

INTRODUCTION

Description	This document describes the steps needed to exclude employees from auto enrollment into a retirement plan.
Conditions	Employee is exempt from participation in a retirement plan (TRS, ORP, GDCP). The entry should be made on the employment instance marked as Primary.
Note	Contact SSC for questions regarding eligibility for retirement plans.

Job Data Entry

STEP 1 Search for Employee

PATH Workforce Administration > Job Information > Job Data

Search for Employee's Record

On the **Find an Existing Value** tab, you will:

- Enter the employee's ID (Empl ID)
- Click Search
- If the employee has multiple records, select the appropriate record number

STEP 2 Update Job Data

Work Location tab

Insert a new row by clicking the (+) sign, then update the following fields:

- Effective Date
- Action (Data Change)
- Reason (Update Data)



Work Location	Job Information	Payroll	Salary Plan	Compensation
Empl ID				
Employee		Empl Record		
<div style="border: 1px solid #ccc; padding: 5px;"> Work Location ? Find First 1 of 2 Last </div>				
*Effective Date <input type="text"/>		Go To Row <input type="button" value="+"/> <input type="button" value="-"/>		
Effective Sequence <input type="text" value="0"/>		*Action <input type="text" value="Data Change"/>		
HR Status Active		Reason <input type="text" value="Update Data"/>		
Payroll Status Active		*Job Indicator <input type="text" value="Primary Job"/>		
Current				

Benefits Program Participation link	Click the Benefits Program Participation link at the bottom of the page.
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Job Data	Employment Data	Earnings Distribution	Benefits Program Participation
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Benefits Administration Eligibility area	Update the following fields: <ul style="list-style-type: none"> Retirement (Select NORET) Exclude from Auto Enroll (Check the box)
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Benefits Administration Eligibility ?			
BAS Group ID <input type="text" value="C1M"/>	Cohort1 Monthly		
Retirement <input type="text" value="NORET"/>	Grndfather <input type="text"/>	Elig Fld 3 <input type="text"/>	
Elig Fld 4 <input type="text"/>	Ret-Rehire: <input type="checkbox"/>	Exclude from Auto Enroll: <input checked="" type="checkbox"/>	
Elig Fld 7 <input type="text"/>	Elig Fld 8 <input type="text"/>	Elig Fld 9 <input type="text"/>	

STEP 3	Save data
Save	Click Save

