

Benefit Setups

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Synopsis:

Benefit Setups, Benefit Categories, Benefit Status Codes and Benefit Rate Details all work together to help configure Benefits. This manual will define the roles of each feature and then walk through a scenario of how they could be used.

NOTE: Benefit Status Code

With v15, if you use Benefit Status Codes the system will copy that to the payroll ledger

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- **Default Employer Contribution Benefit Category:**

TO ACCESS BENEFITS SETUPS

- Full Payroll Menu
- Setup Group column
- HR Setup
- Benefit Setup – Benefit Categories – Benefit Status Codes – Benefit Rate Details

Full Payroll Menu						
Payroll Processing	Reports	History	Periodic Activities	Setup	Setup Groups	Posting Setup
Payroll Employees	Payroll Report	Posted Payroll	Periodic Processing..	Payroll Setup	Additional Setups..	Employee Posting Groups
Payroll Processing	US Tax Reports..	Payroll Ledger Entries	Financial Periodic Activities..	Payroll Codes	HR Setup..	Earnings
Batch Payroll Processing	Payroll Financial Reports..	Payroll Statistics	ACA Compliance..	Pay Cycles..	Payroll Divisions	Holdings /
Payroll Applicants	Payroll Employee Info..	Posted Batch List	Web Portal Documents..	Payroll Calc. Formulas	Emp. Info Change Setup	Actions
Payroll Journal	HR Reports..	PTO Ledger Entries	Create Emp. Info. from Template..	Earnings Rates	HR Tracking Codes	Employer Taxes
PTO Management..	Field Select. Reports..	Hours Detail Entries	Time Transfer Reports..	Payroll Tax Setup	Benefit Setup	Employer Contributions
Enter Hours / Quantity..	Time / PTO Reports..	Approved PTO Hours	Labor Cost Updates..	Customer Payroll Tax Setup	Benefit Categories	Reimbursements
Emp. Change Req./Approve..	Labor Costing Information..	Other Ledgers..	Automatic Data Migration..	State Tax IDs	Benefit Status Codes	Benefits
					Benefit Rate Details	
					Security Group Codes	Benefits
					Security Group User ID Setup	Benefits
					Certification Setup	
					Qualification Setup	
					Position Qualifications	
					EEO Codes	
					Ethnicity List	

BENEFIT SETUP

This allows you to change the Benefit Summary Report's format. This is how the system knows what to put in the dependent setup

Benefit Setup

Benefit Summary Rep...
Pending Request Dep... ☐

Benefit Summary Rep...
Benefit Age Limit

Dependent Setup

Health Insurance Ben...
Benefit 6 Code

Benefit 2 Code
Benefit 7 Code

Benefit 3 Code
Benefit 8 Code

Benefit 4 Code
Benefit 9 Code

Benefit 5 Code
Benefit 10 Code

Web Portal Setup >

BENEFIT CATEGORIES

These settings determine what options are available in the 'Employee Dependents' table on the employee card. As you can see if you check off 'Show Dependent' checkbox in the 'Benefit Categories' (see screenshots below) the categories then become available selections in the 'Payroll Employee Dependents' table.

BENEFIT CATEGORIES | WORK DATE: 10/10/2019

Search
 New
 Edit List
 Delete
 Open in Excel

Code ↑	Description	Show Benefic...	Show Depen...	Show in Benefit Summa...	Do Not Show in Check Stub	Term. Date to Use
→ AFLAC LIFE	Aflac Life Insurance	☐	☒	☐	☐	
HEALTH	Health Insurance	☐	☒	☐	☐	
		☐	☐	☐	☐	

← PAYROLL EMPLOYEE DEPENDENTS | WORK DATE: 10/10/2019

Search + New Edit List Delete Open in Excel

First Name	Birth Date	Phone No.	Eme... Con...	Hea... Insu...	Aflac Life Insu...	Ben...	Con... Ben...	Percent of Distribution
→			☐	☐	☐	☐	☐	0.00
			☐	☐	☐	☐	☐	

If you apply 'Benefit Categories' to the 'Benefit Setup' tab of a 'Deduction Card' in the 'Benefit Category field' the system will know this deduction is a health insurance deduction and it will drive reports etc.

