

Health Care Overview


The following will be maintained/viewed in HRMS:

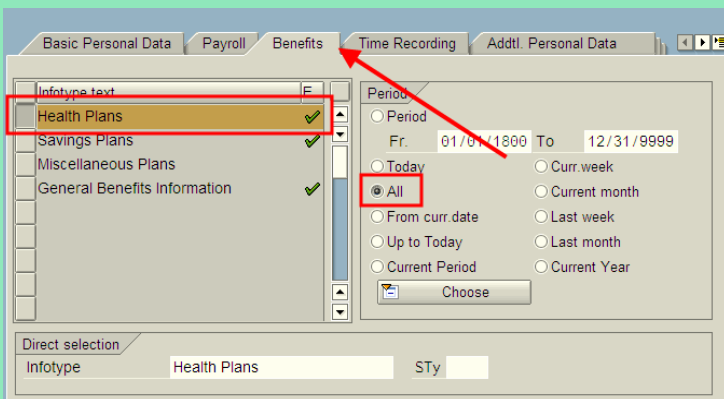
- ♦ **Health Plans** (0167) stores Medical and Dental information for all employee's
 - Includes Qualified Domestic Partners and Same Gender Marriage and their qualified or unqualified dependents
- ♦ **Health Plans** (0167) indicates when an employees wants their medical deductions taken on a post-tax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

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

Creating Additional Contributions for Health Insurance

<http://www.dop.wa.gov/payroll/HRMS/HRMSSupport/Pages/HRMSResources.aspx>

OLQR:

<http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/default.aspx>

Health Care Authority

www.pebb.hca.wa.gov

www.perspay.hca.wa.gov

DCAP / FSA

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

www.asiflex.com/pebb

Department of Retirement Systems

www.drs.w.gov


Deferred Compensation – (888) 327-5596

Office of Financial Management

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 10th and 25th 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 1st of the month and the insurance is entered by the employee’s 1st paycheck (25th), 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 1st paycheck (25th), 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	2575 – Health Provider
-------------------	---------------------------------	-----------------------------------	------------------------------------	-------------------------------

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_RPTPYN08) on DAY 1 and 2.

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 & 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 2nd, then the 2nd should be keyed on the A.41 screen in PAY1 when establishing insurance. Another example is that the 1st falls on Saturday and the new person starts Monday (3rd), the 3rd 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 (15th or 30th/31st)</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>	<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>
		<p>Life, Auto, Home and LTD (Adjustments per HCA)</p>		
		<p>Post-tax Deduction</p> <p>OLQR: Benefits – Post-tax Premiums</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 or screens.



HRMS Benefits: Valid Combinations of Employee Type Code & Retirement Plan

Retire-ment Plan	Employee Type Code (IT-0171 Benefit Status)																											
	00	01	09	10	17	24	25	26	29	34	47	51	52	55	5500	59	62	63	64	65	70	71	75	78	97	98	99	
P0	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	Y
P1** Multiple	N	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
P2	N	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
P3** Multiple	N	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
T0	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	Y	
T1	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	Y	Y	N	N	N	
T2	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	Y	N	N	N	N	
T3** Multiple	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	Y	N	N	N	N	
E2	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	
E3** Multiple	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	
J1	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	
L1	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	
L2	N	N	N	N	N	N	N	N	N	N	Y	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	
S1	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	
S2	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	
N0	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	
N2	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	Y	Y	N	N	N	N	N	N	N	N	
1405	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	

2.PG	2nd ProgrGroup. Text
00	Ineligible
01	State Employees
09	Elected Officials
10	PERS JudgSuperior&Ap
17	Employee-Deaf/Blind
24	St Official - appnt
25	Appt Bds/Commissions
26	JBM-PERS Appeals
29	JBM-PERS Supreme Ct
34	SERS Elected/Appt.
47	LEOFF Elected
51	WSP Comm. Officer
52	Judge
55	F&W Law Enforcement
5500	Convention and Trade
59	PERS Judg Supreme Ct
62	PSERS Correct. Offcr
63	PSERS Com. Cor. Ofc.
64	PSERS Other Agency
65	PSERS Elected/Appt.
70	JBM-TRS Plan 1
71	Teacher - Deaf/Blind
75	TRS Elected
78	TRS/Non-Educ. Agency
97	TRS Plan 1 Retiree
98	Retiree - Eligible
99	Retiree - Ineligible

Note: Only the yellow-highlighted combinations of Employee Type Code and Retirement Plan are valid. Do not use the N combinations.

HRMS Benefits Reports

Report Name	Transaction Code	Use
Run Prior to Payroll being Released and Prior to Payroll Exiting		
Preemptive Compensation Data Check	ZHR_RPTPYN08	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	ZHR_RPTPY376	Use to display a record of money being transferred between agencies via Journal Voucher.
Plan 3 Age Banded Rate Changes	ZHR_RPTBNN30A	Use to identify employees in the PERS3 (Option B and C) who have a rate increase.
Run After Payroll is Released for Corrections and Prior to Payroll Exiting		
Wage Type Reporter	PC00_M99_CWTR	Use to identify transactions automatically recorded in the Agency State Payroll Revolving Account 035.
Active Employees With No Retirement Deductions Taken Report	ZHR_RPTPY024	Use to identify employees that did not have retirement subtracted from their pay during a particular payroll period.
EEs with No Retirement Contribution	ZHR_RPTBNN29	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	ZHR_RPTBNN03	Identifies any retirement mismatches.
Preemptive Payroll Threshold Check	ZHR_RPTPYN08	Use to identify any deductions in arrears.

HRMS Benefits Reports

Report Name	Transaction Code	Use
Run After Payroll is Exited		
Payroll Posting Report	ZHR_RTPY126	Use to display employees that have cancelled warrants for a selected pay period.
Run anytime during the month		
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_RTPYU06	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_RTPYU26	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.