

Group Term Life (Life over 50K)

Plan set up

A8-SCR

The A8-SCR should already be set up. Change the frequency for 1st or 2nd pay.

Company Earnings	
HED> 350	
Description: LIFE OVER 50K	<input type="checkbox"/> Propagate To All
Category: Earn/Ded-Normal Tax	Vacation/ Sick Pay: Apply to Vac & Sick
Frequency: Inactive	
Taxability: Fully Taxable	
Calc Method: Fixed Amount	Priority Overrides
Amount/Percent:	Permanent Order: 350
	Temporary Order: 350
TE-2 Hours: Not In Use	TE-2 Amt: Not In Use
<input type="checkbox"/> More Options	

A8-SCR Back side

Company Earnings	
HED> 350	Description: LIFE OVER 50K
FLSA Calc Use: No FLSA In Use	<input checked="" type="checkbox"/> Show on HED Register
Tax Frequency: Report;No tax taken	Pretax Type: Inactive
Auto Setup: Do Not Use	Shift Differential <input type="radio"/> Allow <input type="radio"/> Do Not Allow
Add Total Hrs: Do Not Add to Hours	
Accrual Optn:	For Benefits Use Earn Bucket: <input type="text"/> Hours Accum: <input type="text"/>
Period Table: Do Not Use	
Timing:	
GL Account:	
<input type="button" value="Return to 1st Screen"/>	

Hewitt

Set up Benefit Plans to create Process

TK-SCR

Benefit Plan Rules Control Number> CICI

Plan ID> 550

Effective Date> 01-01-2010

Year End: 12-31

Plan Name: LIFE OVER 50

Plan Type: Life Basic Taxable

Service Date: Employment Date

Class: Optional

Flex Master:

Group Master:

Accum Name:

Ins Carrier:

Default Enrollment

Option: 22 COVERAGE = 2X SAL

Pre-tax Post-tax

HEDs

Basic Pre-tax:

Basic Post-tax: 350

Company:

Supplemental Pre-tax:

Supplemental Post-tax:

Match to HED

Continue Plan Rules


Hewitt

There are different coverage options available to choose from. Just be sure to select a different option for each type of coverage. For example 2 times salary or \$100,000.00 of coverage.

Plan 550 is available and it will link to HED 350.

TL-SCR


Benefit Plan Eligibility Rules		Control Number> CICI	
Plan Name: LIFE OVER 50			
Plan ID>	550	Search Type:	NO-SEARCH-ARGUMENT
Search Argument>		Plan Type:	Life Basic Taxable
Effective Date>	01-01-2010		
Rules		Eligible Status	
Eligibility Type:	Immediate Elig At Hr	1:	0*
Minimum Age:		2:	0B
Maximum Age:		3:	03
Service:		4:	04
Days/Hours:		5:	01
Service Method:		6:	1*
Date Method:	Actual Event Date	7:	9*
		8:	
		9:	
		10:	
		11:	
		12:	



There is one TL-SCR for each Plan, and it should be completed as above

TTOSCR

Option/Resulting Plan Status Rules		Control Number> CICI	
Plan Name: LIFE OVER 50			
Plan ID> 550			
Option> 22 COVERAGE = 2X SAL ▼			
Search Argument> <input type="text"/>		Search Type: NO-SEARCH-ARGUMENT	
Effective Date> 01-01-2010			
Date Method: Actual Event Date ▼		Plan Type: Life Basic Taxable	
Plan Status			
Low Status	High Status	Resulting Status	Delay Time
1: 0	1	1 Active Participant	<input type="text"/>
2: 5	5	1 Active Participant	<input type="text"/>
3: 7	7	1 Active Participant	<input type="text"/>
4: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



Create enroll and de-enroll for each plan, and each option within the plan

Option/Resulting Plan Status Rules		Control Number> CICI	
Plan Name: LIFE OVER 50			
Plan ID> 550			
Option> 28 20,000 COVERAGE ▼			
Search Argument> <input type="text"/>		Search Type: NO-SEARCH-ARGUMENT	
Effective Date> 01-01-2010			
Date Method: Actual Event Date ▼		Plan Type: Life Basic Taxable	
Plan Status			
Low Status	High Status	Resulting Status	Delay Time
1: 0	1	1 Active Participant	<input type="text"/>
2: 5	5	1 Active Participant	<input type="text"/>
3: 7	7	1 Active Participant	<input type="text"/>
4: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

