


## 9.2 Enrolling an Employee in Spending Accounts

**Purpose:** Use this document as a reference for enrolling staff into Spending Accounts in ctclink.

**Audience:** Benefits Administrators and Core HR Administrators.

 You must have at least one of these local college managed security roles:

- ZC Benefits Enrollments
- ZD Benefits Enrollment Inquiry

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

### Enrolling an Employee in Spending Accounts

**Navigation:** NavBar > Navigator > Benefits > Enroll in Benefits > Spending Accounts

1. The **FSA Benefits** search page displays.
2. You must know the **Empl ID** or name of the employee you want to enroll. Enter their **ID** in the **Empl ID** field.
3. Select the **Search** button.

**FSA Benefits**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID begins with

Benefit Record Number =

Name begins with

Last Name begins with

Business Unit begins with

Department Set ID begins with

Department begins with

Organizational Relationship =

Alternate Character Name begins with

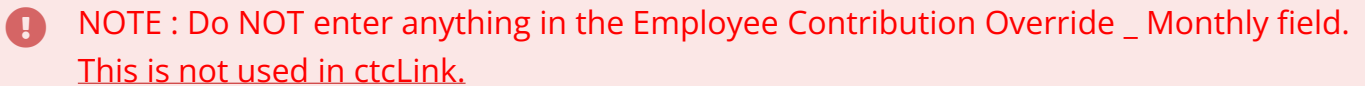
☐ Include History ☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

4. The **Spending Accounts** page displays.
5. Use the lookup to choose the desired **Plan Type**.
  - Plan Type **60** is Flex Spending Health
  - Plan Type **61** is Flex Spending Dependent Care
  - Plan Type **67** is Health Savings Account
6. If there is a previously saved row, then it will be necessary to add a row in the Coverage sub-tab by selecting the **(+)** button on the right hand side of the screen.
7. Enter **Coverage Begin Date, Deduction Begin Date, and Election Date**:
  - **Coverage Begin Date** will depend on the business process of your college, but will typically match the Deduction Begin Date.
  - **Deduction Begin Date** is when you want Payroll to begin looking at the screen in order to determine if a deduction will be taken from a pay period's check. This will typically be the first day of a viable pay period.
  - **Election Date** will depend on the business process of your college and will either represent the day the employee chose the plan or the day that the Benefit Admin entered the information into ctcLink.
8. Use the radio button to select **Elect**:
  - Waive will never be used for this Benefit, only Elect and Terminate.
9. Use the lookup to choose the **Benefit Plan**:
  - For each Plan Type there is only one Benefit Plan possible to choose, but it must be entered here.
10. **Annual Pledge** must have an amount entered:
  - Even if there is an Override, Annual Pledge must be present.

11. **Flat Deduction Amount Override Optional** can also be entered at this time:

- This is particularly helpful for employees that do not work standard year round jobs.
- This customization was introduced by SBCTC when it was noted that an annual pledge on its own only takes into account a standard number of pay periods in a year not the number of pay periods indicated in the Job Data frequency. This led to underpaying towards the Annual Pledge early in the year until a final pay period in which a large balance would try to be collected by the system. This customization will prevent this situation.
- Override will still be halted when the Annual Pledge is met. Override must be calculated with Annual Pledge, and number of pay periods the employee will experience taken into account.



Please only use the **Flat Deduction Amount Override Optional** which is at the end of the screen to enter the deduction amount to be taken per pay period.

12. **Account Information** is a box that will always give you current YTD activity on this item:

- This is a derived value on the page, which means it cannot be queried.
- To arrive at a similar number, deductions through Payroll would need to be referenced.

13. No other entry is needed on this page.

14. Select the **Save** button.

## Spending Accounts

Kadin Wells Employee ID 201008278 Benefit Record Number 170

Plan Type

\*Plan Type

+

-

Coverage

\*Coverage Begin Date

Coverage Election

☒ Elect
 ☐ Waive
 ☐ Terminate

Benefit Program

Primary Benefits inc HCA

Benefit Plan

\*Deduction Begin Date

\*Election Date

03/18/2019

Option Code

Account Information

FSA Account Status

Active

Contributions YTD

\$0.00

Employee Status

Active

Contribution Level

Annual Pledge

\$0.00

Credit Rollover Included in Pledge

☐

Employee Contribution Override

Flat Deduction Amount Override - Optional

Deduction Amount

Save

Return to Search

Notify

Refresh

Update/Display

Include History

Correct History

15. The process to enroll and employee into a spending account is now complete.

## Transfer of Spending Accounts to Another Company

1. When an employee is going to another company/institution within the same calendar year:
  - a. The Transferring **FROM** Company needs to Terminate the Coverage for the Spending Accounts by adding a new row.
  - b. The Transferring **TO** Company needs to enroll into the Spending Accounts AND the Spending Account's (FSA,DCAP,HSA & HSA EE+Dependents) **Annual Pledge** amounts need to be adjusted to account for the Transferring **FROM** Company's YTD Balances.
2. **Example** : From Company's FSA YTD Balance is \$1000 and the Annual Pledge Amount was \$2750.
3. To Company's Annual Pledge should be \$1750 and NOT \$2750 (even if the employee has noted on their forms for the annual pledge to be \$2750).
4. The process of transfer spending accounts to another company is now complete.
5. End of procedure.