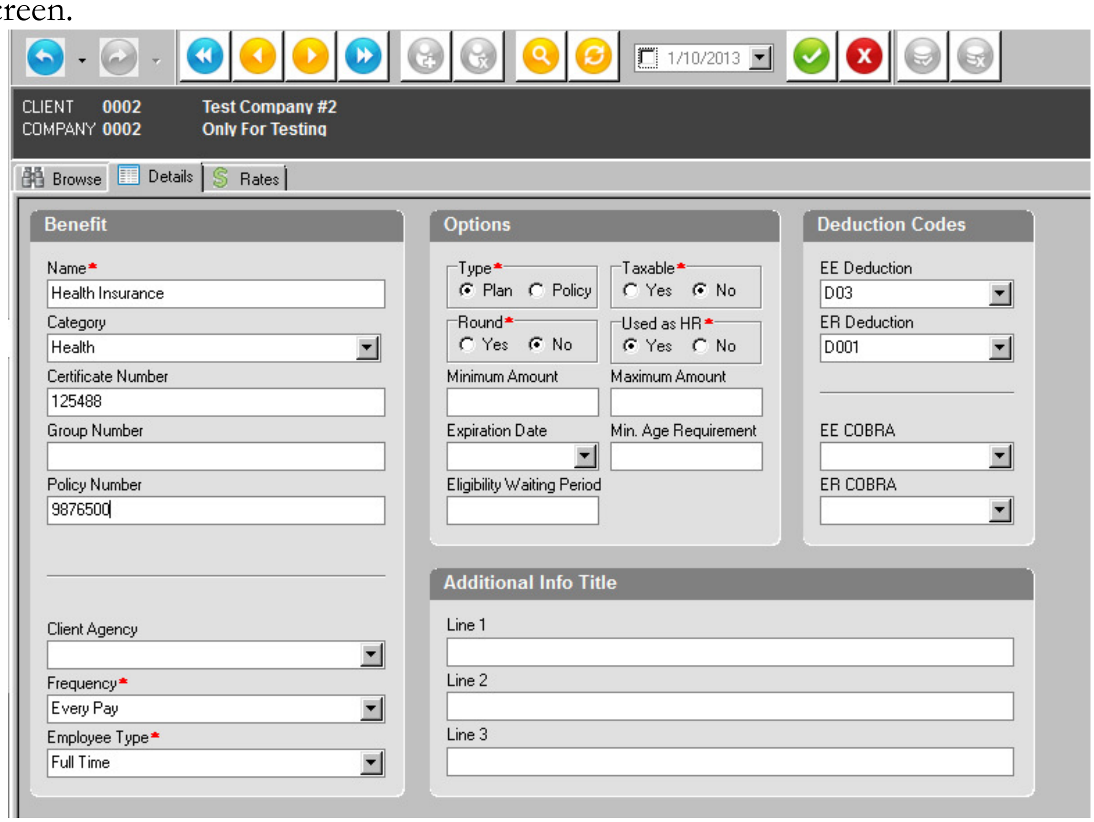
# Setting up or Changing HR Benefits

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.

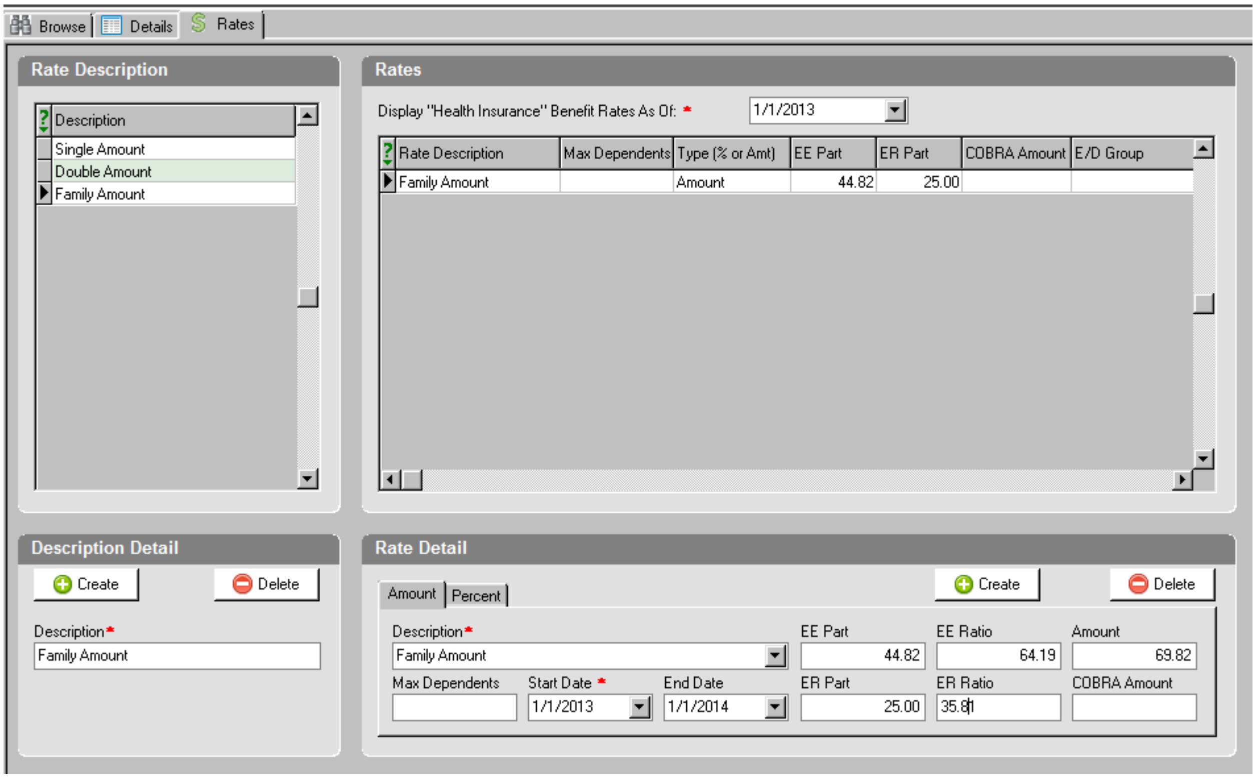
2. To Change a Benefit, go to the Benefit that you need to adjust. Go to the Details tab and update all necessary information.