----New table entry has been established----

Plan Name: LIFE OVER 50
Plan ID> 550
Option> 97 SHUTOFF/DEENROLL

Search Argument> Search Type: NO-SEARCH-ARGUMENT
Effective Date> 01-01-2010
Date Method: Actual Event Date Plan Type: Life Basic Taxable

Plan Status

Low Status	High Status	Resulting Status	Delay Time
1: 1	1	5 Inactive Lost Cover	<input type="text"/>
2: <input type="text"/>	<input type="text"/>		<input type="text"/>
3: <input type="text"/>	<input type="text"/>		<input type="text"/>
4: <input type="text"/>	<input type="text"/>		<input type="text"/>
5: <input type="text"/>	<input type="text"/>		<input type="text"/>
6: <input type="text"/>	<input type="text"/>		<input type="text"/>



TM-SCR

The TM-SCR must be created for each plan.

Coverage And Contribution Factors		Control Number> CICI	
Plan ID>	550	Plan Name:	LIFE OVER 50
Option>	22 COVERAGE = 2X SAL	Ctrb Type>	Basic Post Tax Contb
Search Argument>		Search Type:	NO-SEARCH-ARGUMENT
Effective Date>	01-01-2010	Plan Type:	Life Basic Taxable Contribution
Coverage		Contribution	
Rule:	Method F	Rule:	Rate/1000 Of Coverage
Factor 1:	2.00	Factor 1:	.0000
Factor 2:	.00	Factor 2:	.0000
Factor 3:	.00	Result Freq:	Monthly Amount
Nondiscrimination Value:	.00	Flex Cost:	.00
		Flex Type:	

The key to this screen is to select the correct coverage rule. The next page shows a table of the various Rules available.

Coverage And Contribution Factors		Control Number> CICI	
Plan ID>	550	Plan Name:	LIFE OVER 50
Option>	28 20,000 COVERAGE	Ctrb Type>	Basic Post Tax Contb
Search Argument>		Search Type:	NO-SEARCH-ARGUMENT
Effective Date>	01-01-2010	Plan Type:	Life Basic Taxable Contribution
Coverage		Contribution	
Rule:	Method C	Rule:	Rate/1000 Of Coverage
Factor 1:	70,000.00	Factor 1:	.0000
Factor 2:	.00	Factor 2:	.0000
Factor 3:	.00	Result Freq:	Monthly Amount
Nondiscrimination Value:	.00	Flex Cost:	.00
		Flex Type:	

A	Method A	Use Coverage-Factor-3 if not blank, else use Coverage-Factor-2, if not blank, else use Coverage-Factor-1.
B	Method B	
C	Method C	Use Coverage-Factor-1.
D	Method D	Multiply Coverage-Factor-1 times Annual Salary Equivalency. Round up to next 1000, if not already an exact multiple. Add Coverage-Factor-2.
E	Method E	Multiply Coverage-Factor-1 times Monthly Salary Equivalency. Round up to next even dollar. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.
F	Method F	Multiply Coverage-Factor-1 times Annual Salary Equivalency. Round up to next 1000, if not already an exact multiple. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.
G	Method G	Multiply Coverage-Factor-1 times Annual Salary Equivalency. Round to nearest 1000. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.
H	Method H	Multiply Coverage-Factor-1 times Annual Salary Equivalency. Round to nearest 1000. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value equal 'X'. If Coverage-Factor-3 is greater than zero,
I	Method I	Multiply Coverage-Factor-1 times Annual Salary Equivalency. Round to nearest 100. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.
J	Method J	Multiply Coverage-Factor-1 times Weekly Salary Equivalency. Round down to the nearest dollar. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.
K	Entered Var Coverage	
L	Entered Var Method D	
M	Entered Var Method E	Multiply Entered Variable times Monthly Salary Equivalency. Round up to next whole dollar. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.
MF	Method MF	Multiply Coverage-Factor-1 times Total Annual Salary. Round up to next 1000, if not already an exact multiple. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.
MG	Method MG	
MI	Method MI	
MN	Entered Var Method MN	Multiply Entered Variable times Total Annual Salary. Round up to next 1000, if not already an exact multiple. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.
MQ	Entered Var Method MQ	
MS	Entered Var Method MS	Multiply Entered Variable times Average Annual Hourly Rate. Round down to the nearest dollar. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.
N	Entered Var Method F	Multiply Entered Variable times Annual Salary Equivalency. Round up to next 1000, if not already an exact multiple. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.
N1	Entrd Var \$10,000 INCR	
O	Entered Var Method G	Multiply Entered Variable times Annual Salary Equivalency. Round to nearest 1000. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.

