



HCM 8.9 Base Benefits
Terminate Flexible Spending Account (FSA) Benefits
Job Aid

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Introduction

The Terminate FSA Benefits Business Process Guide provides an overview of how to terminate coverage for an employee previously enrolled in FSA benefits.

PeopleSoft enables employees to specify how to apply money towards benefits through Flexible Spending Account (FSA) plans. You can enroll employees in FSA benefit plans by associating an employee with a specific plan type, then recording the appropriate coverage and deduction information. FSA amounts are deducted directly from the employee's paycheck. Eligible employees who participate in an FSA plan have a pre-tax amount deducted directly from their paycheck. The employees can later recoup this money once their dependents incur a medial expense and the employee requests reimbursement.

For Base Benefits, if an employee holds multiple jobs with separate benefits enrollment, each job must be handled separately.

In general, the HCM 8.9 Business Process Guides should be used in the following order:

- Assign Benefit Program
- Enroll in FSA Benefits
 - Change FSA Benefits
 - **Terminate FSA Benefits**

The guide listed in bold is the guide you are working on now.

Business Process Diagram

Business Process diagrams are posted as supporting documents to this guide at <http://cms.calstate.edu/T2hr89bp.asp>.

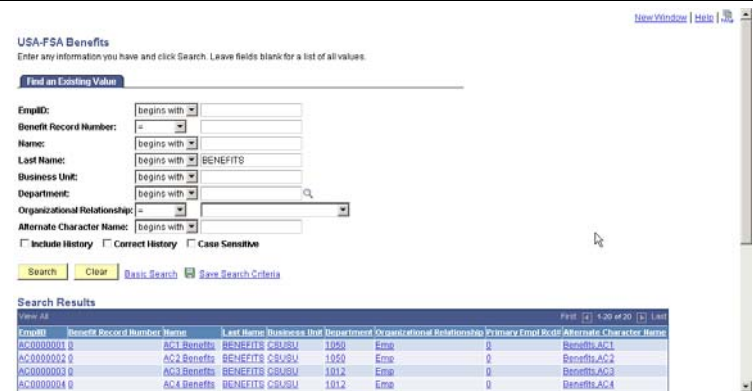
Process Prerequisites/Assumptions

Prerequisite/Assumption	Detail
Employee must have been hired	
Benefit program must be assigned	
Employee must be enrolled in FSA benefits	

Processing Steps

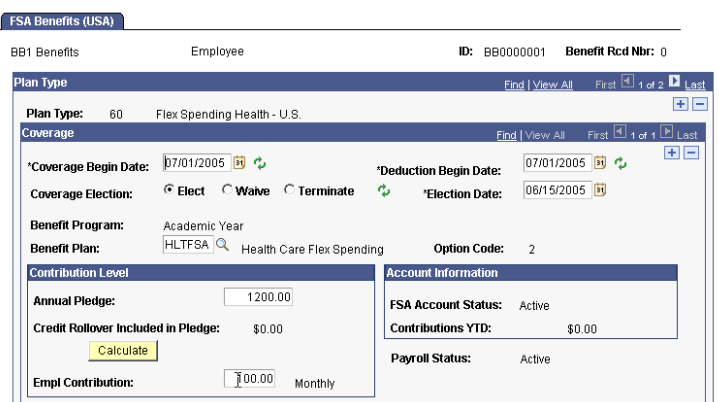
Search - USA-FSA Benefits

Navigation: [Benefits](#) > [Enroll in Benefits](#) > [USA-FSA Benefits](#)


Processing Steps	Screen Shot
<ol style="list-style-type: none"> 1. Enter the EmplID and Benefit Rcd Nbr. <div style="display: flex; align-items: center;"> <div> <p>If the employee holds more than one Benefit Rcd Nbr, select the job that should drive this benefit.</p> <p>If you do not know the EmplID, you can enter other information such as Name, Last Name, or Department.</p> </div> </div> 2. Click Search. <div style="display: flex; align-items: center;"> <div> <p>You will either go directly to the page or see a list of search results. Click the desired search result.</p> </div> </div> <p> The USA-FSA Benefits (page) displays.</p> 	

USA-FSA Benefits

Navigation: [Benefits](#) > [Enroll in Benefits](#) > [USA-FSA Benefits](#)

Processing Steps	Screen Shot
<ol style="list-style-type: none"> 1. Select the Plan Type to change the FSA Benefits for the employee. 2. Insert a new row . 3. Enter the date coverage will terminate in the Coverage Begin Date field. 4. Enter Deduction Begin Date. 5. Select the Coverage (Terminate). 6. Enter the Election Date or accept the default. 7. Click Save. 	

