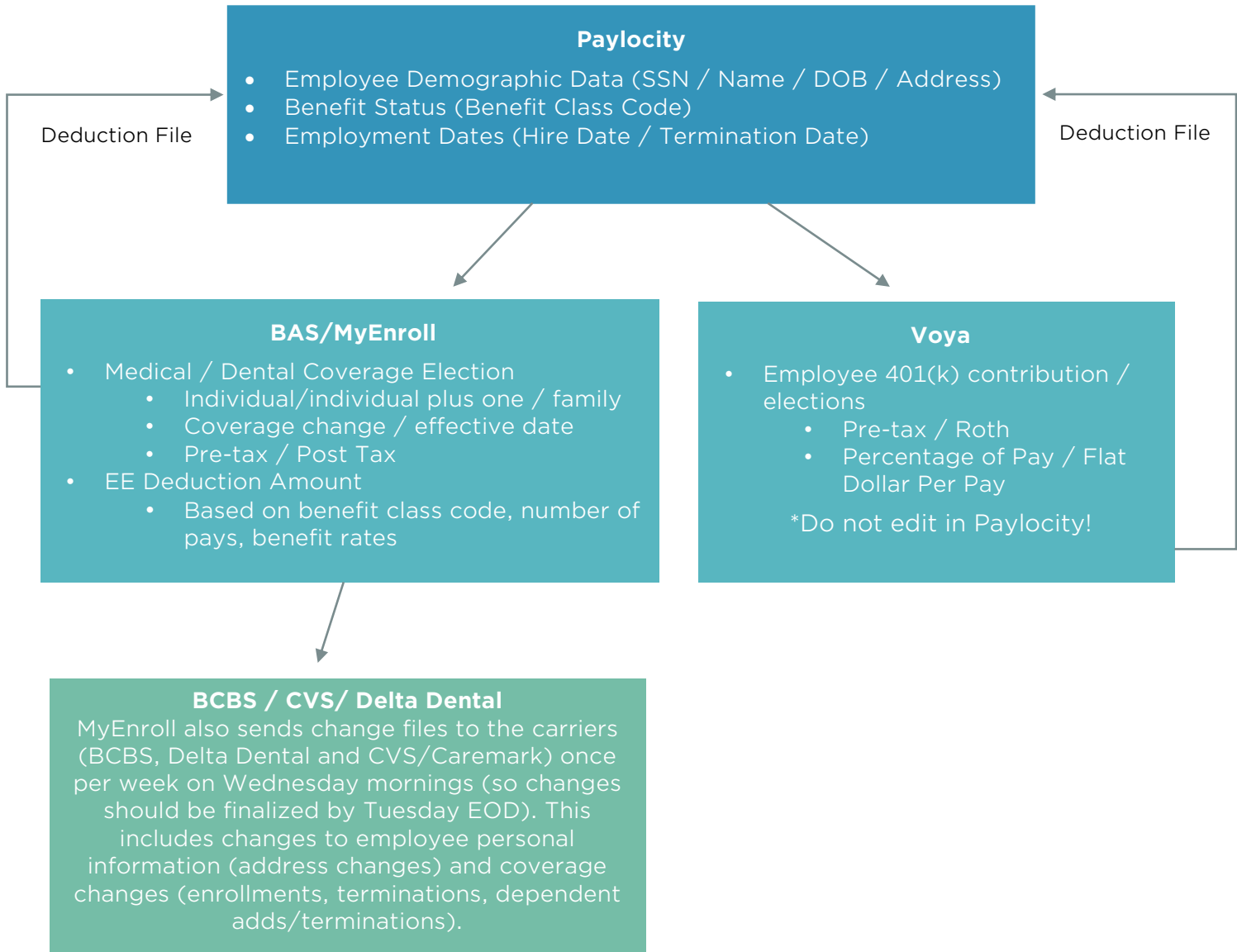


BAS/MyEnroll Quicksteps

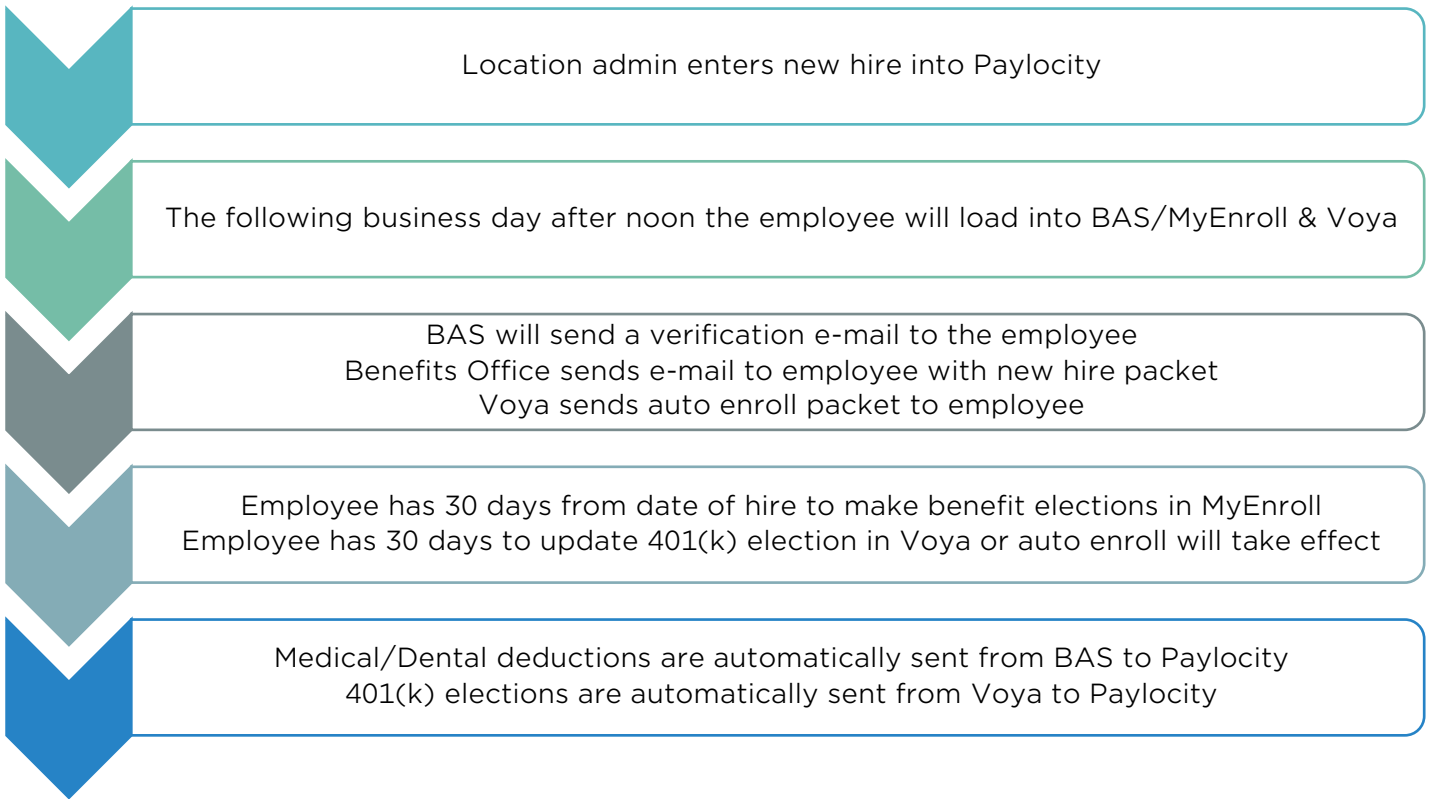
Paylocity - 2023

PAYLOCITY AND BAS/MYENROLL DATA EXCHANGE



*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.

Benefit Class Setup

ENTER HIRE DATE IN EFFECTIVE DATE FIELD.

Benefits Setup

| Effective Date | Benefit Class | Benefit Location | Benefit Division | Part Time | Benefit Termination Date |
|----------------|---------------|------------------|------------------|-----------|--------------------------|
| 05/12/2023 | | | | | |

