B/P/P Operations Center

Personnel File

Section Five

Revised Edition
January 10, 2011

ON-LINE PERSONNEL MAINTENANCE

The Personnel File contains information regarding the employees and retirees of the Texas A&M University System. It contains information such as personal data (birth date, sex, marital status, EEO data, etc.), budget data (salary, ADLOC, title code, etc.), payroll deduction data (income tax, social security, retirement plan, annuities, etc.), and insurance data (coverage, premiums, dependent data, etc.).

Various screens and transactions provide all update and inquiry capabilities necessary for normal maintenance of the Personnel File. This maintenance includes: correcting or adding information for an employee who is already on the file, deleting some data for a non-paid employee, adding an employee to the file, requesting a printed copy of an employee's insurance data (mastercard) or benefit summary, or transcribing the data from an erroneous SSN to the correct SSN for an employee.

Additionally, records may be flagged for further processing to update the State Comptroller's Texas Payee Information System TPIS database.

Primary access to an employee's record is made using their UIN or social security number. While in the inquiry function, the UIN or social security number may be changed to gain access to a different employee's data. Any other function (i.e. change or correction or transcribe) requires returning to the Personnel Maintenance (100) menu before accessing another employee. If the UIN or Social Security number is not known, it can be looked up using the employee number lookup. Access it from the Personnel Maintenance menu by placing the cursor in the UINfield and then pressing PF1 key.   See "Special Purpose Processing - Employee Number Lookup" (page 8.3) in the BPP user's manual.

System Standard Use Fields and Rules

General fields with their rules, uses, hints and techniques.

SCREEN   (Next Screen, Screen Nbr) 3-digit code that identifies the next screen to be viewed; this is used to maneuver through the B/P/P System screens.

UIN   (Universal Identification Number) 9 digit number assigned by TAMUS to identify students, staff, faculty, dependents in and between TAMUS systems. Generally the preferred 'key' for finding persons in the system through screens or reports. Pattern is NNN00NNNN where position 4 and 5 are zeros.

SSN   (Social Security Number) 9 digit number assigned by Federal agency for US residents. Where possible should be protected data for screens and reports

RULES - -

?Help:	Symbol (?) is used next to field names, like **Screen** ?**,** to show that there is a help function related to that data field. After the cursor has been placed in/on the field area, pressing <F1> will display the help information related to that field. In the case of **Screen**, the multiple values possible for input to the screen number can be viewed or selected. If pressing <F1> gives you the message 'WNMP0101 0253 NAT1148 No help available for this data field.' then there no current help for that field on this screen

TERMINAL SCREENS

There are several terminal screens used in the Personnel File Inquire/Update procedure. The screens are identified by a three-digit code*. Generally, entering this code in the next screen code on any of these screens will cause this screen to be presented next. These are:

NEXT SCREEN CODE	GENERAL DESCRIPTION	PAGE
100	PERSONNEL MAINTENENCE - used to select the function desired and the screen to be used.	5.9
101	PERSONAL DATA - used to view and maintain general information about the employee/retiree/survivor.	5.12
102	TAXES <OASI/UCI/EIC/FIT/SIT> - used to view and maintain data relating to social security, unemployment compensation insurance, advanced earned income credit, and federal and state income tax.	5.25
104	RETIREMENT PROGRAMS <TRS/ORP> - used to view and maintain data relating to Teacher Retirement System and Optional Retirement Program deductions.	5.32
115	DEPENDENT DATA - used to view and maintain dependent data for group insurance plans.	5.39
106	BENEFIT MAINTENENCE - used to view and maintain data relating to group insurance benefits (Life, Medical, Dental, LTD, ADD, Vision, LTC and Spending Accounts).	5.45
130	BENEFIT TOTALS - used to view data relating to the employees benefit selection coverage.	5.66
	ADDITIONAL GROUP BENEFIT SCREENS - used to view data relating to an individual's insurance benefits.	5.70

123 – Expanded Basic Life Coverage
120 – Expanded Medical Coverage
121 – Expanded Dental Coverage
129 – Expanded Vision Coverage
124 – Expanded Optional Life Coverage
125 – Expanded Dependent Life Coverage
126 – Expanded AD&D Coverage
122 – Expanded Long Term Disability
107 – Expanded Long Term Care Coverage
105 – Spending Accounts

NEXT SCREEN CODE	GENERAL DESCRIPTION	PAGE
109	ANNUITY / DEFERRED COMPENSATION - used to view and maintain data relating to tax deferred annuity and deferred compensation deductions.	5.80
110	U.S. SAVINGS BOND / MAINTENANCE - used to view and maintain data relating to U.S. Savings Bond deductions.	5.84
113	COURT ORDERED DEDUCTION / STUDENT LOANS - used to view and maintain data relative to taking court ordered deductions.	5.87
127	SCREEN 127 - TAX LEVY / STUDENT LOANS - This screen contains information relating to Federal Tax Levies and Student Loan Repayments.	5.90
119	USER SERVICE FEES - This screen contains information relating to Employee User Service Fees.	5.94
108	EMPLOYEE ORGANIZATION DEDUCTION / TEXAS TOMORROW FUND - used to view and maintain data relative to state employee organization membership fees (union dues) and the Texas Tomorrow Fund deduction(s).	5.96
117	CREDIT UNION/CHARITABLE CONTRIBUTIONS- used to view and maintain data relative to the credit union deduction(s) and the charitable contributions deduction(s).	5.98
114	CHARITABLE CONTRIBUTIONS - HIGHER ED / ENGLISH PROFICIENCY / EXTENDED PAY PLAN - used to view and maintain data relative to charitable contributions for higher education, the English proficiency deduction and the extended pay plan.	5.100
112	FEDERAL RETIREMENT - used to view and maintain data relating to Federal Retirement Program.	5.103
103	FEDERAL INSURANCE - used to view and maintain data relating to various Federal Life Insurance (regular or optional) programs.	5.106
111	ADDRESS DATA - used to view and maintain data relating to employee/retiree mailing, home and employment addresses and phone numbers.	5.109
	FOREIGN ADDRESS - used to view and maintain foreign addresses along with the employment address.	5.106

NEXT SCREEN CODE	GENERAL DESCRIPTION	PAGE
140	EMERGENCY CONTACT INFORMATION - contains information relating to employee emergency contact information	5.115
118	BILLING INFORMATION - used to update insurance billing status, percent local and bank draft information. Used to view balance information for all insurance participants.	5.120
116	BENEFIT HISTORY - used to view data relating to changes in group insurance benefits.	5.124
XXX	Comment Maintenance Utility Screen	

The operator can traverse the screens in the order listed on the function select screen or can select the next screen desired by entering the corresponding code in the SCREEN field of the screen being processed. A blank or invalid SCREEN code will result in the default being taken.

When adding a new employee, certain screens must be processed in a specific sequence to insure that all segments are built properly. For example, the Tax Screen (102) will always follow the Personal Data Screen (101). Additionally, if the new employee has a federal appointment, the Federal Retirement (112) and the Federal Life Insurance (103) Screens will follow the Tax Screen, regardless of which screen may have been requested in the SCREEN field.

DO NOT override the screen order when adding a new employee.

* The majority of the two-character screen codes that were used in the past are still active. The two-character codes will only work within the Personnel System while the three-digit codes will work from the other systems such as Tables. They are cross referenced in the following table:

NEXT SCREEN CODE

NUMERIC	ALPHA	NUMERIC	ALPHA
100	---	116	BH
101	PD	117	CC
102	TX	118	BI
103	FI	---	---
104	RT	120	MD
105	SA	121	DE
106	BE	122	LT
107	LC	123	BL
108	EO	124	OL
109	AN	125	DL
110	BD	126	AC
111	AD	---	---
112	FR	---	---
113	CO	129	VI
114	EN	130	BT
115	DD		

HIGHLIGHTED MESSAGES

Certain messages are periodically displayed on the screens to give information and/or indicate the presence of errors detected during processing. These messages are displayed in a brighter intensity (or different color) than are the other fields on the screen.

It should be noted that on the Personal Data screen, the current function and SSN are always highlighted, and on all other screens (except the Function Select) the current function, SSN, and employee's name are always highlighted.

The following message may appear on any screens except for Function Select:

HIGHLIGHTED FIELD(S) IN ERROR - Required data was not entered, or invalid data has been entered in the highlighted fields. The screen will <u>not</u> be processed until valid data has been entered.

Several messages are unique to the Function Select screen. A list of them can be found on page 5.9.

SCREEN 100 - PERSONNEL MAINTENANCE

This screen is used to gain initial access to the Personnel File on-line maintenance system. All of the various functions of the system are accessed from this screen.

After proper sign-on has been completed, the user must enter either **Screen 100 or Screen 000** to retrieve the screen. Any one of the various functions may now be selected.

DESIRED FUNCTION CODE	GENERAL DESCRIPTION
b (blank)	**INQUIRY** - This function allows the user to view any or all data on the Personnel File for the employee having the specified social security number or UIN.
C	**CORRECTION** - This function is used to correct data for an SSN that is already on the File. The user is presented with the data on the Personnel File and given the opportunity to change the data or add new data. All data fields are edited prior to allowing the user to proceed to the next requested screen.
D	**DELETION** - This function is used to delete the data for a SSN which has not yet been paid on the payroll system. (This function is restricted and not generally available. Most deletions occur in a batch mode.)
N	**NEW Employee** - This function will prompt you to verify the SSN to be added before taking you to empty screens on which the data for a new employee may be entered into the Personnel File. All fields on each screen are edited prior to allowing the user to pass to the next requested screen.
P	**PRINT BENEFIT SUMMARY** - This function requests a printed memo addressed to the employee detailing a benefit insurance summary for the specified UIN be produced via batch (off-line) processing at a later time.
T	**TRANSCRIBE TO CORRECT SSN** - This function copies all data from an incorrect SSN to the correct SSN.
V	**VENDOR FILE ADDITION REQUEST** - This function causes a flag to be set so that a record will be generated with the next payroll to build an update record for this person for the State Comptroller's Texas Payee Information System (TPIS)

SCREEN 100 - PERSONNEL MAINTENANCE

```
100 TAMUS B/P/P - Personnel Maintenance                    05/22/08 09:57
                                                           P R168


Screen:_1_

     Function:_2     Blank = Inquiry
      UIN/SSN: 3_____  C = Correction    N = New Employee (Enter SSN)
                         D = Deletion      T = Transcribe data to correct SSN
                         V = Vendor file addition request
                         S = Schedule insurance mastercard

101 Personal Data                        119 User Service Fees
102 Tax <OASI/UCI/EIC/FIT/SIT>           108 Employee Org/TX tomorrow fund
104 Retirement <TRS/ORP>                 117 Credit union/Charitable cont.
115 Dependent data                       114 Charitable Cont. EDU/ENG PROF/EPP
106 Benefit maintenance                  112 Federal retirement
130 Benefit totals                       103 Federal insurance
109 TDA/DCP/Roth 403(b)                  111 Addresses & phone numbers
110 U.S. savings bond                    140 Emergency contact information
113 Court ordered deductions             118 Billing Information
127 Tax Levy/Student Loans/Bankruptcy    116 Benefit History
```

SCREEN 100 - PERSONNEL MAINTENANCE EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the **ENTER** key, you will be able to move through all the screens in the Personnel File.
2	FUNCTION	Blank - Inquire C - Correction D - Deletion N - New Employee P - Print Benefits Summary S - Schedule insurance mastercard T - Transcribe data to correct SSN V - Vendor file addition request
3	UIN or SSN	Valid 9-digit UIN or social security number.

MESSAGES UNIQUE TO SCREEN 100 - PERSONNEL MAINTENANCE

1. **INVALID FUNCTION CODE FOR THIS USERID** - The user attempted to perform a function that is not allowed for this user. If the user <u>should</u> be allowed to perform the requested function, contact the B/P/P Operations Center.

2. **UIN HAS BEEN UPDATED - CONGRATULATIONS! -** A benefits summary memorandum for the specified UIN has been scheduled for later printing OR an insurance mastercard for the specified UIN has been scheduled for later printing OR The flags have been set to generate an add transaction for the State Comptroller's Texas payee information system for the specified UIN.

3. **PRESS 'ENTER' TO DEL UIN; OTHERWISE, ENTER 'NO' IN SCREEN FLD** - A request was made to delete an UIN, and the UIN has been cleared for deletion, if the user wishes to go ahead and do so.

4. **INVALID SYSTEM SELECTED. USE PF1 FOR HELP** - The user decided to forego deletion of an UIN from the file OR an invalid screen code was entered.

5. **UIN CANNOT BE DELETED FROM THE FILE** - A request was made to delete the specified UIN, but it has already been processed by the payroll calculation program, and is therefore ineligible for deletion. (If the UIN was entered incorrectly, you may want to use function "T" to transcribe the data.)

6. **UIN DELETED FROM FILE** - The records for the specified UIN have been deleted from the File.

7. **UIN IS ALREADY ON THE FILE** - A request was made to add the specified UIN to the File, but it is already there. Be sure the correct UIN was entered.

8. **UIN WAS NOT FOUND ON THE FILE** - A request was made to access the specified UIN, but it was not on the File. Be sure the correct UINN was entered.

9. **SSN HAS BEEN TRANSCRIBED (ADDED) TO THE FILE** - The data for an erroneous SSN has been copied to new records for the specified SSN.

SCREEN 101 - PERSONAL DATA

This screen contains general information about the employee/retiree, including sex, marital status, salary, employee status, etc. There is a limited amount of interdependence between various data fields on this screen. For example, if the employee status is equal to **R** (retired), the retirement date must contain a valid date.

One data field is unique in that it appears only when the **TRANSCRIBE** function is invoked. The **COPY TO SSN** field is located to the right of the SCREEN code field. When transcribing the data from an erroneous SSN to the correct SSN, enter the <u>correct</u> SSN in this field.

For budgeted employees, several data elements on this screen are updated automatically from data in the Active Budget. As a part of normal payroll processing (when changes are made before BVD2 is run for monthly paid employees, or the PPRs are run for biweekly paid employees), the following fields are updated if the payroll source being processed originated in the Active Budget:

(for Pay Types B, H, F or R on sources originating from the Active Budget)

PIN	BUD-SAL	STU/STF/FAC
ADLOC	POS-PCT-EFT	EEO-JOB
PAY IND	ANNUAL-TRM-MOS	CURR-TL-CD
LST-ACT-DT	PREV-TL-CD	LST-BUD-ACT

The following data elements are updated as a result of normal on-line Form 500 processing:

If the Budget Occupant Action Code is **VT** or **IT** for all workstations except **A**, **W**, and **X**, the EEO Termination Code, Employee Status Code, SGIP Eligibility and Termination Date are updated.

If the Budget Occupant Action Code is **RE** for all workstations except **A**, **W**, **X**, and **L**, then the SGIP Eligibility and Retirement Date are updated.

SCREEN 101 - PERSONAL DATA

```
101 TAMUS B/P/P - Personal Data - Correction              08/01/05  15:33
Screen: 1                                                 D BPP0002  R003


SSN _____A_____  UIN _____B_____  Name _____C_____  PIN __2__ Status _ 3
Name: Last _____4_____  First _____5_____  MI 6 Sufx __7__
Gender      8  Educ-Lvl  10 PI        9       Stu-Stf-Fac  11 Attnd 12
Tenure     13  EEO-Mnty  14 EEO-Job  15 EEO-Term  16 Armed Svc Medal Vet 17
Veteran    18  Disbld-Vet 19 Orphan-Vet 20 Surv-Sps  21 Other Protected Vet 22
US-Citizen 23  Natl-Orgn _24 Visa-Type 25 Visa-Stat 26 Vet-Sep-Dt 27 27 _27
Sel Ser Reg 28 Province  _29 I-9 D I-9-Exp-Dt 30 30 _30 FNE-Exp-Dt 31 31 _31


ADLOC _____32_____  Emp-Loc _____33_____  Chk-Distr _____34____  SGIP-Elig-Cd        35
Bud-Sal _36_    FTE-Sal _____37_____  Pos-Pct-Eft _60_38___  Annual-Trm-Mos      39
Ben-Sal _40_    OL-Sal  _____41_____  Lst-Bud-Act      42   Last-Act-Dt 43 43 _43
Curr-Tl-Cd _44_ Pay-In 45 ES E W2 F Lng 46 _47 Ret  _48  Hz-Dty 49 50 Leave 51
Prev-Tl-Cd _52_ ACH 53 _____54____  _____55_____  Change-Date G G _G


Birth-Dt   _56 56 _56 Curr-Empl _57 57 _57 Org-Empl _58 58 _58 Updt __ __ H H   H
Retired-Dt _59 59 _59 Promotion _60 60 _60 Last-Pay __ __ I I thru __ __ J J   J
Terminated _61 61 _61 COBRA-Notify K      Term-RC _62 YTD-Cnty-Pay __L_._____
YTD-Gross ____M_.__ FYTD-Gross _____N_.__ Vendor-Id _____O_____ Mail __63


Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12—
     Help        Exit  Main  Prev  Next
-----------------------------------------------------------------------------
4-©            1   Sess-1    128.194.103.18        TAMT1726        1/2
```

SCREEN 101 - PERSONAL DATA EDIT DEFINITIONS

Most of the fields on this screen are optional and can therefore be left blank when creating a record for a new employee. The fields which are mandatory (and cannot be left blank) are footnoted to that effect.

NUMBER	DATA FIELD	EDITS PERFORMED
1	NEXT SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the **ENTER** key, you will be able to move through all the screens in the Personnel File. **NOTE:** If the status on screen 101 is **C** (COBRA) and you press the **ENTER** key, you will be presented with screen 115 (Dependent Data). If you want screen 102 (TAX Screen) or screen 104 (Retirement Programs) you <u>MUST</u> specify the screen you wish to go to.
2	PIN[1]	Valid alpha workstation code followed by 5 digits; (for wage employee, enter workstation code only)

---

[1] These fields are required for all employees.

NUMBER	**DATA FIELD**	**EDITS PERFORMED**
3	EMPLOYEE STATUS[1]	A - Active C - COBRA Participant D - Deceased I - Incapacitated K - Dependents on COBRA L - Leave of Absence Q - Invalid SSN R - Retired S - Survivor of Employee T - Terminated U - New Employee Base Record W - Working Retiree
4	Last Name	Max 30 characters
5	First Name	Max 15 characters
6	MI	Middle Initial, 1 character
7	SUFX	Name suffix, 4 characters
8	GENDER	F - Female M - Male
9	PI	Principle Investigator Eligible (Y or N)
10	EDUCATION LEVEL[1]	1 - Less than high school 2 - High school/GED 3 - Associate degree 4 - Baccalaureate degree 5 - Master's degree 6 - Doctoral degree 7 - Special professional (D.D.S., D.V.M., J.D., M.D., etc.) Blank - For employee status of **C**, **S**, or **K**
11	STUDENT/STAFF/ FACULTY	1 - Student 2 - Staff 3 - Faculty Blank -
12	HOW ATTAINED	A - Appointment C - Change Title P - Promotion Blank -

[1] These fields are required for all employees.

NUMBER	DATA FIELD	EDITS PERFORMED
13	TENURE STATUS	N - No Blank - No Y - Yes P - Probationary Service (on track)
14	EEO MINORITY CODE	1 - White (not Hispanic or Latino) 2 - Black or African American (not Hispanic or Latino) 3 - Hispanic or Latino 4 - Asian (not Hispanic or Latino) 5 - American Indian or Alaskan Native (not Hispanic or Latino) 6 - Native Hawaiian or Other Pacific Islander (not Hispanic or Latino) 7 - Two or More Races (not Hispanic or Latino) Blank - Not Provided
15	EEO JOB CATEGORY	1 - Executive/Administrative/ Managerial 2 - Faculty 3 - Professional/Non-Faculty 4 - Secretarial/Clerical 5 - Technical/Paraprofessional 6 - Skilled Craft 7 - Service/Maintenance Blank -
16	EEO TERMINATION CODE	I - Involuntary Termination V - Voluntary Termination Blank -
17	ARMED FORCES SERVICE MEDAL VETERAN[2]	N - No or not provided Y - Yes
18	VETERAN[2]	N - No or not provided Y - Yes
19	DISABLED VETERAN[2]	N - No or not provided Y - Yes

[1] These fields are required for all employees.=

[2] These fields are required for all new employees.

NUMBER	DATA FIELD	EDITS PERFORMED
20	ORPHAN OF VETERAN[2]	N - No or not provided Y - Yes
21	SURVIVING SPOUSE OF[2] VETERAN	N - No or not provided Y - Yes
22	OTHER PROTECTED[2] VETERAN	N - No or not provided Y - Yes
23	US-CITIZEN	N - No Y - Yes
24	NATIONAL ORIGIN[1]	See BPP code book; (blank defaults to 'US')
25	VISA TYPE	Non-Immigrants

Non-Immigrants
- AA - Adjustment Applicant
- A1 - Ambassador, Public minister or diplomat & family
- E3 - Australian Citizen
- F1 - Student
- H1 - Temp. worker of distinguished merit and ability
- H3 - Temporary trainee
- J1 - Exchange visitor
- J2 - Spouse or child of an exchange visitor
- L2 - Spouse Intracompany Transferee
- O1- Alien of Extraordinary Ability
- PA - Political asylum
- PR - Permanent resident
- RF - Refugee
- TN - Treaty agreement with Canada & Mexico (NAFTA)
- TP - Temporary protected status
- XN - Exempt national – working outside U.S.

---

[1] These fields are required for all employees.=

[2] These fields are required for all new employees.

5. 17

26	VISA STATUS	If Visa-Type is **J1**, then the following entries are required:
		C - Scholar
		T - Non-Student
		S - Student
		If ST = C, then the CURR-TL-CD can either be a student or non-student title code.
		If ST = T, then the CURR-TL-CD must be a non-student title code.
27	VETERAN SEPARATION DATE	If ST = S, then the CURR-TLCD must be a student title code.
		(MMDDYYYY) Date veteran separated from armed services.
28	SELECTIVE SERVICE REGISTRATION	Required for males hired after 9/1/99; Required only for workstations **C**, **D**, **E**, **H**, **I**, **L**, **S** & **W**
		1 - Properly registered with Selective Service
		2 - Not of age required to register for Selective Service
		3 - Exempt from registration
		4 - Under 18, not required to register
29	PROVINCE	Canadian Province code
30	I-9 EXPIRATION DATE	(MMDDYYY) Expiration date of government documents used to verify I-9 status. May be left blank for employees that have no expiration date.

