System Office Administration
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System Benefits Administration

- System wide EPAF’s processed for any Type of Leave
  - Joan will receive an FYI
- System wide EPAF’s processed for Terminations
  - Pat will receive an FYI
- EPAF entry (NOAEPAF)
  - Joan Humphrey
    - Full Early Retirees
    - Long Term Disability
    - Chronic Workers Compensation
    - Retirees
  - Pat Noseworthy
    - Domestic Partner
- EPAF approvers
  - Stephen Blakney
    - Full Early Retirees
    - Long Term Disability
    - Chronic Workers Compensation
    - Retirees
  - Liz Pelletier
    - Domestic Partner

- System Benefits Office Approval Categories
  - BFERSU – FER Set Up
  - SBTERM – Benefits Termination
  - BDOMPO – Domestic Partner Offset Entry
  - BDPERC – Domestic Partner Default Earn Code Change
  - BCWCSU – CWC Set Up
  - BLTDSU – LTD Set Up
  - BJBTRM – Job Termination
  - BENOFF – Offset Job Entry
  - BENRET – Retirement
• Routing Queue (NTRROUT)
  o Routing Queue’s must be established before any EPAF’s can be processed.
  o Approval level SYSBEN – enter the user id of the individual approving your transactions. Required Action must be Approval.
  o Approval level SYSCTR – enter GPRATT as the user id. Required Action must be Apply.
    ▪ Joan Humphrey – SYSBEN approval level is SBLAKNEY
    ▪ Pat Noseworthy – SYSBEN approval level is EAP2

• Proxies (NTRPROX) –
  o Proxies need to be established if you will be away from the office and others will be performing your EPAF approvals.
    ▪ Stephen Blakney
    ▪ Liz Pelletier
MEA’s

- Singlemea.1 and singlemea.2 will still need to be run. Disregard 2003 totals.
- NBAJOBS should be referenced for the employee’s annual salary. Make sure you take into consideration there could be multiple benefits eligible jobs (primary and secondary jobs are benefits eligible).
- PEIDTOT can be used to view the year-to-date totals for each retirement deduction for 2003.
- All 809 records have been converted into Banner using deduction code Y10.
• Deduction – Y10
• For new MEA deductions we no longer require an ‘anchor’ record, previously coded with a 1995 date.
• Brand new MEA records should be established using the first of the month as the effective date, which will default into the begin date of the DEDN record.
• Required information includes:
  o Reference Field – no longer needs to be populated.
  o Max Cont (Maximum Contribution) – Employee’s Individual Contribution Limit
  o MEA Sal (MEA Salary) – Employee’s salary used to perform calculation
  o Total % (Total Percent) – Employee’s maximum contribution percentage of salary
• To make a change or term this deduction follow procedures outlined in Advanced Benefit Training, Lesson 4.
SRA/RIC’s

- SRA and RIC’s are established using the same procedures as establishing any new deduction.
• Deductions – See attached Retirement Coding List
• Required information includes:
  o EE Amnt (Employee Amount) – Employee per pay period deduction
• To make a change or term this deduction follow procedures outlined in Advanced Benefit Training, Lesson 4.
• Deductions - VB3 - $100; VB4-$200; VB5-$500
• Required information includes:
  o EE Amnt (Employee Amount) – Employee per pay period deduction
• To make a change or term this deduction follow procedures outlined in Advanced Benefit Training, Lesson 4.
• Deduction – VS0

• Required information includes:
  o Plan – Click on the Plan button to receive a list of values – select plan that corresponds to the salary range for which employee has been approved.
  o EE Amnt (Employee Amount) – Annualized employee cost will show in this field once plan is selected. You cannot enter data into this field.

