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HR Benefit, GTL & ACA Guide 2.0

The Archdiocese of New Orleans has standardized benefits for all of the locations. You will be utilizing the **Employee Benefit** screen under the **Human Resource** tab to maintain the following benefits.

- Medical
- Dental
- Vision

Below are the steps you will need to follow to maintain your existing employees or new hires.

Changing a Current Benefit Rate

The screenshot shows the 'HR Employee Benefits' interface. A red arrow points to the 'Rate Level' dropdown menu, which is currently set to '2 - EMPLOYEE & SPOUSE'. The dropdown menu is open, showing options: '1 - EMPLOYEE', '2 - EMPLOYEE & SPOUSE', '3 - EMPLOYEE & CHILD', '4 - EMPLOYEE & FAMILY', and '5 - PART TIME'. Below the dropdown, the 'Employee' section shows a table with columns for Employee, Company, Total, Premium Frequency, Employee Pay Cycle, and Deduction Last Pushed. The 'Override Rates' section has three rows for SEQ 1, 2, and 3, each with fields for Employee Amount, Employer Amount, and Effective Date. The 'Dependent Information' section has a 'Select to ADD a Dependent' dropdown.

1. To change a benefit rate for an existing employee. Choose the employee from the employee list located on the right hand side.
2. Using the drop down, select the **Benefit Code** you need to change.
3. Select the rate from the **Rate Level**. The rates will update for the employee and company level below once a new rate is selected. This will automatically update the employee's deduction on the payroll side.
4. Click **Save** at either the bottom or top of the screen.



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Adding a New Benefit to an Employee

1. To add a new benefit to an employee, choose the employee from the employee listing located at the right hand side.
2. Click on the **Add New** icon at the top of the screen.
3. The **Benefit Code** field will display the company level benefits the employee is currently not participating in.
4. Select the benefit you want to add to the employee. Once you have selected the benefit, the company level information will populate the applicable fields.
5. Select the **Rate Level** you want to apply to the employee. Once the rate level is selected, the employee and company fields will populate with the corresponding rate.
6. Input the **Eligible** and **Effective Dates**
7. Click **Save**
8. The payroll deduction will then be set up in payroll.



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Stop an Employee Benefit/Voluntary Deduction

HR Employee Benefits

Benefit Code GOLD - MEDICAL			
Decline No			
Status Historical Benefit	Rate Level 1 - FAMILY	Policy Number 456	Coverage Amount
Deduction Code MED - MEDICAL	Deduction Freq Every pay	Deduction Flag Yes	Push to Deduction No
Eligible Date 06/01/2016	Effective Date 06/01/2016	Disenroll Date 09/08/2016	Auto Update Off
Employee \$10.00	Company \$20.00	Total \$30.00	Premium Frequency Taken Weekly
Deduction Last Pushed		Employee Pay Cycle Bi-Weekly	
Select to ADD a Beneficiary			

1. To stop a benefit for an employee, choose the employee from the employee listing located at the right hand side.
2. Choose the benefit that needs to be stopped from the **Benefit Code** drop down.
3. Move the **Status** field to **Historical Benefit**.
4. The **Disenroll Date** will open up allowing you to populate the disenrollment date. This is mandatory field and must be filled out.
5. Click **Save**. This will stop the voluntary deduction for the employee on the payroll side.

***Note:** You will also need to add a disenrollment date for any dependents you have tied to the benefit.



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Override Rates

This feature allows you to override the amounts for benefits for a specified period of time based on dates entered.

HR Employee Benefits

Benefit Code
 AFLAC - AFLAC SHORT TERM B-W

Decline
 No

Status: Current Benefit | Rate Level: 4 - FAMILY | Policy Number: 1506500 | Coverage Amount:

Deduction Code: HLTH - BCBS-WKLY | Deduction Freq: Every pay | Deduction Flag: Yes | Push to Deduction: On Input | Auto Update: On

Eligible Date: 09/05/2016 | Effective Date: 02/02/2011

Employee: \$80.00 | Company: \$350.00 | Total: \$430.00 | Premium Frequency: Taken Biweekly | Employee Pay Cycle: Bi-Weekly

Deduction Last Pushed: \$80.00

Select to ADD a Beneficiary

Override Rates

SEQ	Employee Amount	Employer Amount	Effective Date
1	40	175	09/16/2016
2	80	350	09/30/2016
3			

Dependent Information

1. Enter in the **Employee Amount** and **Employer Amount** if applicable that you would like to deduct from the employee.
2. Enter the check date under the **Effective Date** when you want the amount to change. You can follow it up with the original amount on the second sequence line with the check date you want it to switch back.
3. Once the date has passed, you will **need** to clear these amounts out.



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Setting up GTL (Group Term Life Auto-calculation)

A new **GTL** deduction code has been set up for the Archdiocese of New Orleans that will replace the existing **GTL** code. This new code will eliminate the need to set up GTL as an earning and a deduction. You only have to set it up once, the system will do the calculations automatically each pay period.

1. To add a new GTL deduction, click on the icon **New Deduction**.
2. Select from the company deduction listing **GTL**.
3. Enter in the total coverage amount (coverage + base) in the **Original Limit** field.
4. Click **Save** either at the bottom or top of the screen.

Employee Voluntary Deductions

Voluntary Deduction Description GTL - GROUP TERM LIFE				
Amount	Percent	Limit	Original Limit	Arrears
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$79,000.00	<input type="text"/>
Remaining Limit	Current Arrears			
<input type="text"/>	<input type="text"/>			

Optional Parameters:

Behavior GTL calc based on age/annual limit		Frequency One time GTL annual calc or catchup	
Rank	Take	ID	CS State
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Allow Partials Yes - Allow partials	Max Makeup <input type="text"/>	Vendor Setup <input type="text"/>	
Labor Override <input type="text"/>	Labor Distribution <input type="text"/>		

Updating Original Limit in GTL (Group Term Life Auto-calculation)

There are two occasions when the original limit would need to be updated to correctly auto-calculate for the staff member's Group Term Life.

1. When an employee has a rate/salary change.
2. At the first pay period in January at the new calendar year, recalculate the rate **ONLY** for those who *hit an age-reduction birthday that year*, of age 65, 70, 75 and 80.



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Required Fields for ACA Reporting

HR Employee Benefit

Required fields for proper ACA reporting on the **HR Employee Benefit** screen include:

- Eligible Date
- Effective Date
- Disenrollment Date (when changing status of a **Current** benefit to **Historical**)
- Rate Level
- Decline **'Y'** (when an employee is offered benefits for the first time and declines The **Decline Reason** field will appear to populate)

The screenshot shows the 'HR Employee Benefits' form with several fields highlighted by red arrows. The 'Decline' dropdown is on the left. The 'Rate Level' dropdown is in the middle. The 'Effective Date' and 'Disenrollment Date' date pickers are at the bottom. The 'Disenrollment Date' field is highlighted in yellow.

Employee Demographics Screen

Required fields for proper ACA reporting on the **Employee Demographics** screen include:

- Social Security number
- Address
- Location Hire Date