P	Entered Var Method H	Multiply Entered Variable times Annual Salary Equivalency. Round to nearest 1000. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value equal 'X'. If Coverage-Factor-3 is greater than zero,
P1	ENTRD VAR \$10M SAL MAX	
P2	ENTRD VAR \$10,000 TX	
Q	Entered Var Method Q	Multiply Entered Variable times Annual Salary Equivalency. Round to nearest 100. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.
R	Entered Var Method J	Multiply Entered Variable times Weekly Salary Equivalency. Round down to the nearest dollar. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.
S	Entered Var Method S	Multiply Entered Variable times Hourly Rate Equivalency. Round down to the nearest dollar. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.
T	Entered Var Method T	Multiply Entered Variable times the Hourly Rate Equivalency. Round up to next whole dollar. If Coverage-Factor-2 is greater than zero, compare to calculated value. Move lesser value to Coverage Amount.
U	Method U	
X	Method X	

Enroll Employees

55-SCR

Welfare Plan Enrollments/Changes		MCNAMARA, CAROLE A	
		ACTIVE-CONTRACT FT	
Enroll Information		Override Entries	
Plan ID> 550	Effective> 100701	Entry Date: 03-01-2003	
Option: 22 COVERAGE = 2X SAL		Suspend End:	
Variable:		Service Date:	
Change Reason:		Current: Inactive Lost Cover	
		Status:	
Plan Information			
Name: BCBS OF MICHIGAN		Type: Health Insurance	

Enter the Plan ID, effective date and Option elected.

Hit enter

Welfare Plan Enrollments/Changes		[REDACTED]	
Enroll Information		Override Entries	
Plan ID> 550	Effective> 07-01-2010	Entry Date:	07-01-2010
Option: 22 COVERAGE = 2X SAL		Suspend End:	
Variable:		Service Date:	05-06-2002
Change Reason:		Current:	
		Status:	Active Participant
Contributions			
Plan Name: LIFE OVER 50			
----- Coverage ----- Deduction -----			
Accept	Reject	Change	Type
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Basic Post
999,000		.00	07-01-2010

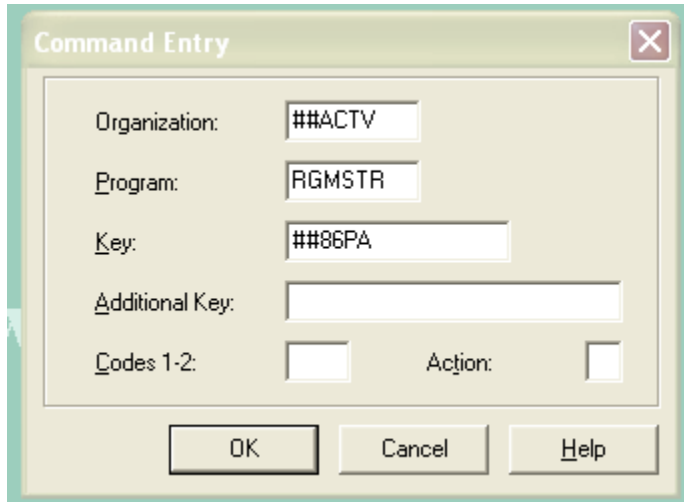
Verify the coverage amount and click the Accept button, then hit enter

