

9.2 Viewing Employee Benefit Information and Deduction Summary

Purpose: Use this document as a reference for viewing employee benefit information in ctclink.

Audience: Benefits Administrators.

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

- ZC Benefits Enrollments
- ZD Benefits Employee Data Inq
- 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.

Health Benefit Summary and HCA/Pay1

1. Entry of certain Benefits start in HCA/Pay1, which is considered the system of record for these benefits:
 - Health and Dental (Health Benefits in PeopleSoft)
 - Spousal Medical Surcharge and Tobacco User Medical Surcharge (Simple Benefits in PeopleSoft)
 - Basic and Optional Life Insurance (until 1/1/2017 at which time HCA transitioned this to MetLife and this is a deduction through Payroll in PeopleSoft)
2. PeopleSoft is the origin of entry and system of record for the following benefits.
 - Retirement (both TIAA-CREF and DRS plans)
 - Disability (LTD Basic and Optional)
 - Savings (403(b) and Section 457)
 - Spending (F S A, H S A, and Dependent Care Assistance)
3. Payroll in PeopleSoft is the system of record for Life Insurance due to the MetLife deduction.
 - Life Insurance was transitioned to a Payroll deduction starting 1/1/2017

Viewing Current Benefits Summary

Navigation: Menu > Benefits > Review Employee Benefits > Current Benefits Summary

1. The **Current Benefits Summary** search page displays.
2. Enter the **Empl ID** in the Search Criteria section.
3. Select the **Search** button.
4. The **Current Benefits Summary** page displays.
5. View the employee's benefits in the **Benefit Enrollment Summary** tab.
6. The information in the **Enrollment** tab is contingent on a few things:
7. **Coverage Begin** date drives display, if entry in PeopleSoft or Pay1 (which comes over to PeopleSoft) isn't consistent with PeopleSoft's needs then the Coverage Begin date may not represent the most current effective date.
8. The **Enrollment** tab will pull the highest effective date only in **Coverage Begin**, even if the **Deduction Date** has a later effective date.
9. Misunderstandings can be circumvented by making sure that the **Coverage Begin Date** always equals **Deduction Begin Date** as in the example (and that this entry is also done in the fields mapped from Pay1 into PeopleSoft).

The screenshot shows the 'Health Benefits' page in a web application. At the top, there are fields for 'Employee ID' and 'Benefit Record Number', both containing redacted black text. Below these is a 'Plan Type' section with a dropdown menu showing '10 Medical'. To the right of this section are links for 'Find | View All' and a 'First' button. Below the plan type is a 'Coverage' section with a dropdown menu showing 'Find | View 1' and a 'First' button. Under 'Coverage', there are two date fields: '*Coverage Begin Date' and '*Deduction Begin Date', both set to '01/01/2016'. Below these is a 'Coverage Election' section with three radio buttons: 'Elect' (selected), 'Waive', and 'Terminate'. To the right of these radio buttons is an '*Election Date' field set to '08/04/2016'. There are also several small circular icons with arrows, likely for refreshing or saving data.

Benefit Deduction Summary

9. View the most recent benefits deductions from an employee paycheck in **Benefit Deduction Summary**.
10. Select the **Benefit Deduction Summary** tab.
11. The **Benefit Deduction Summary** page displays.
12. Information in Deduction is always going to represent the last Payroll period only, not any prior payroll periods.
 - Seeing multiple rows for the same deduction can happen for various reasons and ERP should be consulted for the exact cause (it does not mean the screen is broken; it often has to do with date or Job Data inconsistencies).
 - The last paycheck should be consulted and compared to this page if the Benefits Admin has any doubts about accuracy, and that must be coordinated with the Payroll Admin at the college.

End of procedure.

Video Tutorial

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial via Panopto

View the link to _____. This link will open in a new tab/window.