


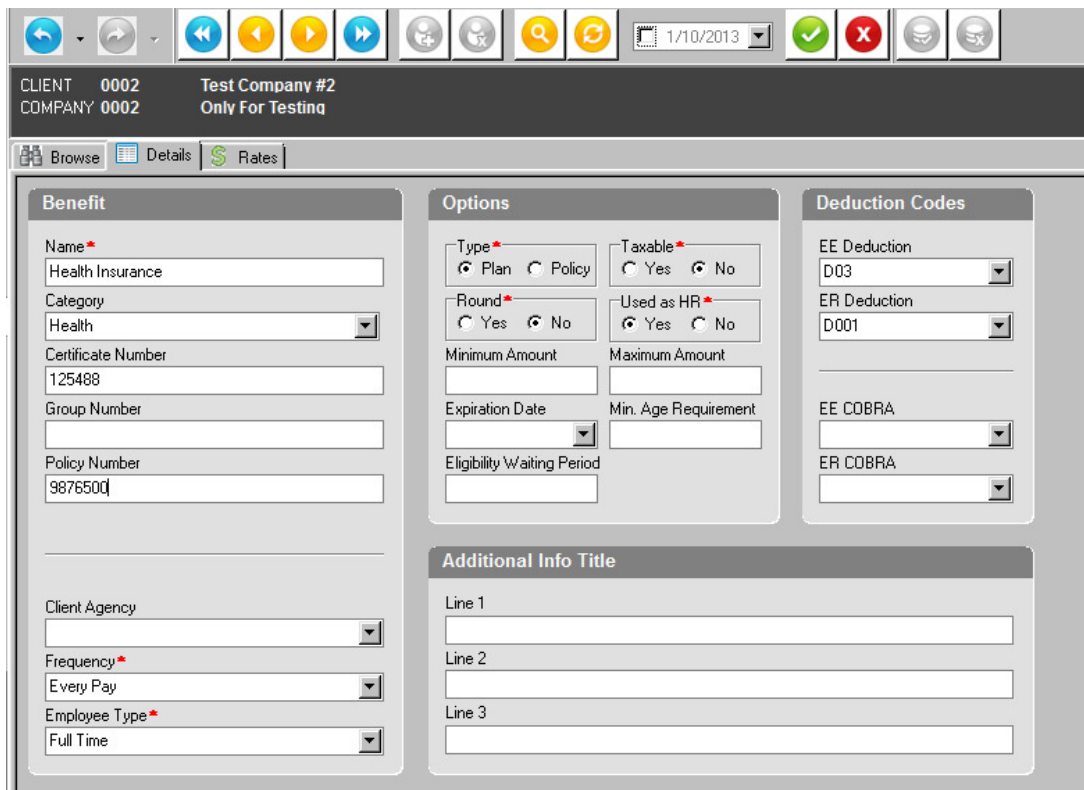



## Setting up or Changing HR Benefits

To add a Benefit you need to go to **Company – Benefits - Benefits**

1. To add a Benefit, click on the green plus key  or Alt-Insert. All the Red fields must be filled in to be able to save your Benefit, but you should be filling in all the applicable fields based on your policy.
2. To Change a Benefit, go to the Benefit that you need to adjust. Go to the Details tab and update all necessary information.
3. Once you have entered or changed all of the necessary data either click on the Green Check mark  or click F10, to save then click on the Green stack of coins to Commit.  These are located in the top right hand corner of your screen.



The screenshot displays the 'Details' tab for a benefit. At the top, there is a navigation bar with icons for back, forward, search, and other functions, along with a date dropdown set to 1/10/2013. Below this, the client and company information is shown: CLIENT 0002, COMPANY 0002, Test Company #2, Only For Testing. The main content area is divided into three sections: 'Benefit', 'Options', and 'Deduction Codes'. The 'Benefit' section includes fields for Name (Health Insurance), Category (Health), Certificate Number (125488), Group Number, Policy Number (9876500), Client Agency, Frequency (Every Pay), and Employee Type (Full Time). The 'Options' section includes Type (Plan), Round (No), Minimum Amount, Expiration Date, Eligibility Waiting Period, Taxable (No), and Used as HR (No). The 'Deduction Codes' section includes EE Deduction (D03), ER Deduction (D001), EE COBRA, and ER COBRA. At the bottom, there is an 'Additional Info Title' section with three lines for text entry.