NUMBER	DATA FIELD	EDITS PERFORMED
31	FOREIGN NATIONAL EMPLOYMENT EXPIRATION DATE	(MM DDYYYY); Expiration date on Employment Eligibility Certificate (EEC) for student workers or expiration date on Work Authorization Certificate (WAC) for budgeted employees. Required for all non-US citizens without Permanent Resident Status.
32	ADLOC	8 numeric digits, followed by a one character alpha modifier, if needed; validated against the ADLOC Table.
33	EMPLOYEE LOCATION	Part and account; validated against the Account Table.
34	CHECK DISTRIBUTION	Part and account; validated against the Account Table.
35	SGIP ELIGIBILITY CODE	E - Eligible for SGIP but has waived all coverage M - Eligible for SGIP (FMLA) N - Not Eligible ? - Not Eligible R - Eligible for SGIP (Retiree) W - Eligible for SGIP (Waived Premium Status - Disabled) 1 - Eligible (Active Employee < 12 months status - 4 months deduction in May 2 - Eligible (Active Employee - 12 month status) 3 - Eligible (Active Employee < 12 month status - billed in summer) 4 - Eligible (Working Retiree)
36	BUDGETED SALARY	Greater than zero; FTE-MO-SAL * percent effort * annual term months. No decimal places assumed (in whole dollars).
37	FTE SALARY	Greater than zero; FTE-MO-SAL * 12. No decimal places assumed (in whole dollars).

NUMBER	DATA FIELD	EDITS PERFORMED
38	PERCENT EFFORT	If not blank, 0.01 through 150.00 for all workstations other than **A**. **A** PINS cannot be greater than 100. (Required for budgeted PINS with employee State Code **A** or **L**.
39	ANNUAL TERM (MONTHS)	1.0 through 12.0, in half-month increments. One decimal place assumed. Can be zero for students.
40	BENEFIT SALARY	Greater than zero; salary at the beginning of a fiscal year or when newly hired when insurance premium is calculated. No decimal places assumed (in whole dollars). If blank, will use budgeted salary.
41	OL SALARY	Greater than zero Annualized Salary (FTE-salary * Percent Effort) at the beginning of the fiscal year or when newly hired. No decimal places assumed (in whole dollars).
42	LAST BUDGET ACTION	CN - Change Name (Active Only) CT - Change Title DI - Demote In DO - Demote Out DW - Demote Within IP - In-grade Promotion IT - Involuntarily Terminated NH - New Hire OA - Other Action PO - Promote Out PW - Promote Within RC - Reclassification RE - Retire RH - Reappoint (Active Only) RL - Return from Leave SL - Start Leave TE - Terminate (Discontinued) TI - Transfer In TO - Transfer Out VT - Voluntarily Terminated
43	LAST ACTION DATE	MM DD YYYY (must be present if LAST BUDGET ACTION is non-blank)
44	CURRENT TITLE CODE	If not blank, validated against Title Code Table. (Required for budgeted PINS with employee Status Code **A** or **L**.

NUMBER	DATA FIELD	EDITS PERFORMED
45	PAY INDICATOR	A - Monthly Full Time Budgeted Position B - Monthly Less Than 100% Budgeted Position C - Monthly Graduate Student D - Biweekly Full Time Budgeted (overtime paid) E - Biweekly Less Than 100% Budgeted (overtime paid) or wage F - Biweekly Student Worker (overtime paid) H - Biweekly Less Than 100% Budgeted (overtime not paid) or wage I - Biweekly Student Worker / Student Intern (overtime not paid) * A thru F – All Work Stations H and I – A, F, H, J, and S
46	LONGEVITY STATUS[1]	N - Not Eligible for Longevity Pay Y - Eligible, unless any source has teaching object class. Leave accrual based on longevity, hazard duty, RET months of service, and leave months of service. R - Not eligible, leave accrual based on RET months of service. Working Retirees only. F - Eligible, based on longevity months of service at 8/31/2005 level, leave accrual based on longevity, hazard duty, and RET months of service. Working Retirees only.
47	LONGEVITY MONTHS[1]	Non-negative integer, incremented by one during month-end processing if the person was paid during the month, was not on leave without pay on the first workday of the month, and had a longevity status code that is not = to 'F' or 'R'.

[1] These fields are required for all employees.

[2] These fields are required for all new employees.

NUMBER	DATA FIELD	EDITS PERFORMED
48	RETIREE MONTHS	Non-negative integer, incremented by one during month-end processing if the person was paid during the month, was not on leave without pay on the first workday of the month, and had a longevity status code of **F** or **R**.
49	HAZARD DUTY STATUS[1]	N - Not Eligible for Hazard Duty Pay Y - Eligible for Hazard Duty Pay
50	HAZARD DUTY MONTHS	Non-negative integer, incremented by one MONTH during month-end processing if the person was paid during the month and was not on leave without pay on the first workday of the month
51	LEAVE MONTHS	Number of months of service credit earned as an employee of Baylor College of Dentistry prior to its becoming part of the A&M System (while not a state agency)
52	PREVIOUS TITLE CODE	Validated against Title Code Table
53	BANK ACCOUNT TYPE	C - Checking Account S - Savings Account Blank or N - Not participating in Direct Deposit
54	BANK ROUTING TRANSIT CODE	Valid bank code (numeric up to 9 digits). Must be Blank if account type = Blank or N.
55	BANK ACCOUNT NUMBER	Employee's bank account number (up to 17 digits). Must be Blank if account type = Blank or N.
56	BIRTHDATE[1]	MM DD YYYY
57	CURRENT EMPLOYMENT DATE[2]	The latest hire date for this employee in this agency in MM DD YYYY format. Must be present if employee status other than **C**, **S**, or **K**. Cannot be greater than 3 months from today's date.

[1] These fields are required for all employees.

[2] These fields are required for all new employees.

NUMBER	DATA FIELD	EDITS PERFORMED

58   ORIGINAL EMPLOYMENT DATE[2]

The original TAMUS employment date in MM DD YYYY format. Must be present if employee status other than **C**, **S**, or **K**. Cannot be greater than 3 months from today's date. Cannot be greater than current employment date.

59   RETIREMENT DATE

MM DD YYYY (must be present if EMPLOYEE STATUS is **R** or **W**. Not allowed if status is **D**, **L** or **T**.

60   PROMOTION DATE

MM DD YYYY date of last promotion

61   TERMINATION DATE

MM DD YYYY (must be present if EMPLOYEE STATUS is **D**, **T** or **C**. Allowed if Employee Status is **R**. Otherwise, must be blank)

62   TERM REASON CODE

Blank -
- 51 - Inadequate salary
- 52 - Lack of opportunity for advancement
- 53 - Dissatisfaction with supervisor or coworkers
- 54 - Dissatisfaction with Travel
- 55 - Working hours

- 56 - Dislike/unsuitability for assigned duties
- 57 - Resignation in lieu of involuntary separation
- 58 - Personal reasons not related to job
- 59 - Reasons unknown
- 63 - At will termination
- 64 - Reduction in force/layoff
- 65 - Transfer to a different state agency/institution
- 66 - End or expiration of contract or grant
- 67 - Dismissal for cause
- 68 - Retirement
- 69 - Death
- 99 - Pending (usually given when updated from the Active Budget)

63   MAIL CD

3 digits, defaults to zero (Part of Vendor ID with the state.)

---

[1] These fields are required for all employees.

[2] These fields are required for all new employees.

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A SOCIAL SECURITY NUMBER Must be a nine (9) digit number

B UIN Universal Identification Number. Computer-generated permanent number assigned to each employee when initially entered into the BPP system.

C SHORT NAME Short name built from long combined name

D I-9 VALID FLAG Flag defaults to **N** when record is built for a new employee or when an employee changes employment from one workstation to another
    N - I-9 forms need to be turned in
    Y - all I-9 forms have been received

E EARNING STATEMENT E-MAIL FLAG Earning Statement E-mail flag. A **Y** will indicate that the employee has elected to received an e-mail notice of payroll processing. No paper earning statement will be generated for employees who select this option when available.

F ELECTRONIC W2 A **Y** will indicate person has opted via HRConnect to receive their W2 electronically

G CHANGE-DATE MM DD YYYY date of last change to ACH information.

H LAST UPDATE MM DD YYYY date of last update to this personnel File record via the terminal

I LAST PAID MM DD YYYY date the employee was last paid

J PAID THRU MM DD YYYY date through which the employee was paid

K COBRA-NOTIFY FLAG Blank for those who have never had MED or DEN coverage. Defaults to N when MED or DEN is added. Updated to Y on Screen 613 when COBRA form is verified by HR office. Updated to I when the office has determined that the person is ineligible for COBRA coverage.

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM (con't.)

L	YTD COUNTY PAY	Calendar Year-to-date total of County pay
M	YEAR-TO-DATE GROSS EARNINGS	Year-to-date total of employee's gross earnings.
N	FISCAL YEAR-TO-DATE GROSS EARNINGS	Fiscal year-to-date total of employee's gross earnings.
0	VENDOR-ID	This is the employee's Vendor ID with the State of Texas and is made up of: the number **2** followed be the employee's SSN followed by a check digit that is generated by the program.

SCREEN 102 - TAX

This screen contains information relating to Social Security/Old Age & Survivors Income insurance (OASI), Benefit Replacement Pay (BRP), (the replacement for employer paid Social Security (EOASI)), unemployment compensation insurance (UCI), advanced payment of earned income credit (EIC), federal income tax (FIT), and state income tax (SIT).

Processing Notes:

If a new employee has state service from another agency or institution, the wages they earned there, which were subject to social security (OASI) withholdings should be entered in the OASI Exempted Earnings. This value will be incorporated in the calculations for social security (OASI).

The FIT Deduction Code of 'S' should be set through the processing of the student exemption files generated from the student enrollment systems for each university campus. This flag is verified from data submitted immediately prior to the processing of each payroll. This automated process may override flags set manually. If there is a need to adjust the flag for a student employee, please contact BPP Production Control to assist in the adjustment of the flag on the appropriate student file.

SCREEN 102 - TAX <OASI/UCI/EIC/FIT/SIT>

```
102 TAMUS B/P/P - OASI/UCI/EIC/FIT/SIT                    11/05/03  13:15
                                                         D BPP0002  0024


 Screen:  1
    UIN:    A          Name:     B

 OASI-Ded-Cd 2 Exp-Ern      3      YTD-Emp-Ded  C         YTD-Empr-Pmt  D
               BRP-Elig  4         YTD-Emp-CE   E          YTD-Empr-CE  F
 OAHI          BRP-Amt      5      YTD-Emp-Ded  G
                                   YTD-Emp-CE   H
 UCI-Ded-Cd  6 County  7      Exp-Ern     8          FYTD-Cvrd-Ern     I

 FIT-Ded-Cd  9 Marital 10 Dep  11  Addl-Amt      12     YTD-Ded       J
               FIT-Lock 13         Exp-Amt       14     YTD-Adj-CE    K
    Frn Natl  Arrvl-Dt 15 15  15  Prior-Vst  16        YTD-Trty-CE    L
               Exp-Dt 17 17   17  Treaty 18 Subs-PRS 19 ETD-Trty-CE   M
    Form 673  Arrvl-Dt 20 20  20  Exp-Dt 21 21  21     YTD-Exp-Amt    N

 EIC-Ded-Cd 22 Marital 23     YTD-Ded     O

 SIT-Ded-Cd 24 Marital 25    Dep 26 Addl-Amt     27    YTD-Ded        P
               State   28 Ad-Dep 29  Exp-Dt  30 30   30 YTD-Adj-CE    Q
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
     Help         Exit  Main  Prev  Next
```

SCREEN 102 - TAX <OASI/UCI/EIC/FIT/SIT> EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	NEXT SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the **ENTER** key, you will be able to move through all the screens in the Personnel File.
2	OASI DEDUCTION CODE	F - Foreign National, Exempt G - Government Employee (Federal Retirement, Exempt) S - Student exemption from OASI deduction * see processing notes Y - Compute OASI, Subject up to the Cutoff Less Exempt Amount
3	OASI EXEMPTED EARNINGS	Blank or greater than zero, 2 decimal places
4	BRP-ELIG	Y - Eligible for Benefit Replacement Pay (New State employees after 9/1/95 are not eligible) N - Not Eligible (New State employees after 9/1/95 are not eligible)
5	BRP-AMT	Blank or not less than zero nor greater than 1034.01
6	UCI DEDUCTION CODE	N - Do not compute deduction (only if CODED exempt from OASI) Y - Compute deduction
7	UCI COUNTY CODE	1 through 255, code for county where employed, see code book
8	UCI EXEMPTED EARNINGS	Blank or greater than or equal to zero

NUMBER	DATA FIELD	EDITS PERFORMED
9	FIT DEDUCTION CODE	B - Deduct Additional Amount Only (phasing out) E - Exempt F - Foreign National, Exempt (under tax treaty program) P - U. S. citizen residing outside country eligible for exemption based upon Form 673 R - Residency Outside US - Exempt T - Tax Employee's Total Income (Ignore Exemption Amount) Y - Compute Tax in Normal Manner (include additional amount, if any)
10	FIT MARITAL STATUS	M - Married S - Single
11	DEP (FIT NO. OF EXEMPTIONS)	Zero through 63
12	FIT ADDITIONAL AMOUNT	Blank or greater than or equal to zero (#5 on W-4)
13	FIT WITHHOLDING LOCK	Y - Cannot change the marital status and number of dependents (to remove the lock, enter "-") Blank - Not locked (to remove the lock, enter "-")
14	FIT EXEMPTED EARNINGS	Blank or greater than or equal to zero (must be blank for all non-federal employees)
15	ARRIVAL DATE[1]	MM DD YYYY (required if FIT DEDUCTION CODE is 'F')
16	PRIOR VISIT	Y - Has been to U.S. previously Blank or N - No previous visit to U.S.
17	EXEMPTION POSTED DATE	MM DD YYYY (must be present if FIT DEDUCTION CODE is E, F or R), FIT DEDUCTION CODE will be reset in February if date is less than current calendar year for deduction code 'E'; in November/December for deduction code 'F' (#6 on W-4)

NUMBER	DATA FIELD	EDITS PERFORMED
18	TREATY CODE[1]	Numeric, validated against Tables File (required if FIT DEDUCTION CODE is **F**)
19	SUBSTANTIAL PRESENCE	Blank - does not meet substantial presence test N - does not meet substantial presence test Y - Does meet substantial presence test, not subject to the single and one with additional amount withholding status for foreign nationals
20	ARRIVAL DATE	MM DD YYYY (required if FIT deduct code is **P**)
21	EXEMPTION POSTED DATE	MM DD YYYY - Must be present if FIT deduct code is **P**. FIT Exemption Date will be re-posted in November/December
22	EIC DEDUCTION CODE	A - Single or head of household B - Married without spouse filing certificate C - Married with both spouses filing certificate Blank - Do not calculate EIC N - Do not calculate EIC
23	EIC MARITAL STATUS	M - Married S - Single
24	SIT DEDUCTION CODE	Y - Compute deduction B - Boarder City State Employee Exemption (will only have their covered wage incremented) E - Wage Exemption (will only have their covered wage incremented) Blank - Do not compute deduction N - Do not compute deduction
25	SIT MARITAL STATUS	H - Head of Household (AL, CA, NC, MO ONLY) M - Married (ALL STATES EXCEPT NJ) O - No personal exemptions (AL ONLY) S - Single (ALL STATES) T - Two Income (ME, GA, MO) Blank- (DC, MD, PA, VA ONLY) A - 19% (AZ ONLY) B - 23% (AZ ONLY) C - 25% (AZ ONLY) D - 31% (AZ ONLY) E - 37% (AZ ONLY)

[1] For foreign nationals - used to identify federal tax exemptions

NUMBER	DATA FIELD	EDITS PERFORMED
26	SIT NO. OF EXEMPTIONS (DEP)	Zero through 30. Valid values for the State of Arkansas are Zero through 2 (1 = self, 2 = self and spouse).
27	SIT ADDITIONAL AMOUNT	Blank or greater than zero or equal to zero
28	SIT STATE CODE	Valid state abbreviation on Tables File
29	SIT ADDITIONAL EXEMPTIONS	Zero through 30. If > zero, the state MUST = CA or AR. For the state of Arkansas, this is the number of dependents in addition to self and spouse.
30	SIT EXEMPTION POSTED DATE	MM DD YYYY

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A	UIN	Must be a nine (9) digit number. SSN may also be entered, the UIN will be dislayed after pressing ENTER.
B	NAME	Must be greater than four (4) characters in length
C	YTD OASI DEDUCTION	Year to date total of employee's OASI deduction
D	YTD OASI PAYMENT[1]	Year to date total of employer's payment toward employee's OASI
E	YTD OASI COVERED EARNINGS	Year to date total of employee's earnings subject to OASI withholding
F	YTD FICA COVERED EARNINGS	Year to date total of employee's earnings FICA eligible for payments
G	YTD OAHI DEDUCTION	Year to date total of employee's OAHI deduction
H	YTD OAHI COVERED EARNINGS	Year to date total of employee's earnings subject to OAHI withholding
I	FYTD UCI COVERED EARNINGS	Fiscal year to date total of employee's earnings subject to UCI withholding

[1] For foreign nationals - used to identify federal tax exemptions

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

J	YTD FIT DEDUCTION	Year to date total of employee's federal income tax withholding
K	YTD FIT ADJUSTED COVERED EARNINGS	Year to date total of employee's adjusted gross income subject to FIT withholding
L	YTD TREATY COVERED EARNINGS	Year to date total of employee's earnings exempt from FIT withholding under a tax treaty
M	ETD TREATY COVERED EARNINGS	Earnings to date amount exempt from FIT withholding under a tax treaty
N	YTD EXEMPTION AMOUNT	Year to date earnings subject to be exempt from FIT
O	YTD EIC DEDUCTION	Year to date total of employee's EIC deduction
P	YTD SIT DEDUCTION	Year to date total of employee's state income tax withholding
Q	YTD SIT ADJUSTED COVERED EARNINGS	Year to date total of employee's adjusted gross income subject to SIT withholding

SCREEN 104 - RETIREMENT

This screen contains information relating to Teacher Retirement System (TRS) and Optional Retirement Plan (ORP). No employee may be enrolled in <u>both</u> plans at the same time.

The following message may appear on the Retirement (104) screen:

EMPLOYEE CAN'T HAVE BOTH TRS & ORP. - A deduction code of **Y** has been entered for both TRS and ORP. Only one of these can be a **Y** at one time. At least one of them must be changed.

SCREEN 104 - RETIREMENT <TRS/ORP>

```
104 TAMUS B/P/P - Retirement Programs - Inquiry            11/08/05  08:06
                                                           D BPP0017  R002


  Screen:  1     UIN:    A        Name:         B

TRS-Ded-Cd 2 Ben-Cap 3          Start-Date 4  4  4        Stop-Date    5  5  5
TRS9 MTD-Ded    C1        TRS MTD-Ded      D1       90-End-Dt    6  6  6
     FYTD-Ded   C2            FYTD-Ded     D2       TRS-Ret-Dt   18 18 18
     FYTD-Pymt  C3            FYTD-Pymt    D3       TRSS FYTD-Pymt   E1
     FYTD-CE    C4            FYTD-CE      D4            FYTD-CE     E2


ORP-Ded-Cd 7  Carr  8   Supl-Elig   9  Start-Date 10 10 10   Stop-Date 11 11 11
            Ben-Cap 12  Vested 13
     YTD-Ded    F1            FYTD-Ded    G1        ETD-Ded       H
     YTD-Pymt   F2            FYTD-Pymt   G2        Decline ORP WS 14
     YTD-CE     F3            FYTD-CE     G3        Date    15 15 15


SORP-Ded-Cd 16 Carr 17
     YTD-Ded    I1            FYTD-Ded    J1        ETD-Ded      K
     YTD-Pymt   I2            FYTD-Pymt   J2
     YTD-CE     I3            FYTD-CE     J3
Comments                      L
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help        Exit  Main  Prev  Next
```

SCREEN 104 - RETIREMENT <TRS/ORP> EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	NEXT SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the ENTER key, you will be able to move through all the screens in the Personnel File.
2	TRS DEDUCTION CODE	Blank or N - Do not compute TRS deduction, or A&M System retiree exempt from TRSS surcharge R - Area 1 TRS Retiree from Non-A&M System reporting district, cannot participate in TRS, compute TRSS surcharge. S - Area 1 or Area 2 TRS Retiree from A&M System reporting district, cannot participate in TRS, compute TRSS surcharge. X - Area 2 TRS Retiree from Non-A&M System reporting district, cannot participate in TRS, do not compute TRSS surcharge. Y - Compute TRS deduction
3	TRS BENEFIT CAP	Y - Enrolled in TRS on or after 9/1/96 (no benefits beyond $220,000 per FY) N - Enrolled in TRS prior to 9/1/96
4	TRS START DATE	MM DD YYYY
5	TRS STOP DATE	MM DD YYYY or 99 99 9999; cannot be less than start date.

NUMBER	DATA FIELD	EDITS PERFORMED
6	90-END-DT	MM DD YYYY. TAMUS pays the first 90 days of the employer contribution to TRS.
7	ORP DEDUCTION CODE	Blank or N - Do not compute deduction R - ORP Retiree, do not compute deduction Y - Compute deduction
8	ORP CARRIER CODE	Validated against Tables File.
9	ORP SUPPLEMENT ELIGIBILITY CODE	Y - Eligible for 2.5% supplement (employer contribution is 8.5%) if participating in Texas ORP on or before 08-31-1995. N - Not eligible (employer contribution is 6%)
10	ORP START DATE	MM DD YYYY[1]
11	ORP STOP DATE	MM DD YYYY or 99 99 9999; cannot be less than ORP Start Date.
12	ORP BENEFIT CAP	Y - Enrolled in ORP on or after 9/1/96 (No benefits beyond $220,000 per FY) N - Enrolled in ORP prior to 9/1/96
13	ORP VESTED FLAG	Y - Vested in ORP (when the individual has enrolled in ORP for one year and one day) N - Not vested in ORP (will be set to **Y** automatically when the individual has been enrolled for one year and one day)
14	ORP DECLINE WORKSTATION	Optional - Valid workstation when not blank. Workstation where ORP was declined. Must be blank if ORP deduction code is **Y** or ORP declined date is blank.
15	ORP DECLINED DATE	Optional - MM DD YYYY or blank; Must be blank if ORP deduction code is **Y** or ORP declined WS is blank.

