

Retirement – Plan Choice Code Chosen or Defaulted to Plan 2

Purpose Use this procedure to record the Public Employee’s Retirement System (PERS) Plan 2 choice after initial enrollment process has been completed.

Trigger The **Plan Choice Code** must be manually entered when the employee has submitted a Member Information Form designating their plan choice and/or contribution rate.

- Prerequisites**
- Employee qualifies for plan enrollment.
 - Member has selected PERS Plan 2 as their retirement plan during the 90-day choice period.

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

Change History	
Date	Change Description
03/13/2013	Procedure updated to match current system. Updated step 7 to show P2

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

Transaction Code PA30

Helpful Hints	<ul style="list-style-type: none"> • For assistance in verifying the Plan 2 member’s eligibility, contact the Department of Retirement Systems for assistance.
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The Plan Choice Codes are defined in the following table:

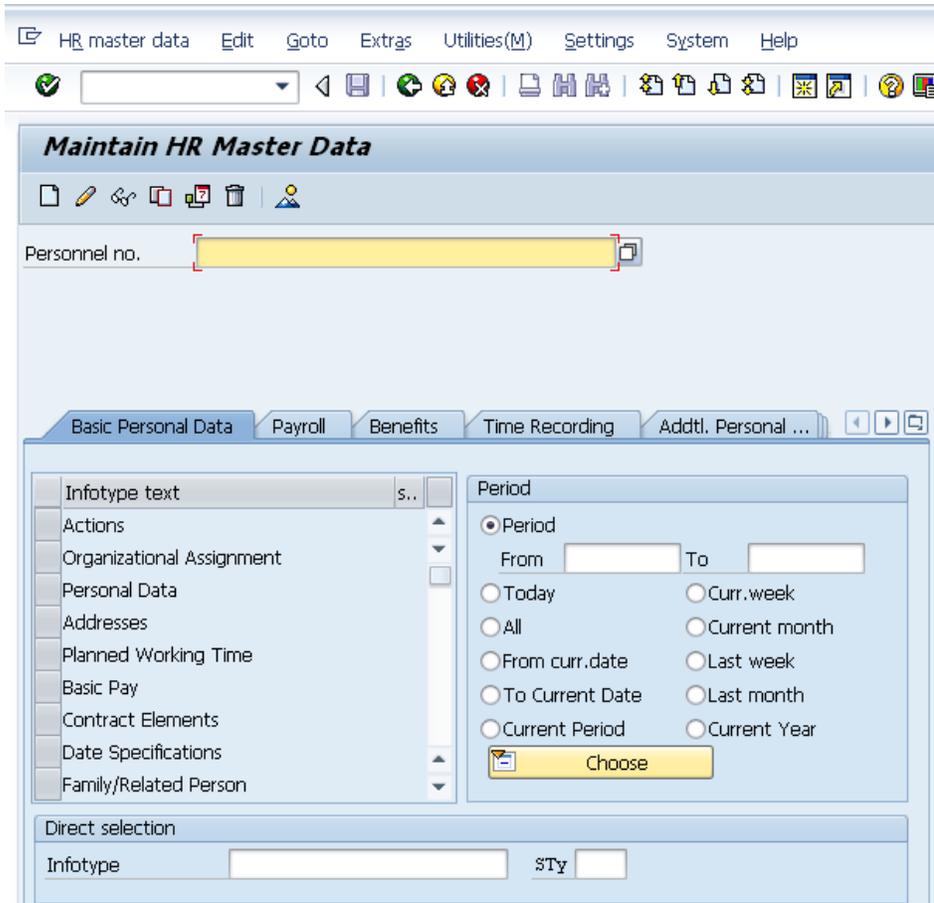
Plan Choice Code	System/ Plan	Employee Status	Plan Choice Description
2C	P2	Employee is a new PERS member.	Employee chooses Plan 2

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**.