4. Go to the Rates tab at the top. This is where you load in the various levels or tiers for this particular benefit. You will see that the screen is split up into 2 parts. Looking at the bottom half of the screen you will see a Create key  Create on

the left and on the right. The create button on the left is used to create the rate descriptions (Single, Family, 2 Person etc.). The create button on the right hand side of the screen is used to put in the amounts or rates for each of those descriptions under the rate detail section.

The screenshot shows a software interface for managing health insurance rates. The interface is divided into four main sections:

- Rate Description:** A list of descriptions: Single Amount, Double Amount, and Family Amount.
- Rates:** A table with columns: Rate Description, Max Dependents, Type (% or Amt), EE Part, ER Part, COBRA Amount, and E/D Group. The table shows one row for 'Family Amount' with values: Max Dependents (blank), Type (% or Amt) (Amount), EE Part (44.82), ER Part (25.00), COBRA Amount (blank), and E/D Group (blank).
- Description Detail:** A section with a 'Create' button and a 'Delete' button. The 'Description' field contains 'Family Amount'.
- Rate Detail:** A section with 'Amount' and 'Percent' tabs, a 'Create' button, and a 'Delete' button. It contains fields for:
 

Description *	EE Part	EE Ratio	Amount		
Family Amount	44.82	64.19	69.82		
Max Dependents	Start Date *	End Date	ER Part	ER Ratio	COBRA Amount
	1/1/2013	1/1/2014	25.00	35.81	


- To add a tier, click on the Create key  on the right hand side of the screen.
- Enter the description of your level, select whether you are entering in the Amount or Percent, then fill in the applicable fields with your specific data.
- To Change a tier, go to the appropriate level and edit the information. At the bottom, enter the updated Amount or Percent. The system will refigure the EE Part and ER Part. Make any necessary change to the Parts and/or Ratios.
- Once you have entered all the necessary data, click the Green Check mark  or click F10 to save.
- Continue with steps 4-6 until all of your levels have been set up.

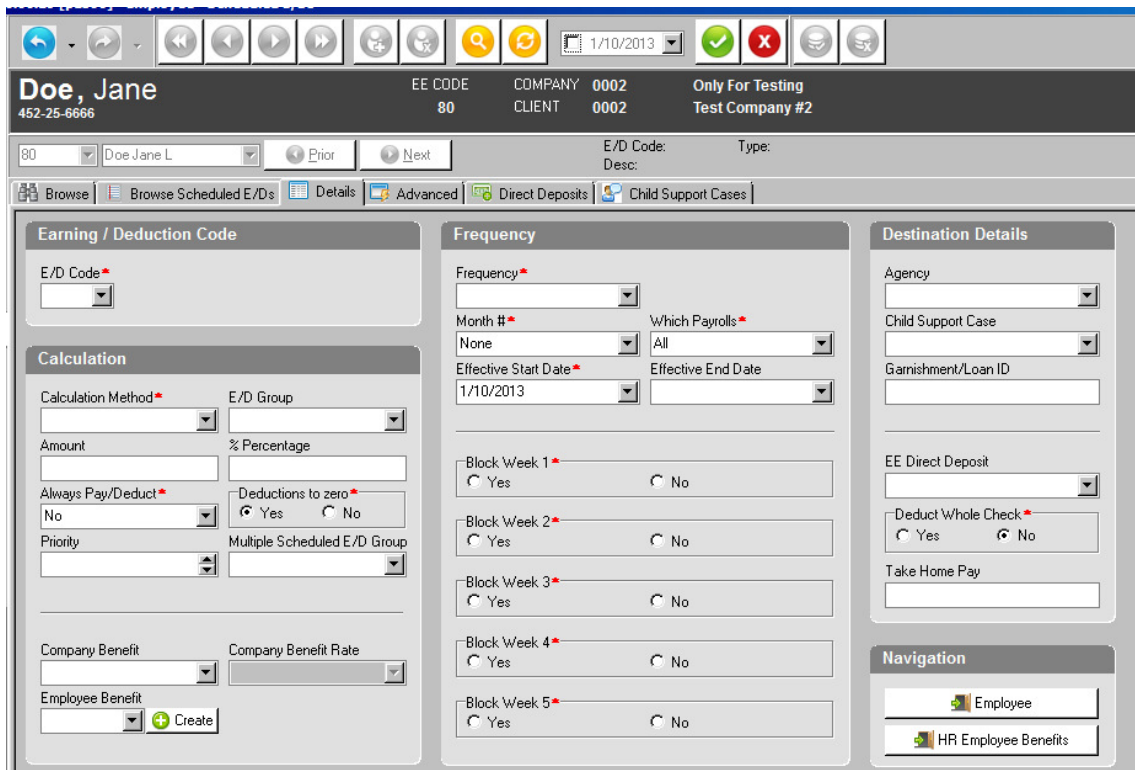
**\*\*If you have more Benefits to set up, start over at step 1 and set up the next benefit. Continue following these instructions until all of your benefits and levels have been successfully set up. You are now ready to set up these Benefits on your employees. Please remember that if you have made any additions or changes to Benefits, you must click on the Refresh Data Button at the top of the screen before you can see these changes in Employee-Scheduled E/Ds.**

