

**Sage HRMS Learning Series**

**Expire Benefits**



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Visit our Web site at [www.SageU.com](http://www.SageU.com) or call (866) 888-6062 to learn about training classes that are added throughout the year.

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Sage Software, Inc. has made every effort to ensure this manual is correct and accurate but reserves the right to make changes without notice at its sole discretion. This courseware contains graphics of the actual screens contained in the software. All the screens were captured using a version of sample data that was available at the time of this printing. If you are using a different version of the software, the sample data on the screens may differ slightly from the pictures in this training manual.

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# **Sage HRMS Training Classes**

This learning session uses concepts contained in the following training class on Sage University:

## ES - Sage HRMS - Managing your HR Setup in Sage HRMS (Virtual)

**Scheduled Training Virtual Classroom 8 hours $549.00 (C$549.00)**

During this course we will introduce you to the set up and management of HR code tables in Sage HRMS. Starting with an overview of all HR code tables in the system, we will deep-dive into creating, editing, and managing benefit code tables. We will review the file structure, functions, and expressions, as well as the tool you will use to manage them – Expression Builder. From rate tables to formulas and complex benefit codes containing both, this course will give you a thorough, hands-on approach to managing your setup for Sage HRMS. This training includes hands-on exercises so you can practice what you have learned in a demo environment.

After completing this course, you will be able to:

* Recognize benefits of using code tables
* Explain what code tables are
* Use the manual to:
  + Indicate the use of each table
  + Locate the field that uses the table
  + Indicate whether codes in the table can be changed
    - Use Expression Builder to create formulas and expression in Sage HRMS
    - Enter, manage, and edit codes in Sage HRMS

**Who Should Attend?**  
Any user responsible for creating, editing, and maintaining Code Tables in Sage HRMS. HR Controllers for Sage HRMS (U.S. and Canada)   
  
**Prerequisites**  
Participants should have a cursory knowledge of Sage HRMS.

## ES – Sage HRMS – Managing your Employees with Sage HRMS

**Scheduled Training Virtual Classroom 16 hours $949.00 (C$949.00)**

During this course we will explore the features and functionality available in Sage HRMS HR and Sage Abra Suite HR. Topics will include using the navigation pane, the user preferences, and the employee toolbar to manage your employee data. We will review the file structure in Sage HRMS, the various HR detail pages, and the tasks and processes needed to manage HR, whether it is for one employee or a group of employees. We will also discuss time off management, as well as the reporting capabilities available in Sage HRMS with standard reports and the secure query. This training includes hands-on exercises so you can practice what you have learned in a demo environment.

After completing this course, you will be able to:

* Operate the Employee Toolbar to promptly navigate employee information
* Quickly and efficiently update your employee information using Tasks and Processes in Sage HRMS
* Make use of Sage Abra/Sage HRMS canned reports to give the metrics you need when you need them
* Interpret and apply best practices when using the Sage Abra/Sage HRMS User Interface for improved management of your HR processes

**Who Should Attend?**  
Sage HRMS and Sage Abra Suite users who are required to access and update employee HR information.

**Prerequisites**  
None

# **Sage University**

To find training and register for training courses, visit [Sage University](https://sageu.csod.com/client/sageu/default.aspx?_ga=2.238070021.408657000.1536069181-1115622968.1476311271) at www.sageu.com. If you have Gold Support, you are entitled to 50% off Sage HRMS instructor-led training and Sage HRMS Any-time learning (ATLs) are free. If you register for an instructor-led training class, use code HRMSresource to receive 10% off. If you have Gold Support, this is in addition to the 50% discount.

To enroll in a course, go to [https://sageu.csod.com](https://sageu.csod.com/) and log on. If you do not have a log on, you will need to [create one](https://sageu.com/en-us/home.html). For registration assistance call Sage University Help Desk at 1-855-724-3864 or email SageUniversity@sage.com.

# **Expiring Benefits Overview**

In today’s Learning Session we will:

* Enable Benefit History
* Review the data dictionary and benefit type codes
* Discuss the difference between a history record and an expired benefit
* Expire a benefit insurance plan for one employee
* Expire a benefit insurance plan for all employees
* Look at solutions to stop expired benefits from appearing on standard HR benefit reports and SAP Crystal Reports

# **How to Enable Benefit History**

**Path**: Setup > System > (Setup) Enterprise Setup

The Benefit History radio buttons provide the ability to enable or disable benefit history. The default option is disabled.



|  |  |
| --- | --- |
| Sage_icons_values_do-the-right-thing | If benefit history is disabled and is changed to enabled, going forward it will save history records. When the setting is disabled, Sage HRMS is not saving benefit history records. |

# **Show All Benefit Plans vs Show Current Plans Only**

Path: Settings > User Preferences > General Preferences tab

In User Preferences you can select the default for the employee’s Insurance Benefit Page to ‘Show All Benefit Plans’ or ‘Show Current Plans Only’.