• To make a change or term this deduction follow procedures outlined in Advanced Benefit Training, Lesson 4.
• Deduction - VR0
• Required information includes:
  o EE Amnt (Employee Amount) – Employee per pay period deduction
• To make a change or term this deduction follow procedures outlined in Advanced Benefit Training, Lesson 4.
• Deduction – VA0
• Basic AD&D ($25,000) is coded with life insurance deduction set up. This deduction is for voluntary AD&D.
• Required information includes:
  o Plan – Click on the Plan button to receive a list of values – select plan that corresponds to the amount of coverage requested by employee
  o EE Amnt (Employee Amount) – Annualized employee cost will show in this field once plan is selected. You cannot enter data into this field.
• To make a change or term this deduction follow procedures outlined in Advanced Benefit Training, Lesson 4.
Benefits Eligible Employees Over 70

- Banner automatically adjusts life insurance premiums and total coverage amounts when an employee reaches age 70. The only deduction that is not automatically adjusted is VA0 (Voluntary AD&D).
  - Employees need to be moved into the appropriate plan at age 70 (see Voluntary AD&D Section above).
For now, you will be required to continue to use the program ARCACCUM for all ARC contributions prior to 2003. The ARCACCUM does give you 2003 contributions, but you need to ignore that line total on the report and take the 2003 contributions from Banner.

PEIDTOT (Deduction/Benefits Year to Date Totals Form) – Required fields for inquiring:
- Deduction – If you don’t know the correct deduction code, click on the flashlight and you will see current employee deductions. Double click on the appropriate selection and the deduction will be populated into this field.
- Employer – must say USNH.
- Year – Enter the year in which you wish to see year to date totals (ex. 2003).
- The Yearly Totals and Life to Date Totals for 2003 will match. After 2003, the Life to Date Totals will be the field you want to use for your ARC Life to Date totals.

Combine ARCACCUM yearly totals prior to 2003 added to PEIDTOT Life to Date Totals.

NOTE: Once all retirement payroll history has been converted, this single form (PEIDTOT) will be the source for ARC life to date totals.
• Deduction – Y09
• There is a group of OSRP recipients who receive a supplemental benefit from USNH. These employees have been put into a retiree job in Banner. If/when these employees pass away their job needs to be terminated using the EPAF, SBTERM Approval Category and their date of death needs to be entered on PPAIDEN, under Biographic Information Option (see Death of Employee Section for EPAF and PPAIDEN entries).

OSRP retirees receiving a supplemental benefit

<table>
<thead>
<tr>
<th>EMPLOYEE</th>
<th>POSITION NUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>LAST</td>
<td>FIRST</td>
</tr>
<tr>
<td>Davis</td>
<td>Alexina</td>
</tr>
<tr>
<td>Duquette</td>
<td>Amie</td>
</tr>
<tr>
<td>Gilman</td>
<td>Mary</td>
</tr>
<tr>
<td>Cross</td>
<td>Eleanor</td>
</tr>
<tr>
<td>Lagasse</td>
<td>Theresa</td>
</tr>
<tr>
<td>Bailey</td>
<td>Marjorie</td>
</tr>
<tr>
<td>Wiggins</td>
<td>Ruth</td>
</tr>
<tr>
<td>Plourde</td>
<td>Irene</td>
</tr>
<tr>
<td>Clark</td>
<td>Viola</td>
</tr>
<tr>
<td>Neal</td>
<td>Ettie</td>
</tr>
<tr>
<td>Bateman</td>
<td>Charles</td>
</tr>
</tbody>
</table>

• The deduction Y09 is updated when an employee starts receiving their benefit or passes away. Depending on their benefit election (either JS – Joint and Survivor or LA – Lifetime Annuity) the benefit is transferred to the spouse and/or a dependent.
• Required information includes:
  o Reference – JS (Joint and Survivor) or LA (Lifetime Annuity).
  o Value – Value of Annual Benefit
  o Bnfciary (Beneficiary) – 18 indicates that benefit is being paid to beneficiary.
• If the benefit is being paid to a beneficiary, the benefit is not termed until the benefit stops or the spouse passes away.
• To make a change or term this deduction follow procedures outlined in Advanced Benefit Training, Lesson 4.
Death of an Employee (Retiree/SIP/Transition/LTD/CWC)

- If a SIP/Transition/LTD/CWC Employee passes away you need to:
  - Review NBIJLST to verify job(s) to be terminated
    - Process termination EPAF if employee has a job
      - SBTERM
        - Using a reason code of TDEAD
    - Their date of death needs to be entered on PPAIDEN, under Biographic Information Option
      - Check the Deceased Indicator box and enter death date, age will automatically calculate.
- Using PEAESCH terminate all applicable deductions.
SIP with or without Benefits

