

**PERS1 Employee Requests Additional Retirement Contribution**

**Purpose** Use this procedure to correctly set up additional post tax contribution for PERS1 employees.

**Trigger** PERS1 employees can now make additional post-tax retirement contributions in HRMS. The additional contribution can be between 0.01% and 4.0% of their earnable compensation. The current pre-tax contribution of 6% and the additional post-tax contribution cannot exceed 10% of earnable compensation per pay period. Employees would make this request through their payroll office and agencies will enter the additional post-tax contribution using *Savings Plan* (0169).

Effective Feb. 1, 2015, agencies will use “WT2279 - P1 PERS Extra Contrib.” to report post-tax contributions.

**Prerequisites** The employee is in PERS1 retirement plan.

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

Change History	
Date	Change Description
03/30/2015	Procedure created

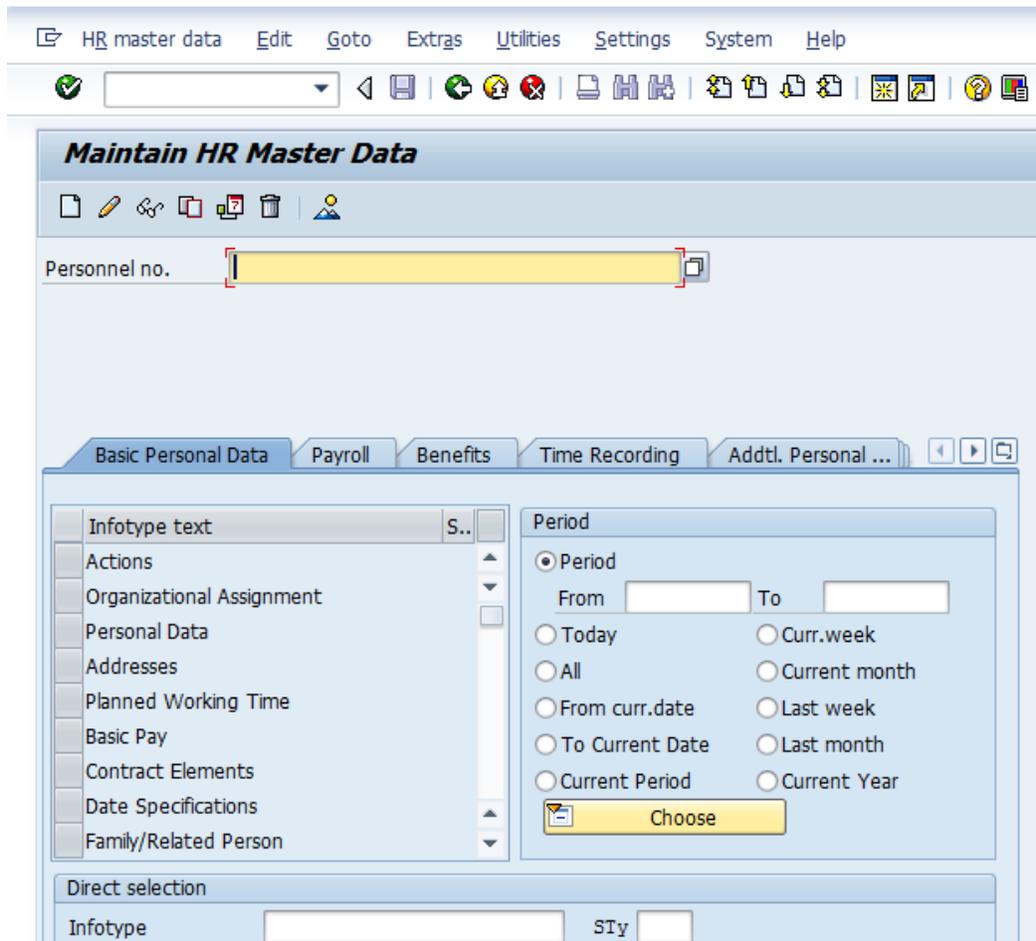
**Menu Path** Human Resources - Personnel Management - Administration - HR Master Data - Maintain

**Transaction Code** PA30

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

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



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. <b>Example:</b> 78000536
From	R	In the time <b>Period</b> section, click Period and enter the From date as the effective date of the Basic Pay record. <b>Example:</b> All

Click the **Benefits** tab.

Click the box to the left of **Savings Plans** to select.



Click (Overview) for an overview of all actions associated with the *Savings Plan* (0169).

Start Date	End Date	Type	Text	Plan	Text
06/01/2006	12/31/9999	401A	401(a)	P1	PERS 1

Click box to the left of the P1 plan  06/01/2006 12/31/9999 401A to select.

Start Date	End Date	Type	Text	Plan	Text
<input type="checkbox"/> 06/01/2006	12/31/9999	401A	401(a)	P1	PERS 1



Click (Copy) to copy and continue.

Personnel No.  Name

PersArea  Dept of Transportation EEGGroup  Permanent

PSubarea  Highway Mntnce EESubgroup  M-OT Elig>40hrs/wk Status

Start  to   Enter start date

Plan  PERS 1

Plan data Administration Regular contrib. Bonus contribution Benefi...

