PERSLink

Quick Steps

INSURANCE

I. Finalize and Submit Insurance Report

NOTE: You do not have to take any steps to get insurance data into the system. The system will automatically create the Insurance Billing Report based on the enrollment data.

(1) Click the "Report ID" of the current Insurance Billing Report from the Dashboard (home page). The list of reports will show in the Payroll Reports panel on the right-hand side of the screen.
(2) The system displays the Payroll Header for your Insurance Billing report
    a. Click on the RELOAD button, if available, to obtain the most up-to-date information from the Insurance Provider
(3) Review the Insurance Billing Report
    a. Use the “Export to Excel” button to see the details of the bill and to compare it to your payroll for the reporting period.
(4) Enter the "Total Premium Amount Reported" = “Total Premium Calculated”
(5) Click the “Save” button
    a. The status of the Payroll Header will change to “Valid”
(6) Click the "Ready to Post" button
    a. The status of the Payroll Header will change to “Ready to Post”

NOTE: You cannot "create" adjustments for Insurance. The system will automatically create these adjustments based on changes to the enrollment data.

II. Initiate payment for Insurance Billing:

a. Initiate Payment for Insurance Using Debit ACH Option

NOTE: Before you can remit payment for Insurance, the status of the Payroll Header record must be "Posted".

NOTE: In order to use the debit ACH option for remitting payment to NDPERS, you must complete the appropriate form and mail it to NDPERS.

(1) Click the "Payroll Header ID" of the Insurance report in "Posted" status from the Dashboard (home page). The list of reports will show in the Payroll Reports panel on the right-hand side of the screen.
(2) The system will display the Payroll Header for your Insurance Billing Report
(3) Click on the “Payment Applied” tab
(4) Click the "Debit ACH" button. This button will only be available if the Payroll Header is in “Posted” status and your organization is set up for ACH

b. Initiate Payment for Insurance Using Credit ACH or Paper Check

NOTE: Before you can remit payment for Insurance, the status of the Payroll Header record must be "Posted".

(1) Click the "Payroll Header ID" of the Insurance report in "Posted" status from the Dashboard (home page). The list of reports will show in the Payroll Reports panel on the right-hand side of the screen.
(2) The system will display the Payroll Header for your Insurance Billing Report
(3) Click on the “Payment Applied” tab
(4) Click the "Remittance Report" button. This button will only be available if the Payroll Header is in “Posted” status.
    a. If the Remittance Report does not display, check to see if your browser is blocking pop-ups and select to allow pop-ups.
(5) Print the Remittance Report displayed
(6) Mail the Remittance Report and the paper check or credit ACH receipt together to NDPERS

NOTE: Once your report is in “Posted” status and balanced it will no longer display in your dashboard. To find your report go to the Payroll Reports Menu, click on the Payroll Report sub-menu, enter your selection criteria and click the "Search" button. The list of reports will appear in the Search Results panel.