Employer Self Service

NDPERS PERSLINK TRAINING

PERSLink Overview

- Setting up new employees
- Employee maintenance
- Payroll reporting
- Communication tool
- Access forms

PERSLink is available daily between 7:00 a.m. and 9:30 p.m.

Future Improvements:

- Limit duplicate messages
  - Contacts for multiple benefit plans
- Search messages by PERSLink ID

Security Roles

- Primary Authorized Agent
- Authorized Agent
- Finance
- Contact (Other)

Primary Authorized Agent (PAA)

- This role is designated to one primary per organization. A Primary Authorized Agent can
  - Update and add new organization information
  - View employee record information for all plans
  - View and update employer reporting data for all plans

Authorized Agent

- An unlimited number of people can obtain the role of an Authorized Agent. This role allows you to:
  - View employees under assigned plans
  - View and update employer reporting data under assigned plans

Finance

- An unlimited number of people can obtain the Finance role. Under this role you can:
  - View organization bank information
  - View employees under authorized plans
  - View and update employer reporting data under authorized plans

Contact (Other)

- An unlimited number of people can obtain the Contact role. This role allows you to:

  - View employees under assigned plans

  - View employer reporting data under assigned plans

Future Improvements:

- Employee search at employment level
  - Terminate employees at Employment level rather than Benefit Plan level
- Easily edit entered information
- Member Setup Wizard timeout
- Display acknowledgment for new employee setup
- Eliminate rejection notices for employee addresses

Interface with PeopleSoft

Current interfaces

(from PeopleSoft to PERSLink)

- Payroll
  - Retirement salary and contributions
  - Deferred comp contributions
  - Insurance premiums
  - On-cycle/off-cycle payroll
  - Bonuses, retro pay and pay adjustments

Interface with PeopleSoft

- Deposit information for Central Payroll
  - Breakout for each payroll, by plan and agency
  - Used for matching payments to payroll headers

Interface with PeopleSoft

Future interfaces (next 6 months)

- Demographic data – from PeopleSoft to PERSLink
  - Empl ID, Name, Address, Telephone
  - For existing employees – not new hires

Future enhancement – determine if new hire data can be ‘pushed’ from PeopleSoft to PERSLink to replace the Member Record Data set up

Interface with PeopleSoft

- Benefit Enrollments – From PERSLink to PeopleSoft
  - Enrollments in benefit plans administered by NDPERS
  - PeopleSoft Benefits Administration will still be used for benefit plans not administered by NDPERS (leave plans, TIAA-CREF)

Payroll Report Status

- Review: errors need to be researched
  - Open the Payroll Report and contact NDPERS after you have reviewed it.
  - Click the “Save” button to update the report

Payroll Report Status

- Valid: no errors, modify or submit to NDPERS
  - Make any additional changes and click the "Save" button
  - Click the "Ready to Post" button to indicate to the system the report can be posted

Payroll Report Status

- Ready to Post: all records are valid
  - Ready to Post records will be posted when the system runs the next batch

Payroll Report Status

- Posted: records have updated member’s account

Payroll Report Status

- Ignored: record will never be processed
  - The systems ignores any reports in “Ignore” status as if it does not exist
  - Never use the “Ignore” button on reports loaded from the payroll interface

Retirement Error Message:

- Total Contributions Calculated do not equal Amount Reported
  - You must refer to the Errors tabs in the payroll report. The amount of the Reported Contributions must equal the Total Contributions Amount Calculated.
  - If difference appears to be rounding (less than $1.00) change the reported amount to the calculated amount and click “Save”

Retirement Error Message:

- Member doesn't exist in the system
  - The member is brand new to the system and must be entered. You must complete the Member Setup Wizard in PERSLink.

Retirement Error Message:

- Employment does not exist
  - The employee hasn't been set up for this employer. The employee may have participated with another PERS employer, but they are not linked to this particular employer. You must complete the Member Setup Wizard in PERSLink to set up employment with your agency.

