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	• For assistance in verifying the Plan 2 member's eligibility, contact the Department of Retirement Systems for assistance.

The Plan Choice Codes are defined in the following table:

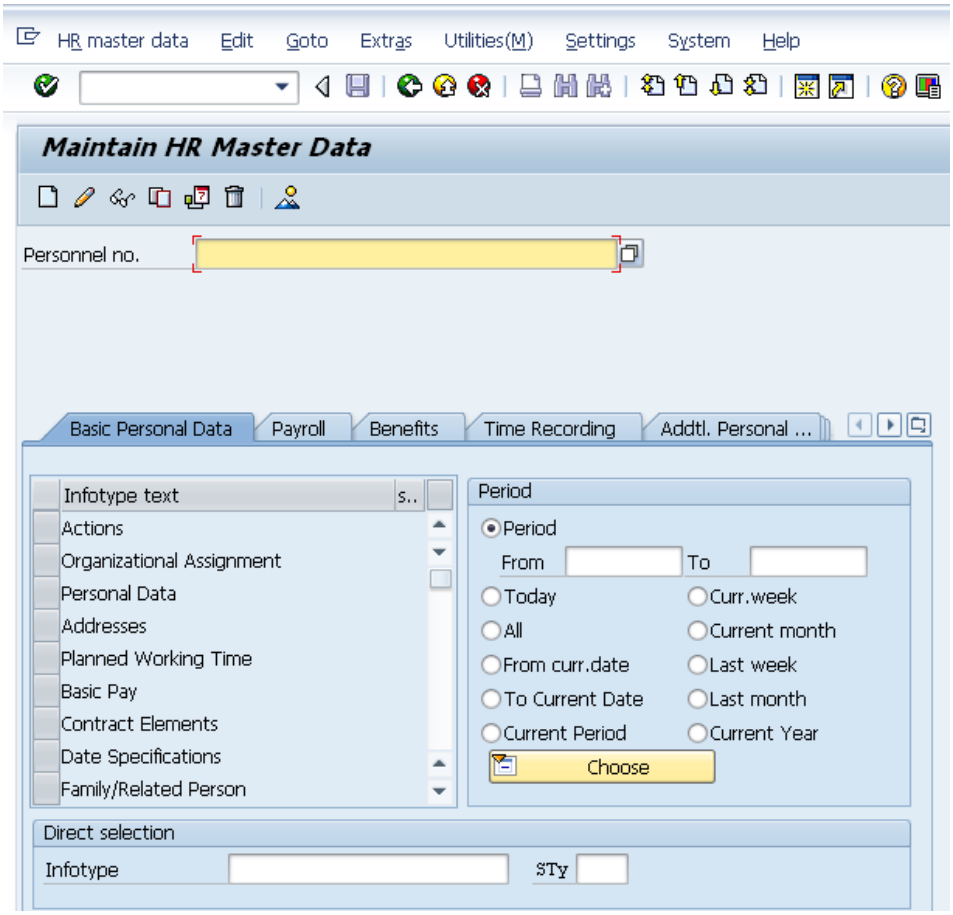
Plan Choice Code	System/ Plan	Employee Status	Plan Choice Description
2C	P2	Employee is a new PERS member.	Employee chooses Plan 2

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:

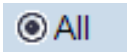
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. **Example**: 40000331