- SIP’s (include information from Liz on payout, etc.)
- PEAEMPL record needs to be updated (note employee’s current BCAT before beginning to code):
  - ECLS 80
  - Enter BCAT you noted (ECLS 80 automatically defaults to BCAT 10 – you may have to override this with the original BCAT)
  - Home Department Org – YSBX99
  - Save
  - Under Option, select Other Information
  - Tab to field called Grouping and enter a Z to reflect the employee is not eligible for Open Enrollment
• PEAESCH – terminate all applicable deduction.
  o You must enter in the Payroll End Date if it does not default in correctly from the Query Date (which must be the last day of the pay period).
  o Refer to PEAESCH documentation contained in Benefits Advanced Training, Lesson 4.

• PDADEDN – to establish SIP deduction
  o Y15 – SIP with Benefits
  o Y16 – SIP without Benefits
  o NOTE – If there are any deductions for MCP coverage or the 62-65 plans, they must be maintained in HUM at this time.
Deduction – Y15

You are adding a Separation/Retirement Incentive (SIP) deduction for an employee who is a SIP with benefits with a begin date, representing the beginning of the SIP and an end date, representing the end of the SIP just as you would’ve done in BENDED BNTYP 880.

- If the end date is past December, 2004 it can’t be entered at this time.
- If the begin date and the end date are different, you must add the record with the begin date and the SIP information and save it. You will then need to add a new effective dated record representing the end date and change the status to terminated and save.
- If the begin date and the end date are the same, you must add the record with the begin date and the SIP information and save it. Then tab over to the status, change it to terminated and save.

Required information:
- Reference – Coding sequence for identifying the SIP that the employee went out on
  - First Four Characters – Calendar year of Plan
  - Fifth Character – Underline
  - Sixth through Ninth Characters – Next Sequential Number (refer to SIP coding matrix)
- Billing – If you don’t know the correct billing code, click on the flashlight and you will see selections:
  - N = No do not bill employee
  - Y = Yes bill employee
<table>
<thead>
<tr>
<th>ID:</th>
<th>096221453</th>
<th>Value: S Bancroft</th>
</tr>
</thead>
<tbody>
<tr>
<td>BCAT:</td>
<td>02</td>
<td>USNH</td>
</tr>
<tr>
<td>Occ:</td>
<td>1998</td>
<td>DIP Without Benefits</td>
</tr>
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</table>

**General Deduction Information**

- **Begin Date:** 01-MAY-1999
- **End Date:** 01-NAV-1999
- **Calc Rule:** 11
- **Query Date:** 24-MAY-2003

**Deduction Information**

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<tbody>
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<td>Terminated</td>
<td>1998_3701</td>
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<table>
<thead>
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<th>Title</th>
<th>Value</th>
<th>Entry</th>
<th>Amount</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Hting</td>
<td>N</td>
<td>Required</td>
<td>No Entry</td>
<td>No Entry</td>
</tr>
<tr>
<td>2</td>
<td></td>
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<td>No Entry</td>
<td></td>
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</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>No Entry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td>No Entry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td>No Entry</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
• Deduction – Y16

• You are adding a Separation/Retirement Incentive (SIP) deduction for a SIP without Benefits (ARC recipient) with a begin date, representing the beginning of the SIP and an end date, representing the end of the SIP just as you would’ve done in BENDED BNTYP 881.
  o If the end date is past December, 2004 it can’t be entered at this time.

• If the begin date and the end date are different, you must add the record with the begin date and the SIP information and save it. You will then need to add a new effective dated record representing the end date and change the status to terminated and save.

• If the begin date and the end date are the same, you must add the record with the begin date and the SIP information and save it. Then tab over to the status, change it to terminated and save.

• Required information:
  o Reference – Coding sequence for identifying the SIP that the employee went out on
    ▪ First Four Characters – Calendar year of Plan
    ▪ Fifth Character – Underline
    ▪ Sixth through Ninth Characters – Next Sequential Number (refer to SIP coding matrix)
  o Billing – If you don’t know the correct billing code, click on the flashlight and you will see selections:
    ▪ N = No do not bill employee
Full Early Retirees (FER’s)

- When notified that an employee will be transitioning to an FER, a new retiree position and budget must be established before their job record can be created. Katrina and Fran must be notified in order to establish the necessary pieces.