← ... SETUP CARD | WORK DATE: 10/10/2019

✓ SAVED

Deduction · HEALTH INSURANCE

Remove Uneditable Lookup Codes

Benefit Setup

Fringe Benefit ☐

Treat as Earnings ☐

Use Employer Contri... ☐

Employer Contributio...

Exclude Employer Co... ☐

Benefit Category

Benefit 834 Code

Health Insurance Ded... ☐

Health Insurance Con... ☐

Retirement Employer ... ☐

Show more

BENEFIT STATUS CODES

These codes can be set up and utilized in the 'Benefit Status Code' field of the payroll code setup. And then from there, you would tie the payroll code with the 'Benefit Status Code' to a process procedure.

← BENEFIT STATUS CODES | WORK DATE: 10/10/2019 ✓ SAVED

Search + New Edit List Delete Open in Excel

Code ↑	Description	834 Value
→ EMP CHILDREN	:	
EMP ONLY		
EMP SPOUSE		
FAMILY		

BENEFIT RATE DETAILS

This is where you set the rate details for your Benefit Status Codes ie, the Payroll Code, the Benefit Status Code, the Starting Date, Deduction Amount, Employer Contribution Amount and Ending Date if applicable.

← BENEFIT RATE DETAILS | WORK DATE: 10/10/2019 ✓ SAVED

Search + New Edit List Delete Open in Excel

Payroll Code	Benefit Status Code	Starting Date ↓	Deduction Amount	Employer Contribution Amount	Ending Date
→ FSA	FAMILY	1/1/2019	150.00	150.00	
FSA	EMP SPOUSE	1/1/2019	80.00	80.00	
FSA	EMP ONLY	1/1/2019	50.00	50.00	
FSA	EMP CHILDREN	1/1/2019	100.00	100.00	

USAGE SCENARIO

When setting up benefits, using the features defined above, you can set up the system to determine the appropriate benefit deduction amount based on the Benefit State Code that is elected. In the following scenario, we are setting up a Flexible Spending Account (FSA) for an employee.

Here are the steps to set that up:

STEP 1. Set Benefit Status Codes

The Benefit Status Code needs to be set in the Deduction Card assigned to the employee.

- Navigate to 'Benefit Status Codes' and set up appropriate codes

← BENEFIT STATUS CODES | WORK DATE: 10/10/2019 ✓ SAVED

Search + New Edit List Delete Open in Excel

Code ↑	Description	834 Value
→ EMP CHILDREN		
EMP ONLY		
EMP SPOUSE		
FAMILY		

- Apply the 'FSA' Deduction code to the employee if needed.
- Open the FSA Deduction Card for the employee
- Click 'Show More'

← ...DUCTION CARD | WORK DATE: 10/10/2019 ✓ SAVED

TEST-EMP-AK · Deduction · FSA · 1/2/2019

Employee Deduction Setup

[Show more](#)

Code	FSA	Employee Deduction ...	
Description	Flexible Spending Account	Employee Deduction ...	0.00
Amount Formula	Benefit Calculation Procedure	Total Contribution Li...	
Amount / Percent	0.00	Total Contribution Bal...	0.00
Limit Does Not Reset ...	☐	Max Percent of Net I...	

- Select appropriate 'Benefit Status Code' for employee

← ...DUCTION CARD | WORK DATE: 10/10/2019 ✎ + 🗑 ✓ SAVED 📄 ↗

TEST-EMP-AK · Deduction · FSA · 1/2/2019

Employee Deduction Setup Show less

Code	FSA	Minimum Net Pay	
Description	Flexible Spending Account	Starting Date	1/2/2019
Amount Formula	Benefit Calculation Procedure	Ending Date	
Amount / Percent	0.00	Garnishment Case Nu...	
Benefit Procedure A...	80.00	Garnishment Cause N...	
Limit Does Not Reset ...	☐	Max Percent of Net I...	
Employee Deduction ...		Custom Deduction Li...	
Employee Deduction ...	0.00	Benefit / Coverage A...	
Total Contribution Li...		Benefit Category	
Total Contribution Bal...	0.00	Benefit Status Code	EMP SPOUSE

STEP 2. Setup Process Procedure

There needs to be a 'Process Procedure' with the line 'Option 2' – Get Benefit Status Code Amount linked to the payroll code 'FSA'

- Go to 'Process Procedure Codes' and create a code 'Flexible Med' with Type: Procedure