General plan data

Benefit area  USA

Plan type  401(a)

Benefit plan  PERS 1

Planning Parameters

EE Contr. Variant  PERS 1

ER Contr. Variant  PERS 1

Vesting rule

Investment Group

Additional fields

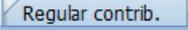
Plan Choice Code

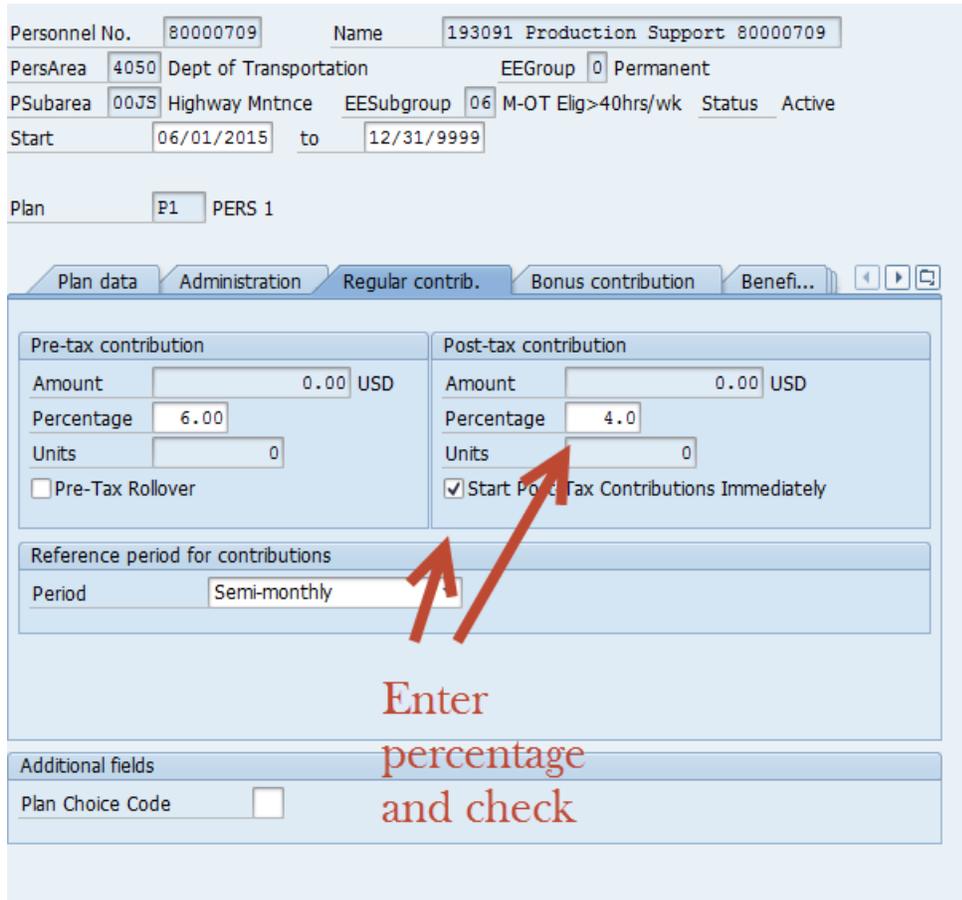


Click (Enter) to validate the information. The message

 Record valid from 06/01/2006 to 12/31/9999 delimited at end will appear at the bottom of the screen.

Click  (Enter) to validate the information. The message  will appear at the bottom of the screen. **Do not save yet.**

Click on the  tab.



Personnel No. 80000709 Name 193091 Production Support 80000709  
PersArea 4050 Dept of Transportation EEGroup 0 Permanent  
PSubarea 00JS Highway Mntnce EESubgroup 06 M-OT Elig>40hrs/wk Status Active  
Start 06/01/2015 to 12/31/9999  
Plan P1 PERS 1

Plan data Administration **Regular contrib.** Bonus contribution Benefi...

Pre-tax contribution	Post-tax contribution
Amount 0.00 USD	Amount 0.00 USD
Percentage 6.00	Percentage 4.0
Units 0	Units 0
<input type="checkbox"/> Pre-Tax Rollover	<input checked="" type="checkbox"/> Start Post-Tax Contributions Immediately

Reference period for contributions  
Period Semi-monthly

Additional fields  
Plan Choice Code

Enter percentage and check

 The Post-tax contribution percent can be a value from .01 to 4.0. The Pre-tax and Post-tax combined percentage cannot exceed a total of 10%.

Click  (Enter) to validate the information. The message  will appear at the bottom of the screen.

Click  (Enter) to validate the information. The message  will appear at the bottom of the screen.

Click  (Save) to save.

Start Date	End Date	Type	Text	Plan	Text	
06/01/2015	12/31/9999	401A	401(a)	P1	PERS 1	
06/01/2006	05/31/2015	401A	401(a)	P1	PERS 1	



“WT 2279 - P1 PERS Extra Contrib.” has been created for the post tax contribution entered in the employee’s Savings Plans (0169) and electronically transferred directly to Department of Retirement Systems (DRS).

You have completed this transaction.