

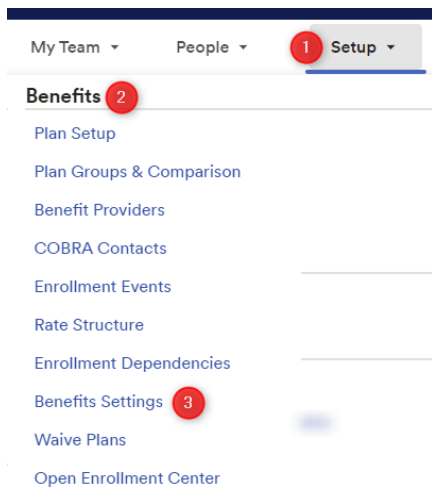
## Overview

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

## Benefits Settings



General Settings | Employee Content Rights | W-2 Memo Code | Imputed Income | Preview Pay Dates | **Benefit Deduction Rules**

**One-Time** (Selected) | Recurring

Company: [Dropdown] | Pay Group: [Dropdown] | Deduction: [Dropdown]

Revised Effective Date: [Dropdown] | Status: [Dropdown: Not yet processed by payroll]

[Add deduction rule](#) (highlighted in red)


Reset | Search

View log files | Total Records: 0

Company	Pay Group	Deduction	From Date	To Date	Revised Effective ...	New Pay Date	Status	Actions
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1. Select the Company, Pay Group (if applicable) and Deduction. The Deduction Frequency will auto-populate based on the Deduction selected.

[← Back](#) **Add One-Time Deduction Rule**

Which deduction will this rule be applied to? 

Company

Deduction


Deduction Frequency

Every Payroll or Processing

[View payroll schedule](#)

2. Enter the effective date of the deduction changes that you want to move to another pay period. After you enter the effective date the current scheduled date for this new deduction will display.


**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. 

The current scheduled Pay Date for these deduction changes is **11/9/2023**  
Week #45 Pay Period of : 10/30/2023 - 11/5/2023

If no deduction rule was in place, this new deduction that is effective November 1st would come out of the second check in November (11/9).

- To force the system to withhold the new deduction with the first check in November, select the first radio button to take the new deduction with the 11/3 check.
- To force the system to withhold the new deduction for a later November check, select the second radio button.

In which pay period should these new deduction changes begin? 

Start taking these deduction changes on the prior pay date of **11/3/2023**

Week #44 Pay Period of : 10/23/2023 - 10/29/2023

Any deduction change that is effective from 10/30/2023 through 11/1/2023 will be applied in Week #44.

Start taking these deduction changes on the next pay date of **11/17/2023**

Week #46 Pay Period of : 11/6/2023 - 11/12/2023

Any deduction change that is effective from 11/1/2023 through 11/5/2023 will be applied in Week #46.

Enrollments in 1 Plan/Eligibility Groups will be impacted if you change when this deduction is taken.

[View plan/eligibility groups](#)

Cancel

Save

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

Click **Save** 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.