[1] If the employee was previously an ORP participant outside of the A&M System, use that start date. Otherwise, use the start date with the A&M System.

NUMBER	DATA FIELD	EDITS PERFORMED
16	SORP DEDUCTION CODE	Blank or N - Do not compute deduction Y - Compute deduction (valid only if ORP deduction code is **Y**
17	SORP CARRIER	On ORP table _and_ SORP-CARR flag is **Y**; defaults to First American Bank (016).
18	TRS RETIRE DATE	MM DD YYYY, TRS Retirement date from non-TAMUS institution

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A	UIN	Must be a nine (9) digit number. SSN may also be entered, after pressing ENTER the UIN will be displayed. Pressing PF1 in inquiry mode will allow you to select from a pick list.
B	NAME	Must be greater than four (4) characters in length
C1	TRS9 MTD DEDUCTION	If TRS9 eligible, a month-to-date amount deducted from employee's pay (usually blank for employees paid monthly) according to TRS9 Rules.
C2	TRS9 FYTD DEDUCTION	If TRS9 eligible, fiscal year-to-date amount deducted from the employee's pay
C3	TRS9 FYTD PAYMENT	If TRS9 eligible, fiscal year-to-date amount deducted from the employee's pay
C4	TRS9 FYTD COVERED EARNINGS	If TRS9 eligible, fiscal year-to-date amount of employee's earnings subject to TRS9 withholding
D1	TRS MTD DEDUCTION	Month to date amount deducted from employee's pay (usually blank for employees paid monthly)
D2	TRS FYTD DEDUCTION	Fiscal year to date amount deducted from employee's pay
D3	TRS FYTD PAYMENT	Fiscal year to date amount contributed by employer
D4	TRS FYTD COVERED EARNINGS	Fiscal year to date amount of employee's earnings subject to TRS withholding
E1	TRSS FYTD PAYMENT	Fiscal year-to-date surcharge paid by employer
E2	TRSS FYTD COVERED EARNINGS	Fiscal year-to-date amount of employee's earnings subject to TRSS surcharge

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM (con't.)

F1	ORP YTD-DEDUCTION AMOUNT	Year to date total of employee's deduction
F2	ORP YTD-PAYMENT AMOUNT	Year to date total of employer's contribution
F3	ORP YTD-COVERED EARNINGS	Year to date total of employee's earnings subject to ORP withholding
G1	ORP FYTD-DEDUCTION AMOUNT	Fiscal year to date total of employee's deduction
G2	ORP FYTD-PAYMENT	Fiscal year to date total of employer's contribution
G3	ORP FYTD-COVERED EARNINGS	Fiscal year to date total of employee's earnings subject to ORP withholding
H	ORP ETD-DEDUCTION AMOUNT	Earnings to date Optional Retirement Deduction amount.
I1	SORP YTD-DEDUCTION AMOUNT	Year to date total of employee's deduction
I2	SORP YTD-PAYMENT AMOUNT	Year to date total of employer's contribution
I3	SORP YTD-COVERED EARNINGS	Year to date total of employee's earnings subject to SORP withholding
J1	SORP FYTD-DEDUCTION	Fiscal year to date total of employee's deduction
J2	SORP FYTD-PAYMENT	Fiscal year to date total of employer's contribution
J3	SORP FYTD-COVERED EARNINGS	Fiscal year to date total of employee's earnings subject to ORP withholding
K	SORP ETD-DED	The total amount that this employee has contributed to the ORP plan as a tax-deferred reduction in salary since July 1979. *(The ORP system was implemented May 1, 1969, but a cumulative total was not started until July 1, 1979.)
L	COMMENTS	Free form comments

* This is true for employees employed by the following parts of the System.

System Administrative and General Offices	Texas Engineering Experiment Station
Texas A&M University	Texas Engineering Extension Service
TAMU - Health Science Center	Texas A&M University at Galveston
Tarleton State University	Texas Forest Service
Texas AgriLife Research	Texas Transportation Institute
Texas AgriLife Extension	Texas Veterinary Medical Diagnostic Laboratory
Texas A&M University – Central Texas	

The accumulations started for the following part on April 1, 1982, as the B/P/P System started processing payrolls for that part on that date.

Prairie View A&M University

The accumulations started for the following parts on September 2, 1990, as the B/P/P System started processing payrolls for these parts on that date.

Texas A&M University - Corpus Christi	Texas A&M International University
Texas A&M University – Kingsville	Texas A&M University – San Antonio

The accumulations started for the following part on January 1, 1991, as the B/P/P System started processing payrolls for that part on that date.

West Texas A&M University

The accumulations started for the following parts on September 1, 1996, as the B/P/P System started processing payrolls for these parts on that date.

Texas A&M University – Texarkana	Texas A&M University - Commerce

SCREEN 115 - DEPENDENT DATA

This screen contains dependent information for Medical, Dental, Vision, and Dependent Life. Changes on this screen affect data entered during Annual Enrollment via both employee and processor web pages. A related Screen 602 allows for dependent searches.

The dependent's name, relationship and birth date are always required (for twins, triplets, etc., the multi-birth field must also be entered). The dependent's Social Security Number (SSN) is optional. The dependent UIN will be automatically filled in. All dependent UINs are checked every time there's a change on this screen.

If the dependent has medical, dental, vision or dependent life coverage, then their Stop and Start dates for the coverage must be entered.

Any non-spouse dependent who turns 25 years old (except a permanently disabled son or daughter) who has medical, dental, vision, or dependent life coverage will automatically have their coverage flags changed to **N** at the end of the month in which they turn 25.

During correction mode, if a benefit history record has been flagged to be reinstated, a pop up box will appear prompting the reinstate process. For more information on the Reinstatement process see Section 8 – Screen 751.

SCREEN 115 - DEPENDENT DATA

```
 115 TAMUS B/P/P - Dependent Data - Correction              06/09/08  13:24
 Screen:  1                                                 D BPP0002  R002


 UIN:     A     SSN:     B      Name: _____C_____
 Last Name                    First Name    MI Sufx          Start   Stop
          _____A1_____         __A2__   A3  __A4__  MED A5   A6     A7
 _____Birth Dt   B1    Mult Birth B2      UIN ____D____ DEN B3   B4     B5
    Cert Typ C1          Qualify C2Medicare C3SSN   C4   VIS C5   C6     C7
       Rel D1              HRC Hide D2               DL D3  D4     D5
                                                    MED _ _____ _____
    Birth Dt _____ Mult Birth _        UIN 702005519 DEN _ _____ _____
    Cert Typ _        Qualify _ Medicare _ SSN _____ VIS _ _____ _____
       Rel __           HRC Hide _          DL _ _____ _____
                                                    MED _ _____ _____
    Birth Dt _____ Mult Birth _        UIN 602007097 DEN _ _____ _____
    Cert Typ _        Qualify _ Medicare _ SSN _____ VIS _ _____ _____
       Rel __           HRC Hide _          DL _ _____ _____
                                                    MED _ _____ _____
    Birth Dt _____ Mult Birth _        UIN _____ DEN _ _____ _____
    Cert Typ _        Qualify _ Medicare _ SSN _____ VIS _ _____ _____
       Rel __           HRC Hide _          DL _ _____ _____
PF3=Exit,PF4=Main,PF5=Prev,PF6=Next,PF7=Up,PF8=Down
```

SCREEN 115 - DEPENDENT DATA EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN ?	System Standard Use
A1	DEPENDENT LAST NAME	Minimum of 4 characters
A2	DEPENDENT FIRST NAME	
A3	DEPENDENT MIDDLE INITIAL	
A4	DEPENDENT NAME SUFFIX	(JR, III, etc.)
A5	MEDICAL COVERAGE	Y - Has Coverage N - No Coverage Blank - No Coverage
A6	MEDICAL START DATE	MM DD YYYY, cannot be less than dependent's birth date
A7	MEDICAL STOP DATE	MM YYYY - will be set by the System if left blank. Children will be set to stop on 25th birthday. Spouse and permanently disabled children will be set to 999999. Coverage ends on the last day of the month.
B1	BIRTHDATE	MM DD YYYY
B2	MULTIPLE BIRTH?	Only required for twins, triplets, etc. 1 through 9 or blank (establishes a sequence number for uniqueness between siblings with same birth date)
B3	DENTAL COVERAGE	Y - has coverage N - no coverage blank - no coverage
B4	DENTAL START DATE	MM DD YYYY, cannot be less than dependent's birth date

NUMBER	**DATA FIELD**	**EDITS PERFORMED**
B5	DENTAL STOP DATE	MM YYYY - will be set by the System if left blank Children will be set to stop on 25th birthday. Spouse and permanently disabled children will be set to 999999. Coverage ends on the last day of the month.
C1	DEPENDENT CERTIFICATION TYPE?	1 - Spouse/Common-law spouse 2 - Natural or adopted child 3 - Stepchild 4 - Prospective adopted child 5 - Grandchild 6 - Foster child 7 - Legal guardianship 8 - Managing conservatorship
C2	DEPENDENT QUALIFY FLAG (IRS WFTRA PRETAX QUALIFYING STATUS FLAG)?	The dependent qualify flag resulted from implementation of the Working Families Tax Relief Act (WFTRA) in January 2006. It is used to determine which dependents' health insurance coverage qualifies for pretax purposes. The qualify flag is required for dependents with active or future insurance coverage who are between the ages of 18 and 24, as of December 31 of the calendar year. See http://sago.tamu.edu/shro/wftra.pdf for qualifying criteria. See HOP #504 for more information.
C2	DEPENDENT QUALIFY FLAG (IRS WFTRA PRETAX QUALIFYING STATUS FLAG)	Y - Qualified as dependent for pretax purposes. Disabled dependents over the age of 18 automatically qualify and their flag is automatically set to Y. N - Not qualified as a dependent for pretax purposes. Blank - Pretax qualification does not apply. Either dependent is a spouse, has no health insurance coverage, or automatically qualifies for health insurance premium pretax purposes since they will be 18 or younger as of December 31 of the current calendar year.

NUMBER	DATA FIELD	EDITS PERFORMED
C3	MEDICARE FLAG?	A - Medicare, Part A B - Medicare, Part B C - Medicare, Parts A & B D - Medicare, Parts Unknown Blank - No Medicare E - No Medicare Y - Covered by Medicare
C4	DEPENDENT SOCIAL SECURITY NUMBER	Numeric, 9 characters or blank
C5	VISION COVERAGE	Y - has coverage N - no coverage Blank - no coverage
C6	VISION START DATE	MM DD YYYY, cannot be less than dependent's birth date
C7	VISION STOP DATE	MM YYYY - will be set by the System if left blank Children will be set to stop on 25th birthday. Spouse and permanently disabled children will be set to 999999. Coverage ends on the last day of the month.
D1	RELATIONSHIP?	DA- Daughter DD- Permanently Disable daughter DS- Permanently Disabled Son GD- Granddaughter GS- Grandson NE- Nephew NI- Niece SO- Son SP- Spouse The relationship description will also be displayed when in inquiry mode.

NUMBER	DATA FIELD	EDITS PERFORMED
D2	HRC HIDE FLAG?	This is the HRConnect Hide Flag. When this flag is set to H (hide) or D (hide deceased), the dependent will not be displayed on any HRConnect web pages. Setting the flag to N or blank will allow the dependent to be seen in the HRConnect System. The description of the flag will also be displayed when in inquiry mode.
D3	DEPENDENT LIFE COVERAGE	Y - has coverage N - no coverage blank - no coverage
D4	DEPENDENT LIFE START DATE	MM DD YYYY, cannot be less than dependent's birth date
D5	DEPENDENT LIFE STOP DATE	MM YYYY - will be set by the System if left blank Children will be set to stop on 25th birthday. Spouse and permanently disabled children will be set to 999999. Coverage ends on the last day of the month.

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A	UIN?	System Standard Use
C	NAME	Must be greater than four (4) characters in length
B	SSN	9-digit, numeric; as stored by system. When in inquiry mode, hidden, but accessible with PF key 9.
D	Dependent UIN	9-digit, numeric; assigned by system

SCREEN LOCKING - Interactions between the Web and Screens 115 and 106

     A locking mechanism has been put in place for interactions between the Web and Screens 115 and 106.   The locking mechanism will allow updates to be made through the Web or Screen 115 and 106 but not both. When updates are done via the web, a document is created. The life span of a document may be very small or may last 90 days or longer. Once a document is created, updates can no longer be made from Screen 115 and 106.

     The second line of Screen 115 and 106 is used to show information relating to an active document. This line will change depending upon the mode:

1. Inquiry mode – No active document. The 115 and 106 screen will look normal and nothing is displayed.

```
106 TAMUS B/P/P - Benefit Maintenance – Inquiry              02/20/09  15:47
Screen: ___
   UIN: 999005555    Name:  AGGIE JOE                  WS: S     Status: A
```

2. Inquiry mode – Active document. The 115 and 106 screen will have document information displayed on the second line.

```
106 TAMUS B/P/P - Benefit Maintenance – Inquiry              02/20/09  15:47
Screen: ___  Web Doc Type/No: NP 123456        User 999009999
   UIN: 999005555    Name:  AGGIE JOE                  WS: S     Status: A
```

3. Correct Mode – No Active Document. The second line will display 'Correction Type: BP'. This simply lets you know the information is currently locked by the NET3270 environment, there are currently no active web documents and none can be created while the NET3270 session is in correct mode.

```
106 TAMUS B/P/P - Benefit Maintenance - Locked              02/20/09  15:47
Screen: ___  Correction Type: BP
   UIN: 999005555    Name:  AGGIE JOE                  WS: S     Status: A
```

4. Correct Mode – Active Document. A document was created on the web and so no changes can be made on the 115 and 106 screens. The first line on 115 and 106 will display 'Locked' and the second line will show the document type, document number and the userid of the person creating the document.

```
106 TAMUS B/P/P - Benefit Maintenance - Locked              02/20/09  15:47
Screen: ___  Web Doc Type/No: NP 123456        User 999009999
   UIN: 9999005555    Name:  AGGIE JOE                  WS: S     Status: A
```

SCREEN 106 - BENEFIT MAINTENANCE

This screen contains all information pertaining to the listed group benefits, except dependent information (See Screen 115). This includes Basic Life Insurance (BL), Medical Insurance (MED), Dental Insurance (DEN), Vision Insurance (VIS), Optional Life Insurance (OL), Dependent Life Insurance (DL), Accidental Death & Dismemberment Insurance (ADD), Long Term Disability Insurance (LTD), Long Term Care Employee Insurance (LTCE), Long Term Care Spouse Insurance (LTCS), and Spending Accounts (SA).

Also, changes made via this screen which reflect a change in coverage and produce a new change date will cause a Benefit History segment in the Employment History file to be generated. These segments may be viewed from the Benefit History 75x Screens.

The priority of the coverages indicates the order in which the employer or state contribution toward group insurance (SGIP) premium is to be used. Current state law limits this money to be used for Basic life and Medical coverage only, unless the employee has certified to have other medical coverage and he/she is not participating in any TAMU medical plans. In that case, the employee may use 1/2 of the employee only SGIP coverage amount toward other optional coverage premiums. The 1/2 SGIP may only be used for alternate Basic Life (BL), ADD, DEN, VIS, or LTD, and will be applied to these coverages in the order listed.

In correction mode, if a benefit history record has been flagged to be reinstated, a pop up box will appear prompting the reinstate process. For more information on the Reinstatement process see Section 8 – Screen 751.

During annual Enrollment (AE), changes on this screen are directly related to AE information entered in the HRConnect system. To keep changes from overlapping, the AE and screen 106/115 are locked while either is in the update process. See prior page on Screen Locking. 2/2009

SCREEN 106 - BENEFIT MAINTENANCE

```
106 TAMUS B/P/P - Benefit Maintenance - Correction          09/01/08  07:38
Screen:  1                                                  P BPP0002   R025
UIN:      A          Name:              B                     WS: C    Status: D


SGIP-Rate 2   SGIP-Dt     3        GS-Sup 4   PreTaxWaive 5    Tob 6 Ben-Salary    E
                                              PreTaxQual F             OL-Salary    G
        D  P  P  C  F   Certified-other-med □ y/n/blank
Ins     e  t  l  a  a   Cover      Deduct    Payment    Start      Due      Change     Stop
        d  y  n  r  m   Amount     Amount    Amount     Date       Date     Date       Date
BL     A1 A2           A3         A4 .__    A5 .__    A6        A7        A8         A9
MED    B1 B2 B3 B4 B5   B6         B7 .__    B8 .__    B9        B10       B11        B12
DEN    C1 C2 C3 C4 C5   C6         C7 .__    C8 .__    C9        C10       C11        C12
VIS    D1 D2      D3    D4         D5 .__    D6 .__    D7        D8        D9         D10
OL     E1    E2        E3         E4 .__    E5 .__    E6        E7        E8         E9
DL     F1    F2        F3         F4 .__    F5 .__    F6        F7        F8         F9
 Spouse      F10       F11        F12 Children F13    F14
ADD    G1 G2 G3    G4   G5         G6 .__    G7 .__    G8        G9        G10        G11
LTD    H1 H2                      H3 .__    H4 .__    H5        H6        H7         H8
LTCE   I1             I2         I3 .__              I4        I5        I6         I7
LTCS   J1             J2         J3 .__              J4        J5        J6         J7
SAHC   K1    K2       K3         K4 . Deb Crd K5    K6        K7        K8         K9
SADC   L1    L2       L3         L4 .__              L5        L6        L7         L8
Direct-Dep __   MedCr __ ABO   LWOP-Start-Date _____    FMLA-Start-Date _____
Comments    O1
PF1=Help,PF3=Exit,PF4=Main,PF5=Prev,PF6=Next
```

SCREEN 106 - BENEFIT MAINTENANCE EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN?	See system codes
2	SGIP RATE	F - Eligible for full SGIP amount P - Eligible for partial SGIP amount N - Not eligible for SGIP amount Blank - Not eligible for SGIP amount
3	SGIP ELIGIBILITY DATE	Date employee may begin to receive SGIP payments (MMDDYYYY)
4	GRADUATE STUDENT SUPPLEMENT FLAG	Y - eligible for supplement N - not eligible Blank - Not eligible
5	PRETAX HEALTH/ DENTAL PREMIUM FLAG	Blank - Participating in tax saver pre taxing W - Waive participation in tax saver pre-taxing program

NUMBER	DATA FIELD	EDITS PERFORMED
6	TOBACCO FLAG	N - Non-Tobacco User S - Tobacco User
A1	BL DEDUCT CODE	L - LWOP Billing Basis M - Family Medical Leave Act N - No coverage R - Retired Billing Basis W - Waived Premiums 1 - 9-Month Ded. Basis - Ded 4 months (summer premiums) in May 2 - 12-Month Ded. Basis 3 - 9-Month Ded. Basis - Bill for Summer Premium 4 - 12-Month Ded. Basis - Working Retiree Blank - No Coverage
A2	BL PRIORITY	1 - If BL participating in SGIP N - No SGIP funding
A3	BL CVRG AMT	Automatically calculated (unless ABO flag = Y). In whole dollars. If BL-DEDUCT-CD = N then blank Otherwise 7500
A4	BL EMP DED AMT	Amount per 1000 dollars of coverage
A5	BL EMPL DED AMT	Zero; unless certified other
A6	BL START DATE	MMDDYYYY
A7	BL DUE DATE	MMDDYYYY (DD must be 01 or 15 for active employees and 01 for billed participants)
A8	BL CHANGE DATE	MMDDYYYY will automatically set if coverage changes, if a person goes from being an active employee (deduct code 1, 2, 3) to a retiree, or if a person goes from being on Leave (L or M) to a retiree.
A9	BL STOP DATE	MMDDYYYY or 99999999. Use actual date of termination for reference, although coverage ends at the end of the month. (Must be greater than start date. If active, stop date must be greater than today's date.)

NUMBER	**DATA FIELD**	**EDITS PERFORMED**
B1	MED DEDUCT CODE	D - COBRA (Dependent losing eligibility) L - LWOP Billing Basis M - Family Medical Leave Act N - Inactive R - Retired Billing Basis S - Survivor of deceased employee T - COBRA (Employee terminated) 1 - 9-month ded. Basis - deduct 4 months (summer premiums) in May 2 - 12-month ded. Basis 3 - 9-month ded. Basis - bill for summer premium 4 - 12-month ded. Basis - working retiree Blank - Never had medical coverage
B2	MED PRIORITY	2 - MED participating in SGIP N - No SGIP funding for MED
B3	MED PLAN	1 - Plan #1 - A&M CARE 350, HMOs 3 - Plan #3 - A&M CARE 65+ 4 - Plan #4 - Medical Carrier 01 Only - A&M CARE 1250
B4	MED PROVIDER	Validated against Tables File
B5	MED FAMILY INDICATOR	Medical Family Indicator. Display only.
B6	MED NO COVRD	Greater than zero (Automatically calculated from DD screen data if blank, unless MED-DED-CD = **N**)
B7	MED EMP DED AMT	Based on carrier, plan, and family indicator. Display only.
B8	MED EMPL DED AMT	Employer Deduct Amount. Display only.
B9	MED START DATE	MMDDYYYY

NUMBER	DATA FIELD	EDITS PERFORMED
B10	MED DUE DATE	MMDDYYYY (DD must be 01 or 15 for active employees and 01 for billed participants)
B11	MED CHANGE DATE	MMDDYYYY - is automatically set to the first of the next month if changes are made which affect coverage such as:

- carrier;
- plan;
- number covered;
- family indicator;
- when a person is on medical carrier **01** and goes from being an active employee (1, 2, 3 deduct code) or on leave (L or M deduct code) to a retiree; or,
- a person initially signs up for COBRA or becomes a Survivor.

The date must be manually overridden if the automatic date is invalid.