← PROCESS PROCEDURE CODES | WORK DATE: 10/10/2019 ✓ SAVED 📄 ↗

🔍 Search + New 📋 Edit List 🗑 Delete 📅 Process Procedures 📊 Open in Excel 🔍 ☰

Type ↑	Code ↑	Description
Procedure	FIXED AMT	
→ Procedure	FLEXIBLE MED	

- Go to 'Process Procedures' and open 'Flexible Med' code

← PAYROLL PROCESS PROCEDURES | WORK DATE: 10/10/2019

Search + New Manage Copy From Procedure Header Set Active Payroll Codes

Code ↑	Starting Date ↑	Ending Date	Earnings Calculation	Apply to All Employees
FIXED AMT	1/1/2019		Actual Earnings	☐
FLEXIBLE MED	1/1/2019		Actual Earnings	☐

- Set Process Procedure Code with 'Option 2' – Gent Benefit Status Code Amt.

← ...URE HEADER | WORK DATE: 10/10/2019

FLEXIBLE MED · 1/1/2019

Copy From Procedure Header Set Active Payroll Codes More options

General

Code **FLEXIBLE MED**

Starting Date 1/1/2019

Ending Date

Earnings Calculation Actual Earnings

Payroll Header Date t... Payment Date

Apply to All Employees ☐

Use Fixed Date in Ag... ☐

Age Calculation Fixed...

Procedure Audit Ena... ☐

Lines Manage

Calculation Order ↑	Procedure Operation	Procedure Operation 2	Amount
→ 10	Option 2 Procedure	Get Benefit Status Code Amt.	

- Go to 'Payroll Codes' and open the FSA Deduction Card
- Apply 'Flexible Med' Code in 'Process Procedure Code' field

← ... SETUP CARD | WORK DATE: 10/10/2019

✓ SAVED

Deduction · FSA

✕ Remove Uneditable Lookup Codes

Payroll Code

Show less

Type	Deduction	Process Procedure C...	FLEXIBLE MED	...
Code	FSA	W2 Classification	12D	
Description	Flexible Spending Account	Sorting No.		200
Manual Input Allowed	☒	Blocked	☐	

Deduction Setup

Show more

STEP 3. Set Benefit Rates

Once you set up your benefit rates that are tied to the payroll code 'FSA', the Benefit Status Code applied to the Employee Deduction Card will determine the appropriate amounts.

- Open 'Benefit Rate Details' and select the payroll code 'FSA'
- Select a 'Benefit Status Code'
- Select a 'Starting Date'
- Enter a 'Deduction Amount'
- Enter an 'Employer Contribution Amount'
- Enter an 'Ending Date' if applicable.

This is a setting in the Additional Setups section of Payroll Setups. If a Default Employer Contribution Benefit Category is entered in the field, it will automatically insert it when you create any new employer contribution payroll codes.

This is helpful because you can set up a benefit category set to 'Do Not Show in Check Stub'. This setting will exclude anything linked to the Benefit Category from showing on a check stub.

Additional Payroll Setup

General

Allow Employer Cont... ☐

Reset Payroll Lines on... ☐

Sort Payroll Lines Bas... ☐

Default Emp. Cont. B... EMP CONT NO STUB

Auto-Apply Expense ... ☒

← BENEFIT CATEGORIES ✓ SAVED

Search + New Edit List Delete Page

Code ↑	Description	Show Benefic...	Show Depen...	Show in Benefit Summ...	Do Not Show in Check Stub	Term. Date to Use
→ EMP CONT NO ST	Employer Cont Not on Stub	☐	☐	☐	☒	
LIFE INS	Life Insurance	☐	☐	☐	☐	
MEDICAL	Medical	☐	☐	☐	☐	
		☐	☐	☐	☐	

Employer Contribution · TEST2

[✕ Remove Uneditable Lookup Codes](#)

Payroll Code

[Show more](#)

Type	Employer Contribution ▼	Manual Input Allowed	☒
Code	TEST2	Blocked	☒
Description	Benefit Category Testing		

Benefit Setup

[Show more](#)

Fringe Benefit	☒	Benefit Category	EMP CONT NO STUB ▼
Treat as Earnings	☒	Benefit 834 Code	
Use Employer Contrib...	☒	Health Insurance Ded...	☒
Employer Contributio...		Health Insurance Cont...	☒
Exclude Employer Co...	☒	Retirement Employer ...	☒