Retirement – Open Enrollment

Purpose Use this procedure to transfer eligible PERS, SERS, and TRS Plan 2 members to Plan 3.

Trigger Perform this procedure when a Plan 2 employee is requesting to transfer to Plan 3 during the open enrollment period each January.

Prerequisites

- The Plan 2 member has completed and submitted the Department of Retirement Systems (DRS) Member Information Form during the month of January.
- You must verify that the Plan 2 member has a January transfer option using the DRS Member Reporting Verification system.

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

Change History	
Date	**Change Description**
7/16/2009	New procedure created

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

Transaction Code PA30

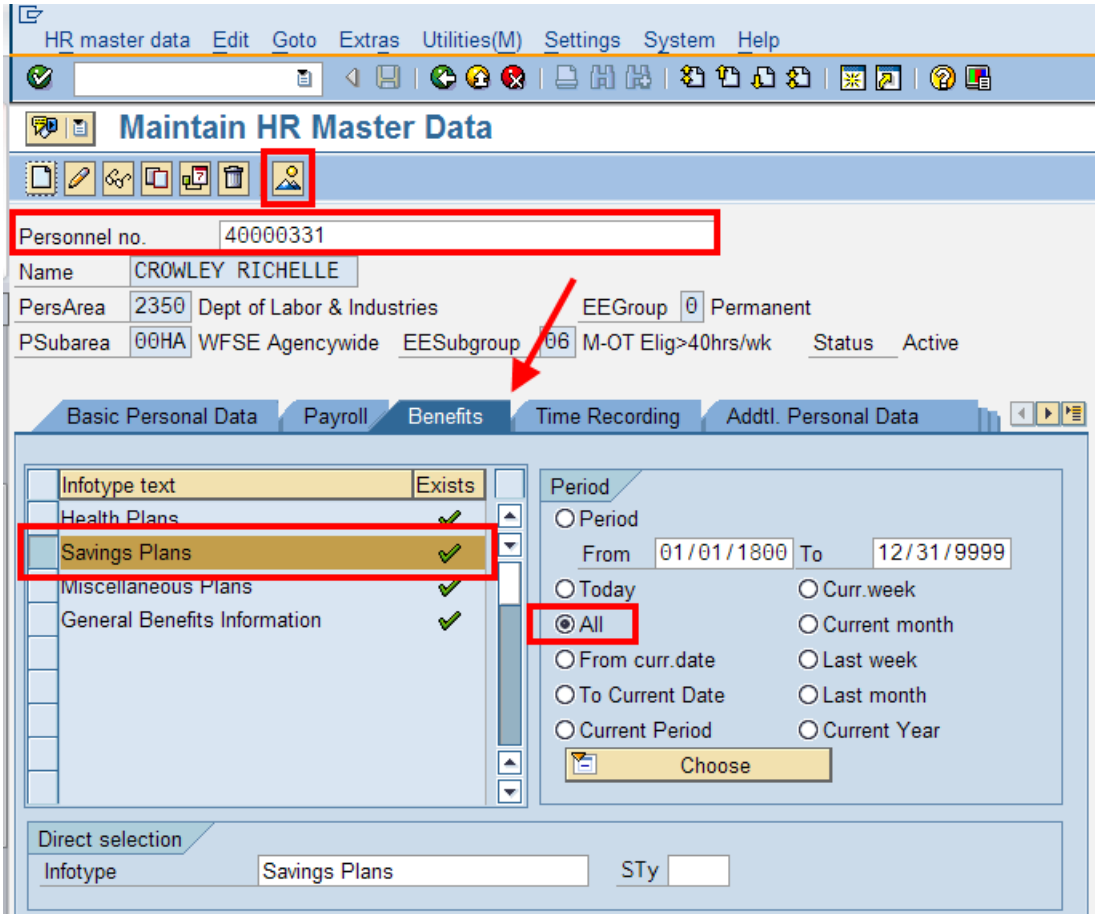
Helpful Hints	
	• For assistance in verifying the Plan 2 member's eligibility, contact the Department of Retirement Systems for assistance. • To help prevent potential errors, agencies are advised to wait until at least January 15th to enter transactions in HRMS for any eligible employees who choose to transfer from Plan 2 to Plan 3.

