Enroll Employee in ORP Plan

Purpose

PayServ will transition enrollment and plan information from the PeopleSoft Retirement Tables to the Savings Plan Tables for ORP (Optional Retirement Plan) (formerly Plan Type 7Z) in 9.2 because the tables for Savings Plans are more flexible and better meet the requirements of the Optional Retirement Plans as delivered than the Retirement tables.

The purpose of this document is to provide step by step instructions for enrolling an employee in ORP.

Helpful Hints

In order to utilize the Savings Plan enrollment functionality, changes were required to Plan Types and some Benefit Plans. Below is a crosswalk of these changes. Many plans were consolidated and three new Benefit Plans were added for employees during the 366 day suspense period. The employee's participation % will be entered on their enrollment page and no longer determined by the Benefit Plan.

9.1 PLAN TYPE	9.1 BENEFIT PLAN	Participation in an ORP	9.2 PLAN TYPE	9.2 BENEFIT PLAN
7Z	**	366 Suspense Period	4Z	CNYSUS
7Z	**	366 Suspense Period	4Z	SNYSUS
7Z	**	366 Suspense Period	4Z	VDCSUS
7Z	T6CNYA	N/A	4Z	T2CUAX
7Z	TSYEDA	N/A	4Z	T2SUAX
7Z	T6CNYB	N/A	4Z	T3CUBX
7Z	T6SNYB	N/A	4Z	T3SUBX
7Z	T5CNYB	< = 7 Years	4Z	T5CU08
7Z	T5CNYB	> 7 Years	4Z	T5CU10
7Z	T7CNYB	< = 7 Years	4Z	T5CU11
7Z	T7CNYB	> 7 Years	4Z	T5CU13
7Z	T5SNYB	< = 7	4Z	T5SU08
7Z	T5SNYB	> 7 Years	4Z	T5SU10
7Z	T7SNYB	< = 7 Years	4Z	T5SU11
7Z	T7SNYB	> 7 Years	4Z	T5SU13
7Z	T6C030	< = 7 Years	4Z	T6CU08
7Z	T6C035	< = 7 Years	4Z	T6CU08
7Z	T6C045	< = 7 Years	4Z	T6CU08
7Z	T6C060	< = 7 Years	4Z	T6CU08
7Z	T6C575	< = 7 Years	4Z	T6CU08
7Z	T6C030	> 7 Years	4Z	T6CU10
7Z	T6C035	> 7 Years	4Z	T6CU10
7Z	T6C045	> 7 Years	4Z	T6CU10
7Z	T6C060	> 7 Years	4Z	T6CU10
7Z	T6C575	> 7 Years	4Z	T6CU10
7Z	T6S030	< = 7 Years	4Z	T6SU08
7Z	T6S035	< = 7 Years	4Z	T6SU08
7Z	T6S045	< = 7 Years	4Z	T6SU08
7Z	T6S060	< = 7 Years	4Z	T6SU08
7Z	T6S575	< = 7 Years	4Z	T6SU08
7Z	T6S030	> 7 Years	4Z	T6SU10
7Z	T6S035	> 7 Years	4Z	T6SU10
7Z	T6S045	> 7 Years	4Z	T6SU10

9.1 PLAN TYPE	9.1 BENEFIT PLAN	Participation in an ORP	9.2 PLAN TYPE	9.2 BENEFIT PLAN
7Z	T6S060	> 7 Years	4Z	T6SU10
7Z	T6S575	> 7 Years	4Z	T6SU10
7Z	T6V030	N/A	4Z	T6VDCB
7Z	T6V035	N/A	4Z	T6VDCB
7Z	T6V045	N/A	4Z	T6VDCB
7Z	T6V060	N/A	4Z	T6VDCB
7Z	T6V575	N/A	4Z	T6VDCB

All active employees with an active 4Z Retirement Enrollment record in 9.1 were converted to the applicable Plan Type and Benefit Plan as shown in the table above. Additionally, an employee terminated on or after January 1, 2015 with an active 4Z Retirement Enrollment was also converted. The Retirement Enrollment pages will no longer be updatable, but are available as display only. This ensures all history is available for viewing and reporting from query.