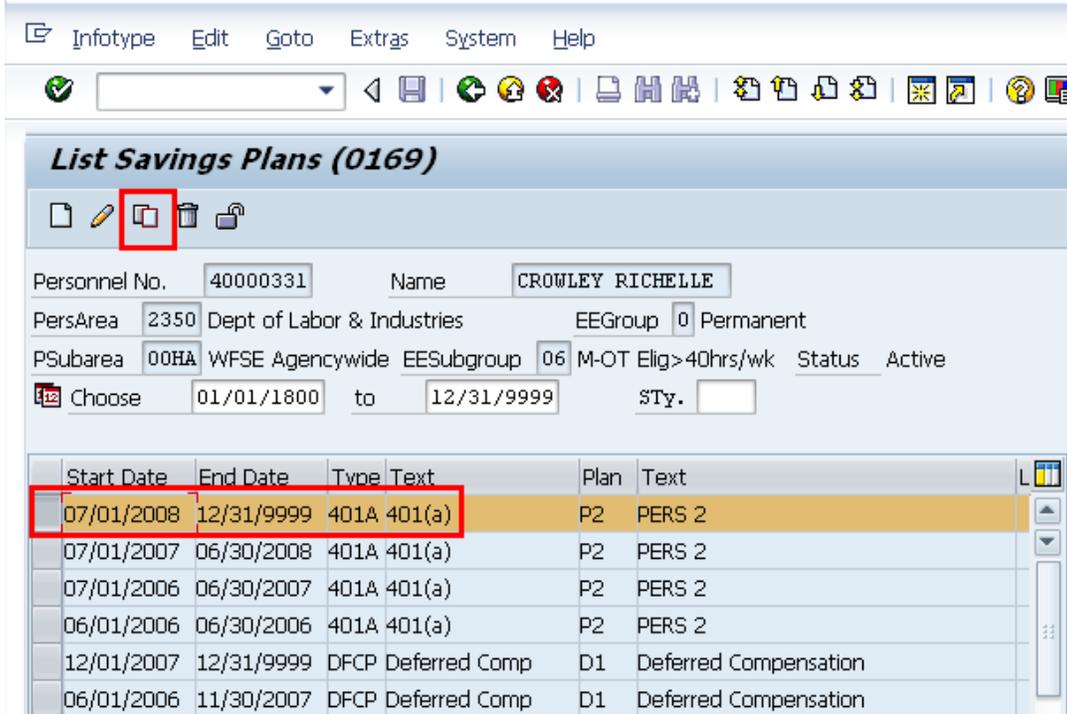
2. Complete the following fields:

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: 40000331

3. Click **Benefits** to select.
4. Click the box to the left of **Savings Plans** to select.

5. Click  to select.

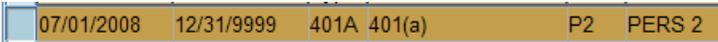
6. Click  (Overview) for an overview of all actions associated with the *Savings Plan (0169)*.



List Savings Plans (0169)

Personnel No. 40000331 Name CROWLEY RICHELLE
 PersArea 2350 Dept of Labor & Industries EGroup 0 Permanent
 PSubarea 00HA WFSE Agencywide ESubgroup 06 M-OT Elig>40hrs/wk Status Active
 Choose 01/01/1800 to 12/31/9999 STy.

Start Date	End Date	Type	Text	Plan	Text
07/01/2008	12/31/9999	401A	401(a)	P2	PERS 2
07/01/2007	06/30/2008	401A	401(a)	P2	PERS 2
07/01/2006	06/30/2007	401A	401(a)	P2	PERS 2
06/01/2006	06/30/2006	401A	401(a)	P2	PERS 2
12/01/2007	12/31/9999	DFCP	Deferred Comp	D1	Deferred Compensation
06/01/2006	11/30/2007	DFCP	Deferred Comp	D1	Deferred Compensation

7. Click  to select.

8. Click  (Copy) to copy and continue.

Infotype Edit Goto Extras System Help

Copy Savings Plans (0169)

Personnel No. 40000331 Name CROWLEY RICHELLE

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00HA WFSE Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 07/01/2008 to 12/31/9999

Plan P2 PERS 2

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

General plan data

Benefit area US USA

Plan type 401A 401(a)