Retirement Error Message:

- Contribution Rates not found for this period and plan

  - Contributions are being reported for a plan and there is no enrollment for this plan in PERSLink for that member.
    - This member is enrolled in a different retirement plan than what was submitted through the payroll interface or
    - Enrollment has not been received or entered

  - Verify information is correct in PeopleSoft and PERSLink. You will need to contact NDPERS for assistance.

Retirement Error Message:

- Enrollment is required
  - You must have the employee send in the paperwork to NDPERS to enroll them in a plan. If the paperwork has been submitted, you should contact NDPERS to verify the paperwork is on file. If an employee was entered incorrectly, NDPERS will need to be contacted to correct the record.

Retirement Error Message:

- Contribution Rates for this PERSLink ID not matching with Reported Amount for this period
  - The contributions reported for a member do not match the amount that PERSLink calculated
    - RHIC is missing
    - Permanent vs temporary
    - Employer rates for different plans
  - Verify information is correct in PeopleSoft and PERSLink. You will need to contact NDPERS for assistance.

Warnings

- A record in “Review” status with <u>no error messages</u> is a Warning.
  - Terminated
  - Salary variances
  - LOA

  - Enter a comment on the detail record to communicate to NDPERS why the record is in “Review” status.

  - NDPERS can suppress Warnings

  - Future enhancement: display warnings

Error Message: Deferred Comp

- Member is not linked to provider1
    - NDPERS is getting a contribution from PeopleSoft for a provider that has not been setup for that employee.
        - Deduction not set up for correct pay period
        - Different provider on PeopleSoft vs PERSLink
    - Verify information is correct in PeopleSoft and PERSLink. You will need to contact NDPERS for assistance.

Error Message: Deferred Comp.

- Pledge amount must match contribution amount for Deferred Compensation Provider
  - The amount from the PeopleSoft file is not equal to the amount NDPERS has setup as a deduction in PERSLink for that pay period.
  - Verify information is correct in PeopleSoft and PERSLink. You will need to contact NDPERS for assistance.
  - If this is an over contribution, the department needs to make a one-time deduction to correct the problem on the next payroll. If the contribution is less than the expected amount, NDPERS will post the money as an Adjustment Report.

Deferred Comp: Known Issues

- Warnings are not visible to the employer

- *Question: When are adjustment reports created by the system?*
  - Adjustment reports are created by PeopleSoft for off-cycle payrolls. Use the comments box on the header or detail record to identify why the adjustment was made.

Insurance

- Regular and Adjustment reports are created automatically.
  - Reports are available for review the second business day of every month

- Regular reports: monthly paper bill

- Adjustment reports: an invoice outside of the monthly bill created for enrollment changes after the regular report is posted

Processing Insurance Reports

- Your role in processing:
  - Reconcile the Regular Reports
    - Compare premiums on PERSLink to PeopleSoft payroll reports
  - Post Regular Reports
  - Review Adjustment Reports (Posted by NDPERS)
  - Make necessary changes

- NDPERS role in processing:
  - Review and post Adjustment Reports
  - Allocate Funds to Payroll Reports
  - Respond to employer questions and issues

Processing Insurance Reports

- Process for University System
  - NDPERS posts regular headers on night of 2nd business day of each month and generates mis-match report
  - NDPERS emails mis-match report to each campus on 3rd business day

- Future enhancements
  - Post mis-match reports to ESS
  - Report of deposit breakout by plan

Processing Insurance Reports

- Process for Central Payroll
  - NDPERS posts regular headers after supplemental payroll generates mis-match report (currently being done for agencies requesting a mis-match report)
  - NDPERS emails mis-match report

- Future enhancements
  - Generate mis-match reports for all central payroll agencies and post to ESS

Future Communication

What is the preferred method of communication?

- Email
- Newsletters
- PeopleSoft portal
- Postal mailing
- NDPERS website
- PERSLink ESS
- Other

Wrap up

- Questions
- Suggestions