NUMBER	DATA FIELD	EDITS PERFORMED
B12	MED STOP DATE	MMDDYYYY or 99999999; Must be greater than start date. If active deduct code must be greater than current date.

NUMBER	DATA FIELD	EDITS PERFORMED
C1	DEN DEDUCT CODE	D - COBRA (Dependent losing eligibility)

D - COBRA (Dependent losing eligibility)
L - LWOP Billing Basis
M - Family Medical Leave Act
N - Inactive
R - Retired Billing Basis
S - Survivor of Deceased Employee
T - COBRA (Employee terminated)
1 - 9-month deduction basis - deduct 4 months (summer premium) in May
2 - 12-month deduction Basis
3 - 9-month deduction basis - bill for summer premium
4 - 12-month deduction basis - working retiree
Blank - Has never had dental coverage

NUMBER	DATA FIELD	EDITS PERFORMED
C2	DEN PRTY	If MED Certify Other field is **ON**, priority code is set to **4**; otherwise, priority code is set to **N**. Display only.
C3	DEN PLAN	Plan 1 - A&M Dental Plan 2 - Dental HMO
C4	DEN CARR	Carrier 03 - A&M Dental Carrier 04 - Dental HMO
C5	DEN FAMILY INDICATOR	E - Employee only S - Employee and Spouse C - Employee and Children F - Employee and Family Display only.
C6	DEN NO COVRD	Greater than zero (Automatically calculated from DD screen data if blank, unless DEN-DED-CD =**N**)
C7	DEN EMP DED AMOUNT	Based on Carrier and Family Indicator. Display only.
C8	DEN EMPL PYMT AMOUNT	Zero; unless Certified Other. Display only.
C9	DEN START DATE	MMDDYYYY
C10	DEN DUE DATE	MMDDYYYY (DD must be 01 or 15 for active employees and 01 for billed participants)
C11	DEN CHANGE DATE	MMDDYYYY - is automatically set to the first of the next month if changes are made which affect coverage such as:

- carrier;
- plan;
- number covered;
- family indicator;
- when a person is on medical carrier **01** and goes from being an active employee (1, 2, 3 deduct code) or on leave (L or M deduct code) to a retiree; or,
- a person initially signs up for COBRA or becomes a Survivor.

The date must be manually overridden if the automatic date is invalid.

NUMBER	DATA FIELD	EDITS PERFORMED
C12	DEN STOP DATE	MMDDYYYY or 99999999; Must be greater than start date. If active deduct code, must be greater than current date.
D1	VIS DEDUCT CODE	D - COBRA (Dependent losing eligibility) L - LWOP Billing Basis M - Family Medical Leave Act N - No coverage R - Retired Billing Basis S - Survivor of Deceased Employee T - COBRA (Employee terminated) 1 - 9-month deduction basis - deduct 4 months (summer premium) in May 2 - 12-month deduction Basis 3 - 9-month deduction basis - bill for summer premium 4 - 12-month deduction basis - working retiree Blank - No coverage
D2	VIS PRTY	If MED Certify Other field is **ON**, priority code is set to **5**; otherwise, priority code is set to **N**. Display only.
D3	VIS FAMILY INDICATOR	E - Employee only S - Employee and Spouse C - Employee and Children F - Employee and Family Display only
D4	VIS NO COVRD	Greater than zero (Automatically calculated from DD screen data if blank, unless VIS-DED-CD = **N**)
D5	VIS EMP DED AMT	Based on Carrier and Family Indicator. Display only.
D6	VIS EMPL PYMT AMOUNT	Zero; unless Certified Other. Display only.
D7	VIS START DATE	MMDDYYYY
D8	VIS DUE DATE	MMDDYYYY (DD must be 01 or 15 for active employees and 01 for billed participants).

NUMBER	DATA FIELD	EDITS PERFORMED
D9	VIS CHANGE DATE	MMDDYYYY - is automatically set to the first of the next month if changes are made which affect coverage such as:

- carrier;
- plan;
- number covered;
- family indicator;
- when a person is on medical carrier **01** and goes from being an active employee (1, 2, 3 deduct code) or on leave (L or M deduct code) to a retiree; or,
- a person initially signs up for COBRA or becomes a Survivor.

The date must be manually overridden if the automatic date is invalid.

D10	VIS STOP DATE	MMDDYYYY or 99 99 9999; Must be greater than start date. If active deduct code, must be greater than current date.
E1	OL DEDUCT CODE	L - LWOP Billing Basis M - Family Medical Leave Act N - Inactive R - Retired Billing Basis W - Waived Premiums 1 - 9-month deduction basis - deduct 4 months (summer premium) in May 2 - 12-month deduction Basis 3 - 9-month deduction basis - bill for summer premium 4 - 12-month deduction basis - working retiree

NUMBER	DATA FIELD	EDITS PERFORMED
E2	OL PLAN	blank - Retiree (no longer has plan number) 0 - One-half times "base" salary option (active employee only) 1 - One times "base" salary option 2 - Two times "base" salary option 3 - Three times "base" salary option 4 - Four times "base" salary option 5 - Five times "base" salary option 6 - Six times "base" salary option Retiree OL plan is blank, coverage amount is no longer calculated based on the OL plan. See benefits and procedures manual.
E3	OL CVRG	Greater than zero but not greater than '800000' (Automatically calculated. If blank for employees, will not calculate for retirees or if ABO flag = Y). In whole dollars. Retiree max is 60,000, unless the retiree is <70 and retired after May 1, 1998. **NOTE:** Agrees with plan #. (See benefit and procedures manual)
E4	OL EMP DED AMT	Based on age and coverage per 1000. Display only.
E5	OL START DATE	MMDDYYYY
E6	OL DUE DATE	MMDDYYYY (DD must be 01 or 15 for active employees and 01 for billed participants)

NUMBER	**DATA FIELD**	**EDITS PERFORMED**

E7   OL CHANGE DATE

MMDDYYYY - is automatically set to the first of the next month if changes are made which affect coverage such as:

- carrier;
- plan;
- number covered;
- family indicator;
- when a person is on medical carrier **01** and goes from being an active employee (1, 2, 3 deduct code) or on leave (L or M deduct code) to a retiree; or,

The date must be manually overridden if the automatic date is invalid.

E8   OL STOP DATE

MMDDYYYY or 99999999; Must be greater than the start date. If deduct code is active, must be greater than current date.

F1   DL DEDUCT CODE

   L - LOA Billing Basis
  M - Family Medical Leave Act
  N - Inactive
  R -   Retired Billing Basis
  S -   Survivor (will eventually be phased out)
 W - Waived Premiums
  1 - 9-Month Deduction Basis - deduct 4 months (summer premiums) in May
  2 - 12-Month Deduction Basis
  3 - 9-Month Deduction Basis - bill for summer premium
  4 - 12-Month Deduction Basis - working retiree
Blank - Has never had DL Coverage

NUMBER	**DATA FIELD**	**EDITS PERFORMED**

F2   DL PLAN

A - Based on OL insurance coverage, Premium will be 1/2 of your OL premium
B - Flat Rate
C - Premium will be 1/2 of your alternate basic life premium

F3   DL FAMILY INDICATOR

E - Employee only
S - Employee and Spouse
C - Employee and Children
F - Employee and Family

F4   DL COVRG AMT

Total dependent life coverage amount. Zero or greater in whole dollars. Will automatically calculate if spaced out unless ABO flag = Y.

A -
     See Spouse and Child coverage amounts.

B - Spouse and child: 5,000 life/5,000; AD&D (or 50% of your total life coverage if less)
C - Spouse: 50% of your Alternate Basic Life amount; Child: 10% of your Alternate Basic Life amount

F5   DL EMP DED AMT

Based on DL plan. Display only.

F6   DL START DATE

MMDDYYYY

F7   DL DUE DATE

MMDDYYYY (DD must be 01 or 15 for active employees and 01 for billed participants)

NUMBER	DATA FIELD	EDITS PERFORMED
F8	DL CHANGE DATE	MMDDYYYY - is automatically set to the first of the next month if changes are made which affect coverage such as: • carrier; • plan; • number covered; • family indicator; • when a person is on medical carrier **01** and goes from being an active employee (1, 2, 3 deduct code) or on leave (L or M deduct code) to a retiree; or, The date must be manually overridden if the automatic date is invalid.
F9	DL STOP DATE	MMDDYYYY or 99999999; Must be greater than start date. If the deduct code is active, must be greater than the current date.
F10	SPOUSE GRANDFATHER INDICATOR	Display only. G – Grandfathered. Retain DL Coverage amount that falls under DL Rules prior to 09/01/2009. Blank . Not Grandfathered
F11	SPOUSE COVERAGE AMOUNT	Display only. Employee, Retiree, or Grandfathered Coverage Amounts allowed. Employees: 25,000; 50,000; 75,000; 100,000; 150,000; and 200,000. Retirees: Less than 69: 25,000; 50,000. 70-79: 25.000 and 30,000 80+: 15,000
F12	DEPENDENT LIFE – NO OF CHILDREN	Display only. Number of children with active DL coverage on the 115 Screen.

NUMBER	DATA FIELD	EDITS PERFORMED
F13	CHILDREN GRANDFATHER INDICATOR	Display Only. G – Grandfathered. Retained DL Coverage that fell under DL Rules prior to 09/01/2009. Blank – Not Grandfathered.
F14	CHILDREN DL COVERAGE AMOUNT	10,000 or Grandfathered Coverage Amount.
G1	ADD DEDUCT CODE	L - LWOP Billing Basis M - Family Medical Leave Act N - Inactive R - Retired Billing Basis 1 - 9-Month Deduction Basis - deduct 4 months (summer premiums) in May 2 - 12-Month Deduction Basis 3 - 9-Month Deduction Basis - bill for summer premium 4 - 12-Month Deduction Basis - Working Retiree
G2	ADD PRTY	If MED Certify Other field is 'ON', priority code is set to '3; otherwise, priority code is set to 'N'. Display only.
G3	ADD PLAN	1 - Employee only coverage 2 - Family coverage Display only.
G4	ADD FAMILY INDICATOR	E - Employee only F - Family
G5	ADD COVRG	Greater than zero. In whole dollars.
G6	ADD EMP DED AMT	Based on family indicator per 10,000 coverage.
G7	ADD EMPL PYMT AMT	Zero; unless Certified Other. Display only.
G8	ADD START DATE	MMDDYYYY
G9	ADD DUE DATE	MMDDYYYY (DD must be 01 or 15 for active employees and 01 for billed participants)

NUMBER	**DATA FIELD**	**EDITS PERFORMED**
G10	ADD CHANGE DATE	MMDDYYYY - is automatically set to the first of the next month if changes are made which affect coverage such as:

- carrier;
- plan;
- number covered;
- family indicator;
- when a person is on medical carrier **01** and goes from being an active employee (1, 2, 3 deduct code) or on leave (L or M deduct code) to a retiree; or,

The date must be manually overridden if the automatic date is invalid.

| G11 | ADD STOP DATE | MMDDYYYY or 99999999; Must be greater than start date. If deduct code is active must be greater than current date. |

NUMBER	**DATA FIELD**	**EDITS PERFORMED**
H1	LTD DEDUCT CODE	L - LWOP Billing Basis M - Family Medical Leave Act N - Inactive W - Waived Premium 1 - 9-Month Ded. Basis - deduct 4 months (summer premiums) in May 2 - 12-Month Ded. Basis 3 - 9-Month Ded. Basis - bill for summer premium
H2	LTD PRIORITY	6 - LTD participating in SGIP N - No SGIP funding
H3	LTD EMP DED AMT	(Benefit Salary/12) * rate/100
H4	LTD EMPL PYMT AMT	Zero; unless Certified Other. Display only.
H5	LTD START DATE	MMDDYYYY
H6	LTD DUE DATE	MMDDYYYY (DD must be 01 or 15 for active employees and 01 for billed participants)
H7	LTD CHANGE DATE	MMDDYYYY - Will be automatically set if changes are made which affect coverage or if tobacco flag is changed. Also if a person goes from being an active employee (1, 2, 3 deduct code) to a retiree, or person goes form being on Leave (L or M) to a retiree.
H8	LTD STOP DATE	MMDDYYYY or 99999999; Must be greater than start date. If deduct code is active, must be greater than current date.

NUMBER	DATA FIELD	EDITS PERFORMED
I1	LTCE DEDUCT CODE	L - LWOP Billing Basis M - Family Medical Leave Act N - No Coverage Blank - No Coverage W - Waived Premium 1 - 9-Month Deduction Basis - deduct 4 months 2 - 12-Month Deduction Basis 3 - 9-Month Deduction Basis - bill for summer premium
I2	LTCE COVERAGE AMT	LTC as of 1/1/2007 is administered by John Hancock and is updated monthly via file feed from John Hancock.
I3	LTCE EMPLOYEE DEDUCT AMOUNT	The rate for the amount of coverage you currently have is based on your age when you initially enrolled and will not change. The rate for the amount you are adding however, is based on you current age. See Screen 107 for current age, cur groups already enrolled in. Display only.
I4	LTCE START DATE	MMDDYYYY
I5	LTCE DUE DATE	MMDDYYYY (DD must be 01 or 15 for active employees and 01 for billed participants)
I6	LTCE CHANGE DATE	MMDDYYYY Will automatically set if changes are made which affect coverage.
I7	LTCE STOP DATE	MMDDYYYY or 99999999; Must be greater than start date. If deduct code is active, must be greater than current date.
J1	LTCS DEDUCT CODE	L - LWOP Billing Basis M - Family Medical Leave Act N - No Coverage Blank - No Coverage W - Waived Premium 1 - 9-Month Deduction Basis - deduct 4 months in May 2 - 12-Month Deduction Basis 3 - 9-Month Deduction Basis - bill for summer premium
J2	LTCS COVERAGE AMT	LTC as of 1/1/2007 is administered by John Hancock and is updated monthly via file feed from John Hancock.

NUMBER	DATA FIELD	EDITS PERFORMED
J4	LTCS START DATE	MMDDYYYY
J5	LTCS DUE DATE	MMDDYYYY (DD must be 01 or 15 for active employees and 01 for billed participants)
J6	LTCS CHANGE DATE	MMDDYYYY automatically set if changes are made which affect coverage.
J7	LTCS STOP DATE	MMDDYYYY or 99999999; Must be greater than start date. If deduct code is active, must be greater than current date.
K1	HEALTH-CARE SPENDING ACCOUNT DEDUCTION CODE	N - Do not compute deduction Blank - Do not compute deduction 1 - Compute deduction during academic year only (Sept. - May) 2 - Compute deduction during entire benefit year
K2	SAHC NUM MONTHS	The number of months the employee will have a spending account deduction over the course of an entire fiscal year
K3	HEALTH-CARE YEARLY ENROLLMENT AMOUNT	Cut-off amount for FYTD deductions
K4	HEALTH-CARE SPENDING ACCOUNT DEDUCTION AMOUNT	Numeric, greater than zero. Minimum is 20, Maximum is calculated; yearly maximum of 4800. Depends on amount. 1 - Amount must be greater than 26.66 and less than 533.33 2 - Amount must be greater than 20.00 and less than 400.00
K5	Debit Card	Y or N.
K5	HEALTH-CARE SPENDING ACCOUNT START DATE	Already deducted and months remaining in fiscal year.
K6	HEALTH-CARE SPENDING ACCOUNT DUE DATE	MMDDYYYY (DD must be 01 and 15 for active employees)
K7	HEALTH-CARE SPENDING ACCOUNT CHANGE DATE	MMDDYYYY
K8	HEALTH-CARE SPENDING ACCOUNT STOP DATE	MMDDYYYY, not greater than last day of current Fiscal Year, must be greater than Start Date.

NUMBER	DATA FIELD	EDITS PERFORMED
L1	DEPENDENT-CARE SPENDING ACCOUNT DEDUCTION CODE	N - Do not compute deduction Blank - Do not compute deduction 1 - Compute deduction during academic year only (Sept. - May) 2 - Compute deduction during entire benefit year
L2	SADC NUM MONTHS	The number of months the employee will have a spending account deduction taken over the course of an entire fiscal year
L3	DEPENDENT CARE YEARLY ENROLLMENT AMOUNT	Cut-off amount for FYTD deductions
L4	DEPENDENT-CARE SPENDING ACCOUNT DEDUCTION AMOUNT	Numeric, greater than zero includes 2 decimal places. Minimum is 40, Maximum is calculated; yearly maximum of 5000. Depends on amount. 1 - Amount must be greater than 26.66 and less than 533.33 2 - Amount must be greater than 40.00 and less than 500.00
L5	DEPENDENT-CARE SPENDING ACCOUNT START DATE	Already deducted and months remaining in fiscal year.
L6	DEPENDENT-CARE SPENDING ACCOUNT DUE DATE	MMDDYYYY (DD must be 01 and 15 for active employees)
L7	DEPENDENT CARE CHANGE DATE	MMMDDYYYY
L8	DEPENDENT-CARE SPENDING ACCOUNT STOP DATE	MMDDYYYY, not greater than last day current Fiscal Year; must be greater than start date.
M1	Debit Card No Debit Card	If debit card has been requested If no request for debit card
N1	SPENDING ACCOUNT DIRECT DEPOSIT FLAG	Y - Send SA reimbursements direct deposit to same account as payroll direct deposit N - No direct deposit Blank - No direct deposit

NUMBER	DATA FIELD	EDITS PERFORMED
N2	MEDICARE	A = has Medicare part A B = has Medicare part B C = has Medicare parts A&B D = has Medicare, parts unknown E or blank = Not on Medicare
N3	ACCELERATED BENEFIT OPTION FLAG	Y - Has received ABO payment Edits are restricted to checking only the maximum coverage amounts for BL, OL and DL. Blank - Has not received a Benefit Option Payment
N4	START LWOP	MMDDYYYY or blank - required if any deduct code = L (only needed if off payroll for at least 1 calendar month)
N5	START FMLA	MMDDYYYY or blank - required if any deduct code = M (only needed if off payroll for at least 1 calendar month)
O1	COMMENTS	None

FIELDS BELOW ARE DISPLAY ONLY

NUMBER	DATA FIELD	EDITS PERFORMED
A	UIN?	Must be a nine (9) digit number. In inquiry mode the SSN can also be entered, the UIN will be displayed after pressing ENTER. Pressing PF1 will bring up a pick list where an employee may be selected.
B	NAME	Must be greater than four (4) characters in length
C	WORKSTATION CODE	Alpha workstation code
D	EMPLOYEE STATUS CODE	Same as Screen 101
E	BENEFIT SALARY	Same as Screen 101
F	PRE-TAX QUALIFY	Y - Yes, credit full deduction amounts as pre-tax amounts since all covered dependents qualify under WFTRA Guidelines.

<u>FIELDS BELOW ARE DISPLAY ONLY</u>

          N - No, credit a portion of deduction amounts as pre-tax amounts since at least one insurance type has only non-qualifying dependents under WFTRA Guidelines.

G   OPTIONAL LIFE SALARY   Same as Screen 101

SCREEN 130 - BENEFIT TOTALS

This screen contains specific summary information relating to the employee's benefit coverage if applicable.

The following fields will contain data if the coverage is in effect and the field is applicable to the individual:

```
 130 TAMUS B/P/P - Benefit Totals                        11/23/10  14:18
 Screen: 1  UIN:      2     Name:       3                D BPP0040  R001



   Ins  Carr  Deduct    Payment          Due      MTD       MTD      FYTD      FYTD
        Code  Amount    Amount           Date    Deduct   Payment   Deduct   Payment
   BL          A2        A3               A4       A5        A6       A7        A8
   MED   B1    B2        B3               B4       B5        B6       B7        B8
   DEN   C1    C2        C3               C4       C5        C6       C7        C8
   VIS         D2        D3               D4       D5        D6       D7        D8
   OL          E2                         E4       E5                E7
   DL          F2                         F4       F5                F7
   ADD         G2        G3               G4       G5        G6       G7        G8
   LTD         H2        H3               H4       H5        H6       H7        H8
   LTCE        I2                         I4       I5                I7
   LTCS        J2                         J4       J5                J7
   SAHC        K2                         K4       K5                K7
   SADC        L2                         L4       L5                L7


   Total       N2        N3                        N5        N6       N7        N8

 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help              Exit  Main  Prev  Next                      St/Dt
```

PF11 - Toggle switch; will switch screen to show Start Date
PF10 - Toggle switch; will switch screen to show Due Date

SCREEN 130 - BENEFIT TOTALS EDIT DEFINITIONS

1	Screen	See **System Overview**
2	UIN	See **System Overview**
3	Name	Employee Name, must be greater than four (4) characters in length

**FIELDS BELOW ARE DISPLAY ONLY ON THE SCREEN AND
MAINTAINED BY THE SYSTEM
(similar to values depicted on screen 106)**

Line A	BL	Basic Life (or ABL for some participants)
Line B	MED	Medical Insurance
Line C	DEN	Dental Insurance
Line D	VIS	Vision Insurance
Line E	OL	Optional Life Insurance
Line F	DL	Dependent Life Insurance
Line G	ADD	Accidental Death & Dismemberment Insurance
Line H	LTD	Long Term Disability Insurance
Line I	LTCE	Long Term Care Employee Insurance
Line J	LTCS	Long Term Care Spouse Insurance
Line K	SAHC	Spending Account – Health Care
Line L	SADC	Spending Account – Dependent Care
Line N	Totals	Dollar Amounts Totaled For Appropriate Columns

Column 1	Carr Code	Carrier Code for Medical and/or Dental, if covered
Column 2	Deduct Amt	Amount Paid by Employee /Retiree, if covered
Column 3	Payment Amt	If Eligible for SGIP, the Amount Paid by Employer
Column 4	Due Date	Due Date of Coverage
	or	(Use PF Key 11 & PF Key 12 to toggle)
	Start Date	Start Date of Coverage
Column 5	MTD Deduct	Amount Paid by Employee or Retiree this Month
Column 6	MTD Payment	Amount Paid by Employer this Month
Column 7	FYTD Deduct	Amount Paid by Employee or Retiree this Fiscal Year
Column 8	FYTD Payment	Amount Paid by Employer this Fiscal Year

ADDITIONAL GROUP BENEFIT SCREENS

The following screens provide the terminal operator with more detailed information concerning an employee's insurance benefits.