Benefit plan P2 PERS 2

Planning Parameters

EE Contr. Variant PRS2 PERS 2

ER Contr. Variant PRS2 PERS 2

Vesting rule

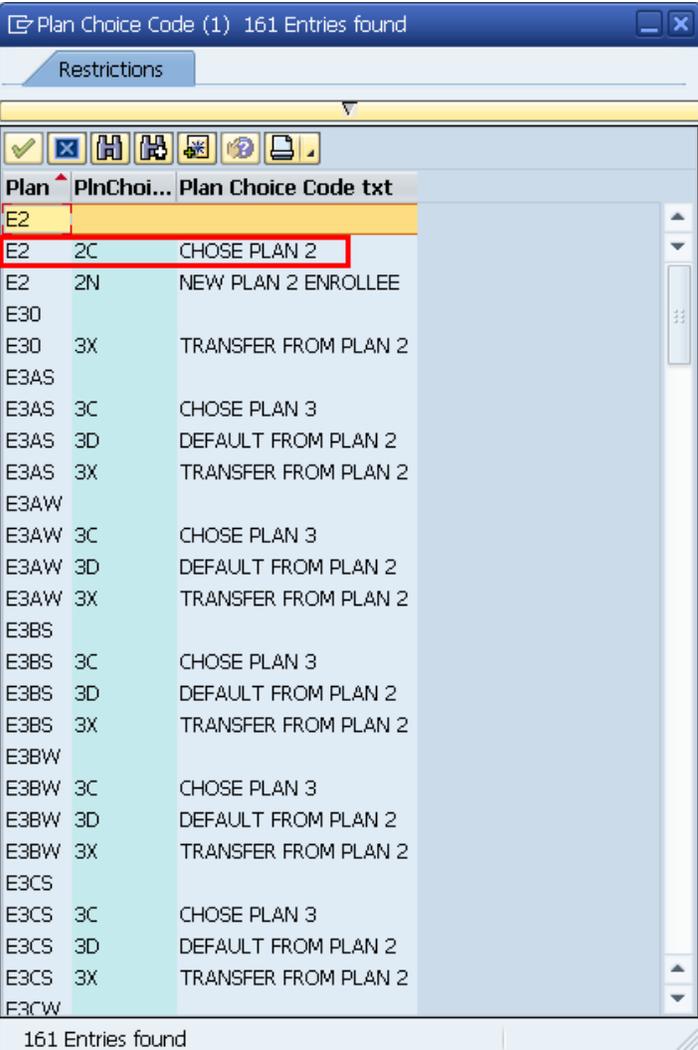
Investment Group

Additional fields

Plan Choice Code

9. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Start	R	This is the date on which a record begins.  Department of Enterprise Services advises to wait until DAY 1 of Payroll Period 2 to prevent potential errors. Example: 01/16/2013
Benefit Plan	R	This is a specific benefit offered by the company with defined providers, benefit levels, and payments.

		<p> Use the  (matchcode) to open selection list. Example: P2 (PERS 2)</p>																																																																																	
<p>Plan Choice Code</p>	<p>R</p>	<p>Defines the associated Benefit Plan.</p> <p> Use the  (matchcode) to open selection list. This selection corresponds with the selected Benefit Plan along with Plan Choice Code text of 'Chose Plan 2'.</p>  <table border="1"> <thead> <tr> <th>Plan</th> <th>PlnChoi...</th> <th>Plan Choice Code txt</th> </tr> </thead> <tbody> <tr> <td>E2</td> <td></td> <td></td> </tr> <tr> <td>E2</td> <td>2C</td> <td>CHOSE PLAN 2</td> </tr> <tr> <td>E2</td> <td>2N</td> <td>NEW PLAN 2 ENROLLEE</td> </tr> <tr> <td>E30</td> <td></td> <td></td> </tr> <tr> <td>E30</td> <td>3X</td> <td>TRANSFER FROM PLAN 2</td> </tr> <tr> <td>E3AS</td> <td></td> <td></td> </tr> <tr> <td>E3AS</td> <td>3C</td> <td>CHOSE PLAN 3</td> </tr> <tr> <td>E3AS</td> <td>3D</td> <td>DEFAULT FROM PLAN 2</td> </tr> <tr> <td>E3AS</td> <td>3X</td> <td>TRANSFER FROM PLAN 2</td> </tr> <tr> <td>E3AW</td> <td></td> <td></td> </tr> <tr> <td>E3AW</td> <td>3C</td> <td>CHOSE PLAN 3</td> </tr> <tr> <td>E3AW</td> <td>3D</td> <td>DEFAULT FROM PLAN 2</td> </tr> <tr> <td>E3AW</td> <td>3X</td> <td>TRANSFER FROM PLAN 2</td> </tr> <tr> <td>E3BS</td> <td></td> <td></td> </tr> <tr> <td>E3BS</td> <td>3C</td> <td>CHOSE PLAN 3</td> </tr> <tr> <td>E3BS</td> <td>3D</td> <td>DEFAULT FROM PLAN 2</td> </tr> <tr> <td>E3BS</td> <td>3X</td> <td>TRANSFER FROM PLAN 2</td> </tr> <tr> <td>E3BW</td> <td></td> <td></td> </tr> <tr> <td>E3BW</td> <td>3C</td> <td>CHOSE PLAN 3</td> </tr> <tr> <td>E3BW</td> <td>3D</td> <td>DEFAULT FROM PLAN 2</td> </tr> <tr> <td>E3BW</td> <td>3X</td> <td>TRANSFER FROM PLAN 2</td> </tr> <tr> <td>E3CS</td> <td></td> <td></td> </tr> <tr> <td>E3CS</td> <td>3C</td> <td>CHOSE PLAN 3</td> </tr> <tr> <td>E3CS</td> <td>3D</td> <td>DEFAULT FROM PLAN 2</td> </tr> <tr> <td>E3CS</td> <td>3X</td> <td>TRANSFER FROM PLAN 2</td> </tr> <tr> <td>E3CW</td> <td></td> <td></td> </tr> </tbody> </table> <p>Example: 2C (Chose Plan 2)</p>	Plan	PlnChoi...	Plan Choice Code txt	E2			E2	2C	CHOSE PLAN 2	E2	2N	NEW PLAN 2 ENROLLEE	E30			E30	3X	TRANSFER FROM PLAN 2	E3AS			E3AS	3C	CHOSE PLAN 3	E3AS	3D	DEFAULT FROM PLAN 2	E3AS	3X	TRANSFER FROM PLAN 2	E3AW			E3AW	3C	CHOSE PLAN 3	E3AW	3D	DEFAULT FROM PLAN 2	E3AW	3X	TRANSFER FROM PLAN 2	E3BS			E3BS	3C	CHOSE PLAN 3	E3BS	3D	DEFAULT FROM PLAN 2	E3BS	3X	TRANSFER FROM PLAN 2	E3BW			E3BW	3C	CHOSE PLAN 3	E3BW	3D	DEFAULT FROM PLAN 2	E3BW	3X	TRANSFER FROM PLAN 2	E3CS			E3CS	3C	CHOSE PLAN 3	E3CS	3D	DEFAULT FROM PLAN 2	E3CS	3X	TRANSFER FROM PLAN 2	E3CW		
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10.