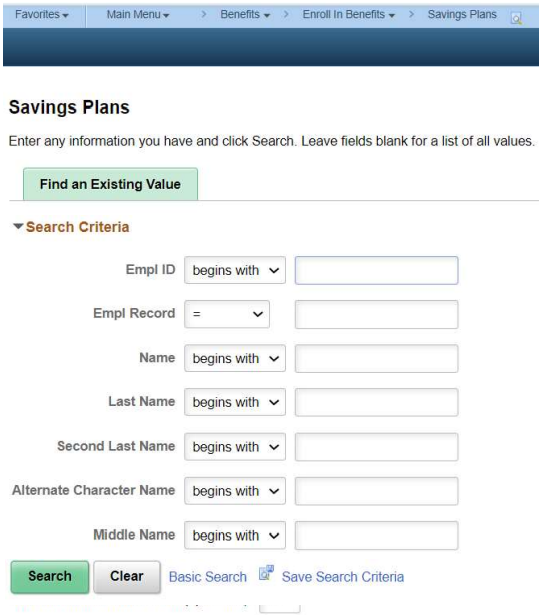
Savings Plans

Navigation Path

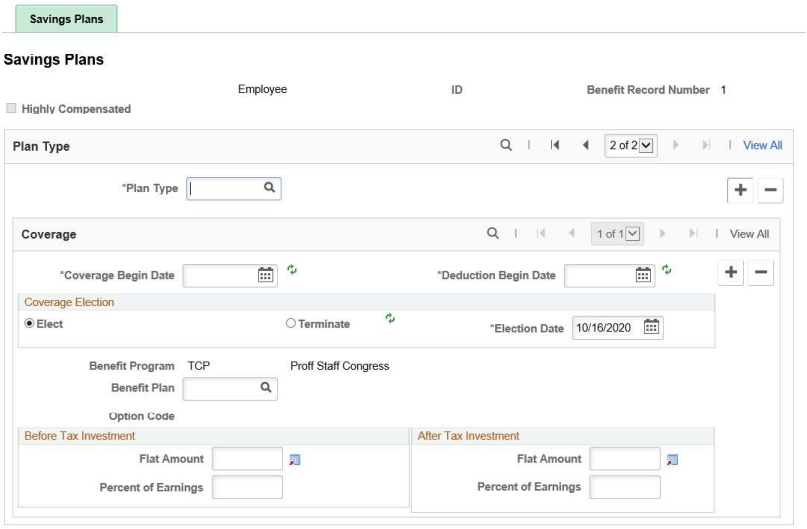
Main Menu > Benefits > Enroll in Benefits > Savings Plans

Steps

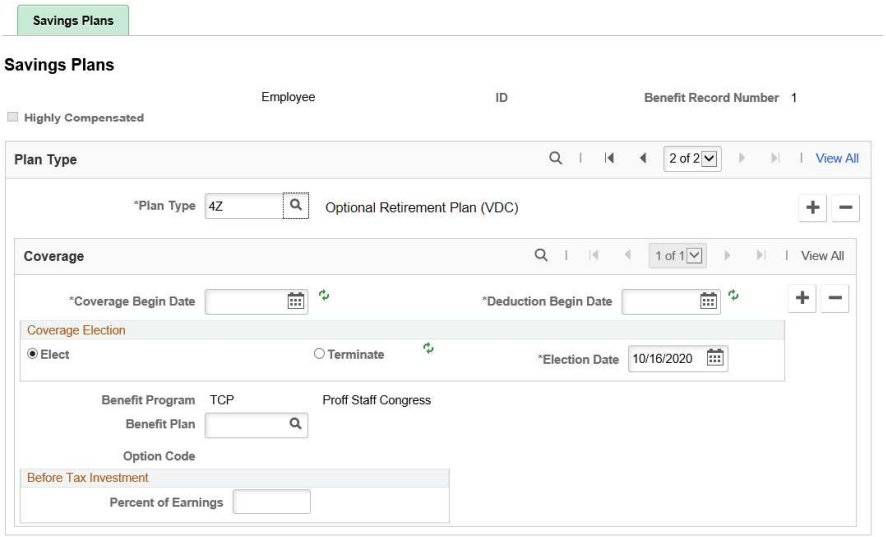
1. Enter Empl ID and, if the employee has multiple records, the Benefit Record Number and then click Search.