- NBIJLST – verify that regular budgeted position has been terminated (Job Status = T).

  The employee needs to be put into a retiree position. The annual salary assigned is the stipend amount. In addition, the employee must be put into a Position Maintenance Position (YX00BN). The annual salary assigned to this position will be equal to the difference between the last salary and the stipend amount.

  NOTE: Before beginning this process, visit employee’s PEAEMPL record and note current Benefit Category (BCAT). You will need to enter this on the EPAF.
• Use EPAF, BFERSU Approval Category (Benefits FER Set Up), which will create both of the above positions.
  o The first approval type is BENPEA, which will alter the employee’s PEAEMPL record.
    ▪ Many fields will default in – do not override any of these. You will need to enter:
      • Enter the employee’s BCAT (see NOTE above)
  o The second approval type is BENJBE, which will establish the retiree’s paying job.
    ▪ Many fields will default in – do not override any of these. You will need to enter:
      • Annual Salary
      • Leave Begin Date – Begin date of the FER
      • Anticipated Return – End date of the FER
  o The third approval type is BENOFF, which establishes the retiree’s maintenance position (YX00BN).
    ▪ Many fields will default in – do not override any of these. You will need to enter:
      • Annual Salary
• FICA, Excluded/Deductions (NBAJOBS)
  o If applicable (ONLY Liz) the retiree’s paying job may need to have FICA excluded.

- On NBAJOBS go to Options and select, Excluded Deductions/Benefits.
  o Enter Codes 302 and 305

- Add information on how is adjustment performed
• FICA Receivable Deduction on PDADEDN (if applicable)

• Deduction 321 – establish like other deductions with a per pay period amount and limit.
• PEAESCH – terminate all applicable deductions.
  o You must enter in the Payroll End Date if it does not default in correctly from the Query Date (which must be the last day of the pay period).
  o Refer to PEAESCH documentation contained in Benefits Advanced Training, Lesson 4.

• PDADEDN – to establish
  o Y08 – Stipend
  o NOTE – If there are any deductions for MCP coverage or the 62-65 plans, they must be maintained in HUM at this time.
• Deduction – Y08
• Full early retirees are eligible to receive a stipend.
• You are adding a Stipend deduction with a begin date, representing the beginning of the stipend and an end date, representing the end of the stipend just as you would’ve done in BENDED BNTYP 807.
• If the begin date and the end date are different, you must add the record with the begin date and the stipend amount and save it. You will then need to add a new effective dated record representing the end date and change the status to terminated and save.
  o If the end date is past December, 2004 it can’t be entered at this time.
• If the begin date and the end date are the same, you must add the record with the begin date and the stipend amount and save it. Then tab over to the status, change it to terminated and save.
• Required information:
  o Stipend – Code with Stipend Amount.
• Terminating a FER
  o You will process an approval category SBTERM EPAF for the paid retiree position.
    ▪ The first approval type is TERMIN. Enter Job Change Reason RXRET (Retirement).
    ▪ The second approval type is BENPEA. You do not have to enter anything.
  o You will process an approval category BENRET EPAF for the position maintenance position (YX00BN) to move them into their retirement status.
    ▪ Approval type BNJBAD - enter Job Change Reason (see attached sheet).
  o PEAESCH – terminate all applicable deduction.
    ▪ You must enter in the Payroll End Date if it does not default in correctly from the Query Date (which must be the last day of the pay period).
  o Refer to PEAESCH documentation contained in Benefits Advanced Training, Lesson 4.
Long-Term Disability (LTD)

- The employee needs to be put into a non paying position (YX00BN). The annual salary assigned is the last active salary for the employee.
  - PEISALH (Employee Salary History Inquiry Form) to identify last Annual Salary.

NOTE: Before beginning this process, visit employee’s PEAEMPL record and note current Benefit Category (BCAT). You will need to enter this on the EPAF.