USA-FSA Benefits Page Fields Defined

 For a detailed explanation of the field terms, see the [Field Type Legend](#) at the end of this document.

Field		Definition
Name	System Display	This field contains the employee's name.
Organizational Relationship	System Display	This field contains the organizational relationship. For Base Benefits, this value should always be Employee.
ID	System Display	This field contains the unique employee identification number assigned by the system when an employee is hired.
Benefit Rcd Nbr	System Display	This field contains the Benefit Record Number the employee is attached to for benefits.
Plan Type	Required	This field contains the benefit plan type selected by the employee. See Plan Type Valid Values Table.
Coverage Begin Date	Required	This field contains the date benefit coverage is set to begin.
Deduction Begin Date	Required	This field contains the date used to derive when benefits-related payroll deductions will begin for the benefit plan selected. By default, this date will match the date coverage will begin. Override the default value, if applicable.
Coverage Election	Required	These radio buttons allow you to select whether the employee will be covered under the selected benefit plan. The selection of the Elect radio button indicates the employee is electing coverage under this benefit plan.
Election Date	Required	This field contains the date of the employee's benefits election. By default, this date will match the current date. Override the default value, if applicable.
Benefit Program	System Display	This field contains the Benefit Program for the employee.
Benefit Plan	Required	This field contains the benefit plan in which the employee is enrolling. Benefit plans are specific benefit offerings within a plan type. Only the benefit plans that are associated with the employee's benefit program as of the Deduction Begin Date will appear on the selection list.
Option Code	Not Used	CSU currently does not use this field for Base Benefits.
Annual Pledge	Required	This field contains the employee's Annual Pledge contribution. This pledge is the total amount an employee plans to contribute to their FSA (Flexible Spending Account) in a single year.
Credit Rollover Included in Pledge	System Display	This field contains the amount of excess benefits credits assigned to the displayed FSA (Flexible Spending Account) plan. This field is used for the PeopleSoft Benefits Administration process.
Empl Contribution	Required	This field contains the monthly contribution the employee plans to make to reach their Annual Pledge amount. PeopleSoft will automatically calculate the monthly Employee Contribution. This value is the Annual Pledge amount divided by 12 (months).
FSA Account Status	System Display	This field contains the current status of the employee's FSA (Flexible Spending Account). The value can either be Active or Inactive.
Contributions YTD	System Display	This field contains the 'running total' of contributions made during the benefits year to the employee's flexible spending account
Payroll Status	System Display	This field contains the employee's current job status. The employee's job status will determine the benefits status for the employee.

Field Type Legend

Field Legend	
System Display	Fields that contain values that are key fields, that default from other pages, and other display-only values. Fields marked as System Display cannot be changed.
System Populated	Fields containing values that default based on your user settings or when other values are selected. System Populated indicates that the field defaults, but that it can be changed. By definition, all fields that are populated by the system are required; the list of fields next to each screen shot reflects this.
Required	Fields that are either required by PeopleSoft to save the data or required by CSU according to business process. These fields are not populated and require entry by the user.
Conditional	Fields that may require entry depending on specific information. Use of these fields is situational rather than campus specific.
Campus Optional	Fields that can be used at the discretion of a campus and are not required.
Not Used for this Procedure	Fields that are not used due to the procedure itself. For example, the Termination Date is not used in a hire procedure and contract numbers are not used except in the case of Temporary Faculty. For these fields, a brief definition is provided.
Not Used	Fields that are not used at all by CSU. For these fields, no definition is provided.

USA-FSA Benefits Page Valid Value Table

Plan Type Valid Value Table

Plan Type	Description
60	Flex Spending Health – U.S.
61	Flex Spending Dependent Care