3. Click

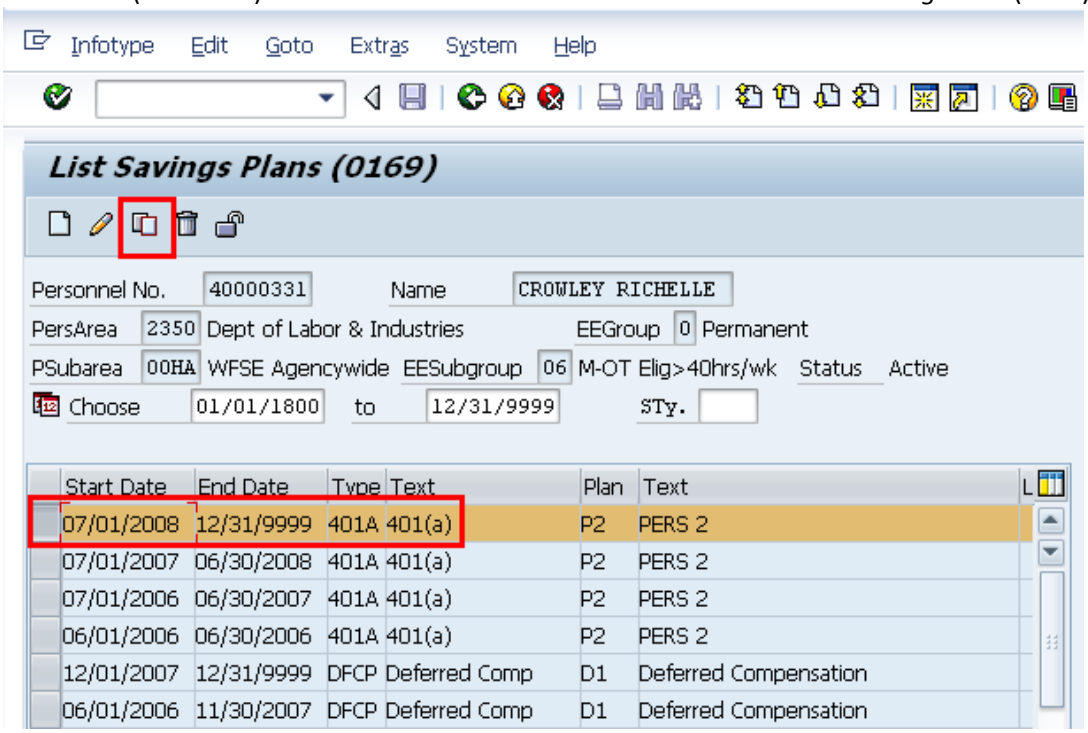
to select.
4. Click the box to the left of

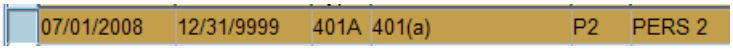
to select.

State of Washington

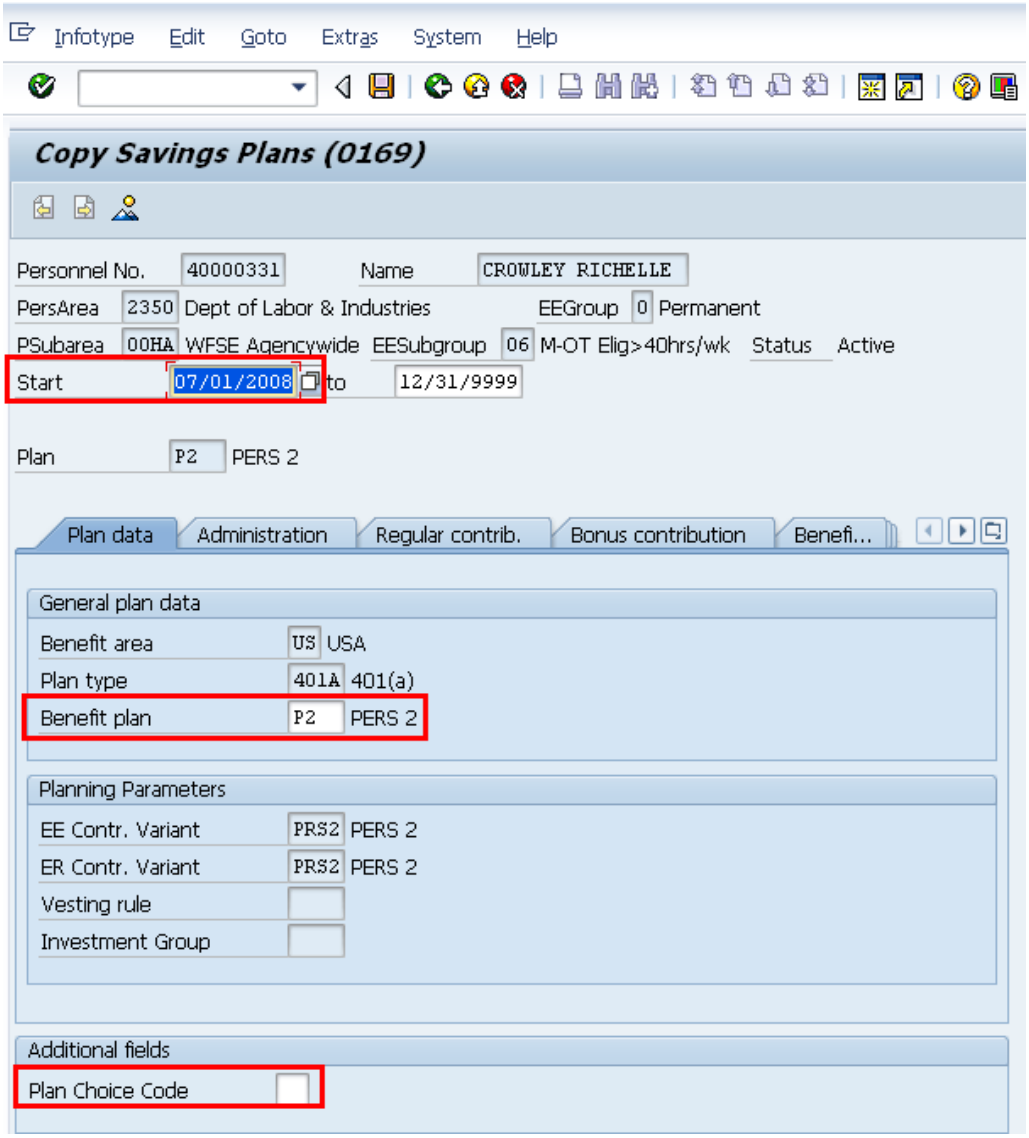
5. Click  to select.