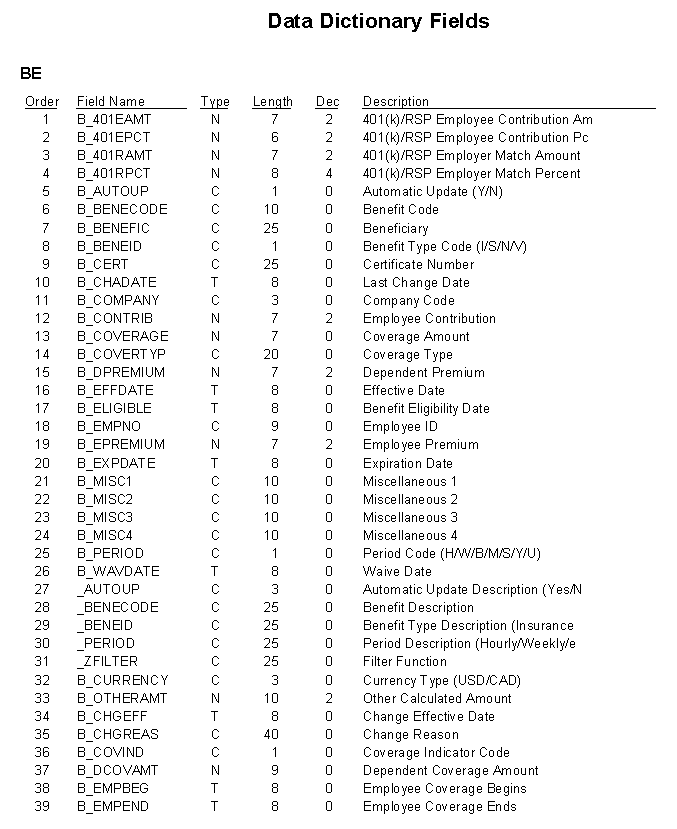
# **Data Dictionary**

The Data Dictionary documents the structure for the tables used by the HR module of Sage HRMS. It is useful when building expressions within Sage HRMS and when deciding what fields to use for your custom reports.

You can access the Data Dictionary though Sage HRMS Online Documentation or Sage HRMS Help. In order to obtain the most accurate and up-to-date data dictionary, run the Data Dictionary Reports by selecting Reports > System > Data Dictionary Reports.

We will focus on the Employee Benefit (BE) table.





# **Benefit Type Code**

The field B\_Beneid is a character field. The description is Benefit Type Code (I/S/N/V)

Legend for Be.b\_beneid

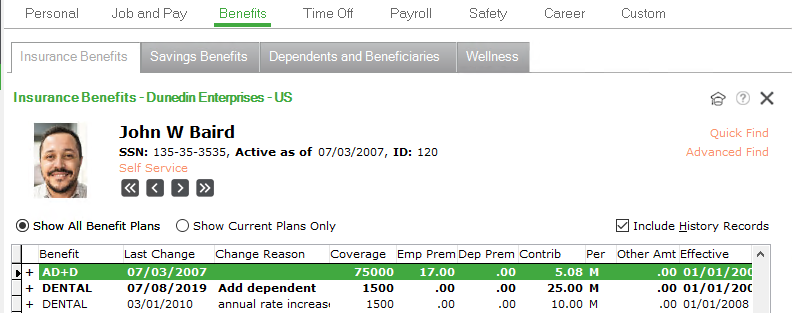
|  |  |
| --- | --- |
| I | Current Insurance or expired plan |
| S | Current Savings |
| N | Insurance History |
| V | Savings History |

|  |  |
| --- | --- |
| Sage_icons_values_do-the-right-thing | Not all expired plans are history records. |

When you expire a benefit for an employee the Be.b\_beneid field remains “I”. The Be.b\_expdate contains the Expiration Date.

When benefit history is enabled, depending on the type of change that is made (for example, adding a covered dependent or causing an amount change), a history record is created, and the new information is now the current record.

When ‘Include History Records’ is selected on the employees Insurance Benefit page, the Current record appears bolded and history records are not bolded. In the screen shot below, DENTAL has a current bolded record (Last Change 07/08/2019) and a history record (Last Change 03/01/2010).