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MONTHLY PAYROLL PROCESSING

RGMSTR

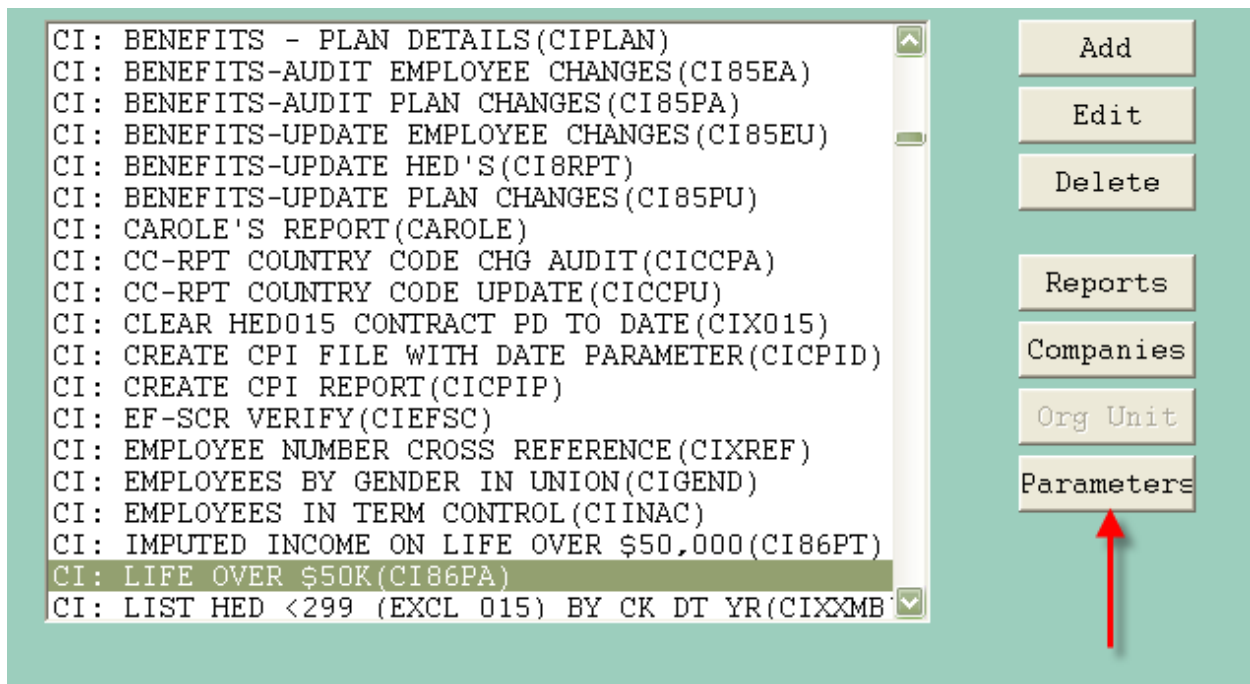
Use Your district code in place of ##



A dialog box titled "Command Entry" with a close button (X) in the top right corner. It contains several input fields and checkboxes:

- Organization:
- Program:
- Key:
- Additional Key:
- Codes 1-2:
- Action:

At the bottom are three buttons: "OK", "Cancel", and "Help".




A list of commands in a scrollable area, with "CI: LIFE OVER \$50K(CI86PA)" highlighted. To the right is a vertical stack of buttons: "Add", "Edit", "Delete", "Reports", "Companies", "Org Unit", and "Parameters". A red arrow points to the "Parameters" button.

```
CI: BENEFITS - PLAN DETAILS(CIPLAN)
CI: BENEFITS-AUDIT EMPLOYEE CHANGES(CI85EA)
CI: BENEFITS-AUDIT PLAN CHANGES(CI85PA)
CI: BENEFITS-UPDATE EMPLOYEE CHANGES(CI85EU)
CI: BENEFITS-UPDATE HED'S(CI8RPT)
CI: BENEFITS-UPDATE PLAN CHANGES(CI85PU)
CI: CAROLE'S REPORT(CAROLE)
CI: CC-RPT COUNTRY CODE CHG AUDIT(CICCPA)
CI: CC-RPT COUNTRY CODE UPDATE(CICCPU)
CI: CLEAR HED015 CONTRACT PD TO DATE(CIX015)
CI: CREATE CPI FILE WITH DATE PARAMETER(CICPID)
CI: CREATE CPI REPORT(CICPIP)
CI: EF-SCR VERIFY(CIEFSC)
CI: EMPLOYEE NUMBER CROSS REFERENCE(CIXREF)
CI: EMPLOYEES BY GENDER IN UNION(CIGEND)
CI: EMPLOYEES IN TERM CONTROL(CIINAC)
CI: IMPUTED INCOME ON LIFE OVER $50,000(CI86PT)
CI: LIFE OVER $50K(CI86PA)
CI: LIST HED <299 (EXCL 015) BY CK DT YR(CIXXMB)
```

Click the Parameters box

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Parameter Selection For CI: LIFE OVER \$50K		CI86PA
86-RPT	Group Insurance Over 50,000 Taxable	<input type="button" value="Set Parameters"/>



Click Set Parameters

Report Parameters For Group Insurance Over 50,000 Taxable		86-RPT
Report Group - CI: LIFE OVER \$50K		CI86PA
Month End Date> 07-31-2010		
Group Term		
Life Insurance Plan ID> 550		
Supplemental Life Insurance Plan ID> <input type="text"/>		
HED to be Updated: 350		<input type="checkbox"/> Update Employees
<input type="checkbox"/> Print All Employees Regardless of Status		

Change the Month End date for the month you are processing.

