

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

Process	<b><i>Enroll Employee into Savings Plan</i></b>
Process Number	<b><i>BEN 0140 Revised 01/01/02</i></b>

***Description of Process***

This process is used to enroll an employee into Savings Plans in order to have a record of participation and to generate the payroll deduction.

***Input to Process***

Election Statement, which has been completed and signed by the employee.

***Output of Process***

Enrollment into the benefit plan for the option selected by the employee and the corresponding payroll deduction.

***PeopleSoft Panel Groups being Used***

<b>Window/Function</b>	<b>Panel Group/Mode</b>
Go	
Compensate Employees	
Administer Base Benefits	
Use	Savings Plans
	Update/Display All
<b>Plan Type Options</b>	<b>Benefit Plans Sponsored</b>
401(k)	GA401K (standard) / 50+401 (age equal or greater than 50)
457	GA 457 (standard) / 50+457 (age equal or greater than 50) / *457 CU ( <b>457 CU -Please refer to Business Process BEN0144</b> )
401(k) MU	*MU1401 (401(k) 2001 Make-up) / *MU2401 (401(k) 2002 Make-up)
457MU	*MU1457 (457 2001 Make-up) / *MU2457 (457 2002 Make-up)
	<b>*These plans must have the approval of the Georgia Merit System Deferred Compensation Unit prior to use.</b>

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***BEN 0140 – Enroll Employee into Savings Plan***

Process Description	Responsibility (/Centralized)
Step 1 – Receipt of election form which has been completed by the employee and certified by the Georgia Merit System’s Deferred Compensation unit.	Company
Step 2 – Go to Go, Compensate Employees, Administer Base Benefits, Use, Savings Plans, Update/Display All.	Company
Step 3 – Enter EmplID and select OK.	Company
<p>Step 4 – Identify your need below:</p> <ul style="list-style-type: none"> <li>- <b>New Enrollment</b> – (Participant has never participated in a Savings Plan)  Select the plan type radio button and continue to Step 5.</li> <li>- <b>New Additional Plan</b> – (Participant has participated in one Plan Type and is wanting to either enroll in a new Plan Type or Re-enroll in a Plan Type, which is terminated at this time.)  <p style="margin-left: 40px;"><b>(Note:</b> Due to the Savings Plan conversion in January of 2002, please remember that the Plan Type of “Savings” (which was used prior to 2002) is now 401(k). If you want to insert a row for 401(k), but do not see it as a Plan Type Option, use the “Savings” Plan Type. Once a 2002 or later row is inserted, the Plan Type description will change to 401(k).)</p> Select the OUTER scroll bar to display the correct Plan Type needed. If the needed option does not exist (the outer scroll bar can not be moved), on the OUTER scroll bar, insert a row and then select the plan type radio button you want to add.</li> </ul> <p><b>(NOTE: If you are enrolling a participant into 457 CU, please refer to Business Process BEN0144.)</b></p>	Company
Step 5 – Enter the appropriate date in the <i>Coverage Begin Date</i> field. When you press the TAB key, the system defaults the same date in the <i>Deduction Begin Date</i> field. This is the first day of the pay period that deductions should begin. It is not necessary to change the date.	Company
Step 6 – Select the <i>Elect</i> radio button for the <i>Participation Election</i> .	Company
Step 7 – Enter the <i>Elect Date</i> to match the <i>Coverage Begin Date</i> or enter the date the employee signed the Election form. Use of this date in one of these two methods is the decision of each company.	Company
Step 8 – Enter the appropriate <i>Benefit Plan</i> or select the appropriate value from the drop-down list of State of Georgia plans. (Reference the Plan Options on Page 1.)	Company

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Step 9 - In the <i>Before-Tax Contribution</i> box, select the radio button for <i>Flat Amount</i> and enter the dollar amount that is to be deducted <b>each pay period</b> .	Company
Step 10 - Click the <i>Save</i> icon.	Company

Waive is not an available option under *Participation Election*.

If an eligible employee initially decides not to have a particular coverage, then an enrollment (*Elect*) will not be entered for that individual. If the eligible employee has decided not to have a coverage (or it ends for other reasons) after the individual had been enrolled, see BEN 0143, "Savings Plan Discontinuation", to terminate participation.

Through use of the Savings Plans panel, a record of the amount for payroll deduction is stored with the effective date for each participating individual. Payroll uses the Deduction Begin Date for the date to start the deduction in the amount stated on the panel for each employee.