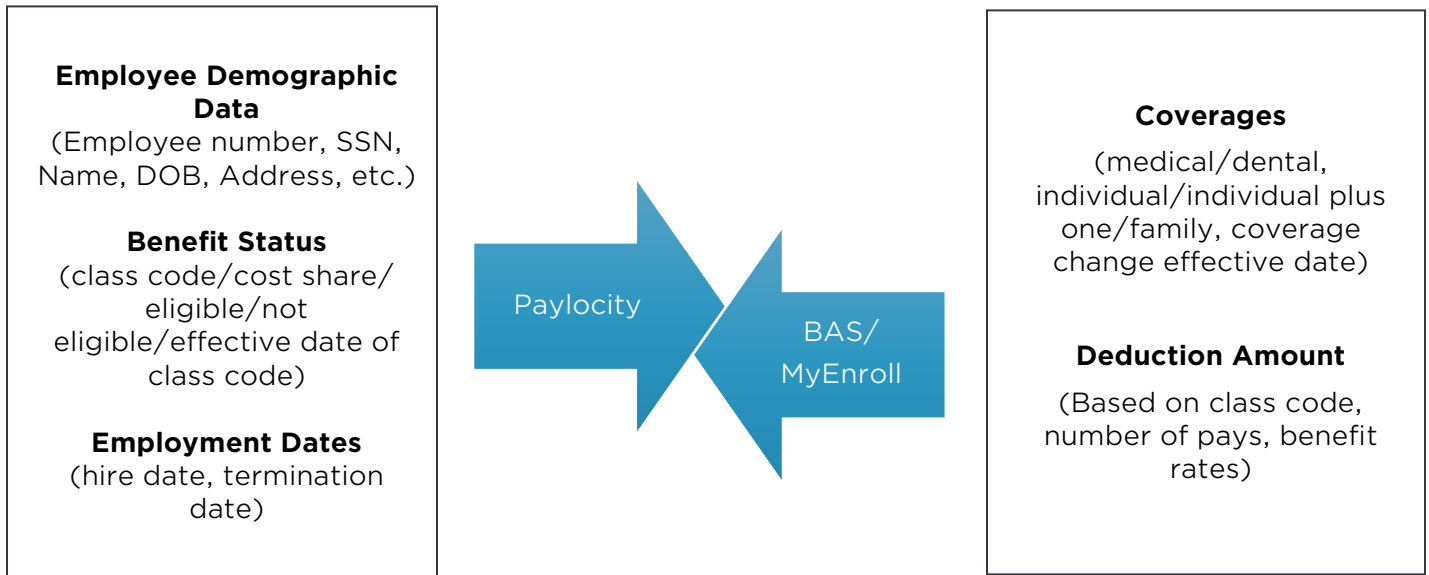


# BAS/MyEnroll Quicksteps

Paylocity - 2023

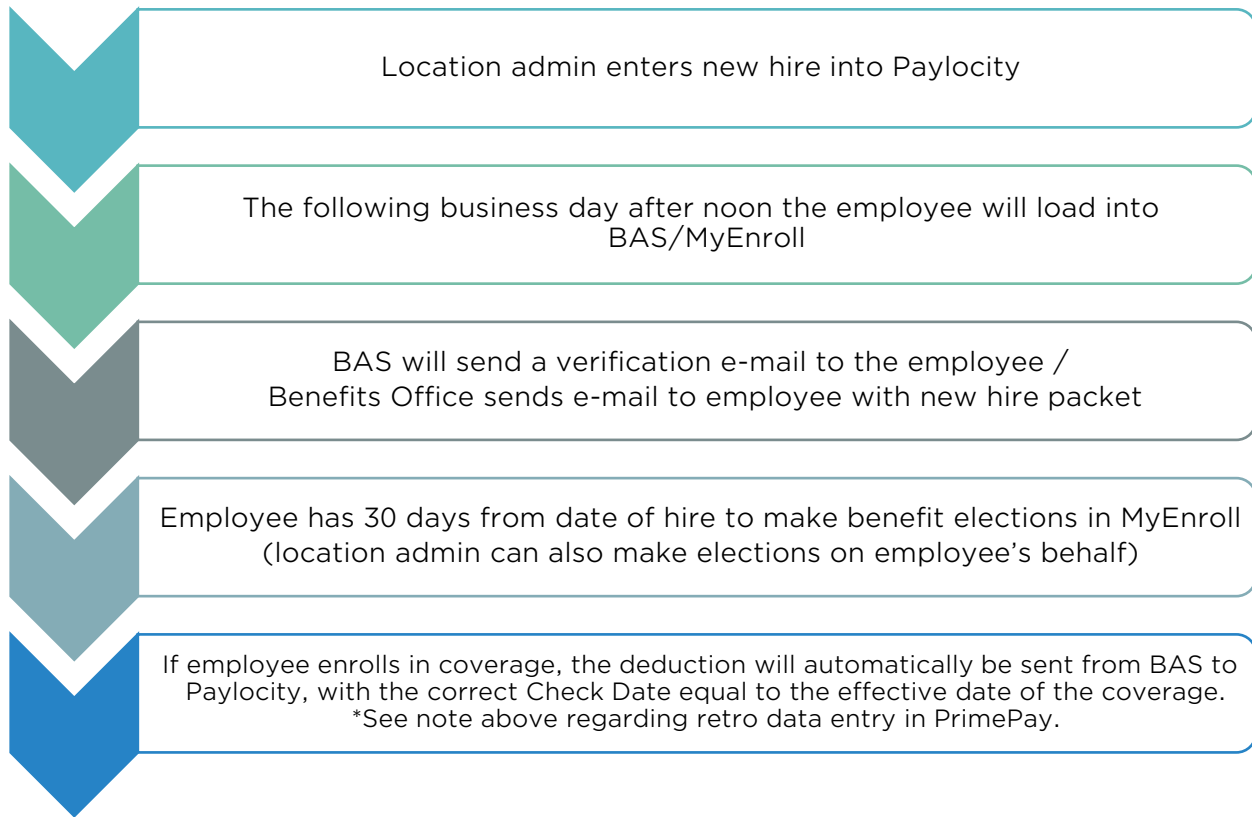
## PAYLOCITY AND BAS/MYENROLL DATA EXCHANGE



MyEnroll also sends change files to the carriers (BCBS, Delta Dental and CVS/Caremark) once per week on Wednesday mornings (so changes should be finalized by Tuesday EOD). This includes changes to employee personal information (address changes) and coverage changes (enrollments, terminations, dependent adds/terminations).

\*Deductions should only be updated manually in Paylocity if there is a retro employee contribution or refund to be made. This is done in the payroll batch, not on the deduction screen.

## NEW HIRES



- In the New Hire Template, click on the [blue](#) date to update the Class Code.
  - Enter the Hire Date in the **Effective Date** field.
  - Select the appropriate **Class Code** based on scheduled hours.

- To view deductions in Paylocity, from the employee's record, go to **Pay** then **Pay Setup**.

Code	Type	Begin Check	End Check	Calc Code	Priority	Amount	Freq	Goal	Paid	Actions
401P	401k	11/25/2022	—	% of Code Group 401k Earns	Benefit - 99	3,000.00	—	\$0.00	\$0.00	
DNFP	125	10/14/2022	—	Flat Amount	Benefit - 0	35,000.00	—	\$0.00	\$0.00	
HDIP	125	10/14/2022	—	Flat Amount	Benefit - 0	55,000.00	—	\$0.00	\$0.00	

## TERMINATIONS

- Location administrator terminates the employee in Paylocity.
  - From the employee's record, select **Employment** > **Status & History** > **Manage Status & Seniority** (see screens below)
  - **A future date can be entered.** The employee will continue to appear in payroll batches until the effective date of the termination occurs.
  - The **Effective Date** should be populated with the termination date.
- The termination will automatically load into BAS/MyEnroll.
- All coverages will terminate in MyEnroll as of the last day of the month.
  - If the 1<sup>st</sup> of the month is used as the termination date, coverages will continue through the end of that month.
- MyEnroll sends an end date for Medical/Dental/GTL deductions to Paylocity with the appropriate effective date.

