# BAS/MyEnroll Quicksteps

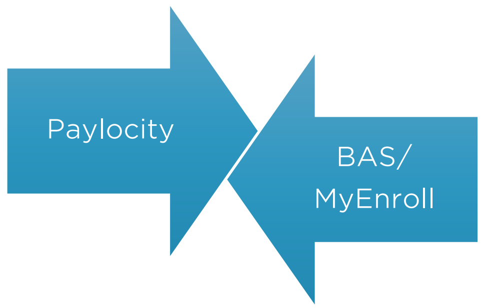
## Paylocity – 2023

### PAYLOCITY AND BAS/MYENROLL DATA EXCHANGE

**Employee Demographic Data**
(Employee number, SSN, Name, DOB, Address, etc.)

**Benefit Status**
(class code/cost share/ eligible/not eligible/effective date of class code)

**Employment Dates**
(hire date, termination date)




**Coverages**

(medical/dental, individual/individual plus one/family, coverage change effective date)

**Deduction Amount**

(Based on class code, number of pays, benefit rates)

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

Location admin enters new hire into Paylocity

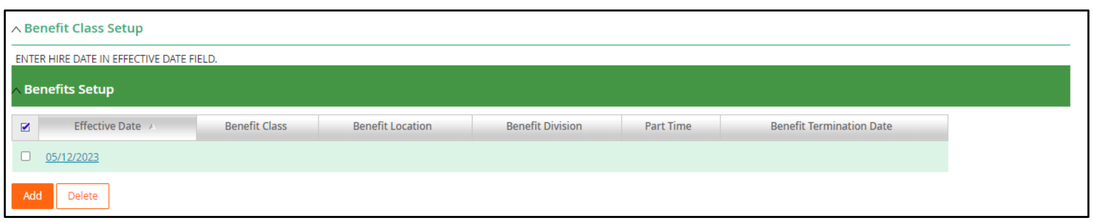
The following business day after noon the employee will load into BAS/MyEnroll

BAS will send a verification e-mail to the employee / Benefits Office sends e-mail to employee with new hire packet

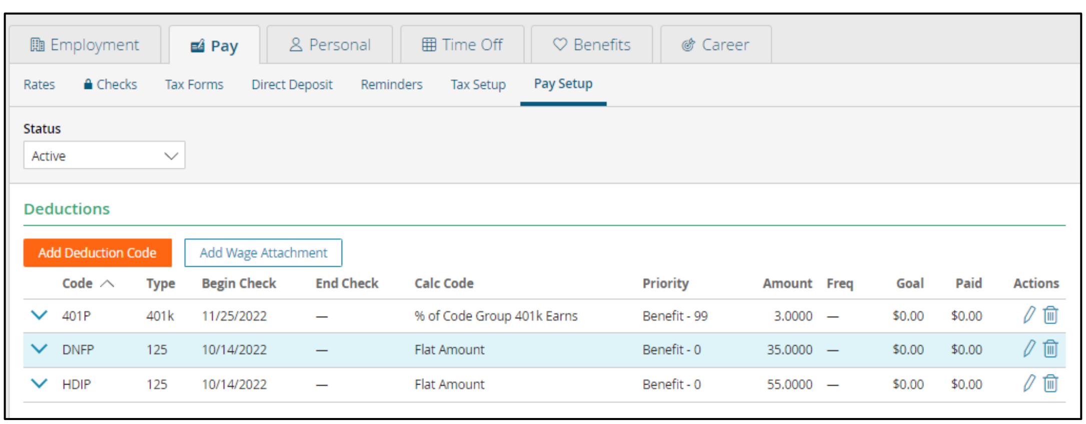
Employee has 30 days from date of hire to make benefit elections in MyEnroll (location admin can also make elections on employee's behalf)

If employee enrolls in coverage, the deduction will automatically be sent from BAS to Paylocity, with the correct Check Date equal to the effective date of the coverage. *See note above regarding retro data entry in PrimePay.

- 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.



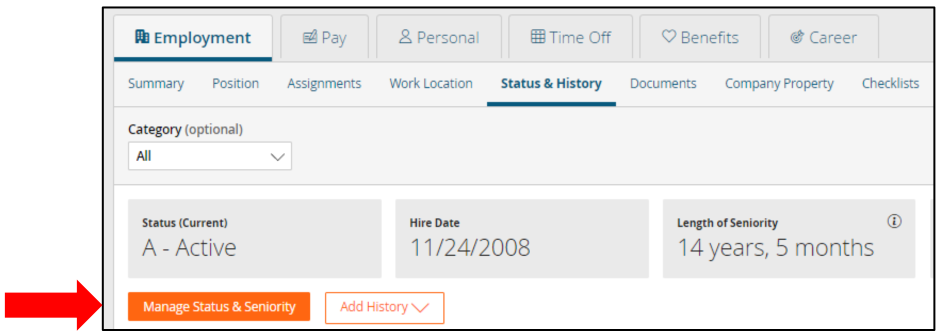

- To view deductions in Paylocity, from the employee's record, go to **Pay** then **Pay Setup.**