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:

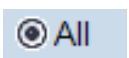
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. **Example**: 40000331

3. Click

to select.

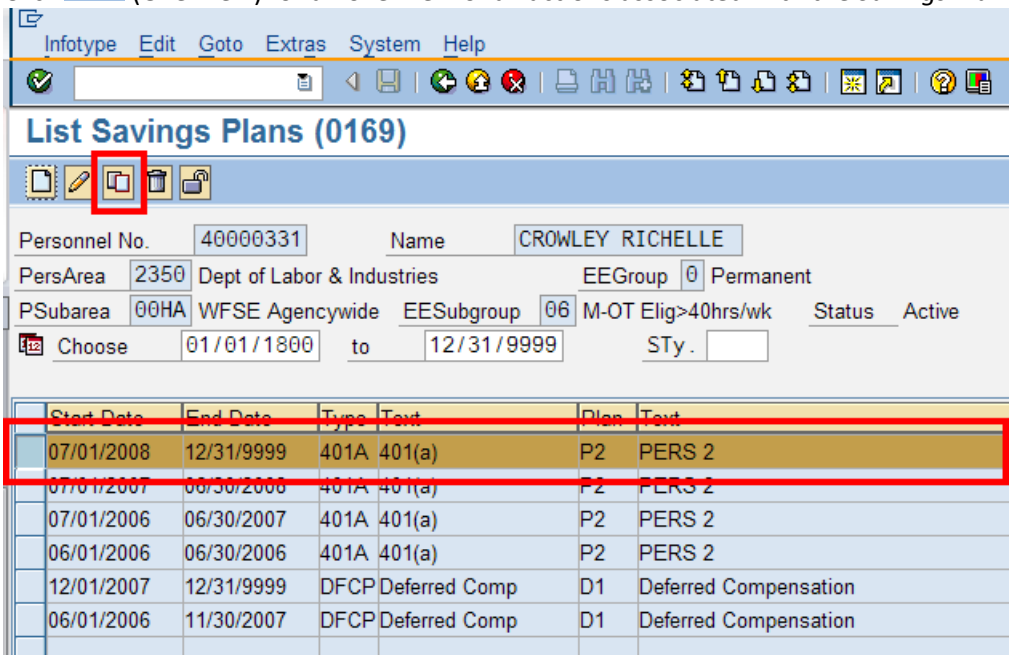
4. Click the box to the left of

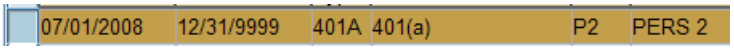
to select.

