

**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

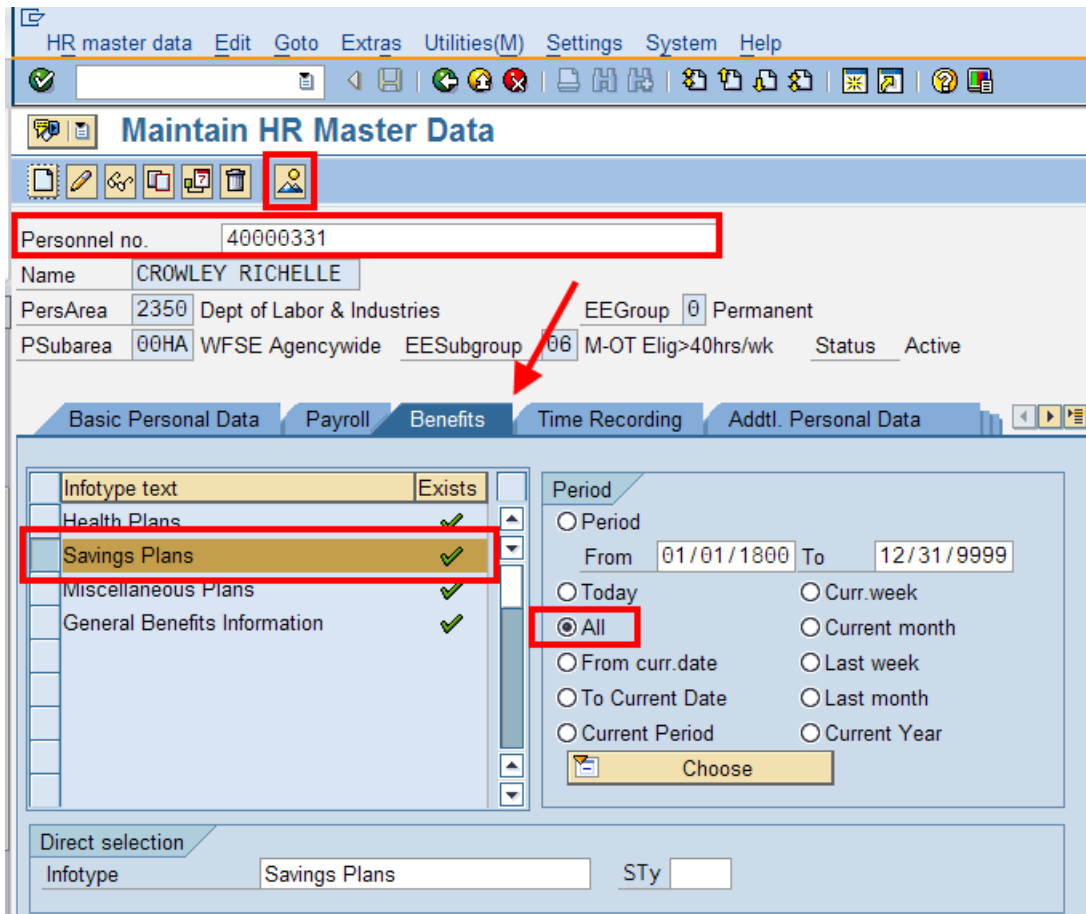
<b>Helpful Hints</b>	<ul style="list-style-type: none"> <li>• For assistance in verifying the Plan 2 member’s eligibility, contact the Department of Retirement Systems for assistance.</li> <li>• To help prevent potential errors, agencies are advised to wait until at least January 15<sup>th</sup> to enter transactions in HRMS for any eligible employees who choose to transfer from Plan 2 to Plan 3.</li> </ul>
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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.