Next Screen Code	General Description	See Page
123	Expanded Basic Life Information	5.62
120	Expanded Medical Information	5.67
121	Expanded Dental Information	5.64
129	Expanded Vision Information	5.71
124	Expanded Optional Life Information	5.65
125	Expanded Dependent Life Information	5.68
126	Expanded Accidental Death and Dismemberment Information	5.63
122	Expanded Long Term Disability Information	5.66
107	Expanded Long Term Care Coverage	5.70
105	Expanded Spending Account	5.69

Please note that all of these screens are 'Inquiry Only' and will NOT allow any updating of the data. If the operator goes to one of these screens while in 'update' mode the system will automatically switch to 'Inquire Only' mode until the user moves to another screen (provided it is not one of these seven screens). All updating for insurance benefits will continue to be done through screen 106.

SCREEN 123 - EXPANDED BASIC LIFE COVERAGE

This screen contains specific information relating to the employee's Basic Life coverage.

The following fields will contain data if the coverage is in effect and the field is applicable to the individual:

> Accelerated Benefit Option
> Month-to-Date Deduction - biweekly paid employees only
> Month-to-Date Payment - for biweekly paid employees only
> Fiscal Year-to-Date Deduction
> Fiscal Year-to-Date Payment

```
123 TAMUS B/P/P - Expanded Basic Life Coverage              11/23/10  15:40
                                                            D BPP0006  R007

  Screen: ___
    UIN: _____      Name:

  Coverage Amount          Accelerated Benefit

  Priority
  Deduct Code

  Coverage Start Date
  Coverage Stop Date                    Employee Deduction
  Premium Due Date                      Employer Payment
                                        MTD Deduction
  Opt Life Salary                       MTD Payment
  Budgeted Salary                       FYTD Deduction
                                        FYTD Payment



  Comments
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help         Exit  Main  Prev  Next
```

SCREEN 126 - EXPANDED AD&D COVERAGE

This screen contains specific information relating to the employee's accidental death and dismemberment coverage.

The following fields will contain data if the coverage is in effect and the field is applicable to the individual:

>   Coverage Amount
>   Plan
>   Deduction Priority
>   Deduction Code / Basis
>   Coverage Start and Stop Dates
>   Coverage Change Date
>   Premium Due Date
>   Benefits Salary
>   Budgeted Salary
>   Employee Deduction
>   Employer Payment
>   Month-to-Date Deduction - for biweekly paid employees only
>   Month-to-Date Payment
>   Fiscal Year-to-Date Deduction
>   Fiscal Year-to-Date Payment

```
 126 TAMUS B/P/P - Expanded AD&D Coverage              05/23/06  14:54
                                                       D BPP0002  R011


 Screen: ___
   SSN:              Name:


 Coverage Amount
 Plan


 Priority
 Deduct Code


 Coverage Start Date
 Coverage Stop Date                  Employee Deduction
 Coverage Change Date                Employer Payment
 Premium Due Date                    MTD Deduction
                                     MTD Payment
 Benefits Salary                     FYTD Deduction
 Budgeted Salary                     FYTD Payment



 Comments ,
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help        Exit  Main  Prev  Next
```

SCREEN 121 - EXPANDED DENTAL COVERAGE

This screen contains specific information relating to the employee's Dental coverage.

The following fields will contain data if the coverage is in effect and the field is applicable to the individual:

> Plan Type
> Deduction Priority
> Deduction Code / Basis
> Coverage Start and Stop Dates
> Coverage Change Date
> Premium Due Date
> Pre-Tax Waive - **W** if waived
> Number Covered
> Family Status
> Employee Deduction / Pre-Tax Amount
> Employer Payment / Emolument Amount
> Month-to-Date Deduction - for biweekly paid employees only
> Month-to-Date Payment
> Fiscal Year-to-Date Deduction
> Fiscal Year-to-Date Payment

```
121 TAMUS B/P/P - Expanded Dental Coverage                02/27/06  08:40
                                                          P BPP0002  R025


  Screen: ___
    UIN: _____      Name:

  Plan                                  Number Covered
                                        Family Status
  Priority
  Deduct code

  Coverage Start Date
  Coverage Stop Date            Emp Ded/PreTax Amt
  Coverage Change Date          Empr Pymt/Emol Amt
  Premium Due Date              MTD Deduction
                                MTD Payment
  Pre-Tax Waive                 FYTD Deduction
                                FYTD Payment




  Comments
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help         Exit  Main  Prev  Next
```

SCREEN 124 - EXPANDED OPTIONAL LIFE COVERAGE

```
124 TAMUS B/P/P - Expanded Optional Life Coverage          12/02/10  13:06
Screen: _1_ UIN:    2       Name:   3                      D BPP0040  R011


Coverage Amount        A1  Accelerated Benefit  A2
Plan A3                                         A4


Deduct Code A5


Coverage Start Date         B1
Coverage Stop Date          B2      Employee Deduction      D1
Coverage Change Date        B3      MTD Deduction           D2
Premium Due Date            B4      FYTD Deduction          D3


FTE Salary          C1
Opt Life Salary     C2
Budgeted Salary     C3
Pos Pct Eft         C4


Comments   E1


Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help           Exit  Main  Prev  Next
```

1	Screen	See **System Overview**

2	UIN	See **System Overview**

3	Name	Employee Name, must be greater than four (4) characters in length

This screen contains specific information relating to the employee's Optional Life coverage.

The following fields will contain data if the coverage is in effect and the field is applicable to the individual:

A1	Coverage Amount	Automatically calculated. If blank for employees, will not calculate for retirees or if ABO flag = Y. In whole dollars. Note: Agrees with Plan #. (See **Benefit and Procedures Manual**)

A2 covered	Accelerated Benefit Option	This benefit is available to employees, retirees and their Dependents and allows an eligible employee/retiree to receive immediate payment of 25% to 50% of his/her total Life coverage amount if a doctor certifies that he/she has less than 24 months to live. (See help for ABO on Screen 106.)

A3	Plan Type	Employees can purchase coverage of ½, 1, 2, 3, 4, 5 or 6 times

		their annual pay. A zero is used to indicate ½. Coverage of 4, 5 or 6 times annual pay requires evidence of insurability. (See **Additional Life Insurance Information**.)
A4	Tobacco Indicator	Non-Tobacco User, Tobacco User or blank
A5	Deduction Code / Basis	See **Screen 106 Documentation** for list of options
B1	Coverage Start Date	MM DD YYYY
B2	Coverage Stop Date	MM DD YYYY
B3	Coverage Change Date	MM DD YYYY – automatically set to the first of the month if changes are made which affect coverage
B4	Premium Due Date	MM DD YYYY
C1	FTE Salary	Greater than zero; FTE-MO-SAL * 12. No decimal places assumed (in whole dollars).
C2 is	Optional Life Salary	This salary is used to set coverage levels for life insurance. It the annualized salary as of the 1st of the current fiscal year or when newly hired. It is calculated by multiplying the FTE salary times the percent effort. It is not adjusted by mid-year salary changes and is never decreased.
C3	Budgeted Salary	Greater than zero; FTE-MO-SAL * percent effort * annual term months. No decimal places assumed (in whole dollars).
C4	Position Percent Effort	If not blank, 0.01 through 150.00 for all workstations other than A. A PINS cannot be greater than 100. (Required for budgeted PINS with employee State Code A or L.
D1	Employee Deduction	Based on age and coverage per 1000.
D2	Month-to-Date Deduction	For biweekly paid employees only
D3	Fiscal Year-to-Date Deduction	Amount deducting during currently fiscal year
E1	Comments	

SCREEN 122 - EXPANDED LONG-TERM DISIBILITY COVERAGE

This screen contains specific information relating to the employee's Long Term Disability coverage.

The following fields will contain data if the coverage is in effect and the field is applicable to the individual:

> Deduction Priority
> Deduction Code / Basis
> Coverage Start and Stop Dates
> Premium Due Date
> Benefits Salary
> Budgeted Salary
> Employee Deduction
> Employer Payment
> Month-to-Date Deduction - for biweekly paid employees only
> Month-to-Date Payment
> Fiscal Year-to-Date Deduction
> Fiscal Year-to-Date Payment

```
 122 TAMUS B/P/P - Expanded Long-Term Disability Coverage       07/05/01  14:21
                                                                 P BPP0002  0311


   Screen: ___
     UIN: _____       Name:

   Priority
   Deduct Code

   Coverage Start Date
   Coverage Stop Date                    Employee Deduction
   Premium Due Date                      Employer Payment
                                         MTD Deduction
   Benefits Salary                       MTD Payment
   Budgeted Salary                       FYTD Deduction
                                         FYTD Payment




   Comments
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help          Exit  Main  Prev  Next
```

SCREEN 120 - EXPANDED MEDICAL COVERAGE

This screen contains specific detailed information relating to the employee's Medical coverage. It is a 'Display' only screen and cannot be updated. Updates can be made on Screen 106.

The following fields will contain data if the coverage is in effect and the field is applicable to the individual:

> Carrier Code and Carrier Name
> Plan Code and Plan Name
> Deduction Priority
> Deduction Code / Basis
> Coverage Start and Stop Dates
> Coverage Change Date
> Premium Due Date
> FMLA Start Date - if applicable / otherwise blank
> Pre-Tax Waive - **W** if waived / otherwise blank
> Certified Other Medical Coverage Code and Detail
> Comments
> BCBS Section & Description (only for Blue Cross Blue Shield coverage)
> Number Covered
> Family Status and Detail
> Medicare - **Y** if covered by Medicare / otherwise blank
> Employee Deduction / Employee Pre-Tax Amount (if applicable)
> Employer Payment / Employer Emolument Amount (if applicable)
> Month-to-Date Deduction - for biweekly paid employees only
> Month-to-Date Payment - for biweekly paid employees only
> Fiscal Year-to-Date Deduction
> Fiscal Year-to-Date Payment

```
 120 TAMUS B/P/P - Expanded Medical Coverage                08/27/08  14:06
                                                            D BPP0003  R004


 Screen: ___
   UIN:            Name:


 Carrier                              BCBS Section:
 Plan


 Priority                             Number Covered
 Deduct Code                          Family Status
                                      Medicare
 Coverage Start Date
 Coverage Stop Date
 Coverage Change Date                 Emp Ded/PreTax Amt
 Premium Due Date                     Empr Pymt/Emol Amt
 FMLA Start Date                      MTD Deduction
                                      MTD Payment
 Pre-Tax Waive                        FYTD Deduction
 Certified Other                      FYTD Payment
  Medical Coverage
 Comments
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
     Help           Exit  Main  Prev  Next
```

SCREEN 125 - EXPANDED DEPENDENT LIFE COVERAGE

This screen contains specific information relating to the Employee's Dependent Life coverage.

The following fields will contain data if the coverage is in effect and the field is applicable to the individual:

> Coverage Amount
> Optional Life Coverage Amount
> Plan
> Family Status
> Accelerated Benefit Option
> Deduction Code / Basis
> Coverage Start Date
> Coverage Change Date/
> Premium Due Date
> Employee Deduction
> Month-to-Date Deduction – for biweekly paid employees only
> Fiscal Year-to-Date Deduction
> Dependent Name
> Start and Stop Dates
> Dependent SSN
> Dependent Birth date
> Coverage Amount

```
125 TAMUS B/P/P - Expanded Dependent Life Coverage           07/05/01 14:30
                                                           P BPP0002  0311

  Screen: ___
    UIN: _____      Name:

  Coverage Amount                      Opt Life Coverage Amt
  Plan                                 Accelerated Benefit
  Family Status
  Deduct Code
  Coverage Start Date
  Coverage Stop Date                   Employee Deduction
  Coverage Change Date                 MTD Deduction
  Premium Due Date                     FYTD Deduction

  Dep Name              Start Dt    Stop Dt    SSN        Birth Dt   Cvrg Amount




  Comments
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help           Exit  Main  Prev  Next  Up     Down
```

SCREEN 105 - EXPANDED SPENDING ACCOUNT

This screen contains information relating to both Health-Care and Dependent-Care Spending Accounts plans. This is a more complete picture of the information summarized on the Screen 106.

The fields will contain data, if coverage is/was in effect.

The Debit Card selection pertains to the Health Care Spending Account Spending Account.

```
 105 TAMUS B/P/P - Spending Accounts                    12/02/10  14:59
  Screen:_1_ UIN:     2      Name:      3             D BPP0040  R011

                    Health          Dependent
                     Care              Care
                   ----------        ----------
           Deduct Cd:    A1               A2
      Number months:    B1               B2

         Start date:    C1               C2
           Due date:    D1               D2
        Change date:    E1               E2
          Stop date:    F1               F2

         Deduct amt:    G1               G2
     MTD deduct amt:    H1               H2
    FYTD deduct amt:    I1               I2
        Goal amount:    J1               J2
         Debit Card:    K1
      Direct Deposit?:  L1
  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
-
        Help           Exit  Main  Prev  Next
```

| 1 | Screen | See **System Overview** |
| 2 | UIN | See **System Overview** |

3 Name Employee Name, must be greater than four (4) characters in length

A1   Health Care Spending Account Deduction Code

    N –   Do Not Compute Deduction

    Blank –   Do not Compute Deduction

    1 –   Compute Deduction during Academic Year only (September – May)

    2 –   Compute Deduction during entire benefit year

A2   Dependent Care Spending Account Deduction Code

    N –   Do Not Compute Deduction

    Blank –   Do not Compute Deduction

    1 –   Compute Deduction during Academic Year only (September – May)

    2 –   Compute Deduction during entire benefit year

B1 Health Care Spending Account # of Months	**B2** Dependent Care Spending Account # of Months
The number of months the employee will have a spending account deduction over the course of an entire fiscal year	The number of months the employee will have a spending acount deduction taken over the course of an entire fiscal year
C1 Health Care Spending Account Start Date	**C2** Dependent Care Spending Account Start Date
Already deducted and months remaining in fiscal year.	Already deducted and months remaining in fiscal year.
D1 Health Care Spending Account Due Date	**D2** Dependent Care Spending Account Due Date
MMDDYYYY (DD must be 01 and 15 for active employees)	MMDDYYYY (DD must be 01 and 15 for active employees)
E1 Health Care Spending Account Change Date	**E2** Dependent Care Spending Account Change Date
MMDDYYYY	MMMDDYYYY
F1 Health Care Spending Account Stop Date	**F2** Dependent Care Spending Account Stop Date
MMDDYYYY, not greater than last day of current Fiscal Year, must be greater than Start Date.	MMDDYYYY, not greater than last day current Fiscal Year; must be greater than start date.
G1 Health Care Spending Account Deduction Amount	**G2** Dependent Care Spending Account Deduction Amount
Numeric, greater than zero. Minimum is 20, Maximum is calculated; yearly maximum of 4800. Depends on amount.	Numeric, greater than zero includes 2 decimal places. Minimum is 40, Maximum is calculated; yearly maximum of 5000. Depends on amount.
1 – Amount must be greater than 26.66 and less than 533.33	1 – Amount must be greater than 26.66 and less than 533.33
2 – Amount must be greater than 20.00 and less than 400.00	2 – Amount must be greater than 40.00 and less than 500.00
H1 Health Care Spending Account Month-to-Date Deduction Amount	**H2** Dependent Care Spending Account Month-to-Date Deduction Amount
I1 Health Care Spending Account Fiscal Year-to-Date Deduction Amount	**I2** Dependent Care Spending Account Fiscal Year-to-Date Deduction Amount
J1 Health Care Spending Account Goal Amount	**J2** Dependent Care Spending Account Goal Amount
Cut-off amount for FYTD deductions	Cut-off amount for FYTD deductions
K1 Health Care Spending Account Debit Card	
N/A, Selected or Not Selected	
L1 Health Care Spending Account Direct Deposit	
Y or N	

SCREEN 107 - EXPANDED LONG TERM CARE COVERAGE

This screen contains specific information relating to the employee's Long Term Care coverage and spouse coverage if applicable.

```
 107 TAMUS BPP - Expanded Long-Term Care Coverage          12/02/10  13:18
  Screen: 1 UIN:     2      Name:     3                     D BPP0040  R011

                          Employee     Spouse        Name:   A
                Birthdate:    B           C           UIN:    D
              Deduct Code:    E           F
    Daily Benefit Amount:     G           H

           Non-Forfeiture:    I           J
     Inflation Protection:    K           L

      Coverage Start Date:    M           N
       Coverage Stop Date:    O           P
     Coverage Change Date:    Q           R
         Premium Due Date:    S           T

       Employee Deduction:    U           V
            MTD Deduction:    W           X
           FYTD Deduction:    Y           Z

   Comments: AA


  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
    -
        Help           Exit  Main  Prev  Next
```

| 1 | Screen | See **System Overview** | 3 | Name | Employee Name, must be greater than four (4) characters in length |
| 2 | UIN | See **System Overview** | | | |

The following fields will contain data if the coverage is in effect and the field is applicable to the individual:

A Spouse Name
B Employee Birthdate
C Spouse Birthdate
D Spouse UIN
E LTCE Deduct Code
F LTCS Deduct Code
G LTCE Total Coverage Amount
H LTCS Total Coverage Amount
I Non-Forfeiture Benefit for Employee
J Non-Forfeiture Benefit for Spouse
K Inflation Amount for Employee
L Inflation Amount for Spouse
M LTCE Coverage Start Date (MM DD YYYY)

N LTCS Coverage Start Date (MM DD YYYY)
O LTCE Stop Date (MM DD YYYY)
P LTCS Stop Date (MM DD YYYY)
Q LTCE Coverage Change Date
R LTCS Coverage Change Date
S LTCE Premium Due Date
T LTCS Premium Due Date
U LTCE Deduction Amount
V LTCS Deduction Amount
W LTCE Month-To-Date Deduction Amount
X LTCS Month-To-Date Deduction Amount
Y LTCE Fiscal Year-To-Date Deduction Amount
Z LTCS Fiscal Year-To-Date Deduction Amount

AA Comments

SCREEN 129 - EXPANDED VISION COVERAGE

This screen contains specific information relating to the employee's Vision coverage.

The following fields will contain data if the coverage is in effect and the field is applicable to the individual:

A	Deduction Priority
B	Deduction Code / Basis
C	Coverage Start
D	Coverage Stop Dates
E	Coverage Change Date
F	Premium Due Date
G	Pre-Tax Waive - **W** if waived
H	Number Covered
I	Family Status
J	Employee Deduction / Pre-Tax Amount
K	Employer Payment / Emolument Amount
L	Month-to-Date Deduction - for biweekly paid employees only
M	Month-to-Date Payment
N	Fiscal Year-to-Date Deduction
O	Fiscal Year-to-Date Payment
P	Comments

```
 129 TAMUS B/P/P - Expanded Vision Coverage                01/09/06  10:06
                                                            D BPP0002  R008


   Screen: ___
     UIN: _____      Name:


                                        Number covered      H
                                        Family Status       I
   Priority       A
   Deduct Code    B

   Coverage Start Date     C
   Coverage Stop Date      D            Emp Ded/PreTax Amt   J
   Coverage Change Date    E            Empr Pymt/Emol Amt   K
   Premium Due Date        F            MTD Deduction        L
                                        MTD Payment          M
   Pre-Tax Waive           G            FYTD Deduction       N
                                        FYTD Payment         O

   Comments:      P



  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
        Help         Exit  Main  Prev  Next
```

SCREEN 109 - ANNUITY/DEFERRED COMP

This screen contains information relating to Tax-Sheltered Annuities, Roth 403 (b)'s, Deferred Compensation, and Deferred Comp Loan Programs including carriers, deduction amounts, and limits on the amounts deducted. Enrollment for TDA's and Roth 403(b)'s is done from Screen 109. Enrollment for DCP and DCPL is done by Citistreet. At the beginning of each month, the DCP Plan administrators (currently CitiStreet, under the direction of ERS) send the B/P/P Operations Center a file that is processed to update the DCP and DCP Loan Deduction information in the B/P/P System. The month-to-date and year-to-date fields are updated through the payroll process. The DCP and DCP Loan fields are display only and are only updated from files sent by CitiStreet. The total TAMUS and TRS years of service fields are updated at the beginning of the fiscal year. The cutoff amounts are updated for all annuity and DCP participants at the beginning of the fiscal year. Additionally, the cutoff amounts are updated each time Screen 109 is entered in correction mode.

