



## **EXERCISE 7: MANUAL EVENT (PRT) TERMINATING CONTRIBUTIONS TO THE DEFERRED COMPENSATION PROGRAM**

In this exercise, you will terminate participation for an individual who no longer wants to contribute to the deferred compensation program. This event deviates from other Ben Admin events because there will be no Job action to trigger an event. You will have to manually insert an event into the Manual Events table so it can be processed properly.

### **STEP 1: MANUALLY INSERT PRN EVENT INTO BAS ACTIVITY**

**Navigation: Benefits>Manage Automated Enrollment>Events>HE/State Manual Events**

1. Enter EmpliD of employee and hit Search button at the bottom of the page.
2. Action Source will fill in to read "Manual". Enter the pay period beginning date that is indicated in Section 5 of the Participant Agreement form (sfn 3803) as the Event Date.
3. Enter PRT (as needed terminations) as BAS Action or select it from the lookup feature.
4. The rest of the fields will default in with the appropriate information – they should not be changed.
5. Save this screen.

*Before you can process this event, it needs to be assigned to your schedule. This is a centralized activity that automatically runs every half hour.*

### **STEP 2: VERIFY SCHEDULE AND PROGRAM ASSIGNMENT**

**Navigation: Benefits>Manage Automated Enrollment>Events>Update Event Status or Update Processing Controls**

1. If you use Update Event Status, you will enter the Emplid and press Search.
2. If you use Update Processing Controls, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRT event, enter PRT in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. Validate the schedule assigned. It should be:
  - a. First 3 numbers of the Business Unit followed by EM, if you are a State Agency (e.g., 110EM)
  - b. For Business Units 110, 325 and 530 schedule will be first 3 numbers of the Department
4. Validate Process Status. It should be Program Assigned (AS).
5. Validate Benefit Program assignment (PGM) (for example, if it is a permanent employee SA1, temporary employee SA3).



### **STEP 3: PREPARE OPTIONS**

#### **Navigation: Benefits>Manage Automated Enrollment >Events>Run Automated Event Processing**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. The Benefits Administration "PSPBARUN" process will be checked by default.
8. Press OK to start the process. This will take you back to the Run Automated Event Processing page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

### **STEP 4: VERIFY PREPARE OPTIONS**

#### **Navigation: Benefits>Manage Automated Enrollment>Events> Update Event Status or Update Processing Controls**

1. If you use Update Event Status, you will enter the Emplid and press Search.
2. If you use Update Processing Controls, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRT event, enter PRT in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRT event should now be Prepared (PR). This means that benefits can now be elected.

### **STEP 5: ELECT OPTIONS**

#### **Navigation: Benefits>Manage Automated Enrollment>Participant Enrollment>Perform Election Entry**

1. Enter your Schedule ID.
2. Enter the Emplid of your PRT and press Search.
3. This will take you to the Option Election page. Remove the Option Code for the deferred compensation program you will be terminating participation in. Also be sure to remove the amount from the contribution section. The other plan types will default to what the employee currently has; these should be left untouched.
4. After you have finished with your termination(s), make sure to press Save. You may receive a warning that no changes were made. Click ok and the save process should complete.
5. The event Process Status will now change to Entered (ET).



## **STEP 6: FINALIZE/ENROLL**

### **NAVIGATION: BENEFITS>MANAGE AUTOMATED ENROLLMENT>EVENTS>RUN AUTOMATED EVENT PROCESSING**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. The Benefits Administration "PSPBARUN" process will be checked by default.
8. Press OK to start the process. This will take you back to the Run Automated Event Processing page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Automated Event Processing" to take you back to Ben Admin.

## **STEP 7: VERIFY FINALIZED EVENT**

### **Navigation: Benefits>Manage Automated Enrollment>Events> Update Event Status or Update Processing Controls**

1. If you use Update Event Status, you will enter the Emplid and press Search.
2. If you use Update Processing Controls, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRT event, enter PRT in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRT event should now be Finalized/Enrolled (FE) and the Event Status is Closed.
4. If you have a Process Status of Elect Error (EE), you will need to view Messages to see what the problem is: Navigation: Benefits>Manage Automated Enrollment>Review Processing Results>Processing Messages.
5. If there is an Election Error, you will need to correct the error by going back to the Election Entry page. Once you fix the problem, you will need to rerun the Ben Admin process by going back to Run Automated Event Processing.
6. If you have no errors, and the event is closed, then the employee is enrolled in the benefit plan(s).



## **STEP 8: VERIFY BASE BENEFITS ENROLLMENT**

**Navigation: Benefits>Enroll In Benefits>Savings Plans.**

1. The purpose of this step is to verify that the employee is enrolled into the benefit plan(s). You will not change anything here.
2. For each of the plan types where there was an election, you should see an enrollment record.
3. Plan type
4. Coverage begin date = Date you want coverage to be terminated.
5. Deduction begin date = Pay period begin of current pay period.
6. Coverage Election = Terminate

Questions or problems, contact the ITD Service Desk at 328-4470 or [itdservicedesk@nd.gov](mailto:itdservicedesk@nd.gov)