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



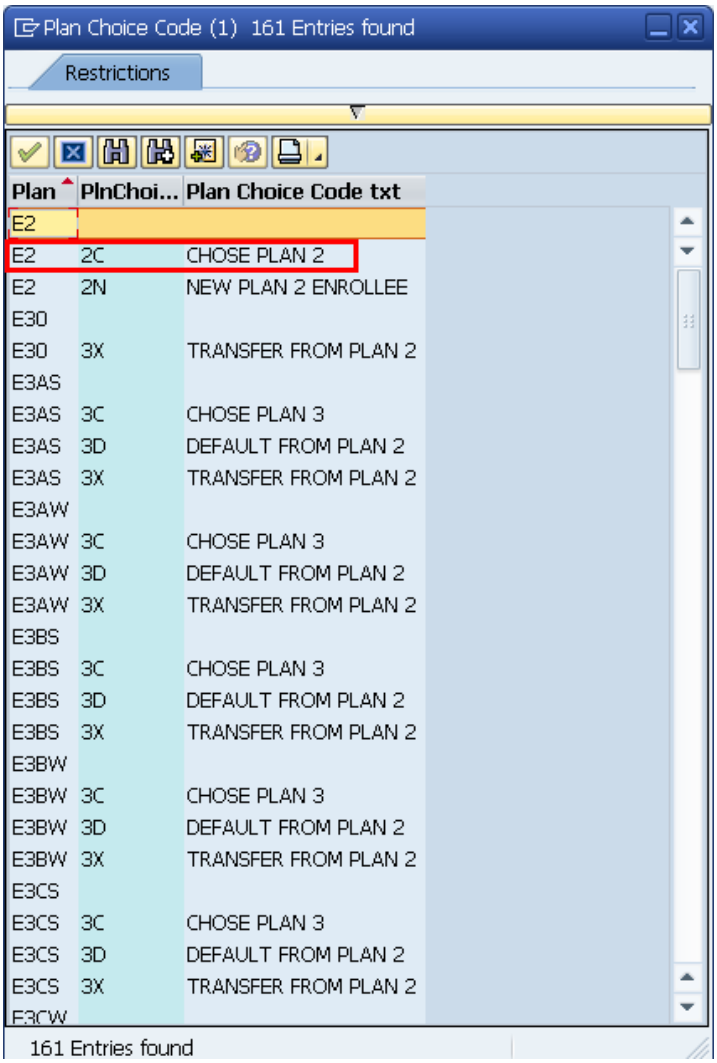
7. Click  to select.