Additional data elements on the lower portion of the screen are used in the annual calculation of the Maximum Cutoff Amount. These fields may be updated manually at any time. The B/P/P System maintains most of these fields on an annual basis, from actual payroll activity for that year.

```
 109 TAMUS B/P/P - TDA /DCP /Roth 403(b)  -            01/09/06  11:48
 Screen:  1   UIN:      2       Name:   A1              D BPP0002  R008

 Tax Deferred Account / Roth 403(b)       Calc Date
Deduct Carrier     Start     Stop               Deduct     MTD         YTD
Cd Typ Cd   Typ    Date      Date     Cutoff  Amt/Pct   Deduct      Deduct
 3  4   5   C1   6  6    6   7  7   7   C2      8         C3          C4

 _ _  ___     __ __ ____ __ __ ____          _____
 _ _  ___     __ __ ____ __ __ ____          _____

 _ _  ___     __ __ ____ __ __ ____          _____
 Texa$aver Deferred Compensation         Calc Date  D1
Deduct Carrier     Start     Stop               Deduct     MTD         YTD
Cd Typ Cd   Typ    Date      Date     Cutoff    Amt    Deduct      Deduct
 9  E1  E2   E3    E4      10 10  10    E5      E6       E7          E8
 Texa$aver Loan Payment
 F1             F2        F3                F4       F5          F6
 DCP 3 Year Catch Up      3 Year C/U Started    Other ORP Contr  _____
 Total TAMUS Svc Thru End Of Prior FY   12     Other TDA Contr      13
 Total TRS Svc Thru End of Prior FY    H1      DTD TDA  Contr       H2
 TRS Contr Before 1988               14        DTD Roth Contr       I1
 Prior 402(G) Contr        J1                  DTD DCP  Contr       J2
 YTD 403(b) (ORP+TDA+Roth)    K1               YTD Longevity        K2
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help        Exit  Main  Prev  Next
```

SCREEN 109 - ANNUITY/DEFERRED COMP. EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens.
2	SOCIAL SECURITY NUMBER	Must be a nine (9) digit number

NUMBER	DATA FIELD	EDITS PERFORMED
3	TDA/ROTH DEDUCTION CODE	D - Delete annuity segment from File (not allowed if MTD (8) or YTD (C) deducts greater than zero. 1 - Compute deduction from September through May only (during academic year). 2 - Compute deduction during entire year. N - Do not compute deduction.
4	DEDUCTION TYPE	F - Fixed amount deduction P - Percentage of salary deduction
5	CARRIER	Valid ANU or Roth Carrier Press <**PF1**> for valid selection.
6	START DATE[1]	MM DD YYYY
7	STOP DATE[1]	MM DD YYYY, 99 99 9999 or blank for default.
8	DEDUCTION AMOUNT or PERCENT	Greater than zero, and: 1) If DEDUCTION TYPE = F, less than or equal to the cutoff; or, 2) If DEDUCTION TYPE = P, 75 or less NOTE: There are two decimal places for **P** types (Ex: 10% would be 10.00 or 5% would be 05.00)
9	DCP DEDUCTION CODE	1 - Compute deduction form September through May only (during academic year) 2 - Compute deduction during entire year N - Do not compute deduction DCP are only allowed to be modified. Enrollment is done through Citistreet
10	STOP DATE	MM DD YYYY, 99 99 9999 or blank for default
11	OTHER ORP CONTRIBUTIONS	Allowed for annuities only; numeric. If no annuities are present, may only be changed to zero.
12	TOTAL TAMUS SVC THRU END OF PRIOR FY	Required for annuities only. Numeric; Years stored in decimal format (Ex: 6 mos. = .5 yr or 8 mos. = .67 yr)

NUMBER	DATA FIELD	EDITS PERFORMED
13	OTHER TDA CONTRIBUTIONS	Allowed for annuities only; numeric to include both employee deduction and employer payment amounts. If no annuities are present, may only be changed to zero.
14	TRS CONTRIBUTIONS BEFORE 1988	Allowed for annuities only. Required for TRS participants only. Numeric. If no annuities are present, may only be changed to zero.

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A1	NAME	Must be greater than four (4) characters in length
B1	CALC DATE	MMYYYY, date cutoff was last calculated.
C1	CARRIER TYPE	Annuity or Roth 403(b)
C2	CUTOFF AMOUNT[2]	Calculated Cutoff Amount
C3	MTD DEDUCT	Month to date deduction amount
C4	YTD DEDUCT	Year to date deduction amount
D1	CALC DATE	MM YYYY - DCP calculation date
E1	DCP DEDUCTION TYPE	F - Fixed amount deduction
E2	DCP CARRIER	001 only
E3	CARRIER TYPE	DCP only
E4	DCP START DATE[1]	MM DD YYYY
E5	DCP CUTOFF AMOUNT[2]	Calculated cutoff amount
E6	DCP DEDUCTION AMOUNT	Monthly deduction amount
E7	DCP MTD DEDUCT	Month-to-date deduct amount
E8	DCP YTD DEDUCT	Year-to-date deduct amount

F1	DCPL DEDUCTION CODE	1 - Compute deduction from September through May only (during academic year).
		2 - Compute deduction during entire year
		3 - Do not compute deduction
F2	DCPL START DATE	MM DD YYYY format
F3	DCPL STOP DATE	MM DD YYYY format
F4	DCP DEDUCTION AMOUNT	Monthly deduction amount
F5	DCP MTD DEDUCT AMOUNT	Month-to-date deduct amount
F6	DCP YTD DEDUCT AMOUNT	Year-to-date deduct amount
G1	DCP 3-YEAR CATCHUP	Allows doubling of the DCP maximum cutoff. When set to Y.
G2	3-YEAR C/U STARTED	The year in which the DCP 3-year catch-up provision was first activated
H1	TOTAL TRS SVC THRU END OF PRIOR FISCAL YEAR	In years
H2	DTD-TDA CONTR	Deductions to date Tax Deferred Annuity contributions (includes any DCP contributions made prior to 01/01/2002)
I1	DTD-ROTH CONTR	Deductions to date Roth 403(b)
J1	PRIOR 402 (G) CONTRIBUTIONS	Tax deferred annuities contributions made above a special limit. Currently limited to a lifetime of $ 15,000.00.
J2	DTD-DCP CONTR	Deductions to date Taxa$aver Deferred Compensation contributions (does not include any DCP contributions made prior to 01/01/2002)
K1	YTD 403(b) TOTAL CONTR (ORP+TDA+Roth)	Year-to-date 403(b) contributions
K2	YTD LONGEVITY	Year-to-date longevity pay in dollars

1. Note: deduction will only be taken on a payroll if the pay date falls within the range of the Annuity Start and Stop dates

2. Calendar-year basis; this may not be the Maximum Cutoff Amount if the employee has more than one carrier. The Maximum Cutoff Amount must be split into appropriate cutoff amounts. If the employee changes carrier or amount in the middle of a year and you want to add a new line, you must subtract the YTD deduction from the 'old' cutoff amount and enter the difference as the 'new' cutoff amount on the new line. May not exceed budgeted salary.

   Calculated for annuity - 'base limit', if age on Dec. 31 > 49 add 'age - 50 catch-up', if years of service on Dec. 31 $\geq$ 15, add '402G additional amount'. If the total cutoff is greater than the 'IRS Shelter limit'; the 'IRS Shelter limit' minus the 'Max ORP contributions'.

   Calculated for deferred comp - 'base limit', if age on Dec. 31 > 49 and < 62, add age 50 catch-up, if DCP 3-year catchup='Y', multiply base limit by 2.

   Calculations are based on current budgeted salary. If salary increases were received during the year or it is a new employee, the cutoff amount may need to be manually adjusted accordingly.

   For TDA, manual input allowed if annual term is less than nine months.

   * No partial years. 4.5 months worked in a Fiscal Year = 1 year of TRS Service.

SCREEN 110 - U. S. SAVINGS BOND MAINTENENCE

This screen contains information relating to U. S. Savings Bond deductions, including bond denominations, deduction amounts, owner address, and co-owner and/or beneficiary information.

Processing Notes:

In order to maximize ease of operation, this screen has a built-in default of the employee's SSN and name for the owner data or beneficiary/co-owner data, whichever is left blank. For example, if the employee is to be the bond owner, simply leave the OWNER-SSN and owner NAME fields blank, and the employee's SSN & name will be put there automatically. If, on the other hand, someone else is to be the owner and the employee is to be a beneficiary or co-owner, put the other person's SSN and name in the OWNER-SSN and owner NAME fields. Then, type a **B** or **C** in the BENE/CO-OWNER field, leaving the bene/co-owner SSN and NAME fields blank. The employee's SSN and name will be placed in the bene/co-owner SSN and NAME fields automatically. Note that no one person's SSN and name can be used for both OWNER and BENE/CO-OWNER for the same bond. If someone other than the employee is to be the owner and no beneficiary or co-owner is named, simply enter that person's SSN and name in the OWNER-SSN and owner NAME fields, and leave the BENE/CO-OWNER, bene/co-owner SSN, and bene/co-owner NAME fields blank.

The BOND COST is automatically calculated as one-half of the BOND DENOMINATION.

It should be noted that if the owner's address information is omitted, the bond will be sent to the employee's MAILING ADDRESS as found on the ADDRESS DATA (111) screen.

This screen is designed to allow an employee to buy as many bonds as desired for up to a maximum of two (2) Owner, Beneficiary/Co-Owner combinations. There is another process that can be used to purchase additional bonds (all of the same denomination) for a maximum of nine different Owner, Beneficiary/Co-Owner combinations. Contact the B/P/P Operations Center should this need arise.

SCREEN 110 - U. S. SAVINGS BOND MAINTENENCE

```
110 TAMUS B/P/P - U.S. Savings Bond Maintenance           07/06/01  09:37
                                                           D BPP0002  0019


  Screen:  1
     UIN:     A        Name:     B                               Next Bond

  Ded-Cd 2      Deduct       3        Denom       4          Cost    C
                Start-Dt     5        Stop-Dt     6
                Owner-SSN    7        Name        8
  Street      9
  City        10                      State    11    Zip    12
  Bene/Co-Owner 13    SSN    14       Name        15
  Ded-Balance   D           FYTD-Ded   E          FYTD-Purch-Val    F

  Ded-Cd _      Deduct    _____     Denom    _____     Cost
                Start-Dt  __ __ ____   Stop-Dt  __ __ ____
                Owner-SSN _____     Name     _____
  Street     _____
  City       _____           State    __    Zip   _____ ____
  Bene/Co-Owner _    SSN  _____     Name     _____
  Ded-Balance               FYTD-Ded               FYTD-Purch-Val

 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help          Exit  Main  Prev  Next
```

SCREEN 110 - U. S. SAVINGS BOND MAINTENANCE EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the ENTER key, you will be able to move through all the screens in the Personnel File.
2	BOND DEDUCTION CODE	D - Delete bond segment from File N - Do not compute deduction Y - Compute deduction
3	BOND DEDUCTION AMOUNT	Greater than zero
4	BOND DENOMINATION	100.00, 200.00, 500.00, or 1000.00
5	BOND START DATE	MM DD YYYY
6	BOND STOP DATE	MM DD YYYY or 99 99 9999
7	BOND OWNER SSN	Blank [1], or nine-digit number

NUMBER	DATA FIELD	EDITS PERFORMED
8	BOND OWNER NAME	Blank[1], or more than three characters format: LAST,SUFX FIRST MI[2]
9	BOND ADDRESS - STREET	Blank, or more than three characters
10	BOND ADDRESS - CITY	Blank, or more than two characters
11	BOND ADDRESS - STATE	Blank, or in code book
12	BOND ADDRESS – ZIP CODE	Blank, five digits, or nine digits
13	BENEFICIARY/CO- OWNER CODE	B - Bond Beneficiary assigned to following person C - Co-owner to be the following person
14	BENE/CO-OWNER SSN	Blank[1], or nine digits
15	BENE/CO-OWNER NAME	Blank[1], or more than three characters format: LAST,SUFX FIRST MI[2]

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A	UIN	Must be a nine (9) digit number. The SSN may also be entered, the UIN will be displayed after pressing ENTER. Press the PF1 key to bring up a pick list.
B	NAME	Must be greater than four (4) characters in length
C	BOND COST	Automatically calculated as one-half of the BOND DENOMINATION
D	DEDUCTION BALANCE	Outstanding balance of the BOND DEDUCTION, maintained by the system
E	FYTD DEDUCTION	Fiscal year to date total of the BOND DEDUCTION, maintained by the system
F	FYTD PURCHASE VALUE	Fiscal year to date value of all the bonds

---

[1] See page 5.76 for instructions on use of default name &SSN

[2] Example: THOMAS, JR TOM T   or   THOMAS TOM T

SCREEN 113 - COURT ORDERED DEDUCTIONS

This screen contains information relating to Court Ordered Deductions, including the mail code (to identify the recipient data for court ordered deductions), the amount to be deducted and the maximum allowable percentage of disposable income that may be deducted. Court Ordered Deduction payments are made either via check or ACH. Payments may be made via ACH by setting the flag. Currently, Texas is the only State set up for ACH.

Some of the data entered for child support deduction on this screen updates the PC table of the Tables File. This table contains the information pertinent to the recipient of this deduction.

```
113 TAMUS B/P/P - Court Ordered Deductions-                 01/09/06  10:20
  Screen: 1      UIN:     A        Name: _____B_____  D BPP0002  R008

Max Pct   2
Ded Seq   Curr Amt    Past Amt    Start    Stop   Assignment            DTD Amt
  3   4      5            6       7  7   8   8            9                 D
     Spl     10          11      ACH 12 SDU 13                14
               Case              15              16       17  18    19

  __   __     _____     _____  __  __  ____  _____
     Spl     _____     _____  ACH _ SDU __
               Case    _____          __  ____  ____

  __   __     _____     _____  __  __  ____  _____
     Spl     _____     _____  ACH _ SDU __
               Case    _____          __  ____  ____

  __   __     _____     _____  __  __  ____  _____
     Spl     _____     _____  ACH _ SDU __
               Case    _____          __  ____  ____

  __   __     _____     _____  __  __  ____  _____
     Spl     _____     _____  ACH _ SDU __
               Case    _____          __  ____  ____

  __   __     _____     _____  __  __  ____  _____
     Spl     _____     _____  ACH _ SDU __
               Case    _____          __  ____  ____

     Spl     _____     _____  ACH _ SDU __  _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help          Exit  Main  Prev  Next
```

SCREEN 113 - COURT ORDERED DEDUCTIONS EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the ENTER key, you will be able to move through all the screens in the Personnel File.

NUMBER	DATA FIELD	EDITS PERFORMED
2	MAX PERCENT OF DISPOSABLE INCOME	Greater than zero and less than 100%. Five decimals assumed (i.e.: 50% = 50000)
3	DEDUCTION CODE	N or blank - Do not compute deduction Y - Compute deduction
4	SEQUENCE NUMBER	Numeric, three digits - 001 through 006, used to uniquely identify each court order.
5	CURRENT AMOUNT	Numeric (the amount is to be taken every month)
6	PAST AMOUNT	
7	START DATE	The date (in MM YYYY format) the court order goes into effect.
8	STOP DATE	The date (in MM YYYY format) the last payroll deduction is to be made.
9	ASSIGNMENT NAME	The name of the agent or agency to which the assignment is to be paid. Generally, this will be the Texas Attorney General.
10	ACH	Flag to determine if the payment is to be made via ACH. **Y**, **N**, or **blank** allowed. **N** or **blank** will cause a check to be produced for the payment.
11	SDU	Required if ACH Flag is set to **Y**. Texas is the only State allowed.
12	CASE NUMBER	Required when ACH Flag is set to **Y**.
13	ADDRESS STREET	The address to which the assignment is to be sent. Generally, this will be the courthouse of the district court from which the assignment was made.
14	ADDRESS CITY	Same as 13 above

NUMBER	DATA FIELD	EDITS PERFORMED
15	ADDRESS STATE	Same as 13 above
16	ADDRESS ZIP CODE	Same as 13 above
17	ADDRESS ZIP CODE SUFFIX	Same as 13 above

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A	UIN	Must be a nine (9) digit number. The SSN may be entered, the UIN will be displayed after pressing ENTER. In inquiry mode, pressing PF1 will display a pick list.
B	NAME	Must be greater than four (4) characters in length
C	MAXIMUM PERCENT DEDUCTION AMOUNT	The total deduction amount withheld since this deduction started.

SCREEN 127 - TAX LEVY / STUDENT LOANS / BANKRUPTCY

This screen contains information relating to Federal Tax Levies, Student Loan Repayments and Bankruptcies.

Student Loan deductions are made using a percentage of the disposable income up to a maximum of 25% for multiple student loans. A fixed amount can be entered when the employee has negotiated the amount with the Department of Education.

Bankruptcy deduct amounts are compared to 100% of the disposable income.   Bankruptcy deductions are taken prior to any other garnishment; COD, STLN, Tax Levy, etc.

```
 127 TAMUS B/P/P - Tax Levy/Student Loan/Bankruptcy-          06/20/06  08:03
 Screen: 1      UIN:    A        Name:  B                     D BPP0002  R004


 Tax Levy:         Expn/Ded  2
  3           4               5   5   6   6       7                8
                              9                         10       11   12    13
 STLN: Ded14 Typ15 Recip 16 Start Dt 17 17  17  Amt/Pct     18    DTD   C
       Ded _ Typ _ Recip __ Start Dt __ __ ____ Amt/Pct _____ DTD

 BNKR:
 Ded       Start      Stop       Amt  Assignment             Case
  19      20  20   21  21    22            23                      24
                  MTD     D            25
                  DTD     E        26            27  28   28


 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help        Exit  Main  Prev  Next
```

SCREEN 127 - TAX LEVY / STUDENT LOANS EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the ENTER key, you will be able to move through all the screens in the Personnel File.

NUMBER	DATA FIELD	EDITS PERFORMED
2	EXEMPTION / DEDUCTION	E - Employee is to have Deduct Amount as Net Pay D - Deduct Amount is taken in addition to calculated taxes
3	TAX LEVY DEDUCTION CODE	N or blank - Do not compute deduction Y - Compute deduction
4	DEDUCT AMOUNT	Numeric, (the amount is to be deducted/exempted every payroll period)
5	START DATE	The date (in MM YYYY format) the tax levy goes into effect.
6	STOP DATE	The date (in MM YYYY format) the last tax levy deduction is to be made.
7	CUTOFF AMOUNT	The maximum amount to be deducted to satisfy the levy.
8	ASSIGNMENT NAME	The name of the agency to which the levy is to be paid. Generally, this will be the Internal Revenue Service.
9	ADDRESS STREET	The address to which the levy is to be sent. Generally, this will be the IRS Office from which the levy notice was sent.
10	ADDRESS CITY	Same as 9 above.
11	ADDRESS STATE	Same as 9 above.
12	ADDRESS ZIP CODE	Same as 9 above.
13	ADDRESS ZIP CODE SUFFIX	Same as 9 above.
14	STUDENT LOAN DEDUCTION CODE	N or blank - Do not compute deduction Y - Compute deduction

NUMBER	DATA FIELD	EDITS PERFORMED
15	DEDUCTION TYPE	F - Fixed P - Percentage
16	RECIPIENT CODE	Numeric, on Tables File
17	START DATE	The date (in MM DD YYYY format) the student loan goes into effect.
18	AMOUNT / PCT	Fixed amount if deduct code is **F**. The amount entered is per pay period. Percentage amount if deduct type is **P**. Cannot be greater than 15% or a total of 25% for multiple student loans.
19	BNKR DED CODE	N - Do not compute deduction Blank - Do not compute deduction Y - Compute deduction
20	START DATE	MM/YYYY
21	STOP DATE	MM/YYYY defaults to 99 9999
22	BNKR AMOUNT	Numeric, halved on bi-weekly payroll
23	ASSIGNMENT NAME	Name appearing on the check
24	CASE	Case number associated with the bankruptcy
25	STREET	Street check will be mailed to
26	CITY	Valid City
27	STATE	Valid State
28	ZIP	Valid Zip Code

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A   UIN   Must be a nine (9) digit number.   The SSN may be entered, after pressing ENTER the UIN will be displayed. In inquiry mode the PF1 key may be pressed to select an employee from a pick list.

B   NAME   Must be greater than four (4) characters in length

C   DEDUCTIONS TO DATE   The total deduction amount withheld since this deduction started.

D   MTD   Month-to-Date, will not allow more than the monthly amount to be deducted

E   DTD   Deductions-to-Date for Bankruptcy

SCREEN 119 - USER SERVICE FEES

This screen contains information relating to Employee User Service Fees. The deduction is for services rendered for a month and the deduct amount is based on a month. The deduction amount will be halved for biweekly employees, if the employee misses the first deduction the entire amount will taken on Second biweekly. Month end reports will be generated by work station so that they can verify their clearing account balances for the month. An electronic file will be generated of all transactions for the month for each recipient code.

```
 119 TAMUS B/P/P - User Service Fees -  Correction              08/13/04  08:59
                                                               D BPP0002  R005

  Screen:  1
    UIN:      A        Name:     B


  User Service Fees

    Ded     Recipient      Start       Stop       Deduct       MTD
    Cd        Code         Date        Date       Amount       Deduct
    2          3             4           5           6           C
    _         __          __ ___      __ ___      _____
    _         __          __ ___      __ ___      _____




 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
                  Exit  Main  Prev  Next
```

SCREEN 119 - USER SERVICE FEE EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the ENTER key, you will be able to move through all the screens in the Personnel File.
2	USER FEE DEDUCT CODE	N or blank - Do not compute deduction 1 - 9 month deduction (September - May) 2 - 12 month deduction
3	RECIPIENT CODE	2 character numeral identifying the recipient.

NUMBER	DATA FIELD	EDITS PERFORMED
4	START DATE	MM YYYY format. The month and year the deduction should be taken.
5	STOP DATE	MM YYYY format. The month and year the deduction should be stopped.
6	DEDUCT AMOUNT	The monthly deduct amount.

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A	UIN	Valid UIN in the Personnel File. The SSN may be entered, the UIN will be displayed after pressing ENTER.
B	NAME	Must be greater than four (4) characters in length.
C	MONTH TO DATE DEDUCT	Will ensure no more than the monthly deduct amount is taken for the employee. Will help to take the full month's amount for biweekly employees who missed the first payroll.

SCREEN 108 - EMPLOYEE ORG/TX TOMORROW FUND

This screen contains information relating to State Employee Organization Membership Fees (union dues) and the Texas Tomorrow Fund. Notices to start these deductions through payroll come from the organizations.

Data included on this screen includes the organization codes, contract numbers, start and stop dates, and deduction amounts.

These deductions are only made once a month, for the entire amount. For biweekly paid employees, these deductions are made on the second biweekly payroll processed each month.

```
108 TAMUS B/P/P - Employee Org/TX Tomorrow Fund          07/09/01  09:17
                                                          D BPP0002  0004

  Screen:  1
    UIN:     A        Name:      B

 Texas Tomorrow Fund

  Ded   TTF    Contract      Start        Stop       Deduct      MTD          YTD
  Cd    Cd     Number        Date         Date       Amount     Deduct       Deduct
   2     3       4            5            6           7          C            D
   _     _     _____    __ __ ____   __ __ ____   _____
   _     _     _____    __ __ ____   __ __ ____   _____
   _     _     _____    __ __ ____   __ __ ____   _____

  Employee Organizations

   Ded           EOrg         Start        Stop       Deduct      MTD
   Cd            Code         Date         Date       Amount     Deduct
    8             9            10           11          12         C
    _            ___         __ __ ____   __ __ ____   _____

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help            Exit  Main  Prev  Next
```

SCREEN 108 - EMPLOYEE ORG/TX TOMORROW FUND EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the ENTER key, you will be able to move through all the screens in the Personnel File.
2	TEXAS TOMORROW FUND DEDUCTION CODE	N or blank - Do Not Compute Deduction Y - Compute Deduction

NUMBER	DATA FIELD	EDITS PERFORMED
3	TEXAS TOMORROW FUND	Numeric, 1-9. Sequence number assigned for uniqueness - assigned by terminal operator.
4	TEXAS TOMORROW FUND CONTRACT ACCOUNT NUMBER	Numeric, ten character number
5	TEXAS TOMORROW FUND START DATE	MM DD YYYY
6	TEXAS TOMORROW FUND STOP DATE	MM DD YYYY or 99 99 9999
7	TEXAS TOMORROW FUND DEDUCTION AMOUNT	Numeric, greater than zero
8	EMPLOYEE ORGANIZATION DEDUCTION CODE	N or blank - Do Not Compute Deduction Y - Compute Deduction
9	EMPLOYEE ORGANIZATION CODE	On Tables File
10	EMPLOYEE ORGANIZATION START DATE	MM DD YYYY
11	EMPLOYEE ORGANIZATION STOP DATE	MM DD YYYY or 99 99 9999
12	EMPLOYEE ORGANIZATION DEDUCTION AMOUNT	Numeric, greater than zero

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A	UIN	Must be a nine (9) digit number. The SSN may be entered, the UIN will be displayed after pressing ENTER. In inquiry mode, pressing PF1 will allow you to select an employee from a pick list.
B	NAME	Must be greater than four (4) characters in length
C	MONTH TO DATE DEDUCT	Month to date deduction amount
D	YTD DEDUCT	Calendar year to date deduction amount

SCREEN 117 - CREDIT UNION/CHARITABLE CONT.

