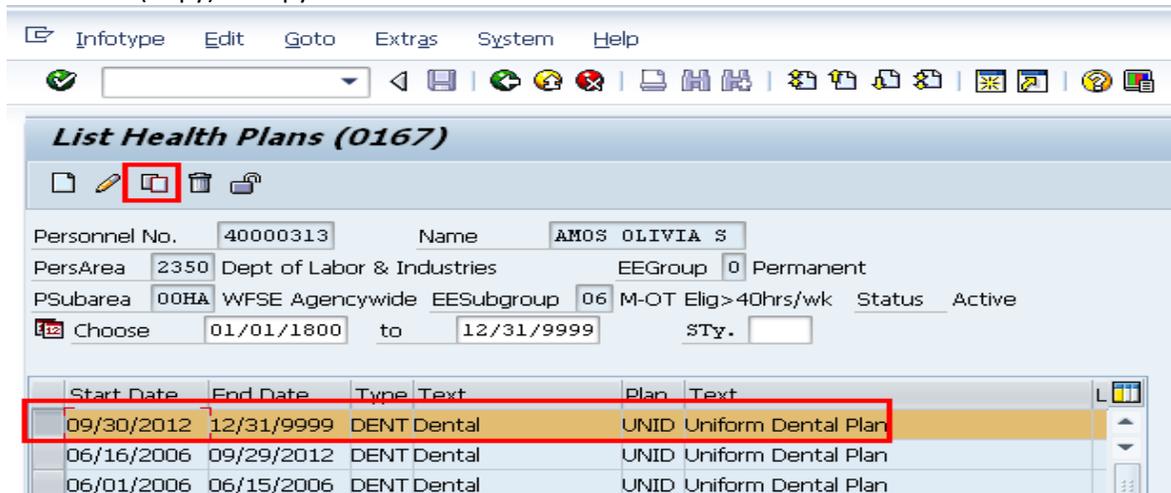
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. Example: 40000373

3. Click the  tab.
4. Click the gray box to the left of  to select.
5. Click  (Overview) for an overview of all action associated with the Health Plans (0167).



6. Select the current medical or dental record (with End Date 12/31/9999) by clicking the blue box to the left of the record. This example shows how to update the dental record.

7. Click  (Copy) to copy and continue.



8. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry

Field Name	R/O/C	Description
Start (date)	R	Must be date in current pay period. Example: 9/30/2013
Dependent Coverage	R	This is the type of family composition covered by a dental and/or medical plan.  Click  (Matchcode) to open the selection list. Options include DNT2, DNT3, DNT4 Example: DNT2

The screenshot shows the 'Copy Health Plans (0167)' form in HRMS. The form includes fields for Personnel No. (40000313), Name (AMOS OLIVIA S), PersArea (2350), Dept of Labor & Industries, EEGroup (0), Permanent, PSubarea (00HA), WESE Agencywide, EESubgroup (06), M-OT Elig (>40hrs/wk), and Status (Active). The Start date is set to 09/16/2013 and the End date is 12/31/9999. The Plan is UNID Uniform Dental Plan. The 'General plan data' section shows Benefit area (US USA), Plan type (DENT Dental), Benefit plan (UNID Uniform Dental Plan), Health Plan Option (UNID Uniform Dental Plan), and Dependent Coverage (DNT2 Dental EE + Spouse). The 'Planning Parameters' section shows Cost Rule Variant (UNF2 Dental Employee + Spouse).



Note: It is up to the employee whether or not they want their deduction to be pre or post tax. When an employee is enrolled into health coverage in PAY1, the enrollment record comes into HRMS with the **pre-tax** option selected on the **Costs tab** of *Health Plans (0167)*. If the employee wants to be **post-tax**, you must **uncheck pre-tax** box on the **Costs tab**.

When creating an enrollment record manually in HRMS the **pre-tax** box is not checked, if an employee wants **pre-tax** you **must** select the **Costs tab** and check the box.

9. Click  (Enter) to validate the information.



You will receive a yellow warning message stating the record will be delimited at end for

example:  Record valid from 09/30/2012 to 12/31/9999 delimited at end click  (Enter) to clear the message.

10. Click  (Save) to save.

11. You will be taken back to the List Health Plans (Overview) screen. You may repeat steps 6-10 to update the medical coverage if needed. For medical coverage, use codes MED2, MED3, or MED4 in step 8.

Start Date	End Date	Type	Text	Plan	Text
09/30/2013	12/31/9999	DENT	Dental	UNID	Uniform Dental Plan
06/16/2006	09/29/2013	DENT	Dental	UNID	Uniform Dental Plan
06/01/2006	06/15/2006	DENT	Dental	UNID	Uniform Dental Plan
09/30/2010	12/31/9999	MEDI	Medical	GHC	Group Health Coop Classic
08/31/2007	09/29/2010	MEDI	Medical	GHC	Group Health Coop Classic
06/16/2006	08/30/2007	MEDI	Medical	GHC	Group Health Coop Classic
06/01/2006	06/15/2006	MEDI	Medical	GHC	Group Health Coop Classic

12. You have completed this transaction.

Results
You have successfully changed the employee's medical and/or dental dependent coverage.
Comments
None.