**Procedure**


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

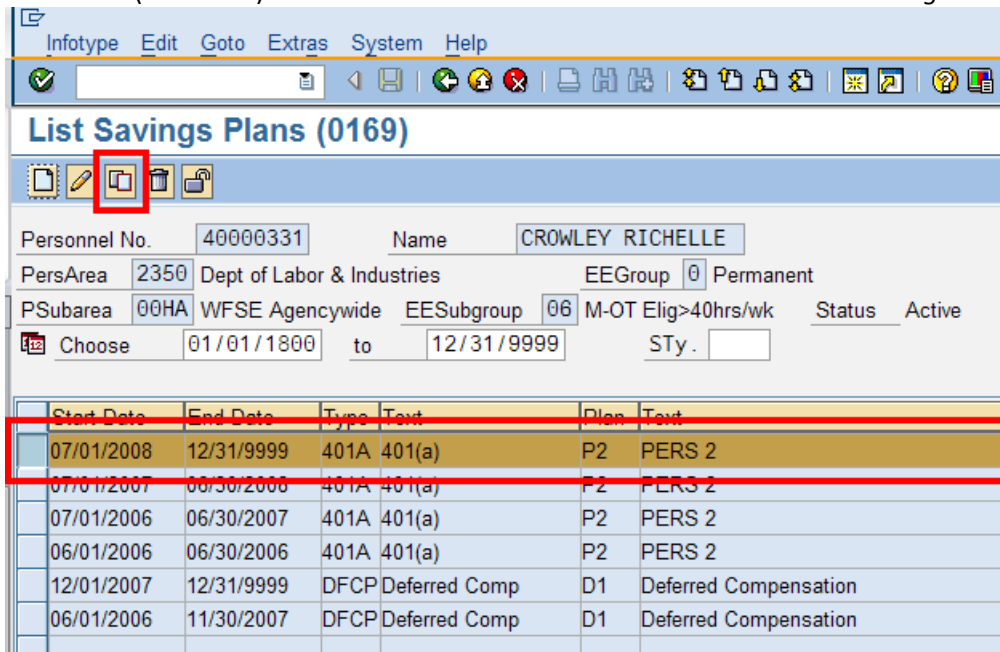


2. Complete the following fields:


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


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

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



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  07/01/2008 12/31/9999 401A 401(a) P2 PERS 2 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 01/15/2010 to 12/31/9999

Plan P2 PERS 2

Plan data Administration Regular contrib. Bonus contribution Beneficiaries

General plan data

Benefit area US USA

Plan type 401A 401(a)

Benefit plan P3AS 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 3X

9. Complete the following fields:


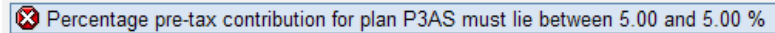
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Start	R	This is the date on which a record begins.  Department of Personnel advises to wait until DAY 1 of Payroll Period 2 to prevent potential errors. <b>Example:</b> 01/15/2010
Benefit Plan	R	This is a specific benefit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


Plan Choice Code	R	<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 'Transfer from Plan 2'.</p> <p><b>Example:</b> 3X (P3AS 3X Transfer from Plan 2)</p>
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10. Click **Regular contrib.** to select.

The screenshot displays the 'Copy Savings Plans (0169)' application. The top menu includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The main area shows employee information: 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 01/15/2010 to 12/31/9999, and Plan P3AS PERS 3 - Rate A - Self. Below this is a tabbed interface with 'Regular contrib.' selected. The 'Pre-tax contribution' section shows 'Amount' 0.00 USD, 'Percentage' 5.00 (highlighted with a red box), and 'Units' 0. The 'Post-tax contribution' section shows 'Amount' 0.00 USD, 'Percentage' 0.00, and 'Units' 0. The 'Reference period for contributions' section shows 'Period' 2 Semi-monthly. The 'Additional fields' section shows 'Plan Choice Code' 3X TRANSFER FROM PLAN 2. A red arrow points to the 'Regular contrib.' tab.

11. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Percentage	R	<p>This is a field used to store a percentage amount.</p>  <p>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.</p>  <p><b>Example:</b> 5.00%</p>

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.