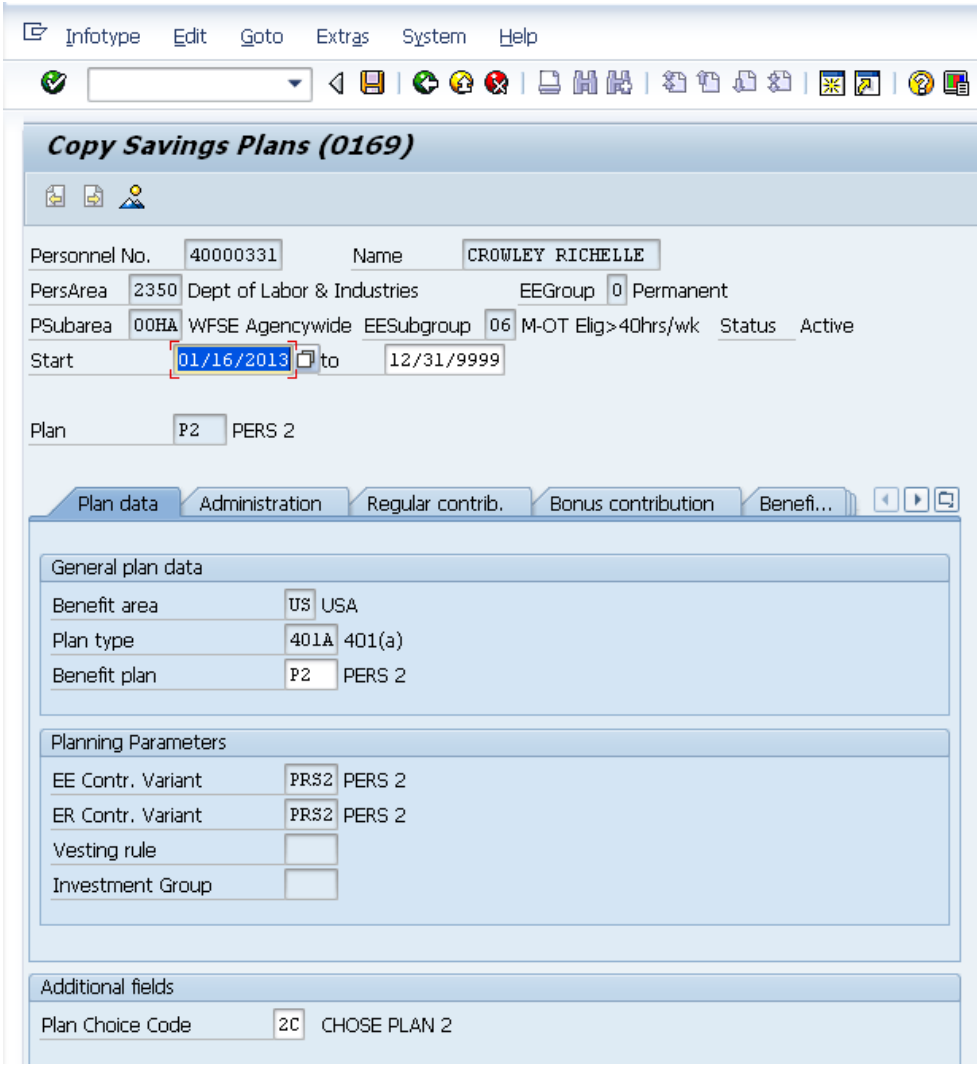
8. Click (Copy) to copy and continue.