The employee's Name, Empl ID and Benefit Record Number display at the top.



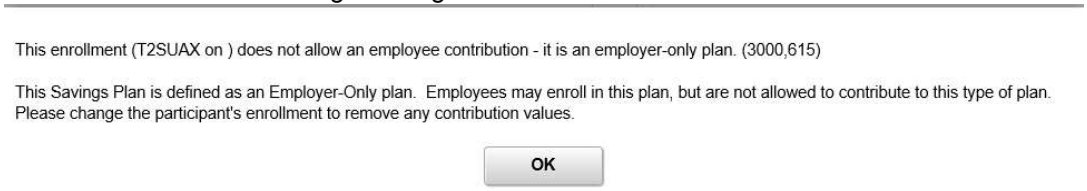
2. Enter the following required fields:
   - Plan Type: 4Z
     NOTE: The Savings Enrollment Record in 9.2 will be used for 457 (Plan Type 48 or 49) and 403(b) (General Deduction in 9.1) in addition to 4Z- ORP. If employee already has an enrollment in 457 or 403(b), you will need to use the + sign to add an additional Plan Type before entering the ORP enrollment.
     Before you enter the 4Z as Plan Type you see the generic Savings Enrollment page (shown on above page). After you enter 4Z as Plan Type and tab out, you will see the page for 4Z only:



   - Coverage Begin Date
   - Deduction Begin Date
   - Election Date
   - Coverage Election: This field defaults to ‘Elect’ and is the value to use for an enrollment.
   - Benefit Program: This value is displayed from the Employee’s JOB Component (Benefits Participation page). If this field is blank you cannot enroll the employee in an ORP and you should contact Payroll Operations – Deductions.
   - Benefit Plan: From the Table which begins on Page 1, select the Benefit Plan in which the employee is enrolling. You can also use the magnifying glass to view all allowed Benefit Plans for the Plan Type entered above.

NOTE: If the Plan Type and Benefit Plan combination entered is not valid for the employee's Benefit Program the page produces an error and cannot be saved.

- Before Tax Investment: Enter the elected percentage.
  NOTE: For the plans that are Employer Contribution only, this field will not allow entry. You will receive the following message:

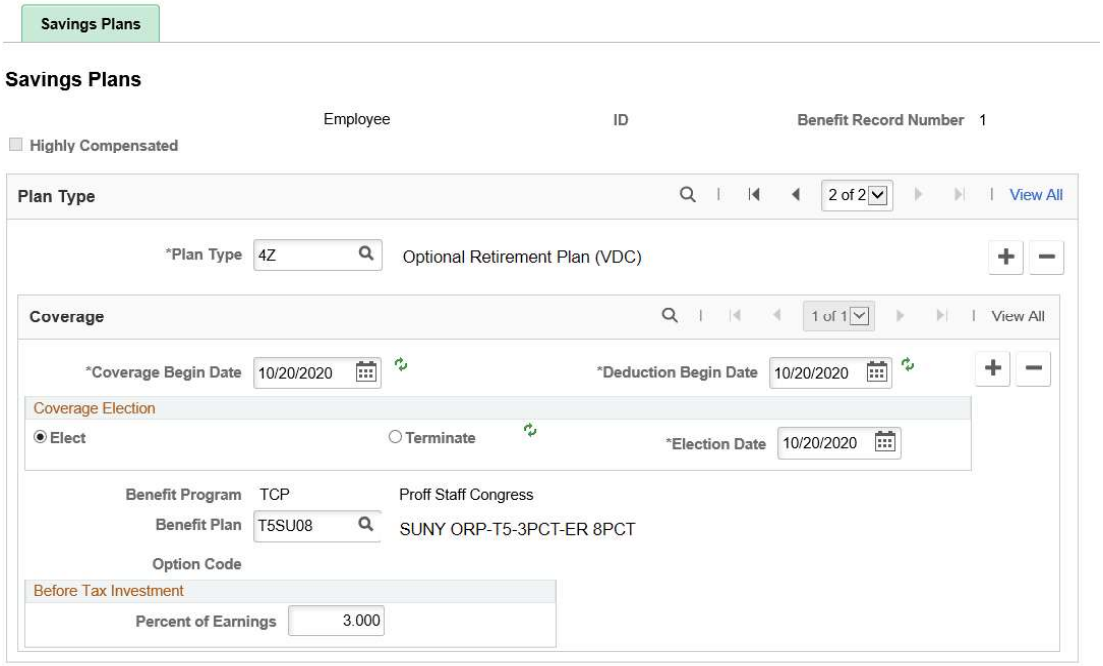


  Employer Contribution only plans are T2CUAX, T2SUAX, T3CUBX, T3SUBX, T5CU11, T5CU13, T5SU11, T5SU13.

3. Click Save.

Result

The employee's deduction for ORP will begin in the pay cycle based upon the Deduction Begin Date. Below is an example of a new enrollment that has been saved successfully:



Processing ORP Annual Limits

By using benefit deductions for the Optional Retirement Plans in 9.2, the annual limits will be administered at the plan level by Payroll Operations and will apply to all Empl Records for the Employee ID.

Suspense Page

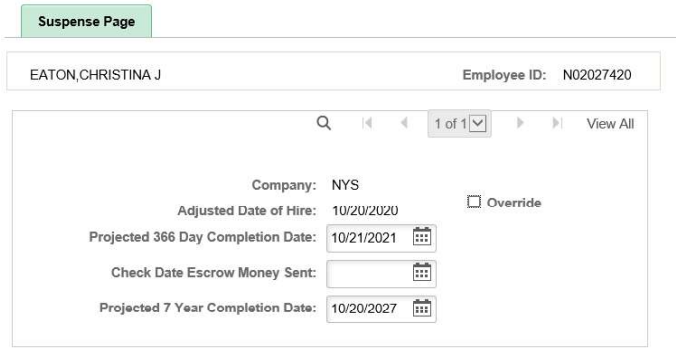
The Suspense Page (previously TIAA/CREF Suspense/NRI) has changed for 9.2 processing and is view only for Agency users and maintained by the system with new processes. Only Payroll Operations – Deductions will have access to correct this page.

Navigation Path

Main Menu > Benefits > Enroll in Benefits > Suspense Page

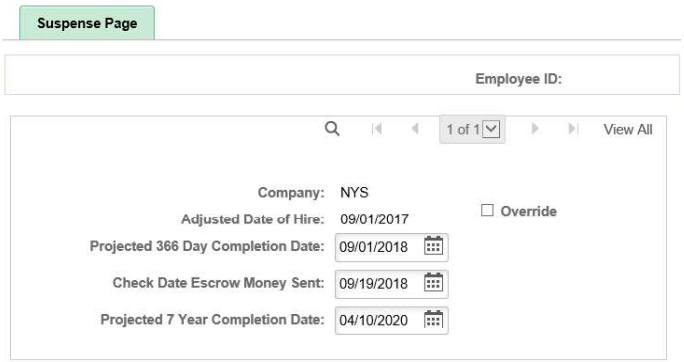
Process Overview

1. When an employee first enrolls in an ORP they should be enrolled in one of the suspense benefit plans. At enrollment, the suspense page will reflect the Election Date in the Adjusted Date of Hire Field. If this requires updating, Payroll Operations – Deductions has the security to make any adjustments.



