Acclaim - How to setup Group Insurance

There are two parts to setup Group Insurance Setup.

We need to create two Payroll categories: one is a Deduction type for the Employee side and the other Benefit type for the Employer side

Create a **SANDBOX** company where you can test prior applying to the real company.

1. Backup your data: utilities > backup company data > write down the location and file name.
2. Create the test company: Setup > Company > Add button > enter test company name (Example: **SANDBOX**. Company name visible in the left bottom corner in Acclaim)
3. In the **SANDBOX** : Utilities > Restore > browse for the backup saved at step 1 > Restore.
4. In the **SANDBOX** apply the changes and run a mock payroll for one or two employees, post and print the history detail report to see the results.

NOTE: The numbers of the pay categories in the screenshots are fictive and the user can enter their own number

Employee part (EE) – deduction pay category

1. Go to Setup > Payroll categories > Click on button **"Add"** on the right hand side and click **"Deduction"** Type

2
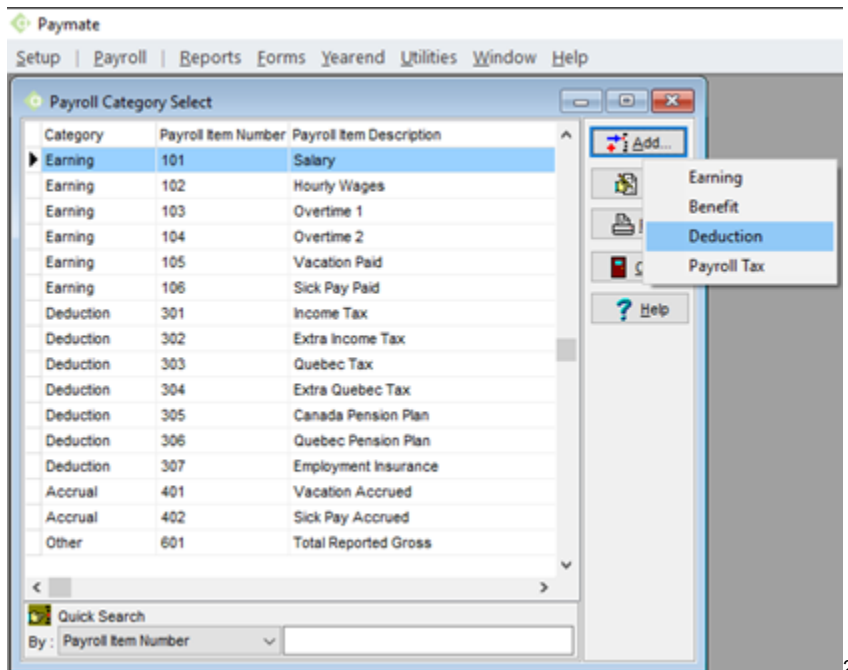
2. Include code of the payroll category "Item Number" Description, Abbreviation (EE) Means Employee Part

3. User can select the T4 box from the drop down list, select the type of the pay category and if this needs to be deducted before taxes.

- If type is defined as "Regular" then user need to enter the amount when creating the Paycard
- If type is defined as "Formula" then the user need to select the pay categories that will be user in the deduction.

Once the deduction is created the user can go to the employee master paycard and enter the %:

Setup > employees > select employee > edit > Paycard tab > locate the pay category and enter the %.

Please specify which items should appear on the employee's
timesheet, and specify any hourly rates and regular payments.

		Regular Amount :	0.00
☐ 197	VACATION DAYS		
		Regular Amount :	0.00
☐ 310	Health Insurance Plan		
		Regular Amount :	0.00
☐ 315	Under Payment of Taxes		
		Regular Amount :	0.00
☑ 316	GroupLife(EE)		
		Percentage (Rate) :	2.00
☐ 800	Child Support Garnishment		
		Regular Amount :	0.00

Save   Cancel   Close

Employer part (ER) – Benefit Pay Category

1. Go to Setup > Payroll categories > Click on button **"Add"** on the right hand side and click **"Benefit"** Type

2. Include code of the payroll category "Item Number" Description, Abbreviation (ER) Means Employer Part

If type is equal as **"Regular"** the user will enter the amount when creating the Paycard

If type is equal as **"Formula"** then the user need to select the pay category that will be considered for the Pay Category.

On Employee master paycard under the Benefit can adjust the amount he wants to contribute for GL(ER) for this particular employee by adjusting the factor. By default the factor is 100 (i.e. 100% of the formula definition) and if the Employer wants to contribute a different amount for this employee then the factor can be changed to represent the correct percentage.

| Basic | Miscellaneous | Tax | Net Claim | Pay Card | Bank | NotePad | History |

Please specify which items should appear on the employee's timesheet, and specify any hourly rates and regular payments.

| | | Regular Amount : | 0.00 |

☑ 222 GroupLife(ER)

Percentage (Rate) : 2█.00

☐ 310 Health Insurance Plan

Regular Amount : 0.00

☐ 315 Under Payment of Taxes

Regular Amount : 0.00

☑ 316 GroupLife(EE)

Percentage (Rate) : 2.00

☐ 800 Child Support Garnishment

Regular Amount : 0.00

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[Save]   [Cancel]   [Close]   ? Help

If the user has multiple group insurance then user need to determine which will pay : the employee or the employer , or both.

In the case above the employee and employer will pay and deduction and benefit pay categories will be created.

If only the employee will pay then only deduction pay category should added.

If only the employer will pay then only one benefit pay category should added.