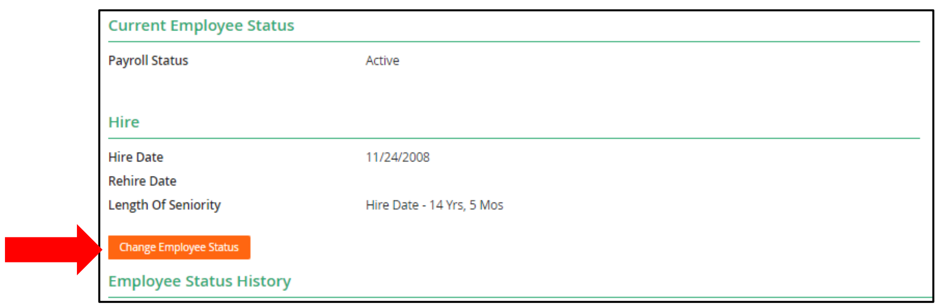


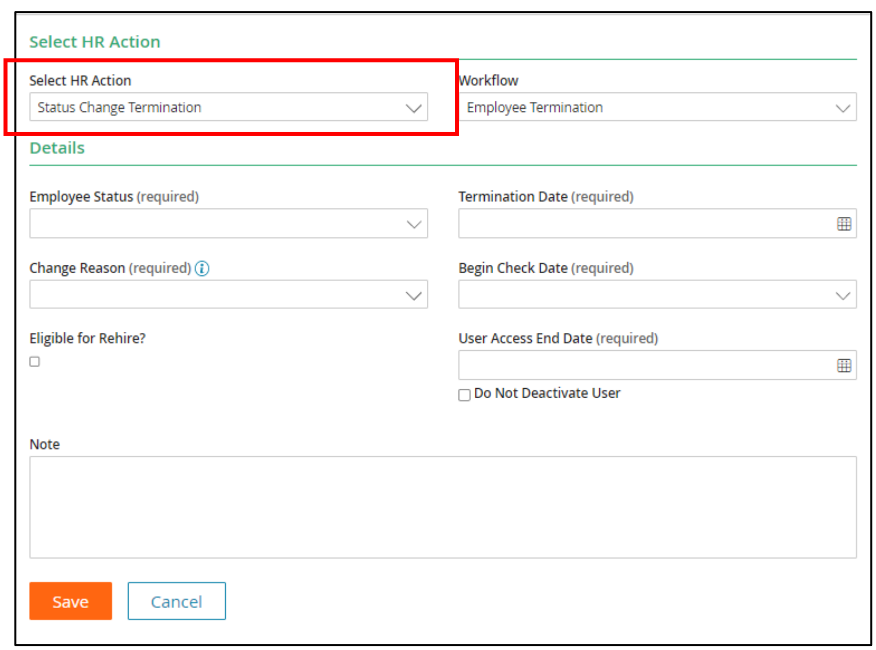

| Code | Type | Begin Check | End Check | Calc Code | Priority | Amount | Freq | Goal | Paid | Actions |
|---|---|---|---|---|---|---|---|---|---|---|
| 401P | 401k | 11/25/2022 | — | % of Code Group 401k Earns | Benefit - 99 | 3.0000 | — | $0.00 | $0.00 | |
| DNFP | 125 | 10/14/2022 | — | Flat Amount | Benefit - 0 | 35.0000 | — | $0.00 | $0.00 | |
| HDIP | 125 | 10/14/2022 | — | Flat Amount | Benefit - 0 | 55.0000 | — | $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 1st 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.

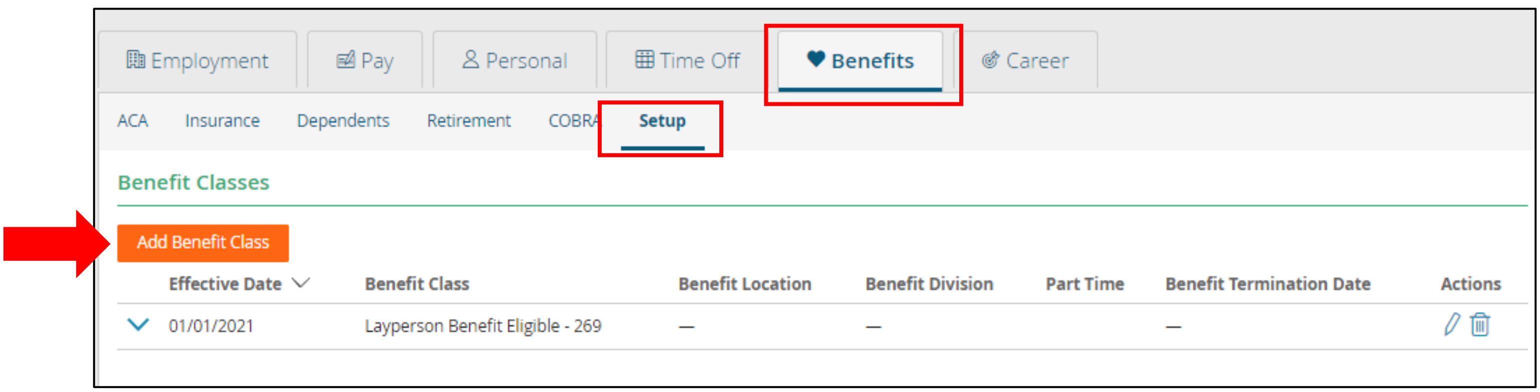


## CHANGE AN EMPLOYEE FROM BENEFIT ELIGIBLE TO *NOT* BENEFIT ELIGIBLE

- 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.




## 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)