- Use EPAF, BLTDSU Approval Category (Benefits LTD Set Up) for YX00BN position.
  - The first approval type is BENPEA which will alter the employee’s PEAEMPL record.
    - Many fields will default in – do not override any of these. You will need to enter:
      - Enter the employee’s BCAT (see NOTE above)
  - The second approval type is BENOFF, which will establish the LTD non-paying job.
    - Many fields will default in – do not override any of these. You will need to enter:
      - Annual Salary
• Leave Begin Date – Begin date of the LTD
• Anticipated Return – End date of the LTD

• PEAESCH – terminate all applicable deduction.
  o You must enter in the Payroll End Date if it does not default in correctly from the Query Date (which must be the last day of the pay period).
  o Refer to PEAESCH documentation contained in Benefits Advanced Training, Lesson 4.

• Terminating an LTD
  o You will process an approval category SBTERM EPAF for the long term disability position YX00BN.
    ▪ The first approval type is TERMIN. Enter Job Change Reason BXLTD.
    ▪ The second approval type is BENPEA. You do not have to enter anything.
  o PEAESCH – terminate all applicable deduction.
    ▪ You must enter in the Payroll End Date if it does not default in correctly from the Query Date (which must be the last day of the pay period).
    ▪ Refer to PEAESCH documentation contained in Benefits Advanced Training, Lesson 4.
  o NOTE – If there are any deductions for MCP coverage or the 62-65 plans, they must be maintained in HUM at this time.
Chronic Workers Compensation (CWC)

- The employee needs to be put into a non paying position (YX00BN). The annual salary assigned is the last active salary for the employee.
  - PEISALH (Employee Salary History Inquiry Form) to identify last Annual Salary.

NOTE: Before beginning this process, visit employee’s PEAEMPL record and note current Benefit Category (BCAT). You will need to enter this on the EPAF.

- Use EPAF, BCWCSU Approval Category (Benefits CWC Set Up) for position YX00BN.
  - The first approval type is BENPEA which will alter the employee’s PEAEMPL record.
    - Many fields will default in – do not override any of these. You will need to enter:
      - Enter the employee’s BCAT (see NOTE above)
The second approval type is BENOFF, which will establish the non-paying job.
  - Many fields will default in – do not override any of these. You will need to enter:
    - Annual Salary
    - Leave Begin Date – Begin date of the CWC
    - Anticipated Return – End date of the CWC or if unknown use 12/31/9999.

- PEAESCH – terminate all applicable deduction.
  - You must enter in the Payroll End Date if it does not default in correctly from the Query Date (which must be the last day of the pay period).
  - Refer to PEAESCH documentation contained in Benefits Advanced Training, Lesson 4.

- Terminating an CWC
  - You will process an approval category SBTERM EPAF for the long term disability position YX00BN.
    - The first approval type is TERMIN. Enter Job Change Reason BXCWC.
    - The second approval type is BENPEA. You do not have to enter anything.
  - PEAESCH – terminate all applicable deduction.
    - You must enter in the Payroll End Date if it does not default in correctly from the Query Date (which must be the last day of the pay period).
    - Refer to PEAESCH documentation contained in Benefits Advanced Training, Lesson 4.
  - NOTE – If there are any deductions for MCP coverage or the 62-65 plans, they must be maintained in HUM at this time.
Employees that are Just Retiring (not becoming a SIP, FER, etc.)

NOTE: Before beginning this process, visit employee’s PEAEMPL record and note current Benefit Category (BCAT). You will need to enter this on the EPAF.

• Use EPAF, BENOFF Approval Category (Benefits Offset Job Entry).
  o The first approval type is BENOFF, which will establish the non-paying job YX00BN.
    ▪ Many fields will default in – do not override any of these.
    ▪ Enter Job Change Reason Code (see listing)
  o The second approval type is BENPEA which will alter the employee’s PEAEMPL record.
    ▪ Many fields will default in – do not override any of these. You will need to enter:
      • Enter the employee’s BCAT (see NOTE above)
  o PEAESCH – terminate all applicable deduction.
    ▪ You must enter in the Payroll End Date if it does not default in correctly from the Query Date (which must be the last day of the pay period).
    ▪ Refer to PEAESCH documentation contained in Benefits Advanced Training, Lesson 4.
  o NOTE – If there are any deductions for MCP coverage or the 62-65 plans, they must be maintained in HUM at this time.
Domestic Partner (DP’s)

- When coding domestic partners, the effective date of the default earning must be the first day of the pay period in which the domestic partner deductions are effective, even though the deductions themselves will be the first of the month.

