

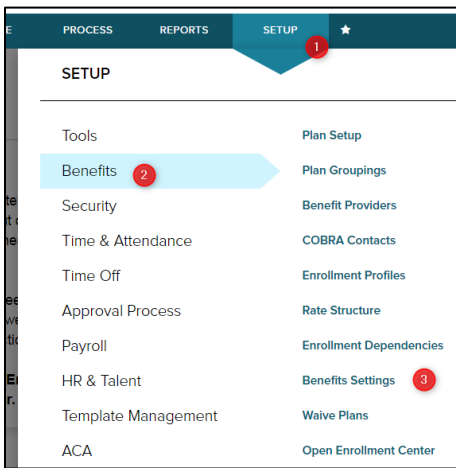
Overview

Benefit Deduction Rules allow you to take deductions in advance of the effective date or to delay them past the effective date. This is most often used at the beginning of the new calendar year or benefit plan year when you want the deduction(s) to be taken prior to the regular schedule begin date.

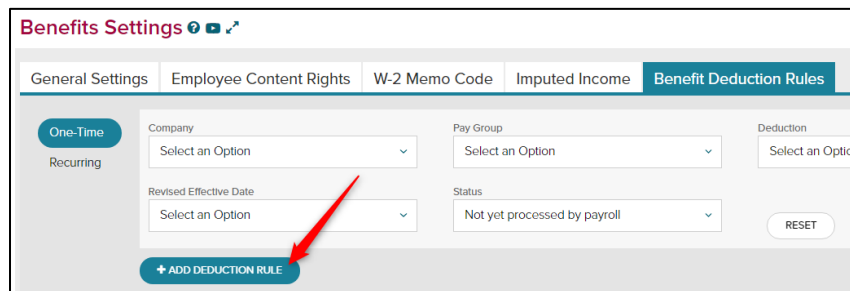
Note: Benefit Deduction Rules only apply to Employee deductions. If you want Employer portions to also be applied in advance (i.e. Employer HSA), this will need to be done in a paydata batch.

Setting up Benefit Deduction Rules

To begin, go to **Setup** → **Benefits** → **Benefits Settings**





Select the **Benefit Deduction Rules** tab. The system defaults to One-Time. Click on Add Deduction Rule



Select the Company, Pay Group (if applicable) and Deduction. The Deduction Frequency will auto-populate based on the Deduction selected.

1 Which deduction will this rule be applied to?

Company
UP4 


Deduction
VIS - VISION-PRE 


Deduction Frequency
Every Payroll or Processing

[View Payroll Schedule](#)

Enter the effective date of the deduction changes that you want to move to another pay period.

2 What is the effective date of the deduction changes that you want to move?

Usually this will be the first day of the new plan year. 

10/01/2018 

The current scheduled Pay Date for these deduction changes is **October 19, 2018**
Week #42 Pay Period of : September 30, 2018 - October 13, 2018

After you enter the effective date the current scheduled date for this new deduction will display.

If no deduction rule was in place, this new deduction that is effective October 1 would come out of the second check in October on October 19.

To force the system to withhold the new deduction with the first check in October, select the first radio button to take the new deduction with the October 5 check.

3 In which pay period should these new deduction changes begin?

Start taking these deduction changes on the prior pay date of **October 05, 2018**
Week #40 Pay Period of : September 16, 2018 - September 29, 2018
Any deduction change that is effective from September 30, 2018 through October 01, 2018 will be applied in Week #40.

Start taking these deduction changes on the next pay date of **November 02, 2018**
Week #44 Pay Period of : October 14, 2018 - October 27, 2018
Any deduction change that is effective from October 01, 2018 through October 13, 2018 will be applied in Week #44.


Enrollments in 2 Plan/Eligibility Groups will be impacted if you change when this deduction is taken. [View Plan/Eligibility Groups](#)

To see which enrollments will be impacted by this change, click on View Plan/Eligibility Groups.

3 In which pay period should these new deduction changes begin? 

Start taking these deduction changes on the prior pay date of **October 05, 2018**
Week #40 Pay Period of : September 16, 2018 - September 29, 2018
Any deduction change that is effective from September 30, 2018 through October 01, 2018 will be applied in Week #40.

Start taking these deduction changes on the next pay date of **November 02, 2018**
Week #44 Pay Period of : October 14, 2018 - October 27, 2018
Any deduction change that is effective from October 01, 2018 through October 13, 2018 will be applied in Week #44.

Enrollments in 2 Plan/Eligibility Groups will be impacted if you change when this deduction is taken. [View Plan/Eligibility Groups](#) 

Because the VIS deduction code is assigned to both the VSP Vision plan and the Vision plan, deductions for enrollment in both plans will be moved up to October 5.

Company UP4
Deduction VIS - VISION-PRE
Deduction Frequency
PLAN NAME/ELIGIBILITY GROUPS
VSP Vision/Eligible Employees
Vision/Enrolled

Click Done to save your changes.

Separate deduction rules must be created for each company code and deduction code combination. Once created, deduction rules will display on the Benefit Deduction Rules tab until the selected payroll is processed.