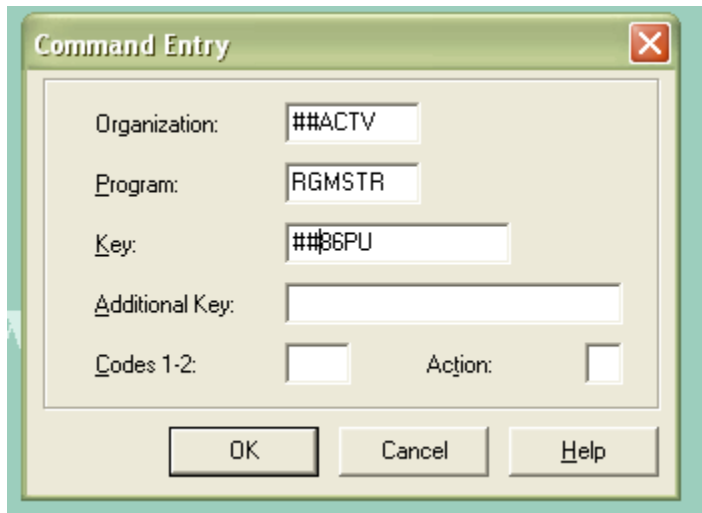
In TSO submit report **LFOVR50A**

Check the report to see if imputed income has been calculated.

