New Hire Action (BN) – Create New Hire Action

Use this procedure to complete the benefits portion of a New Hire action. The personnel administration and payroll portions of the New Hire Action must be completed first.

Roles:

Payroll Processor
Payroll Analyst
Benefits Processor

Related Procedures:

New Hire Action (PA) – Create New Hire Action
New Hire Action (PY) – Create New Hire Action

Related Resources:

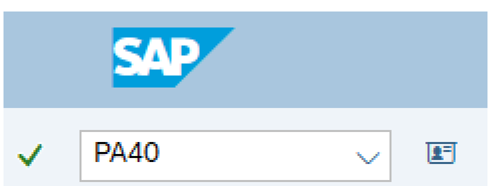
Department of Retirement Systems
Employer Reporting Application Log-in
DRS ERA Employer Handbook

TIPS

> As a benefits processor, you will not process this action until you have received a new hire information packet from the payroll processor indicating they have completed their portion of the action. The personnel administration and payroll portions of the New Hire Action must be completed first.
>
> Before beginning this action, log into DRS Employer Reporting Application to check for previous retirement elections and enroll the employee accordingly.
>
> The benefits portion of the new hire action walks you through creating the General Benefits Information (0171) and Savings Plan (0169) infotype records for the employee. All employees must have an active General Benefits Information (0171) infotype record. A Savings Plan (0169) infotype record is needed if the employee is in a retirement eligible position.

Step 1

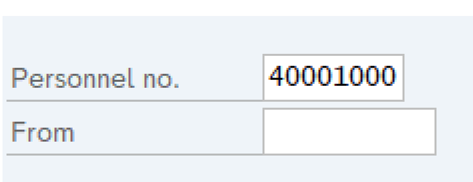
Enter transaction code PA40 in the command field and click the Enter button.



Step 2

Complete the following fields:

- Personnel no.



TIPS

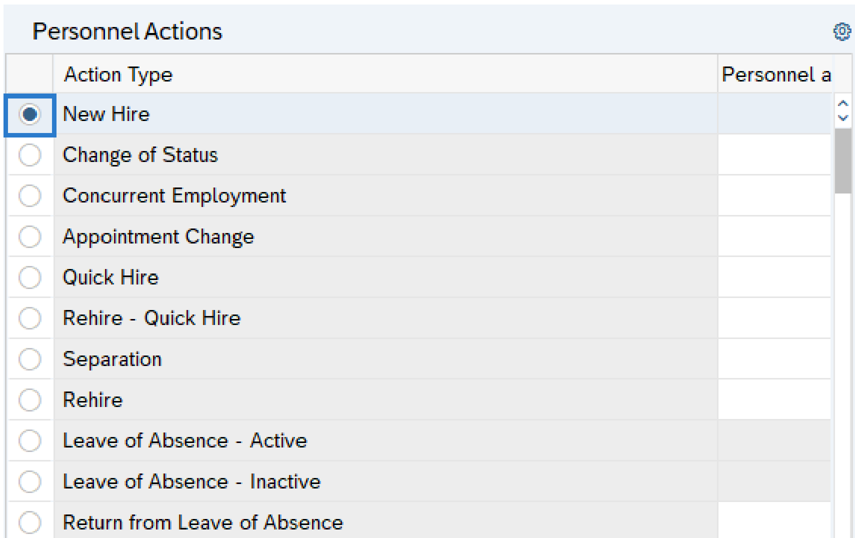
> Do not enter a From date on the Personnel Actions screen.

Step 3

Click Enter to populate the employee information.

Step 4

Select the New Hire radio button.



Step 5

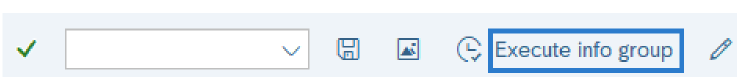
Click the Execute button to begin the transaction.

Step 6

Verify the Actions (0000) infotype contains the correct action you need to execute.

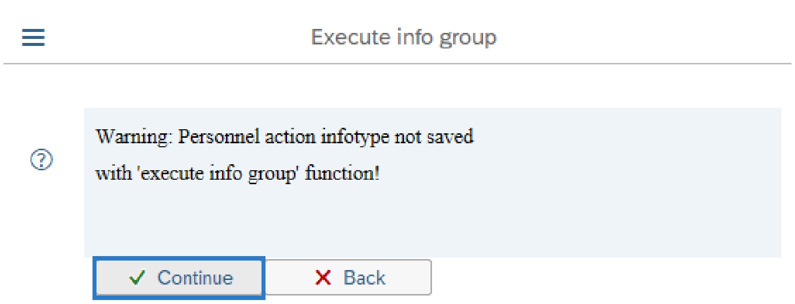
Step 7

Click the Execute info group button.



