PERS Employee Forms and Employee Orientation
Work Instruction (BUD-W502)

1.0 SCOPE:

1.1 This work instruction outlines the handling of enrollment and termination of employees from PERS and the associated documentation.

2.0 RESPONSIBILITY:

2.1 PERS Liaison

3.0 APPROVAL AUTHORITY:

3.1 Senior Accountant Payroll

(Approval signature on file)

_____   _____
Signature   Date

4.0 DEFINITIONS:

4.1 Classified Personnel: PERS Agency 219
4.2 Certified Personnel: PERS Agency 218

5.0 PROCEDURE:

5.1 Classified, new employees (219):

5.1.1   Determine PERS eligibility and stamp requisition-to-hire with either "PERS" or "No PERS" stamp.

5.1.2   Attend new employee orientation, (NEO), and provide PERS instruction.

5.1.3   Collect W-4s and Enrollment forms for new employees.

5.1.4   Enter W-4 information into Bi-Tech and fill out bottom half of PERS enrollment form.

5.1.5   Log information into Excel spreadsheet, "Submitted", and make copies.

5.1.6   Send all completed forms to PERS.

5.1.7   Send W-4s to Payroll.

5.2 Classified, New position, (219):

5.2.1 Receive notification that enrollment is needed.

5.2.2 Enter name and location in Excel spreadsheet, "Submitted".

5.2.3 FAX cover letter to school/employee with: 1) Enrollment Form; 2) Contributions Form; and 3) Demographics Form.

5.2.4 Collect W-4 and Enrollment form for new-position employee.

5.2.5 Enter W-4 information into Bi-Tech and fill out bottom half of PERS enrollment form.

5.2.6 Send all completed forms to PERS.

5.2.7 Send W-4s to Payroll.

5.3 Certified, new employees, (218):

5.3.1 Attend new employee orientation, (NEO), and provide PERS instruction.

5.3.2 Collect W-4 and Enrollment form for new employee.

5.3.3 Enter W-4 information into Bi-Tech and fill out bottom half of PERS enrollment form.

5.3.4 Make copies.

5.3.5 Send all completed forms to PERS.

5.3.6 Send W-4s to Payroll.

5.3.7 Log information into Excel spreadsheet, "Submitted"

5.4 Terminations, (218/219):

5.4.1 Run "Leave and Separation" report weekly.

5.4.2 Fill out "Termination" form.

5.4.3 Log information into Excel spreadsheet, "Submitted"

5.4.4 Make copies.

5.4.5 Send completed forms to PERS.

5.5 Refund Request, (219):

5.5.1 Receive Refund Request form from employee.

5.5.2 Check bi-Tech payroll screens for date of last check.

5.5.3 After verifying last check, fill out bottom half of Refund Request form.

5.5.4 Make copies.

5.5.5 Send completed forms to PERS.

5.6 Change of Member Contributions Plan, (219)

5.6.1 Issue form to employee when requested.

5.6.2 Receive filled out form from employee.

5.6.3 Coordinate with HR Tech to establish date of change.

5.6.4 Change Bi-Tech Tax screen.

5.6.5 Fill out form and copy.

5.6.6 Log information into Excel spreadsheet, "Submitted".

5.6.7 Send completed form to PERS.

5.7 Change of Police or Fire Protection Title, (218/219)

5.7.1 Receive Promotion Report for Police or Fire Protection.

5.7.2 Distribute forms as required.

5.8 Report Preparation:

5.8.1 Prepare Separation Screen report weekly.

5.8.2 Prepare Leave Screen report weekly.

5.8.3 Prepare full time/part time comparison report every two weeks.

5.8.4 Prepare matching Taxation and Pay Screen report every month.

5.8.5 Prepare Employee's earning record every year.

5.8.6 Prepare Social Security Number/Taxation report monthly.

5.8.7 Prepare HR Licensing Expiration report twice per month.

6.0 ASSOCIATED DOCUMENTS:

6.1 Termination From PERS form

6.2 Member Contribution/Refund Request form

6.3 Change of Member Contribution Plan, (219)

6.4 Form W-4

6.5 Member Enrollment 218, (Non-choice agency)

6.6 Member Enrollment 219, (Choice agency)

6.7 Member Demographics form

7.0 RECORD RETENTION TABLE:

Identification	Storage	Retention	Protection	Disposition
Hard copy and Excel Spreadsheet, Terminations, (Refunds from PERS)	Electronic copy on local drive with weekly backup to "H" drive. Hard copy in PERS office.	6 months	PERS files, limited access.	Paper, recycle best way. Electronic file, delete.
Enrollments in PERS	Electronic copy on local drive with weekly backup to "H" drive. Hard copy in PERS office.	6 Months	PERS files, limited access.	Paper, recycle best way. Electronic file, delete.

8.0 REVISION HISTORY:

Date:	Rev.	Description of Revision:
11/28/05	A	Initial Release

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