If the report is OK

RGMSTR

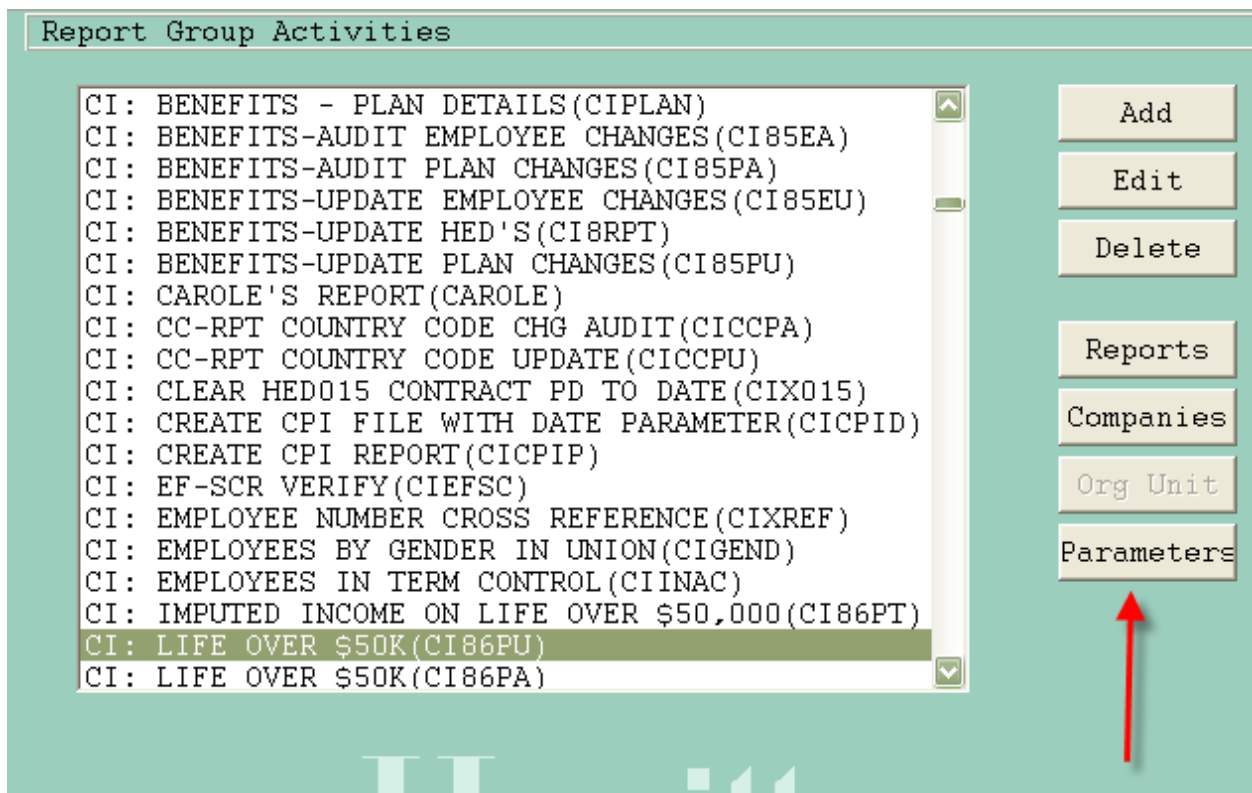
Use Your district code in place of ##



A dialog box titled "Command Entry" with a close button (X) in the top right corner. It contains several input fields and checkboxes:

- Organization:
- Program:
- Key:
- Additional Key:
- Codes 1-2:
- Action:

At the bottom are three buttons: "OK", "Cancel", and "Help".



A window titled "Report Group Activities" with a list of report names on the left and a vertical toolbar on the right. The list includes:

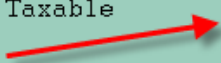
- CI: BENEFITS - PLAN DETAILS (CIPLAN)
- CI: BENEFITS-AUDIT EMPLOYEE CHANGES (CI85EA)
- CI: BENEFITS-AUDIT PLAN CHANGES (CI85PA)
- CI: BENEFITS-UPDATE EMPLOYEE CHANGES (CI85EU)
- CI: BENEFITS-UPDATE HED'S (CI8RPT)
- CI: BENEFITS-UPDATE PLAN CHANGES (CI85PU)
- CI: CAROLE'S REPORT (CAROLE)
- CI: CC-RPT COUNTRY CODE CHG AUDIT (CICCPA)
- CI: CC-RPT COUNTRY CODE UPDATE (CICCPU)
- CI: CLEAR HED015 CONTRACT PD TO DATE (CIX015)
- CI: CREATE CPI FILE WITH DATE PARAMETER (CICPID)
- CI: CREATE CPI REPORT (CICPIP)
- CI: EF-SCR VERIFY (CIEFSC)
- CI: EMPLOYEE NUMBER CROSS REFERENCE (CIXREF)
- CI: EMPLOYEES BY GENDER IN UNION (CIGEND)
- CI: EMPLOYEES IN TERM CONTROL (CIINAC)
- CI: IMPUTED INCOME ON LIFE OVER \$50,000 (CI86PT)
- CI: LIFE OVER \$50K (CI86PU)
- CI: LIFE OVER \$50K (CI86PA)

The "Parameters" button in the toolbar is highlighted with a red arrow.

Click the Parameters box and hit enter

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Parameter Selection For CI: LIFE OVER \$50K		CI86PU
86-RPT	Group Insurance Over 50,000 Taxable	<input type="button" value="Set Parameters"/>



Click Set Parameters

Report Parameters For Group Insurance Over 50,000 Taxable		86-RPT
Report Group - CI: LIFE OVER \$50K		CI86PU
Month End Date> 07-31-2010		
Group Term		
Life Insurance Plan ID> 550		
Supplemental Life Insurance Plan ID> <input type="text"/>		
HED to be Updated: 350	<input checked="" type="checkbox"/>	Update Employees
<input type="checkbox"/> Print All Employees Regardless of Status		

Change the Month End date for the month you are processing, and make sure Update Employees box is checked.

In TSO, Submit **FILEDN**

Submit **LFOVR50U**

Check the reports, then look at an employee's HH-SCR for HED 350 to make sure the amount is correct.

It will show under the One Time Amount field

Employee Earnings And Deductions		SMITH, SUZIE Q	
HED> 350 LIFE OVER 50K		ACTIVE-CONTRACT FT This is an EARNING	
Frequency:	1st Pay Period	Start Method:	Inactive
Type:	Fully Taxable	Start Value:	000000
Calc Method:	Fixed Amount	Stop Method:	Inactive
Amount/Pct:		Stop Value:	000000
One-time Rule:	Stop Norm;Add This	User Fields	
One-time Amt:	16.10	Code:	00
Amount One:	.00	Number:	000000000000
Amount Two:	.00	Multi Currency:	

DO NOT rerun this job as the program will add the dollars into the One-time amount field, doubling the deduction. The One-time amount gets cleared after you have processed your payroll.