This screen contains information relating to the Credit Union Payment Deduction and the Charitable Contributions Deduction.

Processing Notes:

The Credit Union Payment Deduction is taken based on the accounting period of the payroll being processed. For employees paid biweekly, the full deduct amount is taken on the second biweekly payroll processed each month. The administrative fee is predetermined by the Texas A&M University System and is automatically calculated in the payroll process. Therefore, no deduction fee amount entry is required.

The Charitable Contributions Deduction is taken based on the pay date of the payroll being processed. For employees paid biweekly, the full deduct amount is taken on the second biweekly payroll processed each month.

```
 117 TAMUS B/P/P - Credit Union/Charitable Cont. - Inquiry      05/06/03  08:23
                                                                T BPP0002  0002

  Screen:  1
    UIN:      A        Name:      B

 Credit Union Payments Deduction
  Ded   Credit        Start        Stop       Deduct        MTD          YTD
  Cd    Union         Date         Date       Amount       Amount       Amount
   2      3         4  4  4      5  5  5        6            C            D
   _     ___       __ __ ___    __ __ ___    _____
   _     ___       __ __ ___    __ __ ___    _____

                                             Admin Fee
 Charitable Contributions Deduction
  Ded   Payee         Start        Stop       Deduct        MTD          YTD
  Cd    Code          Date         Date       Amount       Amount       Amount
   7      8         9  9  9     10 10  10       11           C            D
   _     ___       __ __ ___    __ __ ___    _____
   _     ___       __ __ ___    __ __ ___    _____
   _     ___       __ __ ___    __ __ ___    _____
   _     ___       __ __ ___    __ __ ___    _____
   _     ___       __ __ ___    __ __ ___    _____

 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help            Exit  Main  Prev  Next
```

SCREEN 117 - CREDIT UNION/CHARITABLE CONT. EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the ENTER key, you will be able to move through all the screens in the Personnel File.

NUMBER	DATA FIELD	EDITS PERFORMED
2	CREDIT UNION DEDUCTION CODE	N - Do Not Compute Deduction Y - Compute Deduction
3	CREDIT UNION CODE	On Tables File
4	CREDIT UNION START DATE	MM DD YYYY
5	CREDIT UNION STOP DATE	MM DD YYYY or 99 99 9999
6	CREDIT UNION DEDUCTION AMOUNT	Numeric, greater than zero
7	CHARITABLE CONTRIBUTIONS DEDUCTION CODE	N - Do not compute deduction 1 - 9-Month Deduct Basis (Academic year, Sept. thru May) 2 - 12-Month Deduct Basis
8	CHARITABLE ORGANIZATION CODE	On Tables File
9	CHARITABLE CONTRIBUTIONS START DATE	MM DD YYYY
10	CHARITABLE CONTRIBUTIONS STOP DATE	MM DD YYYY
11	CHARITABLE CONTRIBUTIONS DEDUCTION AMOUNT	Numeric, greater than zero

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A	UIN	Must be a nine (9) digit number. The SSN may be entered, the UIN will be displayed after pressing ENTER. In inquiry mode, pressing PF1 will allow you to select an employee from a pick list.
B	NAME	Must be greater than four (4) characters in length
C	MTD DEDUCT	Month-to-date deduction amount
D	YTD DEDUCT	Calendar Year-to-date deduction amount

SCREEN 114 - CHAR CONT EDU/ENGL PROF/EPP

This screen contains information relating to the Charitable Contributions (Education), the English Language Proficiency Program and the Extended Pay Plan.

Charitable Contributions allow for payroll deductions for the purpose of contributing to an institution of higher education. Currently, this is limited to the institutions within the A&M System. Contributions can be made to the general funds of the institutions or to specified departments or special use funds.

The deduction amounts for the English Proficiency Program are predetermined in the payroll process as set by each individual educational institution. Therefore, no deduction amount entry is required. Deductions will be taken based on the accounting period of the payroll being processed.

The Extended Pay Plan allows an employee who has a less than twelve-month contract to be paid over a twelve-month period. This is an optional benefit with the employee selecting the 'withholding' rate that he or she desires. The specified 'withholding' amount is deducted from the employee's NET pay during the academic year and is dispersed during the summer months.

```
114 TAMUS B/P/P - Char Cont Edu/Engl Prof/EPP              07/09/01  10:48
                                                          D BPP0002  0004


 Screen:  1
    UIN:      A         Name:      B


 Charitable Contributions - TAMUS Education (Higher Ed.) Campaign
    Ded      Carr        Start        Stop       Deduct        MTD         YTD
    Cd       Code        Date         Date       Amount       Amount      Amount
    2         3      __ __  4     __ __  5        6                  C           D
    _        ___     __ __ ___    __ __ ___      _____
    _        ___     __ __ ___    __ __ ___      _____


 English Proficiency Deduction
           Deduct        Start       Stop         MTD         FYTD
           Code          Date        Date        Deduct       Deduct
             7        __  8      __  9                 E            F


 Extended Pay Plan
            EPP          Start        Stop        FYTD
            Code         Date         Date       Balance
            10       __ __  11    __ __  12             G
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help           Exit  Main  Prev  Next
```

SCREEN 114 - CHAR CONT EDU/ENGL PROF/EPP EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the ENTER key, you will be able to move through all the screens in the Personnel File.
2	CHARITABLE CONTRIBUTIONS DEDUCTION CODE	N - Do not compute deduction 1 - 9-Month Deduct Basis (Academic year, Sept. thru May) 2 - 12-Month Deduct Basis
3	CHAR CONT CARRIER CODE	Carrier code is defined on Tables File
4	CHAR CONT START DATE	MM DD YYYY; Default is '01 MM YYYY' where MM YYYY equals the Current month and year
5	CHAR CONT STOP DATE	MM DD YYYY; Default is 99 99 9999
6	CHAR CONT DEDUCT AMOUNT	Must be a numeric field, not less than $2.00
7	ENG DEDUCTION CODE	N or blank - Do Not Compute Deduction Y - Compute Deduction
8	ENG START DATE	MM YYYY
9	ENG STOP DATE	MM YYYY
10	EPP CODE	1 - withhold at 12.5% rate 2 - withhold at 25% rate N - withdrawn from program
11	EPP START DATE[1]	MM DD YYYY
12	EPP STOP DATE[1]	MM DD YYYY

---

[1] Note that the EPP start and stop dates DO NOT affect whether or not the EPP amounts will be withheld. The value of the EPP code at the time of PAYCALC will determine if the withholding will be done.

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A	UIN	Must be a nine (9) digit number. The SSN may be entered, the UIN will be displayed after pressing ENTER. In inquiry mode, pressing PF1 will display a pick list that will allow you to select an employee.
B	NAME	Must be greater than four (4) characters in length
C	MTD AMOUNT	Month-to-date contribution amount
D	YTD AMOUNT	Fiscal year-to-date contribution amount
E	MTD DEDUCT	Month-to-date deduction amount
F	FYTD DEDUCT	Fiscal Year-to-date deduction amount
G	FYTD BALANCE	Fiscal Year-to-date balance

SCREEN 112 - FEDERAL RETIREMENT

This screen contains information relating to the federal Civil Service Retirement System (CSRS) and the Medicare portion of Social Security (FIM). These are available <u>only</u> to employees with a federal appointment. All employees hired prior to January 1, 1984 are required to enroll in CSRS and FIM.

```
112 TAMUS B/P/P - Fed. Retirement                        05/02/02  15:53
                                                          D BPP0014  0026

   Screen:  1
     UIN:      A         Name:     B


   CSRS-Ded-Cd 2  MTD-Ded       C        YTD-Ded       E       Prior-Yrs   G
                  MTD-CE        D        YTD-CE        F

   FIM-Ded-Cd  3  Expn-Ern       4       MTD-Ded       C       YTD-Ded     E
                                         MTD-CE        D       YTD-CE      F

   CES-Appt-Dt __  5 ____   Job-Cd  6   CES-Pct   7

   CSRS-SCD     _  8  ___             Ret-Type  9



 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help          Exit  Main  Prev  Next
 ------------------------------------------------------------------------------
 4-©            1    Sess-1    128.194.103.18                          2/20
```

SCREEN 112 - FEDERAL RETIREMENT EDIT DEFINITIONS

<u>NUMBER</u>	<u>DATA FIELD</u>	<u>EDITS PERFORMED</u>
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the ENTER key, you will be able to move through all the screens in the Personnel File.
2	CSRS DEDUCTION CODE	D - Delete FR/FIR/FIA segment from File N or blank - Do not compute deduction (inactive) R - Do not compute deduction (retired) Y - Compute deduction (active)
3	FIM DEDUCTION CODE	N or blank - Do not compute deduction Y - Compute deduction
4	FIM EXEMPTION EARNINGS	Blank or greater than zero

NUMBER	DATA FIELD	EDITS PERFORMED
5	CES DATE OF APPOINTMENT	MM DD YYYY or blank
6	CES JOB CODE	Blank or 3 digits
7	CES PERCENT	Blank, zero, or 0.01 through 100.00.
8	CSRS-SCD	MM DD YYYY or blank, service calculated from date
9	RET-TYPE	Blank -

        27 - Resignation
        30 - Termination (RIF)
        31 - Termination
        32 - Retirement - Disability (CSRS or FERS)
        33 - Retirement - Voluntary (CSRS or FERS)
        34 - Retirement - Special Option (CSRS Early Out)
        35 - Retirement - Special Option (FERS Early Out)
        36 - Retirement - In Lieu of Involuntary Action (ILIA) (CSRS DSR or FERS DSR)
        37 - Retirement Mandatory (CSRS or FERS)
        38 - Death

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

NUMBER	DATA FIELD	EDITS PERFORMED
A	UIN	Must be a nine (9) digit number. The SSN may be entered, the UIN will be displayed after pressing ENTER. In inquiry mode, pressing PF1 will allow you to select from a pick list.
B	NAME	Must be greater than four (4) characters in length
C	MTD DEDUCT	Month to date deduction amounts
D	MTD CE	Month to date covered earnings
E	YTD DEDUCT	Calendar year to date deduction amounts
F	YTD CE	Calendar year to date covered earnings

G   PRIOR YEARS   Covered Earnings prior to employment in the TAMUS

SCREEN 103 - FEDERAL INSURANCE

This screen contains information relating to the federal life insurance programs available to employees with federal appointments. These insurance programs are: regular (FIR), option **A** (FIA), option **B** (FIB), and option **C** (FIC). These are available only to federal employees.

```
103 TAMUS B/P/P - Federal Insurance                       07/09/01  11:58
                                                          D BPP0002  0004

  Screen:  1
    UIN:     A        Name:      B


 Age-Group:   C

 FIR-Ded-Cd  2 Cvrg     3              Emp-Ded     D      YTD-Emp    F
                                       Empr-Pymt   E      YTD-Empr   G

 FIA-Ded-Cd  4 Cvrg     5    Cutoff     6   Emp-Ded   D      YTD-Ded    F

 FIB-Ded-Cd  7 Cvrg     8    Cutoff     H   Emp-Ded   D      YTD-Ded    F
               Multiplier 9

 FIC-Ded-Cd 10 Multiplier11 Cutoff     12  Emp-Ded   D      YTD-Ded    F


 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help          Exit  Main  Prev  Next
```

SCREEN 103 - FEDERAL INSURANCE EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the ENTER key, you will be able to move through all the screens in the Personnel File.
2	FIR DEDUCTION CODE	N or blank - Do not compute deduction Y - Compute deduction
3	FIR COVERAGE	Automatically calculated when field is blanked out
4	FIA DEDUCTION CODE	N or blank - Do not compute deduction Y - Compute deduction

NUMBER	DATA FIELD	EDITS PERFORMED
5	FIA COVERAGE	Automatically calculated when field is blanked out
6	FIA CUTOFF DATE	Automatically calculated when field is blanked out (MM YYYY)
7	FIB DEDUCTION CODE	N or blank - Do not compute deduction Y - Compute deduction
8	FIB COVERAGE	Automatically calculated when field is blanked out
9	FIB MULTIPLIER	Computes Coverage base on following: 1 - One times "base" salary option; 2 - Two times "base" salary option; 3 - Three times "base" salary option; 4 - Four times "base" salary option; 5 - Five times "base" salary option.
10	FIC DEDUCTION CODE	N or blank - Do not compute deduction Y - Compute deduction
11	FIC MULTIPLIER	Computes Coverage base on following: 1 - One times "base" salary option; 2 - Two times "base" salary option; 3 - Three times "base" salary option; 4 - Four times "base" salary option; 5 - Five times "base" salary option.
12	FIC CUTOFF DATE	Automatically calculated when field is blanked out (MM YYYY)

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A	UIN	Must be a nine (9) digit number. The SSN may be entered, the UIN will be displayed after pressing ENTER. In inquiry mode the PF1 can be pressed to display a pick list of employees.
B	NAME	Must be greater than four (4) characters in length
C	FIB AGE-GROUP	Age group for rating / premium calculations based on age of participant
D	DEDUCTION	Automatically calculated
E	EMPLOYER PAYMENT	Automatically calculated
F	YTD EMPLOYEE DEDUCTION	Calendar year to date deduction amount
G	YTD EMPLOYER PAYMENT	Calendar year to date employer payment
H	FIB CUTOFF DATE	Automatically calculated (MMYYYY)

SCREEN 111 - ADDRESS

This screen contains information relating to employee mailing, resident and employment addresses and telephone numbers.

This screen has a ZIP CODE lookup feature for selected cities. To utilize this feature, simply leave the CITY and STATE blank and enter the ZIP CODE. The CITY and STATE will automatically be placed in the corresponding fields. The cities (all of which are in Texas) are Bryan, College Station, Galveston, Prairie View, Stephenville, Kingsville, Laredo, Corpus Christi, and Canyon. This lookup feature works for Residence, Mailing, and Employment addresses.

Additional EDITS insure that correct city names are entered. Listed below are the zip code ranges that will result in the city automatically being entered if left blank. If you are entering the city manually using one of the below zip codes, the full city name must be used, otherwise an error will appear. The zip codes that are currently being edited and their respective cities are:

College Station	77840 - 77849
Bryan	77800 - 77809
Stephenville	76401
Prairie View	77445
Galveston	77553
Kingsville	78363
Laredo	78040
Corpus Christi	78412
Canyon	79016

The mailing address has an optional first line. This line may be used to accommodate longer addresses or to indicate a recipient other than the employee/retiree as is sometimes needed for retiree billing. If left blank, this line will not be printed. When you enter a new person into the File, if you enter the residence address and leave the mailing address all blanks, then the residence address will be automatically copied into the mailing address.

For retiree billing, the Billing Information Screen 118 has a flag to indicate whether the bills should be sent to the Home or Mailing address. An H indicates Home Address and an M or blank will indicate that the bill should go to the mailing address.

SCREEN 111 - ADDRESS

```
111 TAMUS B/P/P - Address                                06/03/02  17:03
                                                          D BPP0014  0004


  Screen:  1
     UIN:      A       Name:      B
                                             Mailing Address
  Residence Address                            7
         Street  2                             8
           City  3                             9
          State  4                            10
            ZIP  5    ____                    11___  ____
          Phone  6   ___ ____  Chg Dt    C    12  ___  ____  Chg Dt    C
  Privacy Flag 13   Foreign Addr Cntry Cd 14  Use Foreign Addr for mailing D
         E-mail E
  Employment Address
       Location  15
    Street/Bldg  16
      City/Room  17
          State 18
            ZIP 19___  ____  Mail Stop  20
          Phone 21    ___  ____   Chg Dt     C


 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help         Exit  Main  Prev  Next
-------------------------------------------------------------------------------
4-(c)             1    Sess-1    128.194.103.18                          4/11
```

SCREEN 111 - ADDRESS EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the ENTER key, you will be able to move through all the screens in the Personnel File.
2	RESIDENCE ADDRESS STREET	Blank, or more than three characters
3	RESIDENCE ADDRESS CITY	Blank, or more than two characters
4	RESIDENCE ADDRESS STATE	Blank, or in code book

NUMBER	DATA FIELD	EDITS PERFORMED
5	RESIDENCE ADDRESS ZIP CODE	Blank, five digits, or nine digits
6	RESIDENCE ADDRESS PHONE	Blank, or ten digits
7	MAILING ADDRESS C/O	Blank, or more than three characters
8	MAILING ADDRESS STREET	Blank, or more than three characters
9	MAILING ADDRESS CITY	Blank, or more than two characters
10	MAILING ADDRESS STATE	Blank, or in code book
11	MAILING ADDRESS ZIP CODE	Blank, five digits, or nine digits
12	MAILING ADDRESS PHONE	Blank, or ten digits
13	PRIVACY FLAG	Blank Y - Do not give home address or phone number to non-TAMU organizations
14	FOREIGN ADDRESS COUNTRY CODE	Same as National Origin; can be found in Code Book
15	EMPLOYMENT LOCATION	Blank, or more than two characters. If blank, will be filled with account title of emp-loc code from PD (101) screen
16	EMPLOYMENT ADDRESS STREET	Blank, or more than three characters
17	EMPLOYMENT ADDRESS CITY	Blank, or more than two characters
18	EMPLOYMENT ADDRESS STATE	Blank, or in code book
19	EMPLOYMENT ZIP CODE	Blank, five digits, or nine digits

NUMBER	DATA FIELD	EDITS PERFORMED
20	MAIL STOP	For workstations A, C, D, E, F, H, M, S, or X, the account table is read using the check distribution code to determine the mail stop. If this field is blank, these workstations may also specify a mail stop.
21	EMPLOYMENT PHONE	Blank, or ten digits

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A	UIN	Must be a nine (9) digit number. In inquiry mode the SSN may be entered, the UIN will be displayed after pressing ENTER. The PF1 may be pressed to display a pick list of employees.
B	NAME	Must be greater than four (4) characters in length
C	CHANGE DATE	MM DD YYYY, date address last changed
D	USE FOREIGN ADDR FOR MAILING	Updated on the Foreign Address Screen
E	E-MAIL ADDRESS *	E-Mail Address

*   If the employee status code is an **A** (Active employee), this field is not updatable by the terminal user. Updates for active employees are received from the e-mail directory services areas from the various campuses. You will need to contact the directory services support function at the respective campus to determine how to make changes. For the campus in College Station, information and instructions are located at: http://neo.tamu.edu

For all other employee status codes, this field may be updated by the terminal user.

SCREEN 111 - FOREIGN ADDRESS

The Foreign Address screen is a second format or view of the Address Screen (111) and is used to enter foreign addresses. The Address Screen contains a 'Foreign Country Code' field which will allow you to go to the Foreign Address Screen. If the foreign country code is not spaces, the employee will be identified as having a foreign address. Pressing the **ENTER** key after entering a Foreign Address Country Code will present you with the Foreign Address Screen.

```
TAMUS B/P/P - Address -                        01/14/02  16:05
                                                  BPP0002  0007
 Screen:  1
   UIN:      A        Name:      B

 Residence Address     Country Code  2

 Street Address 1                            3
 Street Address 2                            4
 City, Province, Country, Postal Code        5
 Other Information (i.e. phone, etc.)        6
              Chg Dt      C          Use Foreign Addr for mailing 7




 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help          Exit  Main  Prev  Next
```

SCREEN 111 - FOREIGN ADDRESS EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the **ENTER** key, you will be able to move through all the screens in the Personnel File.

NUMBER	DATA FIELD	EDITS PERFORMED
2	COUNTRY CODE	Same as the National Origin Code; can be found in Code Book
3	STREET ADDRESS 1	Free text lines; 38 spaces to enter in the Foreign Address
4	STREET ADDRESS 2	Free text lines; 38 spaces to enter in the Foreign Address
5	CITY, PROVINCE, COUNTRY POSTAL CODE	Free text lines; 38 spaces to enter in the Foreign Address
6	OTHER INFORMATION (i.e. phone etc.)	Free text lines; 38 spaces to enter in the Foreign Address
7	USE FOREIGN ADDRESS FOR MAILING	Y - All correspondence generated from B/P/P will be sent to the Foreign Address. N or space - All correspondence from B/P/P will be sent to the mailing address.