## Setting up an Employee with Benefits

HR Benefits is a very useful piece to the HR and Payroll System. Not only do you have the ability to track what benefits your employees have available to them, but you can also apply global premium changes as well.



To add Benefit deductions to your employees you need to go to **Employee – Scheduled E/Ds**.

1. Go to the appropriate employee and click on the green plus key  or hold down the Alt-Insert keys.



The screenshot shows the 'Employee – Scheduled E/Ds' setup screen for Jane Doe. The interface is organized into several panels:

- Header:** Employee name 'Doe, Jane' (ID: 452-25-6666), EE CODE 80, COMPANY 0002, CLIENT 0002, and 'Only For Testing Test Company #2'.
- Navigation:** Buttons for 'Browse', 'Browse Scheduled E/Ds', 'Details', 'Advanced', 'Direct Deposits', and 'Child Support Cases'.
- Earning / Deduction Code:** Includes an 'E/D Code' dropdown menu.
- Calculation:** Contains 'Calculation Method', 'Amount', 'Always Pay/Deduct' (No/Yes), 'Priority', 'E/D Group', 'Deductions to zero' (Yes/No), and 'Multiple Scheduled E/D Group'.
- Frequency:** Includes 'Frequency', 'Month #', 'Which Payrolls', 'Effective Start Date' (1/10/2013), 'Effective End Date', and five 'Block Week' options (Block Week 1-5) with 'Yes' and 'No' radio buttons.
- Destination Details:** Includes 'Agency', 'Child Support Case', 'Garnishment/Loan ID', 'EE Direct Deposit', 'Deduct Whole Check' (Yes/No), and 'Take Home Pay'.
- Navigation:** Buttons for 'Employee' and 'HR Employee Benefits'.

2. In the E/D code section, pull in the appropriate deduction code.
3. On the left side of the screen you will see a drop down box for Company Benefit. Select the benefit that corresponds with the deduction code you have selected i.e. medical code with the medical benefit, dental code with the dental benefit.
4. Select the applicable Company Benefit Rate for this employee. The Rate is the level that the employee has selected i.e. Single, 2 Person, Family, etc. You will see that the amount field is grayed out and cannot be changed here because it is pulling this data from the Client Benefit information.
5. Once you have entered all the necessary data, click on the Green Check mark  or F10 to save, then the Green stack of coins to Commit.  These are located in the top right hand corner of your screen.