

**Session 15 - Human Resources- Benefits and Deduction Management**



**Date: Friday, April 15, 2022**

**Time: 10:00am - 12:30pm**

**Anthology**

**Evaluator's Name:** \_\_\_\_\_

	<b>Functionality</b>	<b>Comments</b>
3.	Demonstrate the ability to create various plans, e.g., medical, dental, vision, life and retiree plans. Ability to copy existing health plans to create a new one with similar characteristics but new rates.	
4.	Demonstrate the ability to assign various plans to employee groups, e.g., faculty, staff, administrators, retirees and surviving spouses.	
5.	Demonstrate the ability to enroll employees in plans for which they are qualified. Including employees who may qualify for more than one plan.	
7.	Demonstrate the ability to enforce the enrollment of employees into required plans including retroactive changes.	
13.	Demonstrate administrative ability to manage COBRA functions.	
2.	Demonstrate the ability to enroll in plans in self-service mode - e.g., during an open enrollment period.	
6.	Demonstrate the ability to assign/change benefits as a result of a qualifying event including retroactive changes.	
14.	Demonstrate the ability to transmit enrollment data to various carriers -- both initially and in an ongoing manner.	
15.	Demonstrate the ability to support the billing reconciliation process for benefits plans with invoicing reports from third party administrators being	
8.	Demonstrate the ability to auto-generate employee notifications, such as dependent aging-out.	
11.	Demonstrate the ability to track/coordinate retiree coverage and Medicare eligibility.	
1.	Demonstrate on-line benefits self-service functionality.	

Evaluation URL:

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12.	Demonstrate the ability to make retroactive adjustments, e.g., because the employee was paying into the wrong retirement program, because the employee was paying too much/too little into a medical program.	
16.	Demonstrate the ability to integrate with third party benefit administrator.	
10.	Demonstrate ACA tracking and reporting. for different classes of employees, some based on their timesheets, some based on their class hours plus office hours plus lab hours (adjunct) and some based on their FTE that is entered in the HRIS.	
9.	Demonstrate how the system handles taxation for Domestic Partners.	
Management of Deductions		
17.	Demonstrate the ability to create various kinds of deductions (e.g., medical, retirement, union dues, donations)	
18.	Demonstrate the ability to assign dues by subject wages and types of assignments.	
19.	Demonstrate the ability to define the rules that are associated with various kinds of deductions (e.g., mandatory, optional, pre-tax)	
20.	Demonstrate various ways deductions can be processed through payroll (percentages, flat amounts, combinations, etc.)	
21.	Demonstrate the ability to track employee year-to-date deduction totals	

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	<b>Functionality</b>	<b>Comments</b>
23.	Demonstrate the ability to perform gross-to-net check modeling	
24.	Demonstrate the ability to calculate taxes based upon gross wages less pre-tax deductions	
25.	Demonstrate the ability to process garnishments, tax levies, child support, etc.	
26.	Demonstrate the ability to track the institution's tax liabilities, e.g., FICA	