9. Complete the following fields:

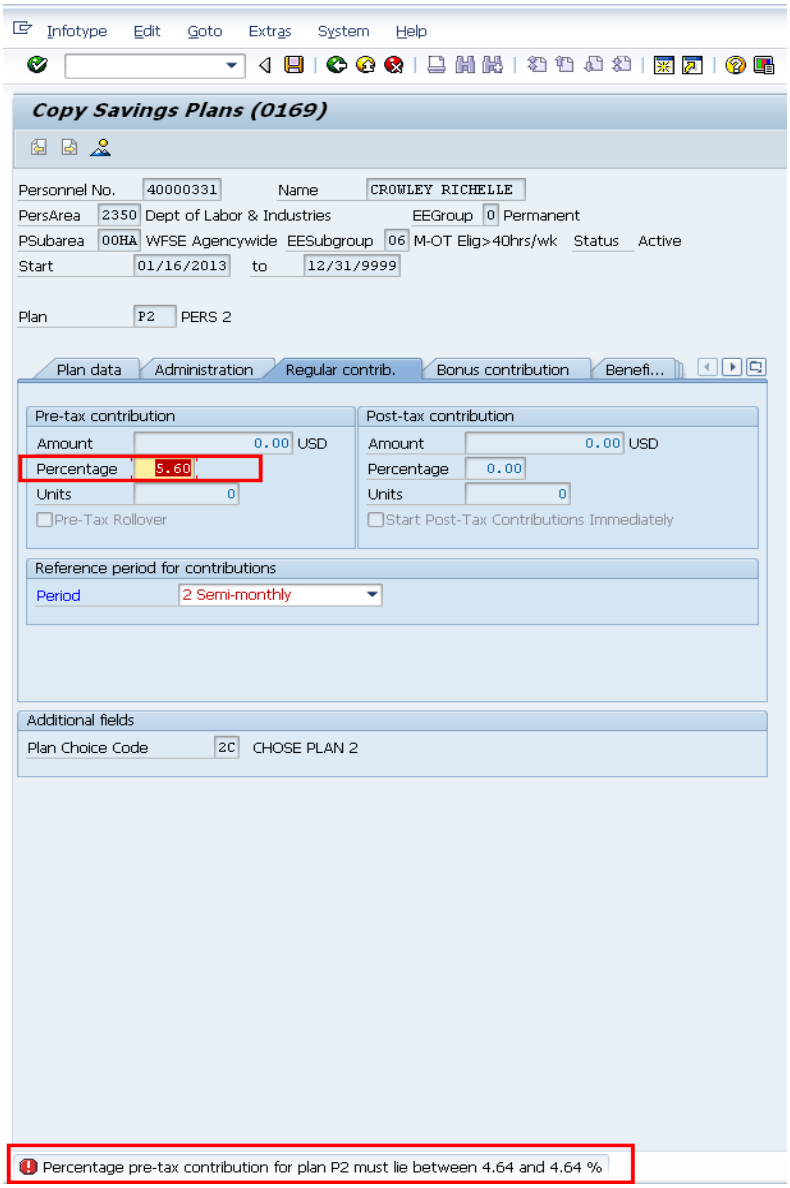
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Start	R	This is the date on which a record begins. Department of Enterprise Services advises to wait until DAY 1 of Payroll Period 2 to prevent potential errors. **Example**: 01/16/2013
Benefit Plan	R	This is a specific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

		Use the (matchcode) to open selection list. **Example**: P2 (PERS 2)
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 'Chose Plan 2'.  **Example**: 2C (Chose Plan 2)



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.



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

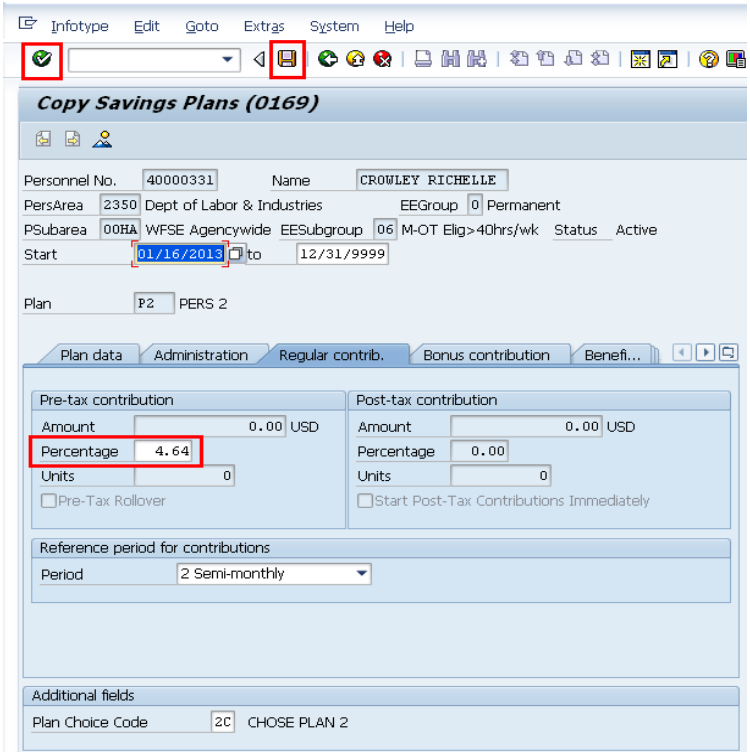
12. Click (Enter) to validate the information.