Click  (Enter)



An **Error message** will display in the status bar telling you that the new Plan Choice does not match the retirement contribution percent that is mandated by the plan. You will be prompted to enter the correct percent into the **Percentage** field. The error message will also prompt you with the correct percent for the plan choice.

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Copy Savings Plans (0169)

Personnel No. 40000331 Name CROWLEY RICHELLE

PersArea 2350 Dept of Labor & Industries EGroup 0 Permanent

PSubarea 00RA WFSE Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 01/16/2013 to 12/31/9999

Plan P2 PERS 2

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

Pre-tax contribution
 Amount 0.00 USD
 Percentage 5.60
 Units 0
 Pre-Tax Rollover

Post-tax contribution
 Amount 0.00 USD
 Percentage 0.00
 Units 0
 Start Post-Tax Contributions Immediately

Reference period for contributions
 Period 2 Semi-monthly

Additional fields
 Plan Choice Code 2C CHOSE PLAN 2

Percentage pre-tax contribution for plan P2 must lie between 4.64 and 4.64 %

11. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Percentage	R	This is a field used to store a percentage amount.  If the rate is unknown, enter a random number in the field and the error message will tell you what percentage needs to be entered.

		 Percentage pre-tax contribution for plan P2 must lie between 4.64 and 4.64 % Example: 4.64
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12. Click  (Enter) to validate the information.



An Information warning message will display in the status bar telling you that the previous plan was delimited.

 Record valid from 07/01/2008 to 12/31/9999 delimited at end

information

- Click  (Enter) to validate the

13. Click  (Save) to save.

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Copy Savings Plans (0169)

Personnel No. 40000331 Name CROWLEY RICHELLE
PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent
PSubarea 008A WFSE Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active
Start 01/16/2013 to 12/31/9999
Plan P2 PERS 2

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

Pre-tax contribution Post-tax contribution

Amount 0.00 USD Amount 0.00 USD
Percentage 4.64 Percentage 0.00
Units 0 Units 0
 Pre-Tax Rollover Start Post-Tax Contributions Immediately

Reference period for contributions
Period 2 Semi-monthly

Additional fields
Plan Choice Code 2C CHOSE PLAN 2

Infotype Edit Goto Extras System Help

List Savings Plans (0169)

Personnel No. 40000331 Name CROWLEY RICHELLE

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00HA WFSE Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Choose 01/01/1800 to 12/31/9999 STy.

Start Date	End Date	Type	Text	Plan	Text
01/16/2013	12/31/9999	401A	401(a)	P2	PERS 2
07/01/2008	01/15/2013	401A	401(a)	P2	PERS 2
07/01/2007	06/30/2008	401A	401(a)	P2	PERS 2
07/01/2006	06/30/2007	401A	401(a)	P2	PERS 2
06/01/2006	06/30/2006	401A	401(a)	P2	PERS 2
12/01/2007	12/31/9999	DFCP	Deferred Comp	D1	Deferred Compensation
06/01/2006	11/30/2007	DFCP	Deferred Comp	D1	Deferred Compensation

Entry 1 of 7

Record created

14. You have completed this transaction and will be taken back to the List Savings Plans (0169).

Results
You have entered the employee's choice election for Plan 2 during the 90-day choice period.
Comments
None.