Add Delete

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

Employment Pay Personal Time Off Benefits Career

Rates Checks Tax Forms Direct Deposit Reminders Tax Setup Pay Setup

Status: Active

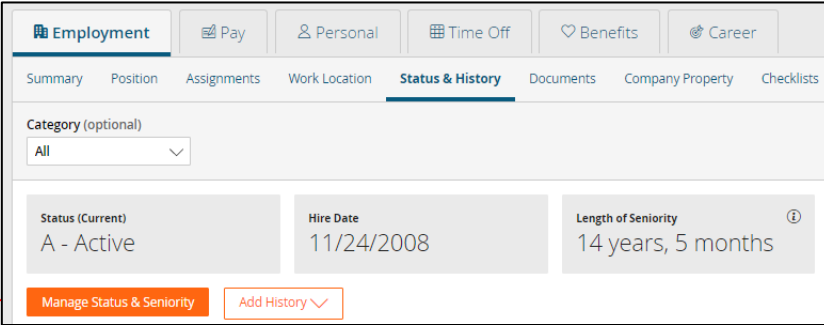
Deductions

Add Deduction Code Add Wage Attachment

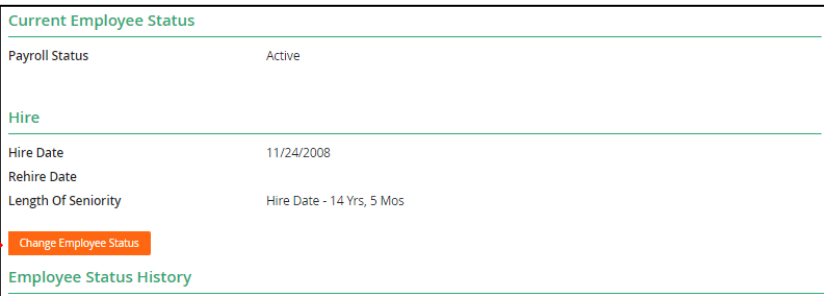
| Code | Type | Begin Check | End Check | Calc Code | Priority | Amount | Freq | Goal | Paid | Actions |
|------|------|-------------|-----------|----------------------------|--------------|---------|------|--------|--------|---------|
| 401P | 401k | 11/25/2022 | — | % of Code Group 401k Earns | Benefit - 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

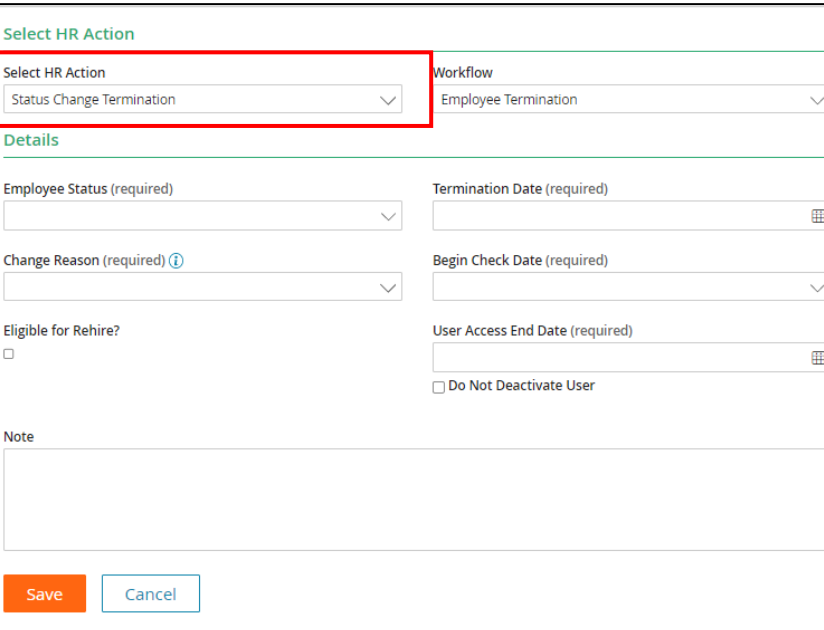
- Location administrator terminates the employee in Paylocity.
 - From the employee's record, select **Employment** > **Status & History** > **Manage Status & Seniority** (see screens below)
 - **A future date can be entered.** The employee will continue to appear in payroll batches until the effective 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.



The screenshot shows the 'Status & History' tab in the Paylocity interface. The 'Status (Current)' is 'A - Active', the 'Hire Date' is '11/24/2008', and the 'Length of Seniority' is '14 years, 5 months'. A red arrow points to the 'Manage Status & Seniority' button.



The screenshot shows the 'Current Employee Status' page. The 'Payroll Status' is 'Active'. The 'Hire Date' is '11/24/2008' and the 'Length Of Seniority' is '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 'Employee Termination'. The 'Details' section includes fields for 'Employee Status (required)', 'Termination Date (required)', 'Change Reason (required)', 'Begin Check Date (required)', 'Eligible for Rehire?' (checkbox), 'User Access End Date (required)', and 'Do Not Deactivate User' (checkbox). A 'Note' field is at the bottom, along with '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 benefit classes. The top navigation bar includes tabs for Employment, Pay, Personal, Time Off, Benefits, and Career. The 'Benefits' tab is active, and the 'Setup' sub-tab is selected. Below the navigation, there are tabs for ACA, Insurance, Dependents, Retirement, COBRA, and Setup. The 'Benefit Classes' section displays 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 | — | — | — | — | |

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)