Step 8

Click Continue in the Execute info group dialog box.

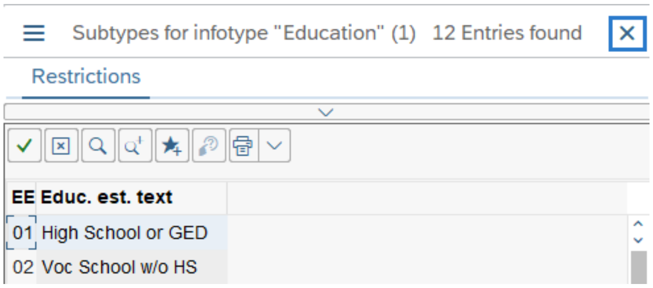


Step 9

Click the Next Record button until you reach Subtypes for infotype “Education” window.

Step 10

Click the Close button to by-pass Subtypes for infotype “Education” window:



Step 11

Continue to click the Next Record button until you reach the General Benefits Information (0171) infotype.

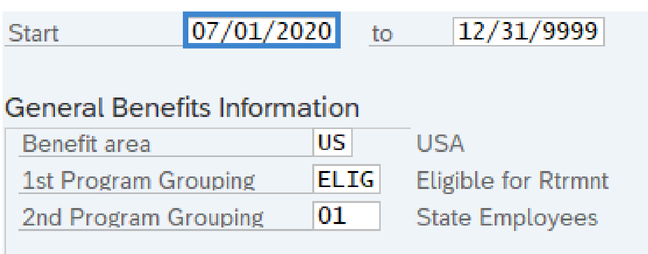
Step 12

Complete the General Benefits Information (0171) infotype.

Complete the following fields:

The following fields are mandatory:

- Start
- Benefit area
- 1st Program Grouping
- 2nd Program Grouping



TIPS

> All employees must have an active General Benefits Information (0171) infotype record.
>
> The Start Date will defalt to the date of the action. The Start Date must reflect the first day the employee becomes eligible for benefits. If the employee is eligible for benefits before the action date, update the start date to the date the employee became is eligible.
>
> The State of Washington only uses Benefit area **US**.
>
> 1st Program Grouping is used to determine an employee’s retirement plan eligibility. This field defaults as eligible for retirement. To verify that the employee is in an eligible position, contact your organizational management processor. If there are still questions surrounding eligibility, refer to the

[Department of Retirement Systems – PERS, SERS, and TRS Plans 2 and 3 Eligibility Worksheet]() or contact DRS at (360) 664-7000 or toll free at 1-800-547-6657.

2nd Program Grouping defines the employee's job type and employer and defaults from the personnel area. You may need to change the 2nd Program Grouping field if:

- An employee chooses a different plan.
- The employee type defaults to a code not consistent with the System/Plan set up at hiring.
- An employee changes positions and wants to continue contributing to the System/Plan from their previous position rather than the one that defaults with the new position.

Step 13

Click the Enter button to validate the information.

Step 14

Click the Save button.

