



## **EXERCISE 9: MISCELLANEOUS EVENT (MSC) - ENROLLING AN EMPLOYEE INTO THE DEFINED CONTRIBUTION RETIREMENT PLAN AND TERMINATING COVERAGE IN THE DEFINED BENEFIT RETIREMENT PLAN**

In this exercise, you will enroll an individual into the Defined Contribution Retirement Program by adding a MSC event to Job Data. Participation in the Defined Benefit Program will be terminated after enrolling the participant in the Defined Contribution Retirement Plan. If you are processing only one two individuals, you may wish to use “On Demand Processing” rather than batch processing for making the change. Both methods are provided here for your convenience.

### **STEP 1: SET UP MISCELLANEOUS EVENT**

**Navigation: Workforce Administration>Job Information>Job Data**

1. Enter Emplid of employee and press Search button at the bottom of the page.
2. Insert a new row in job data, using the start date that the employee is to be enrolled in the DC Plan that is found on the Benefit Enrollment Report available in PERSLink ESS.
3. Enter Action of “Data Change”, Reason of “Status Change”.
4. Click on the Benefits Program Participation link.
5. Enter “DC” in Elig Fld 4 and click “save”.
6. This will create a MSC event through Benefits Administration.

*For batch processing, before you can process the event, it needs to be assigned to your schedule. This is a centralized activity that automatically runs every half hour. If you are using Batch Processing, please use the instructions provided.*

*If using “On Demand Event Maintenance, you can immediately process the event. The instructions are provided immediately below:*

### **On Demand Event Maintenance Procedure**

**Navigation: (Main menu>Benefits>Manage Automated Enrollment>Events>On Demand Event Maintenance)**

1. Enter Emplid of employee and hit search button at the bottom of the page.
2. This will take you to the “On Demand Event Maintenance page where you should see a yellow “Schedule/Prepare Activity button. Select the button.
3. Status should be “Program Assigned” in the event status. Next, select the yellow Prepare Options button.
4. You will then need to select the yellow “Election Entry” button. Scroll down to Plan Type 7A, Defined Contribution Retirement Plan. Use the lookup feature to select an option or enter “1” in the Option Code field. Next, go to Plan Type 7D Retiree Health Insurance Credit. Use the lookup feature to select an option or



- enter “8” in the Option Code field. After you have finished with your election, press Save. The event Process Status will now change to Entered (ET).
- Next, select the yellow Validate/Finalize button. After the process runs, the status will change to “Finalized/Enrolled” and the event will close. No further action is needed.

**Note:** When using “On Demand Event Maintenance” if you notice that all buttons are grayed out and you need to complete additional processing to close out an event, it may be necessary for you to go all the way back to On Demand Event Maintenance and hit search again to refresh the page. When processing more than one event for an employee, we have found this to be necessary. After you do this, you will be able to access the necessary yellow buttons to continue processing.

***If you will be processing several changes and wish to utilize batch processing, please follow the steps below:***

## **STEP 2: PREPARE OPTIONS**

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

- Enter your Run Control ID (business unit followed by EM)
- Enter your Schedule ID in the Schedule ID field.
- BAS Type will always be “Process Existing Events Only”.
- Company and BAS Group ID will automatically fill in.
- Press the Run button to take you to the Process Scheduler.
- Select Server Name “PSNT” if it is not already selected.
- The Benefits Administration “PSPBARUN” process will be checked by default.
- Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
- When the process finishes (Success), press “Go Back to Run Control” to take you back to Ben Admin.

## **STEP 3: VERIFY PROCESS STATUS**

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

PeopleSoft will only process one event at a time. Enrollments are processed first.

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



## **STEP 4: ELECT OPTIONS**

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

1. Enter your Schedule ID.
2. Enter the Emplid of the employee and press Search.
3. This will take you to the Option Election page. Scroll down to Plan Type 7A, Defined Contribution Retirement Plan. Use the lookup feature to select an option or enter "1" in the Option Code field. Next, go to Plan Type 7D Retiree Health Insurance Credit. Use the lookup feature to select an option or enter "8" in the Option Code field.
4. After you have finished with your election, press Save.
5. The event Process Status will now change to Entered (ET).

## **STEP 5: 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 Control 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 6: 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 MSC event, enter MSC 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 MSC event should now be Enrolled 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 Defined Contribution Retirement Plan.
7. This will terminate the enrollment in the Defined Benefit Retirement Plan and change the RHIC enrollment to the RHIC for the Defined Contribution Plan.