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A	UIIN	Must be a nine (9) digit number. In inquiry mode the SSN may be entered, the UIN will be displayed after pressing ENTER. Pressing PF1 will allow you to select employees from a pick list.
B	NAME	Must be greater than four (4) characters in length
C	CHANGE DATE	MM DD YYY, date address last changed

SCREEN 140 - EMERGENCY CONTACT INFORMATION

This screen contains information relating to employee emergency contact information. This screen is primarily updated via the web by employees. An employee may have up to two emergency contacts and one foreign contact. The foreign contact information will only be shown in inquiry mode when any of the foreign contact fields are populated. In correct mode the foreign screen is show as the next screen.

```
140 TAMUS B/P/P - Emergency Contact- Correction               12/20/07,,09:07
                                                              D R002


Screen: _1_
  UIN: ____A_____      Name: _____B_____

- - - Primary Emergency Contact - - -
Name: Last_____P2_____ First _____P3_____MI P4_Sufx_P5_
Street: _____P6_____
City:        _____P7_____ State:_P8_ZIP:__P9__ ____ Relation: __P10_____
Phones:     Home:___ P11_ ____       Work: ___ P12_ ____
       Alternate: ___ P13_ ____       Fax: ___ P14 ____
Email: ___P15_____
Comnt: ___P16_____
- - - Secondary Emergency Contact - - -
Name: Last _____S2_____ First ____S3_____MI S4_ Sufx _S5_
Street:       _____S6_____
City:        _____S7_____ State: S8 ZIP: _S9__ ____ Relation: ___S10_____
Phones:     Home: ___ S11 ____      Work: ___ S12_ ____
       Alternate: ___ S13 ____       Fax: ___ S14_ ____
Email: __S15_____
Comnt: __S16_____
```

SCREEN 140 - EMERGENCY CONTACT INFORMATION
EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the **ENTER** key, you will be able to move through all the screens in the Personnel File.

NUMBER	DATA FIELD	EDITS PERFORMED

Primary Emergency Contact

P2	LAST NAME	Required field
P3	FIRST NAME	Required field
P4	MIDDLE INITIAL	Optional field
P5	SUFFIX	Optional field
P6	STREET	Optional field
P7	CITY	Optional field
P8	STATE	Optional field
P9	ZIP	Optional field; suffix is optional
P10	RELATION	Optional field
P11	HOME PHONE	Optional, Reguired if Name Supplied.
P12	EMPLOYMENT PHONE	Optional
P13	ALTERNATE PHONE	Optional
P14	FAX	Optional
P15	EMAIL	Optional
P16	COMMENTS	Optional

Secondary Emergency Contact

S2	LAST NAME	Required field
S3	FIRST NAME	Required field
S4	MIDDLE INITIAL	Optional field
S5	SUFFIX	Optional field
S6	STREET	Optional field
S7	CITY	Optional field
S8	STATE	Optional field
S9	ZIP	Optional field; suffix is optional
S10	RELATION	Optional field

S11	HOME PHONE	Optional, Required if Name Supplied.
S12	EMPLOYMENT PHONE	Optional
S13	ALTERNATE PHONE	Optional
S14	FAX PHONE	Optional
S15	EMAIL	Optional
S16	COMMENTS	Optional

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A	UIN	Must be a nine (9) digit number. In inquiry mode, the SSN may be entered, the UIN will be displayed after pressing ENTER. The PF1 Key may be pressed to select from a list of employees.
B	NAME	Name relating to UIN.

SCREEN 140 (CON'T) - EMERGENCY CONTACT INFORMATION

This is the Foreign Emergency Contact Information Screen. The foreign contact information will only be shown in inquiry mode when any of the foreign contact fields are populated. In correct mode the foreign screen is show as the next screen.

```
        140 TAMUS B/P/P - Emergency Contact- Correction                12/20/07
0:11
                                                                 D R002


Screen: _1_
    UIN: ___A_____     Name: _____B_____

 - - - Foreign Emergency Contact - - -
 Name: Last ___F2_____ First _____F3_____ MI _F4_ Sufx _F5_
 Street Address 1: ___F6_____
 Street Address 2: ___F7_____
 City, Province, Country, Postal Code:  ___F8_____
 Phone: _____F9_____        Relation: _F10__
 Alternate:__F11_____     Fax: __F12_____
 Email: _____F13_____
 Comnt: _____F14_____
```

SCREEN 140 (CON'T) - EMERGENCY CONTACT INFORMATION
EDIT DEFINITIONS

NUMBER	DATA FIELD	EDITS PERFORMED
1	SCREEN CODE	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens. There is also a default screen sequence. By pressing the **ENTER** key, you will be able to move through all the screens in the Personnel File.
F2	LAST NAME	Optional field
F3	FIRST NAME	Optional field
F4	MIDDLE INITIAL	Optional field
F5	SUFFIX	Optional field

F6	STREET 1	Optional field
F7	STREET 2	Optional field
F8	CITY, PROVINCE, COUNTRY, POSTAL CODE	Optional field
F9	PHONE (or other information)	Optional field
F10	RELATION	Optional field
F11	ALTERNATE PHONE	Optional field
F12	FAX	Optional field
F13	Email	Optional field
F14	Comments	Optional field

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

A	UIN	Must be a nine (9) digit number. In inquiry mode the SSN may be entered, the UIN will be displayed after pressing ENTER. The PF1 Key may be pressed to select from a list of employees.
B	NAME	Name relating to UIN.

SCREEN 118 – BILLING INFORMATION

This screen is part of the Personnel File. It allows entry of billing information for billing frequency, billing to an alternate address, and electronic bank draft information. The billing amounts shown are inquiry only and updated as described. The Retired From Work Station when present, overrides the PIN Work Station in determining which Work Station receives the billing reports for this person and which system part the retiree/employee amount due is attributed to. The Retired From ADLOC when present, overrides the ADLOC on screen 101 in determining which system part is responsible for the employer amount due. Please notice that the PF10 and PF11 keys at the bottom of the screen have been utilized to toggle between the Total Owed To Carrier field and the Monthly Bill field.

```
 118 TAMUS B/P/P - Billing Info - Inquiry                    01/28/08  08:56
  Screen: 1                                                   D BPP0009  R001
   SSN:  A           Name:  B                                  ┌─────────────
                                                               │Press {F11}
   Bill Status 2  Bill Addr 3  Med Carr 4    Den Carr 5    Per │t o view
   Bank Draft 7  8               Acct 9                    Chan│Monthly Bill
   Retired From: Wrk Stn 10 ADLOC 11        Emp-Loc 12       Ch│data
       Employer  Retiree             Days            FYTD   Ava└──────┬──────
       Amt Due   Amt Due    Due     Past   FYTD      Paid    To Pay  │Monthly
       Carrier   Carrier    Date    Due  Received   Carrier Carrier  │  Bill
  BL       D         E        F       G      H          I       J    │K    L
  MED      .         .        .       .      .          .       .    │.    .
  DEN      .         .        .       .      .          .       .    │.    .
  VIS      .         .        .       .      .          .       .    │.    .
  OL       .         .        .       .      .          .       .    │.    .
  ADD      .         .        .       .      .          .       .    │.    .
  LTD      .         .        .       .      .          .       .    │.    .
  DL       .         .        .       .      .          .       .    │.    .
  LTCE     .         .        .       .      .          .       .    │.    .
  LTCS     .         .        .       .      .          .       .    │.    .
  Total    D         E        F       G      H          I       J    │K    L
      ADDL-MED M   N    O                ADDL-DEN P    Q    R
  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
      Help          Exit  Main  Prev  Next                    Left  Right
  ----------------------------------------------------------------------------
```

SCREEN 118 – BILLING INFORMATION EDIT DEFINITIONS

Nbr	Data Field	Description
1	Screen	See codes book
2	Bill Status (Billed Status)	A – Annual bill (September) B – or blank, Monthly Bill D – Draft (Bank) – monthly only P – Participation in prepayment plan Q – Quarterly bill (Sept, Dec, Mar, June) S – Semi-annual (Sept, March)
3	Bill Address	H – send to Home(residence) address M – or blank, send to Mailing address
4	Medical Carrier	Medical Carrier code – carrier for this month's coverage; updated from screen 106 at month-end.

5	Dental Carrier	Dental Carrier code – see notes for Med Carrier
6	Percent Local	Percent of the retiree's employer contribution that should be paid from local funds.
7	Bank Draft (ACH) Account Type	C – Checking S – Savings Blank – no bank draft
8	Bank Draft (ACH) Routing Transit Code	Valid bank code – numeric.
9	Bank Draft (ACH) Account Number	Retiree's bank account number for drafting.
10	Workstation Retired From	Blank or valid Work Station Code. Required when the ADLOC Retired From is present or the employee has a retirement date.
11	ADLOC Retired From	Blank or valid ADLOC. Required when the Work Station Retired From ADLOC is present or the employee has a retirement date.
12	Location Retired From	Blank or valid Location. Required when the Work Station Retired From ADLOC is present or the employee has a retirement date.
13	Check Distribution Retired From	Blank or valid Check Distribution Code. Required when the Work Station Retired From ADLOC is present or the employee has a retirement date.

FIELDS BELOW ARE MAINTAINED BY THE SYSTEM

<u>Letter</u>	<u>Data Field</u>	<u>Description</u>
A	UIN	Valid 9 digit UIN. In inquiry mode the SSN may be entered, the UIN will be displayed after pressing ENTER. Pressing the PF1 key will allow you to select employees from a pick list.
B	Name	From screen 101
C	Change Date	Date of pre-note. All zeroes will pre-note on next run.
D	Employer Amt Due Carrier	Employer payments that will be paid. Created by monthly billing or requested bills. Adjusted when corrections are made to bills. Zeroed out when the month-end employer contribution report is run unless there are past due amounts for that coverage.

E	Retiree Amt Due Carrier	Retiree amount due to the carrier at the next Billing month-end. Set when bills are created or requested. Adjusted when corrections are made to bills. Reduced at Billing month-end by the amount paid to the carriers.
F	Due Date	Oldest due date for amounts in the current charges column.
G	Past Due	Number of days past due of oldest amount due.
H	FYTD received	Total amount received this fiscal year. Increased by bank drafts and daily receipts. Adjusted by corrections to receipts. A fiscal year-end job will reduce this amount.
I	FYTD paid carrier	Total amount paid to the carrier this fiscal year. Adjusted by the month-end program that produces the reports used to pay the carriers. A fiscal year-end job will reduce this amount.
J	Available to pay carrier	FYTD received amounts less FYTD paid amounts. The month-end process to pay the carriers will use these balances to determine how much is available to pay the carrier for each insurance.
K	Total owed carrier (PF10 View)	Retire amount due carrier less the Available to pay carrier amount; this amount is yet due from the retiree.
L	Monthly Bill (PF11 View)	The amount due each month reflected on the Benefit Enrollment Screen (106).
M	Additional Medical carrier	Carrier code for amounts entered on the Bill Request (641) screen with a medical carrier code different than on this screen (118).
N	Additional Medical Billed amount	Billed amounts for a medical carrier (see M above) other than that shown on this screen (see 4 above). Zeroed when available to pay carrier amount is enough to pay both retiree amount due carrier and this amount.
O	Additional Medical Employer Contribution	Employer contribution amounts for a medical carrier (see M above) other than that shown on this screen (see 4 above).
P	Additional Dental carrier	Carrier code for amounts entered on the Bill Request (641) screen with a dental carrier code different than on this screen (118).
Q	Additional Dental Billed amount	Billed amounts for a dental carrier (see P above) other than that shown on this screen (see 5 above). Zeroed(see N above).

R   Additional Dental   Employer contribution amounts for a dental carrier (see P
        Employer Contribution   above) other than that shown on this screen (see 5 above).

SCREEN NNN – Comment Maintenance Utility Program

A generic comment utility program has been developed for use on practically any BPP screen. The comment utility will allow for a single summary comment and up to 10 detail comment lines.   The summary comment line is required.   The summary comment line is required before detail comments can be entered. Detail lines are not required, but you may enter up to 10 detail lines for each summary line. Both the summary and detail lines will allow up to 70 characters per line. Currently, there is no retention schedule in place for comments. Since we are capturing the date/time comments are entered/modified a purge process could be implemented in the future as needed.   Each comment will be date/time stamped, with the latest summary comment appearing on the original BPP screen.   Please keep in mind, comments can be viewed and/or updated by other BPP users with the appropriate screen access.   Comments can be accessed in both inquiry and correction mode. While in inquiry mode you can only inquire on existing comments. In correction mode, comments may be viewed, added, or modified.

The summary comment line is displayed at the bottom of each primary screen NNN where comments are available.   The comment maintenance utility program can be activated by pressing the PF2 key.   The PF2 key will be the standard function key on all screens where the new comment functionality is enabled.   Once the PF2 key has been pressed a pick list of historical comments will be displayed.   To access the expanded comment screen type an 's' or 'x' next to the desired summary line and press <Enter>. The expanded comment screen will display the selected summary comment and any detail comments associated with it.

The ability to keep, view, and modify historical comments has been incorporated into the comment utility program. To add a new comment, type 'N' in the Function field and press <Enter>. Now the summary and any associated detail lines can be added.   After pressing <Enter> and returning to the primary screen, the most recent summary comment will be displayed at the bottom of the screen. .

To have the comment utility added to additional screens in the BPP System, please have the designated requestor for your workstation submit a BPP System Change Request form, http://www.tamus.edu/offices/bpp/bpprequest/.

```
118 TAMUS B/P/P - Billing Info - Inquiry                 04/21/09  15:00
Screen: ___                                              D R010

   UIN: 111001111    Name: SAMPLER TOM
   Bill Status    Bill Addr    Med Carr    Den Carr    Percent Local
   Bank Draft                  Acct                     Change Date
   Retired From: Wrk Stn   ADLOC          Emp-Loc          Chk-Distr
      Employer  Retiree            Days           FYTD    Available    Total
      Amt Due   Amt Due    Due     Past   FYTD    Paid     To Pay      Owed
      Carrier   Carrier    Date    Due  Received Carrier  Carrier    Carrier
BL                        04012009
MED                       04012009
DEN                       04012009
VIS                       04012009
OL                        04012009
ADD                       04012009
LTD                       04012009
DL                        04012009
LTCE
LTCS
Total
     ADDL-ME                          ADDL-DEN
Comment INVOICE #1
PF1=Help,PF2=Comm,PF3=Exit,PF4=Main,PF5=Prev,PF6=Next,PF11=Right
```

New PF2 key and Comment area

```
118 TAMUS B/P/P - Billing Info - Inquiry                 04/21/09  15:00
Screen: ___                                              D BPP0017  R010

   UIN: 111001111    Name:
   Bill Status    Bill Addr                   rr    Percent Local
   Bank Draft                                        Change Date
   Retired From: Wrk Stn                             Chk-Distr
+------------------------------------------------------------------------+
| No More Data                                                           |
|     Summary Line Selection                                             |
|                                                                        |
|     Summary Lines                          Date/Time Updated           |
|  _  INVOICE #1                             04/14/2009 09:02:05          |
|  _  SUMMARY LINE 5                         04/03/2009 09:02:26          |
|  _  SUMMARY LINE 4                         04/03/2009 09:02:04          |
|  _  SUMMARY LINE 1                         04/03/2009 08:58:27          |
|  _  SUMMARY LINE 2                         04/02/2009 17:11:12          |
|  _  SUMMARY LINE 3                         04/02/2009 17:10:41          |
|                                                                        |
|                                                                        |
|                                                                        |
|         F3=Exit     F7=Up     F8=Down                                  |
+------------------------------------------------------------------------+
```

After pressing the PF2 key on the primary screen, a 'pick list' of comments will pop-up.

```
118 TAMUS B/P/P - Billing Info - Inquiry                04/21/09  15:00
Screen: ___                                             D BPP0017  R010

   UIN: 111001111    Name: SAMPLER TOM
   Bill Status    Bill Addr    Med Carr      Den Carr    Percent Local
                         Acct                     Change Date
        Wrk Stn   ADLOC         Emp-Loc            Chk-Distr
   -----------------------------------------------------------------------+
                                                                          |
   Summary Line Selection                                                 |
                                                                          |
   Summary Lines                          Date/Time Updated               |
 x INVOICE #1                             04/14/2009 09:02:05             |
 _ SUMMARY LINE 5                         04/03/2009 09:02:26             |
 _ SUMMARY LINE 4                         04/03/2009 09:02:04             |
 _ SUMMARY LINE 1                         04/03/2009 08:58:27             |
 _ SUMMARY LINE 2                         04/02/2009 17:11:12             |
 _ SUMMARY LINE 3                         04/02/2009 17:10:41             |
                                                                          |
                                                                          |
                                                                          |
                                                                          |
            F3=Exit      F7=Up      F8=Down                               |
+-------------------------------------------------------------------------+
```

Select a Summary comment by typing an 'x' or 's' on the corresponding line.

```
Screen 118            TAMUS B/P/P - Comment Maintenance



 Function _  (Blank=Inquire; E=Exit)

 UIN: 111001111    Name: SAMPLER TOM
                                  Updated BPP8888  04/14/2009 09:02:05
 Summary                          Added BPP8888    04/03/2009 11:05:30
  INVOICE #1_____
 Detail
  DETAIL LINE 1_____
  _____
  _____
  _____
  _____
  _____
  _____
  _____
  _____
  _____
  _____
  _____


PF1=Help,PF3=Exit
```

Screen display of Summary and Detail comments.

```
Screen 118                          Comment Maintenance          04/21/09 15:06
                                                                 D  R010

  Function _  (Blank            N=New,A=Add; M=Modify; E=Exit)

  UIN: 111001111    Name: SAMPLER TOM
                                        Updated BPP8888  04/14/2009 09:02:05
  Summary                               Added   BPP8888  04/03/2009 11:05:30
   INVOICE #1_____
  Detail
   DETAIL LINE 1_____
   _____
   _____
   _____
   _____
   _____
   _____
   _____
   _____
   _____
   _____
   _____
   _____



 PF1=Help,PF3=Exit
```

Enter 'M' for modify, type on Summary and/or Detail lines.

```
Screen 118              TAMUS B/P/P - Comment Maintenance        04/21/09 15:07
                                                                 D R010
 0200 Database successfully updated

 Function _  (Blank=Inquire; N=New,A=Add; M=Modify; E=Exit)

 UIN: 111001111    Name: SAMPLER TOM
                                       Updated BPP8888  04/21/2009 15:07:55
 Summary                               Added   BPP8888  04/03/2009 11:05:30
  INVOICE #1_____
 Detail
  DETAIL LINE 1_____
  DETAIL LINE 2 ADDED 4/21_____
  _____
  _____
  _____
  _____
  _____
  _____
  _____
  _____
  _____
  _____



 PF1=Help,PF3=Exit
```

Example of detail line 2 modified.

```
Screen 118                                          04/21/09 15:10
                                                     D R010
```

Enter 'N' to add a NEW summary, press ENTER.

```
 Function N  (Blank=Inquire; N=New,A=Add; M=Modify; E=Exit)

 UIN: 111001111    Name: SAMPLER TOM
                                   Updated BPP8888   04/21/2009 15:07:55
 Summary                            Added BPP8888   04/03/2009 11:05:30
  INVOICE #1_____
 Detail
  DETAIL LINE 1_____
  DETAIL LINE 2 ADDED 4/21_____
  _____
  _____
  _____
  _____
  _____
  _____
  _____
  _____
  _____



PF1=Help,PF3=Exit
```

```
Screen 118                                          04/21/09 15:11
                                                     D R010
```

'A' for add is filled in automatically.

```
 Function A  (Blank=Inquire; N=New,A=Add; M=Modify; E=Exit)

 UIN: 111001111    Name: SAMPLER TOM
                                   Updated BPP8888   04/21/2009 15:07:55
 Summary                            Added BPP8888   04/03/2009 11:05:30
  _____
 Detail
  _____
  _____
  _____
  _____
  _____
  _____
  _____
  _____
  _____
  _____
         *** ADD NEW SUMMARY/DETAIL LINES ***

PF1=Help,PF3=Exit
```

```
Screen 118            TAMUS B/P/P - Comment Maintenance        04/21/09 15:13
                                                                D R010
  0200 Database successfully updated

  Function _  (Blank=Inquire; N=New,A=Add; M=Modify; E=Exit)

  UIN: 111001111    Name: SAMPLER TOM
                                             Updated BPP0017   04/21/2009 15:13:58
  Summary                                    Added   BPP0017   04/21/2009 15:13:58
   Newest level summary for April business_____
  Detail
   Person is in arrears on FAMIS account and also in BPP billing_____
   so must be corrected with additional bill to extract payment._____
   _____
   _____
   _____
   _____
   _____
   _____
   _____
   _____
   _____


PF1=Help,PF3=Exit
```

Comment summary and detail added.

```
118 TAMUS B/P/P - Billing Info - Correction                    04/21/09  15:15
 Screen: ___                                                    D R010

    UIN: 111001111    Name: SAMPLER TOM
    Bill Status    Bill Addr    Med Carr     Den Carr     Percent Local
    Bank Draft                  Acct                      Change Date
    Retired From: Wrk Stn    ADLOC          Emp-Loc        Chk-Distr
        Employer  Retiree           Days           FYTD    Available    Total
        Amt Due   Amt Due    Due    Past    FYTD   Paid     To Pay      Owed
        Carrier   Carrier    Date   Due   Received Carrier  Carrier   Carrier
 BL                         04012009
 MED                        04012009
 DEN                        04012009
 VIS                        04012009
 OL                         04012009
 ADD                        04012009
 LTD                        04012009
 DL                         04012009
 LTCE
 LTCS
 Total
     ADDL-MED                        ADDL-DEN
 Comment Newest level summary for April business
PF1=Help,PF2=Comm,PF3=Exit,PF4=Main,PF5=Prev,PF6=Next,PF11=Right
```

Once a comment has been successfully modified, that Summary comment will appear on the 118 screen.

```
 118 TAMUS B/P/P - Billing Info - Correction                04/21/09  15:15
 Screen: ___                                                D 010


   UIN: 111001111    Name: SAMPLER TOM
   Bill Status    Bill Addr    Med Carr      Den Carr
   Bank Draft                  Acct
   Retired From: Wrk Stn   ADLOC            Emp-Loc
 +---------------------------------------------------------
 | No More Data
 |     Summary Line Selection
 |
 |
 |     Summary Lines                        Date/Time Updated
 |  _  Newest level summary for April business 04/21/2009 15:13:58
 |  _  INVOICE #1                           04/21/2009 15:07:55
 |  _  SUMMARY LINE 5                        04/03/2009 09:02:26
 |  _  SUMMARY LINE 4                        04/03/2009 09:02:04
 |  _  SUMMARY LINE 1                        04/03/2009 08:58:27
 |  _  SUMMARY LINE 2                        04/02/2009 17:11:12
 |  _  SUMMARY LINE 3                        04/02/2009 17:10:41
 |
 |
 |
 |           F3=Exit     F7=Up     F8=Down
 +----------------------------------------------------------------------+
```

Pressing the PF2 key brings us back to the first 'pick-list' screen with new summary group on top.