

## ClearBenefits Monthly Checklist

- Are there any drop-down menus missing PTAs?** Remember to scroll to the right and check the often-missed Dental and Vision columns.
- Did any of your postdocs start last month?** Dental and vision coverages do not begin until the first of the following month, so I get a lot of missing PTAs for Dental and Vision fields.
- Do you see any fields where PTAs were there but now missing?** This may mean that the PTA has "expired"--the end date will need to be fixed in the PTA Number Maintenance Screen.
- Is there anyone not on this list that should be?** A postdoc will not show up on your screen until they have made their enrollment elections AND it has been approved by Postdoc Benefits, but you want to be sure that they didn't get missed altogether.
- Are there any terminations up through the end of the month that were not entered?** Check the right hand side of the screen to see if an End Date was entered. It is required that departments confirm that Terminations have been processed in ClearBenefits for the month in which they are checking. (Note: Terminations for future months will be entered closer to the actual termination date.)
- Was there a change in start date for any of your postdocs?** On the Monthly PTA Screen, verify that any changes in start dates were also entered.
- Has anyone moved from stipend to salary or vice versa in this month that would warrant a change in Benefits Pool eligibility?** A GFS Report in Reportmart1 can be run for all of your postdocs.
- Have all of the GFS lines been entered and are they APPROVED?** This is the number one issue I have each month with Department Charges. If a salary payline is entered and completed, but not approved, then the 50% Report will not reflect that the postdoc is Pool Eligible. If you are having trouble with a PTA ahead of time, please let me know, and I will work with you.
- Did you log in one last time on the last day of entry?** This is important since many postdocs don't go in to make their elections until the end of the month, after you've gone in the first time.
- Have you checked your Guarantee Account financials from the previous month and made the necessary changes in GFS and/or ClearBenefits for the current month?** A 279 Expenditure Report run in Reportmart3 for your Guarantee Account is sufficient and will show if a postdoc's health premiums were charged to that account. Either a GFS entry needs to be fixed or a ClearBenefits PTA needs to be fixed (or both).