2. The system calculates the projected 366 completion date and the projected 7 year completion date.
3. Each pay cycle a process runs to identify when an employee reaches their 366 date. Upon reaching the 366 date, the system automatically:
    a. Moves the employee to the appropriate non-suspense Benefit Plan
    b. Initiates the process for the escrow money to be distributed to the employee
    c. Populates the Check Date Escrow Money Sent field on the Suspense Page
4. This same process identifies when an employee has reached their 7 Year completion date or 10 Year completion date—then the system automatically moves the employee to the appropriate over 7 Year Benefit Plan or over 10 Year Benefit Plan.
5. When these new processes run, new effective dated rows are inserted into the Savings Plan Page, providing an audit of the changes in alignment with the information on the Suspense page.
6. If an employee is terminated before they meet the projected 366 completion date or the projected 7 year completion date these dates will be wiped out. If the employee is rehired the agency will need to calculate the new adjusted hire date.

Below is an example of an employee who has reached the over 7 Year status:



Below is the progression of Benefit Plan changes generated by this new process:

Upon reaching 366 Days:

When an employee reaches 366 days, and is in:		Move enrollment to:	
Plan Type	Benefit Plan	Plan Type	Benefit Plan
4Z	SNYSUS	4Z	T6SU08
4Z	CNYSUS	4Z	T6CU08
4Z	VDCSUS	4Z	T6VDCB

Upon reaching 7 Years:

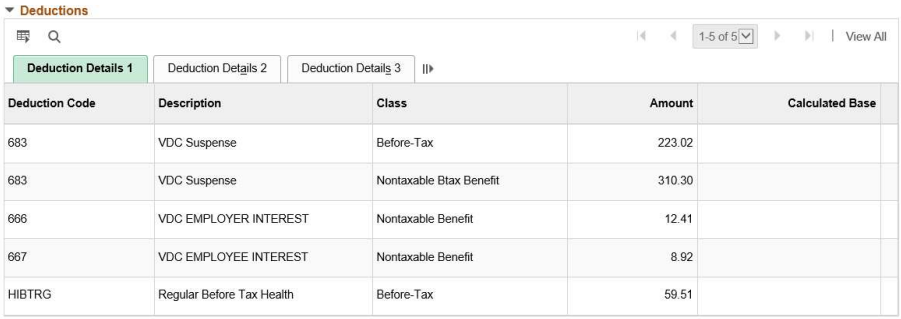
When an employee reaches 7 Years, and is in:		Move enrollment to:	
Plan Type	Benefit Plan	Plan Type	Benefit Plan
4Z	T5CU08	4Z	T5CU10
4Z	T5SU08	4Z	T5SU10
4Z	T5CU11	4Z	T5CU13
4Z	T5SU11	4Z	T5SU13
4Z	T6CU08	4Z	T6CU10
4Z	T6SU08	4Z	T6SU10

Upon reaching 10 Years:

When an employee reaches 10 Years, and is in:		Move enrollment to:		Additional Requirement
Plan Type	Benefit Plan	Plan Type	Benefit Plan	
4Z	T5CU10	4Z	T5CU11	Election date + 10 years, 7yr = N
4Z	T5CU10	4Z	T5CU13	Election date + 10 years, 7yr = Y
4Z	T5SU10	4Z	T5SU11	Election date + 10 years, 7yr = N
4Z	T5SU10	4Z	T5SU13	Election date + 10 years, 7yr = Y

Accruing Escrow Money

During the suspense period, the 9.2 system has been configured to calculate these amounts each pay period using a ‘memo’ or non-taxable benefit deduction code. These deductions codes are setup automatically when an employee enrolls in a suspense plan and inactivate automatically when the employee reaches the 366 date. These are used by the system processes and will never appear on the employee’s advice or paycheck stub. Agency users will be able to see these on the Review Paycheck deduction pages. Here is an example of how the interest deductions will display on these pages:



Deduction Code	Description	Class	Amount	Calculated Base
683	VDC Suspense	Before-Tax	223.02	
683	VDC Suspense	Nontaxable Btax Benefit	310.30	
666	VDC EMPLOYER INTEREST	Nontaxable Benefit	12.41	
667	VDC EMPLOYEE INTEREST	Nontaxable Benefit	8.92	
HIBTRG	Regular Before Tax Health	Before-Tax	59.51	

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