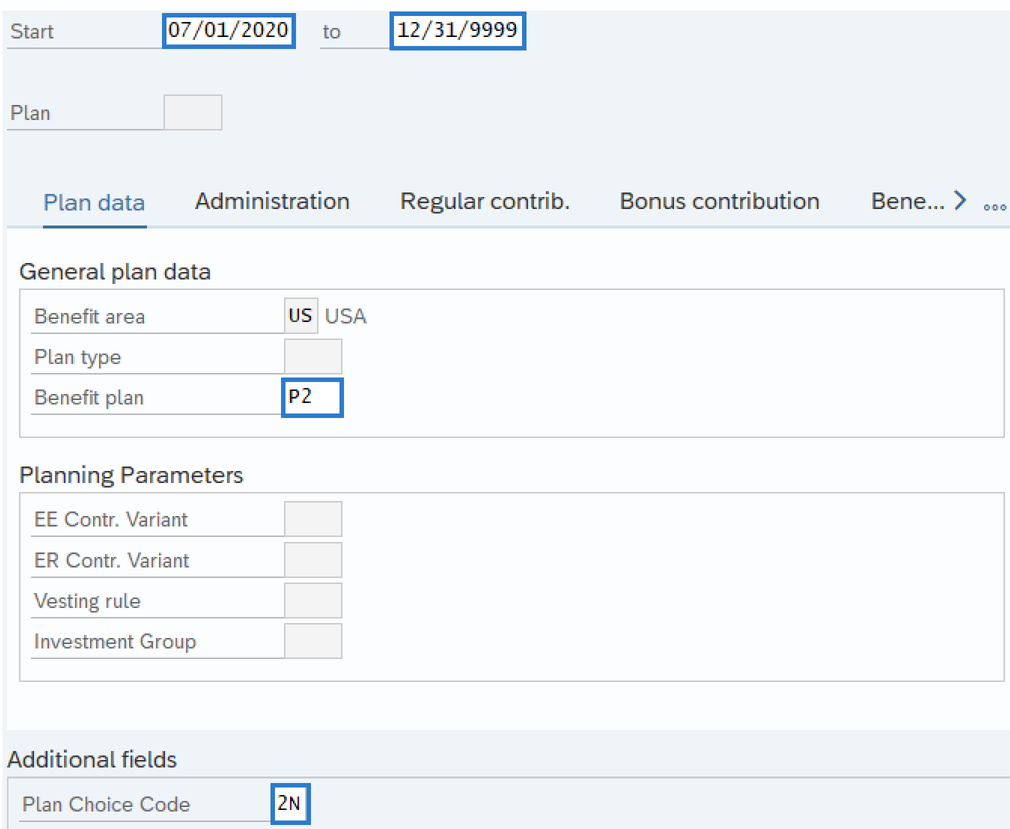
Step 15

Complete the Savings Plan (0169) infotype.

On the Plan Data tab, complete the following fields:

The following fields are mandatory:

- Start
- Benefit plan
- Plan Choice Code



TIPS

The Start Date will defalt to the date of the action. The Start Date must reflect the first day the employee becomes eligible for benefits. If the employee is eligible for benefits before the action date, update the start date to the date the employee became is eligible.

The To date should reflect the end date of the 12/31/9999.

If you have the employee's Member Information Form, enter the Plan Choice Code that corresponds with their selection.

If you don't have the employee's Member Information Form, select Plan Choice Code 2N to begin the 90 day choice window. Most employees are members of the Public Employees' Retirement System and are typically enrolled in PERS 2 or PERS 3. Newly hired employees have a 90-day window to choose a PERS plan. After 90 days they will automatically be defaulted to PERS 2.

Step 16

Click the Enter button to validate the information.

TIPS

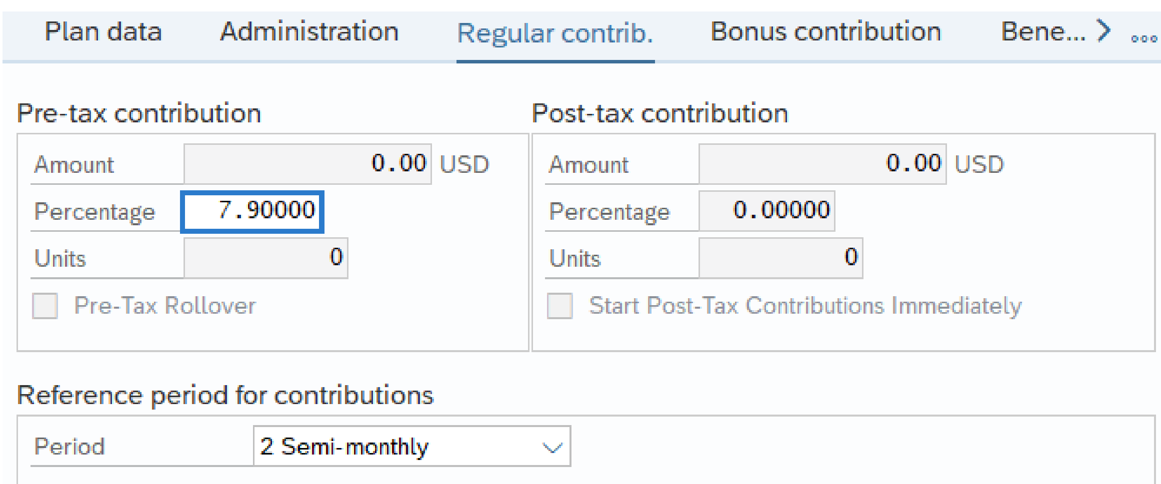
You will be taken to the Regular Contrib. (Regular Contribution) tab.

Step 17

Complete the following field:

The following field is mandatory:

- Percentage



TIPS

Enter the employee's contribution percentage for their plan. If you are uncertain of the current percentage rate, view the warning message containing the correct percentage in the status bar located on the bottom of your active SAP window.

Step 18

Click the Enter button to validate the information.

Step 19

Click the Save button.

STOP

For the benefits processor, this will mark the end of the New Hire action. After saving, click the exit button and if necessary, contact the time and attendance processor who may have entries to complete for the employee.

Visit Health Care Authority (HCA) Personnel and Payroll section for informtion regarding enrolling employees in medical coverage if applicable. Medical benefit elections are entered into Pay1 and subsequent records sent directly to HRMS within a GAP file to process through payroll. For assistance related to Pay1, please contact HCA Help Desk at 360-725-1111 or by emailing servicedesk@hca.wa.gov.