# **How to Expire a Benefit Plan**

## Expire a benefit insurance plan for one employee

**Path**: Employees > (Tasks) View/Edit Employee > Benefits tab > Insurance Benefits tab

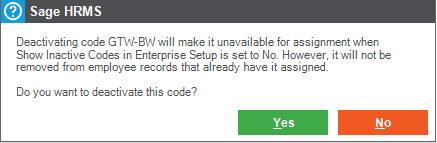
1. Make sure you have selected the employee that will have the plan expired
2. Click on the benefit record you want to expire. Click More
3. Click Expire Benefit
4. Enter the expiration date in Coverage Expiration Date field. Click OK
5. Employee Coverage Ends date will be updated. Click OK to save
6. In the Summary View scroll to the far right and the Expiration field will display the date entered you entered above

Note: If Coverage Expiration Date is prior to the system date and benefit history is enabled, the benefit will no longer appear under the option ‘Show Current Plans Only’. If Coverage Expiration Date is equal to or greater than the system date, the benefit will appear in ‘Show Current Plans Only’ and ‘Show all Benefit Plans’.

## Expire a benefit insurance plan for all employees

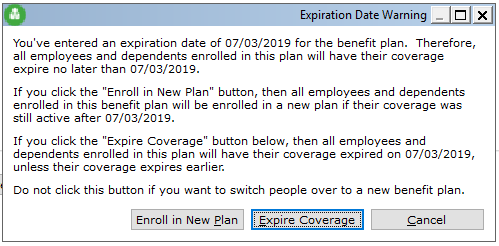
**Path**: Setup > (Codes) Employees > (Benefits) Insurance Plans

1. Select the Employer field where the code is being pulled from. If the code exists at the employer level select the employer, if the code is not at the employer level select \*\*\* Enterprise
2. Click on code to be expired and click More
3. Enter the date to expire the plan in the ‘Plan Is In Effect To’ field
4. Click OK
5. A message will appear



Click Yes to deactivate this code. If you do not want to deactivate the code click No

1. If you click Yes in the previous step, an Expiration Date Warning Message will appear



1. Select the appropriate button for your scenario

|  |  |
| --- | --- |
| Sage_icons_values_do-the-right-thing | If Expire Coverage is selected, the Be.b\_beneid field will remain ‘I’ since the b\_expdate field has been updated. The record line was not replaced. If Enroll in New Plan is selected the Be.b\_expdate will be updated and be.b\_beneid will remain ‘I’. |
| Sage_icons_values_do-the-right-thing | Expiring a Benefit Savings plan is similar to expiring an insurance benefit plan. It can be done in Setup for all employees or one employee at a time on the employee Savings Benefit page. |

# **HR Benefit Reports Pulling Expired Benefits**

If a standard HR benefit report is pulling expired benefits and you want to see current benefits only, enter the following Visual FoxPro Expression on the reports’ Standard Criteria tab > Custom Criteria.

(isnull({hbene.b\_expdate})or   
{hbene.b\_expdate}=datetime(0,0,0,0,0,0) or   
{hbene.b\_expdate} >= CurrentDate)  
and   
{hbene.b\_beneid} in ["I", "S"]

|  |  |
| --- | --- |
| Sage_icons_values_do-the-right-thing | Some benefit reports have the option on the Specific Criteria tab to select/deselect ‘Include History Records’. |

# **SAP Crystal Reports Pulling Expired Benefits**

**To see active benefits as of a specified date (June 30, 2019)**

1. From the Crystal Report Menu select Report, Edit Selection Formula, and Record
2. Paste in all three lines of **ONE** of the following formulas:

{hbene.b\_beneid} in ["I", "S"] and   
({hbene.b\_expdate} >= Date (2019, 06, 30) or  
{hbene.b\_expdate} = Date (0, 0, 0))

**OR** instead of having to replace 'Date (2019, 06, 30)' with the current or desired date;

({hbene.b\_expdate} >= CurrentDate or  
{hbene.b\_expdate} = Date (0, 0, 0)) and  
{hbene.b\_beneid} in ["I", "S"]

**Links and contact information**

|  |  |  |
| --- | --- | --- |
| **Topic** | **URL** | **Additional Information** |
| [Sage City – HRMS Forum](https://www.sagecity.com/support_communities/sage_hrms/f) | https://www.sagecity.com/support\_communities/sage\_hrms/f | Ask product questions  Share tips and tricks with Sage peers, partners, and pros |
| [Questions and Answers relating to Sage HRMS Learning Series](https://www.sagecity.com/support_communities/sage_hrms/f/sage-hrms---training) | https://www.sagecity.com/support\_communities/sage\_hrms/f/sage-hrms---training | This link will take you directly to the Sage HRMS – Training forum on Sage City |
| [Sage University](https://www.sageu.com/hrms) | https://www.sageu.com/hrms | Log on  Training and certification  View training by subject  Create a Profile  Test your knowledge  View training schedule |
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