- Adding a New Employee
  - The employee needs to be put into a domestic partner non paying position (YXB1BN).
  - Use EPAF, BDOMPO Approval Category (Domestic Partner Set Up) for position YXB1BN which will establish the earn codes for domestic partner earning.
    - The first approval type is DOMPJB – enter the Payroll ID
      - B1 – Salaried Employee
      - B2 – Hourly Employee
    - The second approval type is EARN.
      - Enter the earn code 920
      - Enter 1 – in units field
      - Enter the per pay period amount of imputed income

- Change of Status
  - If employee drops their domestic partner
    - Produce Benefits Enrollment Form
    - PEAESCH to terminate both pre-tax and after-tax DP deductions
    - PEAEMPL to change BCAT
    - PDADEDN to add new choices

- Terminating Employment from USNH – benefits are ending
  - Pat to receive FYI on all termination EPAF’s
  - Use EPAF BJBTRM Approval Category (Job Termination) for position YXB1BN and enter Job Change Reason.

- Annual Open Enrollment Changes
  - Even for open enrollment, when coding domestic partners, the effective date of the default earning must be the first day of the pay period of the new year, even though the deductions themselves will be effective January 1st.
    - Use EPAF BDPERC Approval Category for position YXB1BN (Domestic Partner Default Earn Code Change) to:
      - Enter the earn code 920
      - Enter 1 – in units field
      - Enter the new per pay period amount of imputed income
Benefits Exceptions

- As an example, if an individual has been terminated from their job but is allowed, for some reason, to maintain benefits which include life insurance and/or LTD for a period of the time, the employee must have a non-paying position.

NOTE: Before beginning this process, visit employee’s PEAEMPL record and note current Benefit Category (BCAT). You will need to enter this on the EPAF.

- Use EPAF, BENOFF Approval Category (Benefits Offset Job Entry) for position YX00BN.
- The first approval type is BENOFF, which will establish the non-paying job.
  - Many fields will default in – do not override any of these.
  - Enter Job Change Reason Code BEEXC
- The second approval type is BENPEA which will alter the employee’s PEAEMPL record.
  - Many fields will default in – do not override any of these. You will need to enter:
    - Enter the employee’s BCAT (see NOTE above)
- PEAESCH – terminate all applicable deduction.
  - You must enter in the Payroll End Date if it does not default in correctly from the Query Date (which must be the last day of the pay period).
  - Refer to PEAESCH documentation contained in Benefits Advanced Training, Lesson 4.
- PPACMNT – comment code, BEX
  - Do not put sensitive information in comments section
    - Code effective dates of exception and note to see system file
  - Do not type over OTI, Operational Title
- NOTE – If there are any deductions for MCP coverage or the 62-65 plans, they must be maintained in HUM at this time.

- Terminating a Benefits Exception
  - You will process an approval category SBTERM EPAF for the exception position YX00BN.
    - The first approval type is TERMIN. Enter Job Change Reason BXEXC.
    - The second approval type is BENPEA. You do not have to enter anything.
  - PEAESCH – terminate all applicable deduction.
    - You must enter in the Payroll End Date if it does not default in correctly from the Query Date (which must be the last day of the pay period).
Refer to PEAESCH documentation contained in Benefits Advanced Training, Lesson 4.

NOTE – If there are any deductions for MCP coverage or the 62-65 plans, they must be maintained in HUM at this time.

**STGR Codes on PEAEMPL – (Leave Pointer)**

- The Leave Pointer code controls the production of benefit enrollment forms during open enrollment. Forms will be produced for any PEAEMPL records where this value equals blank, D, L, R, W. In addition the employee must have a primary job.

- Pre-1990 LTD and Workers Compensation Employees
  - Employees who went on to LTD and/or Workers Compensation pre-1990 are coded as such on the PEAMPL form, under Options, Other Information in the Grouping field.