5. Click 

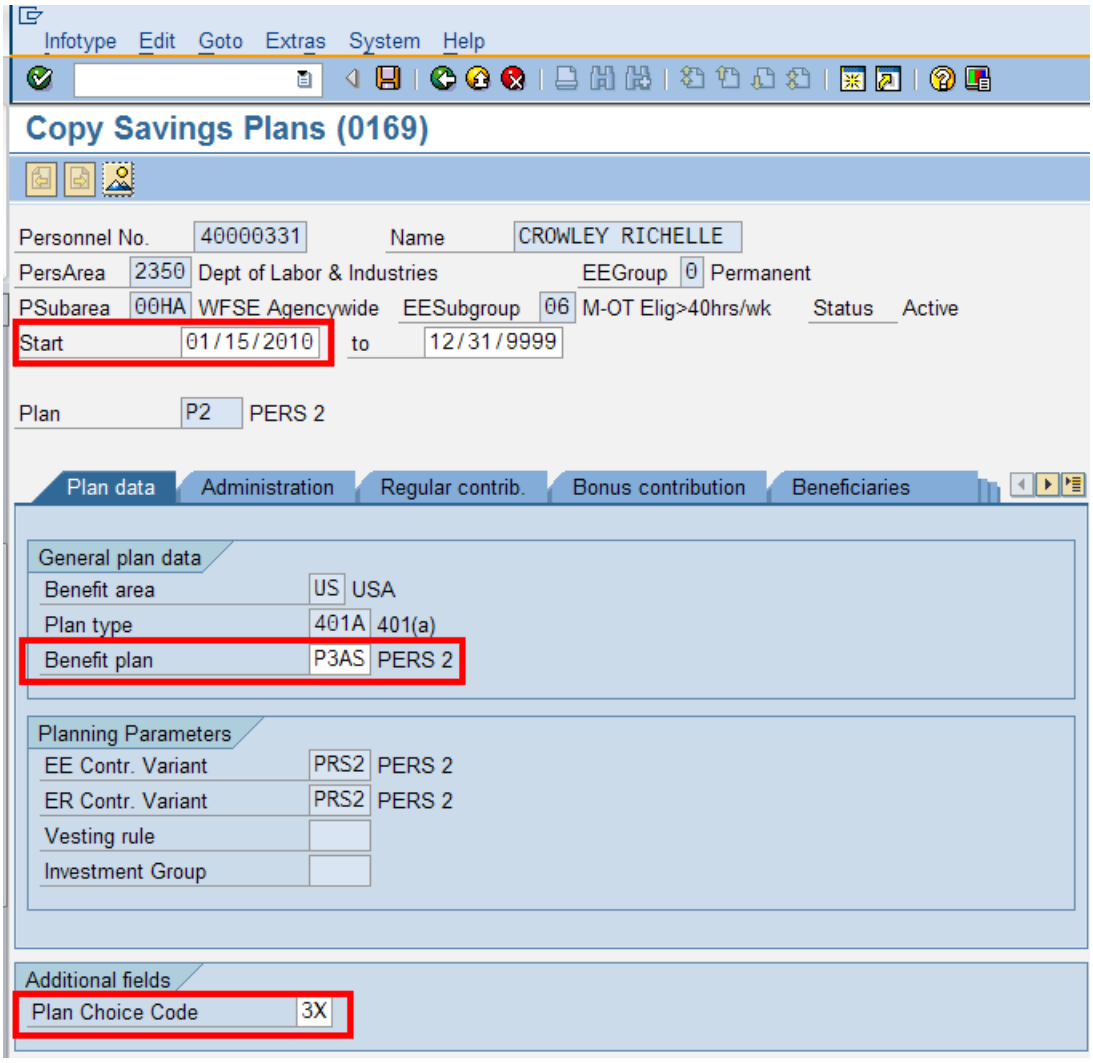
to select.

