

**Phoenix Program  
Process Definition – HRMS/Benefits**

Process	<b><i>Pension Plan Changes</i></b>
Process Number	<b><i>BEN 0111 Revised 04/17/02</i></b>

***Description of Process***

This process is used to record a change in the Pensionable Earnings Panel. Change in Percent Worked, Salary, Monthly Additional Pay, Rehires, and the discontinuation of employee contributions will fall in this process. (Discontinuation of employee contribution can only be entered when an employee is enrolled in an ERS Plan and has more than 34 years of service or has reached the age 65 and requests a discontinuation.) Termination from Pension Plans is described in BEN 0112.

***Input to Process***

Appropriate notice of job change that impacts on Pensionable Earnings, e.g., salary change.

***Output of Process***

Historical record of activity on Pension Plan participation and corresponding payroll action.

***PeopleSoft Panel Groups being Used***

Window/Function	Panel Group/Mode
Go	
Administer Workforce	
Administer Workforce U.S.	
Use	Pensionable Earnings
	Update/Display All

## Phoenix Program Process Definition – HRMS/Benefits

### ***BEN 0111 – Pension Plan Changes***

Process Description	Responsibility (Company/Centralized)
<p><b>Background.</b> It is necessary to keep a complete history of Pensionable Earnings activity. Changes that impact an employee's pension contributions require that the Pensionable Earnings Panel be updated.</p>	
Step 1 – Notice of change that impacts on Pensionable Earnings.	Company
<p>Step 2 – Identify if employee will need a different Pension Group or Pension Plan than the current one that they are actively enrolled in.</p> <p>If “yes”,</p> <ul style="list-style-type: none"> <li>• STOP and reference BEN0112 (Pension Plan Terminations) to terminate the current plan then return to this Business Process.</li> </ul> <p>If “no”,</p> <ul style="list-style-type: none"> <li>• Continue to step 3.</li> </ul>	Company
Step 3 – Select Go, Administer Workforce, Administer Workforce U.S., Use, Pensionable Earnings, Update/Display All	Company
Step 4 – Enter EmplID and select OK.	Company
<p>Step 5 – Ensure you are viewing the most current row of data for the employee and then click the Insert Row toolbar button.</p> <p>The <i>Effective Date</i> of the row should match the <i>Effective Date</i> in the employee's Job Data panels, unless a Plan termination was required. In this case, you would use the first day available for the pay period affected. (If it does not match, a warning message will appear. Click OK and continue; if necessary, verify with HR staff).</p>	Company
<p>Step 6 – Identify type of change needed.</p> <ul style="list-style-type: none"> <li>• Salary Change – proceed to Step 7.</li> <li>• Rehire or New Pension Group/Plan Assignment, Monthly Additional Pay Change, or Percent Worked Change – skip to Step 9.</li> <li>• Discontinuation of Contribution - If the employee meets the criteria of being enrolled in an ERS Plan and has more than 34 years of service or has reached the age of 65 and has completed the form requesting a discontinuation skip to Step 8.</li> </ul>	Company
Step 7 – Tab out of the <i>Effective Date</i> field and proceed to Step 13.	Company
Step 8 – Click on the <i>Stop Employee Contributions</i> checkbox and proceed to Step 13.	Company

## Phoenix Program Process Definition – HRMS/Benefits

Step 9 – Verify that the <i>Assign to Pension Plan</i> radio button is accurate.	Company
Step 10 – Enter the new <i>Pension Group</i> and <i>Pension Plan</i> in the field if applicable.	Company
Step 11 – Enter the new amount in the <i>Monthly Additional Pay</i> field if applicable.	Company
Step 12 – Enter the new <i>Percent Worked</i> if applicable.	Company
Step 13 – Verify remaining items and that the change has been correctly reflected. Click the <i>Save</i> icon.	Company

In PeopleSoft, the State of Georgia sponsored pension plans are setup as benefit plans. Through the use of the Pensionable Earnings Panel, a record of the plan participation is stored with the *Effective Date* for each participating individual. Payroll uses the *Effective Date* for the date to start the payroll actions required for each employee as appropriate for each plan.

The Pensionable Earnings Panel will update the enrollment panels in PeopleSoft for Pension Plans and the Additional Pay fields in Payroll.

The Pensionable Earnings panel allows only one row of data per Effective Date. So, if multiple Job actions are taken on one given Effective Date, be sure to complete the update in the Job Data Panel prior to Pensionable Earnings to reflect each and all actions that impact on the pension contributions. (For example, if an employee receives a promotion with a salary increase on 02/01/2000 AND receives a Monthly Additional Pay amount effective the same date, one row of entry should be completed on the Pensionable Earnings Panel. The new row would be for the Effective Date of 02/01/2000 and should reflect the salary change from Job Data as well as the entry for the Monthly Additional Pay. If the two entries are attempted separately (i.e., a row inserted for 02/01/2000 to update the comp rate followed by a row to update the Monthly Additional Pay), an error will occur and not allow the second row to be inserted for the same date). In the event that the updates are completed separately, the second item must have a different Effective Date (e.g., in this example, 02/02/2000).