Job Aid for PDADEDN and PDABDSU

December 13, 2011

There will be typos.

- Sue Jennings

Contents

Employee Benefit and Deduction Form – PDADEDN .......................................................... 2
Employee Benefit and Deduction Setup Form – PDABDSU .................................................. 4
PDADEDN – Add or Replace (change deduction amount on next pay period) ...................... 6
PDADEDN – Arrears .............................................................................................................. 7
PDADEDN – Remove a deduction ......................................................................................... 8
1. Enter the employee ID. The benefit category will default in from PEAEMPL.
2. No changes can be entered prior to the last paid date.
3. The Query date will default to the begin date of the record. The default can be overridden.

4. Enter the Deduction code. You can either enter the code or use the List of Values function to see eligible codes.
   If you select Eligible Deductions (PTRBCAT) you will see all benefit, deduction, and tax codes this employee is eligible for.

   If you select Employee Deductions (PDIDLST) you will see that specific employee’s benefit, deduction and tax enrollment.

5. Once the code had been entered, move into the next block.

   | Begin Date | This defaults from the Query date and can be overridden. |
   | End Date   | No entry. This field is automatically populated by the system when you terminate a record. |
   | Calculation Rule | This defaults from the rule from and connate be overridden. |
   | Bond Balance | not used |

6. Move into the next block.
Fields and notes from the Deduction detail window

7. The Effective Date defaults in from the begin date –do not override.
8. Deduction Change reason not currently used
9. Status Should be active
10. Reference not used
11. Event Date not used
12. Comments Exist This is automatically populated when entry is done in the Comments Window
13. Options/Amounts The entry in these fields are dictated by the calculation rule.

A Plan means that a plan code must be selected. Click on the Plan button under the title column to see a list of values.

There are four values that can appear in the entry columns:
- Required: a value must be entered before the record can be saved
- Optional: a value may be entered if required
- No Entry: No values should be entered. Either the values will default or there are no entries in these fields.
- System: System generated values will populate these fields.


This value defaults from the rule form. Combined limit processing is associated with appropriate retirement codes. No overrides should be done.
Employee Benefit and Deduction Setup Form – PDABDSU

This form is used to enroll an employee in selected benefits, deductions, and required taxes at time of hire.

How to read this form:
1. The benefit category defaults in from PEAEMPL and cannot be updated here.
2. The Default Begin Date will default and the effective date for all records selected when you move into the form.
3. When a record is selected that makes other selections ineligible, then newly ineligible options automatically display “possible preclusion. For example: the employee can only be enrolled in one medical plan.
4. If a benefit, deduction, or tax code is required for payroll processing, the required indicator appears as checked. This defaults from a rule form and cannot be updated here.
5. The default rules for the begin date for the benefit, deduction or tax is set up on a rule form.
   - Current hire - - defaults from the Current Hire field on PEAEMPL
   - User Specified – defaults from the Default Begin Date at the top of the form.
6. There will be check in this indicator if the benefit, deduction or tax rule has been set up to default a common value.
7. The records you selected in the Setup Column will appear when you do the next block function.
Set up Window

The code highlighted by your cursor will dictate what appears on right hand side of the screen. Two codes have been selected. The screen prints below show the display differences between the codes.

The text in the right hand column will guide you in the entry for each code.
PDADEDN – Add or Replace (change deduction amount on next pay period)

Access the Add or Replace and Arrears Window.

This function is designed to take an additional amount, or to provide a refund, for a specific benefit, deduction or tax code during the next payroll process. Once the payroll is completed, the system removes these values.

The employee must be enrolled in this specific benefit, deduction or tax for the pay period being processed.

This does not apply to enrollment records terminated prior to this pay period. Adjustments made to those terminated records must be done through the payroll adjustment form.

1. **Add or Replace**
   - **Add**: Take the normal pay period amount and this additional amount
   - **Replace**: Replace the normal pay period amount with the amount(s) in these fields
   - **Neither**: This is a default value only. It cannot be selected once you have clicked on one of the other options.

2. **Enter Employee and/or Employer Amount as required.**
3. **Typically Applicable Gross is only entered for taxes.**
4. **Payroll ID is not used here.**
**PDADEDN – Arrears**

Access the Add or Replace and Arrears Window.

This function is designed to take an additional amount for a specific benefit, deduction or tax each pay period until the recovery amount (balance) has been reached.

<table>
<thead>
<tr>
<th>Arrears</th>
<th>Active Arrears Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Arrears Balance | 140.25 |
| Maximum Recovery Amount | 00105 |

**Active Arrears Status**

This will be populated automatically if the system creates or removes an arrears balance.

If an arrears balance is manually entered, this check box will need to be populated.

**Arrears Balance**

This is the total amount to be recovered from the employee.

The system will deduct from the balance the Maximum Recovery Amount teach pay period. During the last pay period of the arrear recovery, the system deducts any remaining balance and unchecks the Arrears Active Status.

**Maximum Recovery Amount**

This is the maximum amount to be deduction from the employees check each pay period.

IF this field is left blank, the entire arrears balance will be deducted with the next pay period.
PDADEDN – Remove a deduction

1. Enter the code you wish to remove.
2. Place your cursor in the Begin Date window.
3. Do a ‘record remove’ function.

JobAidDeduction01.062112.PDADEDNandPDABDSU