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.




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 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.




5. To add a tier, click on the Create key 

on the right hand side of the screen.

6. 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.

7 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.

6. Once you have entered all the necessary data, click the Green Check mark  or click F10 to save.

7. Continue with steps 4-6 until all of your levels have been set up.

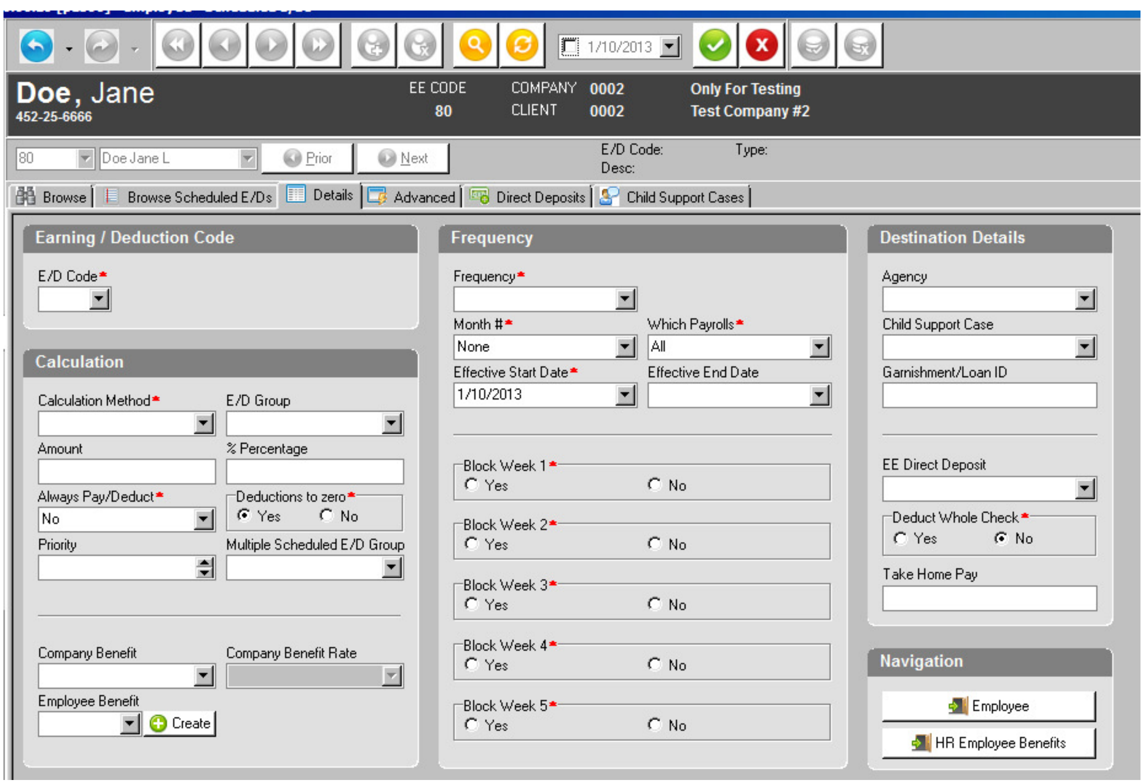
****If you have more Benefits to set up, start over at step 1 and set up the next benefit. Continue following these instructions until all of your benefits and levels have been successfully set up. You are now ready to set up these Benefits on your employees. Please remember that if you have made any 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.



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.