The screenshot shows the 'Status & History' section of an employee's record. At the top, there are tabs for Employment, Pay, Personal, Time Off, Benefits, and Career. Below these are sub-tabs for Summary, Position, Assignments, Work Location, Status & History (selected), Documents, Company Property, and Checklists. A 'Category (optional)' dropdown is set to 'All'. Three summary cards are displayed: 'Status (Current)' showing 'A - Active', 'Hire Date' showing '11/24/2008', and 'Length of Seniority' showing '14 years, 5 months'. At the bottom, there are two buttons: 'Manage Status & Seniority' (highlighted with a red arrow) and 'Add History'.

The screenshot shows the 'Current Employee Status' page. It displays 'Payroll Status' as 'Active'. Under the 'Hire' section, it shows 'Hire Date' as '11/24/2008', 'Rehire Date', and 'Length Of Seniority' as 'Hire Date - 14 Yrs, 5 Mos'. A red arrow points to the 'Change Employee Status' button.

The screenshot shows the 'Select HR Action' form. The 'Select HR Action' dropdown is highlighted with a red box and contains 'Status Change Termination'. The 'Workflow' dropdown is set to 'Employee Termination'. Under the 'Details' section, there are several required fields: 'Employee Status (required)', 'Termination Date (required)', 'Change Reason (required)', 'Begin Check Date (required)', 'Eligible for Rehire?' (checkbox), and 'User Access End Date (required)'. There is also a 'Do Not Deactivate User' checkbox. A 'Note' text area is at the bottom, followed by 'Save' and 'Cancel' buttons.

## CHANGE AN EMPLOYEE FROM BENEFIT ELIGIBLE TO NOT BENEFIT ELIGIBLE

- Location admin adds the new class code/cost share in Paylocity on the employees record under **Benefits > Setup > Add Benefit Class**.
  - The **Effective Date** should be the date of the change in status/reduction in hours.
  - Under **Benefit Class**, select **Not Benefit Eligible 149\_N**.
  - Additional fields must also be updated to align with the status change such as standard hours, pay rates, sick accrual code, etc.
- The following business day by noon the update will load into BAS/MyEnroll.
- All coverages will terminate in MyEnroll as of the last day of the month based on the Effective Date entered in to Paylocity.
- MyEnroll sends an end date for Medical/Dental/GTL deductions to Paylocity with the appropriate effective date.

The screenshot shows the Paylocity interface for managing employee benefits. The top navigation bar includes tabs for Employment, Pay, Personal, Time Off, Benefits, and Career. The 'Benefits' tab is active. Below this, there are sub-tabs for ACA, Insurance, Dependents, Retirement, COBRA, and Setup. The 'Setup' sub-tab is selected. The main content area is titled 'Benefit Classes' and features a table with the following data:

Effective Date	Benefit Class	Benefit Location	Benefit Division	Part Time	Benefit Termination Date	Actions
01/01/2021	Layperson Benefit Eligible - 269	—	—	—	—	

A red arrow points to the 'Add Benefit Class' button located to the left of the table.

## CHANGE AN EMPLOYEE FROM NOT BENEFIT ELIGIBLE TO BENEFIT ELIGIBLE

- Location admin adds the new class code/cost share in Paylocity on the employees record under **Benefits > Setup > Add Benefit Class**.
  - The **Effective Date** should be the date of the change in status/increase in hours.
  - Under **Benefit Class**, select the appropriate class code.
  - Additional fields must also be updated to align with the status change such as standard hours, pay rates, sick accrual code, etc.
- The following business day by noon the update will load into BAS/MyEnroll.
- The Benefits Office will send an e-mail to the employee with new hire packet.
- Employee has 30 days from the class code change effective date to make benefit elections in MyEnroll (location admin can also make elections on employees' behalf).
- If the employee enrolls in coverage, the deduction will automatically be sent from BAS to Paylocity, with the appropriate effective date.

(see screen above)