PERS Enrollment Elements in Workday

This is a high-level overview of all the elements in WD that make up PERS enrollment. Each of these elements will need to be considered when enrolling/unenrolling and correcting an employee's PERS benefit or deductions. Agency Payroll & HR staff are responsible for ensuring all elements are accurate.

1. **What: PERS Status Check / PERS Contribution Start Date**

    Where: Viewable in Workday by selecting Actions >Additional Data >View All under the section titled PERS Status Check.

    Why: The PERS Contribution Start Date is the date the employee becomes PERS eligible. This date is provided by PERS and is entered in Workday by agency HR or payroll when the status check is performed at the time of hire.

    Function: This date is used by the central **Workday HR** team as part of a monthly process that enrolls employees in the appropriate grade profile when they become PERS eligible. The automated monthly process occurs for all PERS eligible employees with *member paid* benefits.

    If this date is a future date, Workday will auto enroll effective to this date. The Workday integration runs on the 1st and the 15th for contribution start dates in the current month and will not run any automated processes on past dates; however, we still recommend agencies fill in this field for auditing purposes.

    Corrections: Agency HR or payroll partner roles can make corrections to the status check date.

    Resources: For detailed information about the status check process and entries in Workday, please visit the "PERS Status Check & Benefit Enrollment Process" knowledge article in Workday.

2. **What: Grade Profile (includes range option)**

    Where: Viewable by selecting Compensation from the employee's profile

    Why: The grade profile is what determines the employee's salary range at either a PERS eligible rate (range option "P"), or a non- PERS eligible rate.

    Function: When the grade profile is PERS eligible (range option "P"), this triggers an auto enrollment process for employees at agencies with *member paid* PERS benefits; if the grade profile is PERS eligible, the employee will be auto enrolled in the applicable PERS benefit at the at the time of their PERS contribution start date.

    Employees at agencies with employer paid benefits remain at a non-PERS grade profile and need to open a case assigned to Workday | Central Payroll Support to enroll the employee in PERS benefits.

    Corrections: Agency HR can make changes to grade profiles for changes effective the 1st of the month via the request compensation change action, reason of "PERS Pickup". If changes are needed on a day other than the 1st of the month (such as on the date of hire), agencies will need to open a help case assigned to Workday | General Help.

3. **What: <u>Benefit Tab</u>**

   Where: Viewable by selecting Benefits from the employee's profile

   Why: The Benefits tab will reflect the PERS enrollment once the employee is enrolled and will be visible on or after the coverage begin date.

   Function: The PERS enrollment occurs depending on the grade profile as explained in the section above. Once enrolled in PERS benefits, the benefits are visible on the benefit tab in Workday. The benefit enrollment is what causes the monthly PERS benefits to be calculated on the employees' wages. This includes the member or employer paid IAP, along with the employer costs of Pension, RHIA, and RHIPA.

   Corrections: Agencies do not have access to make Benefit enrollment corrections. If corrections are needed, (enrolling or unenrolling) agencies will need to create a help case assigned to WD | Central Payroll Support.

4. **What: <u>Pay Input- PERS</u>**

   Where: Viewable in Workday by selecting Pay from employee's profile/Input. Can be searched by pay component.

   Why: Agency payroll partners use this to enter adjustments to earnings and/or deductions. For example, if PERS corrections are needed, payroll would make a pay input entry for each pay component.

   Function: Pay input is used to enter one-time or ongoing adjustments for earnings and/or deductions. The Workday system knows how to calculate based on the pay component entered so amounts are entered as positive unless you want it to do the opposite. For example, if payroll is entering PERS corrections, which are a deduction, they enter the amounts as a positive if deducting from the employee and a negative if money is owed to the employee.

   Note: There are four standard PERS pay components included in adjusting an employee's PERS benefit via pay input (PERS, or PERS ER Paid, PERS Pension, PERS RHIPA, PERS RHIA). There are some additional PERS pay components that are entered via pay input and not included on the benefit tab. These are PERS P&F Units and PERS - Voluntary Contributions.

   Corrections: Agency payroll partners have the access to make Pay Input Corrections. If assistance is needed agencies need to open a help case assigned to Workday | Central Payroll Support.

   Resources: For added support with making PERS corrections, please visit the "[PERS Corrections, Payroll Partner"](#) knowledge article in Workday.