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



7. Click  to select.

8. Click (Copy) to copy and continue.

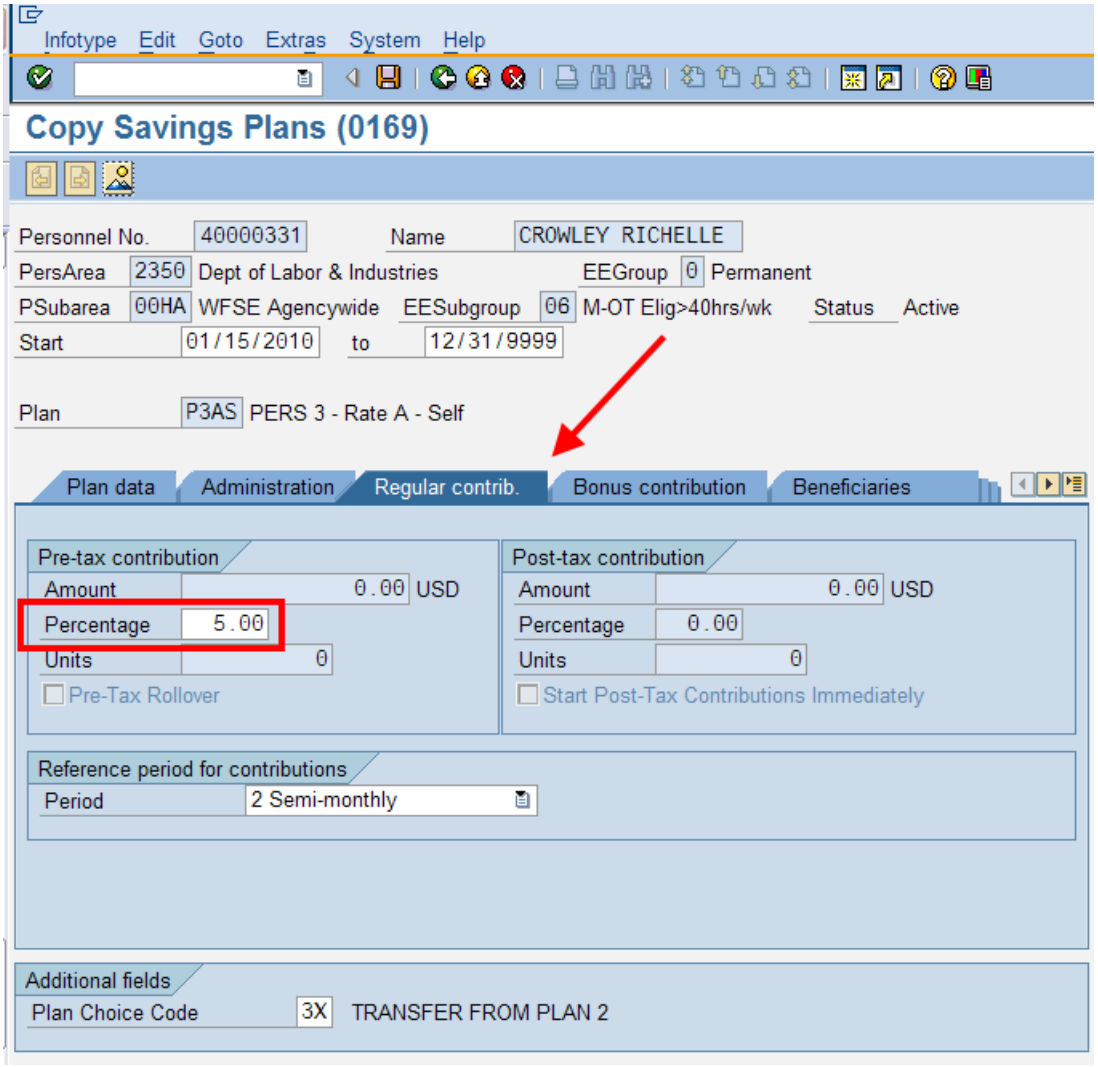


9. Complete the following fields:

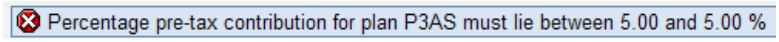
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Start	R	This is the date on which a record begins. Department of Personnel advises to wait until DAY 1 of Payroll Period 2 to prevent potential errors. **Example**: 01/15/2010
Benefit Plan	R	This is a specific benefit offered by the company with defined providers, benefit levels, and payments. Use the (matchcode) to open selection list. **Example**: P3AS (PERS 3 – RATE A – SELF)

Plan Choice Code	R	Defines the associated Benefit Plan. Use the (matchcode) to open selection list. This selection corresponds with the selected Benefit Plan along with Plan Choice Code text of 'Transfer from Plan 2'. **Example**: 3X (P3AS 3X Transfer from Plan 2)

10. Click Regular contrib. to select.



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.  **Example**: 5.00%

12. Click (Enter) to validate the information.

13. Click (Save) to save.

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

Results
You have transferred an eligible member's PLAN 2 to PLAN 3.
Comments
None.