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

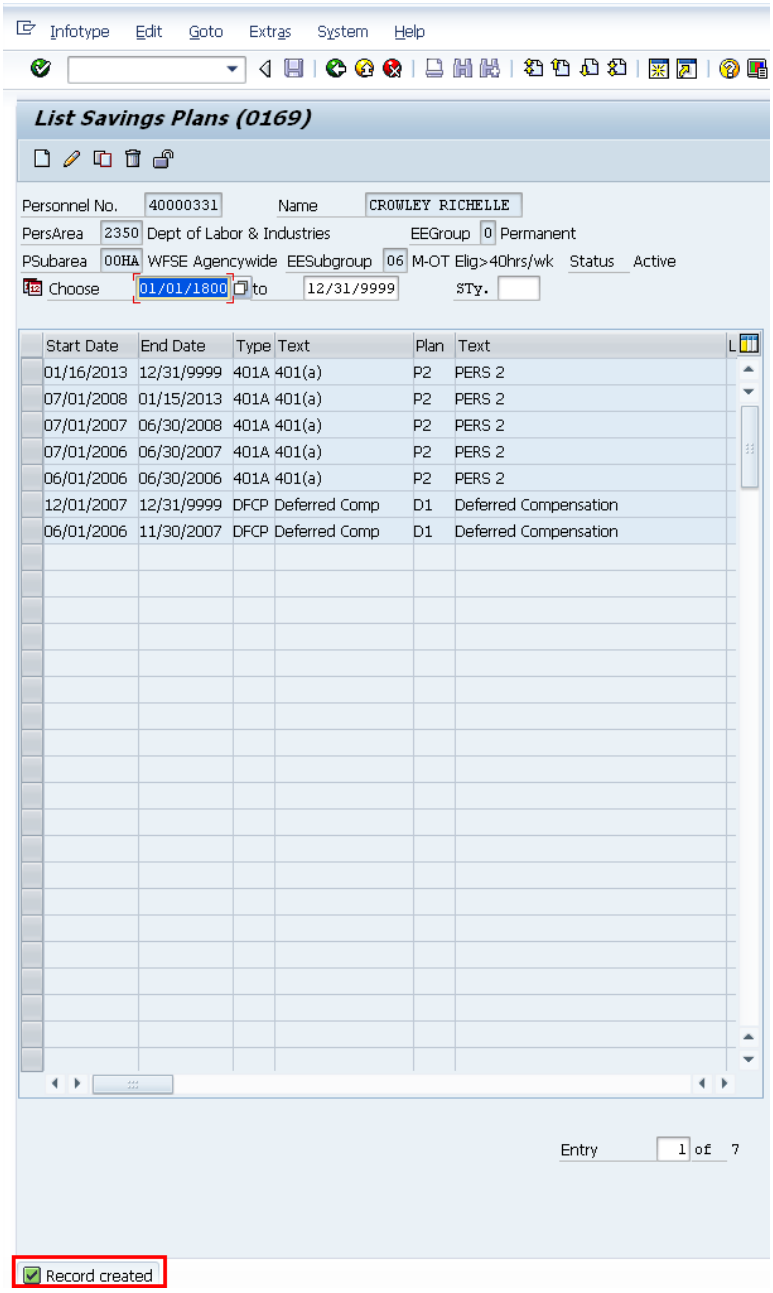
Record valid from 07/01/2008 to 12/31/9999 delimited at end

Click (Enter) to validate the information

13. Click (Save) to save.



State of Washington



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.