



Paycom Training: Form 13

This Quick Reference Guide will explain what you are able to see on Form 13.

FORM 13

Form 13 is the benefit enrollment page in Paycom. This page shows you the current enrollment and pending approval of enrollment along with Life Status Changes.

Form 13 - Employee Benefits

Benefits Eligibility Profile [LAY] Lay [View Change History](#)

Employee Benefits | Dependent Benefits | **Beneficiary Benefits** | Enrollment | Qualifying Events

Show: Current Plans [Batch Actions](#)

Requested Benefits

Search

Plan Name	Plan Year(s)	Payroll Deduction	Deduction Start Date	Deduction Stop Date	Coverage Level	Monthly 100% Amount	Employee Cost	Coverage Start Date	Edit	Delete
No Records Found										

Approved Benefits

Search

Plan Name	Plan Year(s)	Payroll Deduction	Deduction Start Date	Deduction Stop Date	Coverage Level	Monthly 100% Amount	Employee Cost	Coverage Start Date	Sent to Payroll	Edit	Delete
Christian Brothers CDHP Plan (CD21)	2021 - 2022	Christian Brothers CDHP (CBH)	02/01/2022	06/30/2022	Employee Only	\$689.70	\$0.00	01/01/2022	Yes		
Delta Dental WA (DD21)	2021 - 2022	Delta Dental WA (DDW)	01/01/2022	06/30/2022	Employee + 1 Dependent	\$108.30	\$29.01	01/01/2022	Yes		
Flexible Spending Account Limited Employee (FL21)	2021 - 2022	FSA Limited (LFS)	07/01/2021	06/30/2022	\$1,062.50	\$0.00	\$62.50	07/01/2021	Yes		

A. The benefit eligibility profile.

- a. This indicates the plans that the employee can enroll in.
 - i. List of available profile choices:
 1. Cemetery – only for location 0305
 2. Cemetery Non-Salary- Cemetery Salespersons
 3. Default- Lay- this is all for lay employees that did not make an election within the first 31 days (about 1 month) of eligibility and were defaulted into CB CDHP EE only coverage no HSA
 4. Extern Priest Southwest- Externs in Southwest locations
 5. Extern Priest- all other locations that have Extern Priests
 6. Lay- all lay employees not in a Southwestern location
 7. Lay Southwest WA- all lay employees in Southwest locations
 8. Active not Eligible- Any employee who is not eligible for benefits (working less than 30 hours per week or temporarily employee)
 9. Active Priests- Priests assigned to a location

10. Principal- Principals who are not located in Southwest WA
11. Principal Southwest WA- those principals in Southwest WA
12. Senior Foreign Priest- A Senior Priest or Active Priest living outside of the US.
13. Senior Priest- A Priest who is no longer assigned to a location and eligible for Medicare.
14. Teacher Southwest WA- Teachers working in Southwest WA
15. Vowed Religious- Seminarian Southwest- Vowed Religious and Seminarians working in Southwest locations
16. Teacher- all teachers not working in a Southwest Location
17. Union-Cemeteries- Union employees that work in location 0305
18. Vowed Religious –Seminarian- Vowed religious or Seminarian not working in a Southwest location.

B. View Change History

- a. This will show you all the changes made and the employee or staff member who made the change. What the change was and the date and time.

Change History for SANFORD, DARLENN MARIE (E234)

Date Range: 03/01/2021 to 03/31/2022 [Submit](#)

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Plan Year(s)	Plan Code	Plan Name	Change Description	Old Value	New Value	Change Date	Changed By	IP Address	User Type	Notes
2021 - 2022	HP21	HSA Employer Seed	Employee Annual Contribution Amount	499.92	250.00	03/24/2022 08:11:39 AM	pcmd92482547	10.203.43.106	CL	
2021 - 2022	HP21	HSA Employer Seed	FSA/HSA Employee Contribution Adjustment	0.00	-1023.35	03/24/2022 08:11:39 AM	pcmd92482547	10.203.43.106	CL	
2021 - 2022	HP21	HSA Employer Seed	Checks to Withhold Contribution Amount		7	03/24/2022 08:11:39 AM	pcmd92482547	10.203.43.106	CL	
2021 - 2022	CD21	Christian Brothers CDHP Plan	Sent To Payroll	No	Yes	03/09/2022 04:54:18 PM	DSanford	63.159.148.234	CL	
2021 - 2022	CD21	Christian Brothers CDHP Plan	Sent To Payroll Date	2021-11-02 19:02:29	2022-03-09 16:54:18	03/09/2022 04:54:18 PM	DSanford	63.159.148.234	CL	
2021 - 2022	CD21	Christian Brothers CDHP Plan	Benefit Status	In Progress	Approved	03/09/2022 04:54:17 PM	DSanford	63.159.148.234	CL	
2021 - 2022	CD21	Christian Brothers CDHP Plan	Carrier Status		Active	03/09/2022 04:54:17 PM	DSanford	63.159.148.234	CL	
2021 - 2022	HP21	HSA Employer Seed	Sent To Payroll	No	Yes	03/09/2022 04:53:55 PM	DSanford	63.159.148.234	CL	
2021 - 2022	HP21	HSA Employer Seed	Carrier Status		Active	03/09/2022 04:53:55 PM	DSanford	63.159.148.234	CL	
2021 - 2022	HP21	HSA Employer Seed	Sent To Payroll Date	0000-00-00 00:00:00	2022-03-09 16:53:55	03/09/2022 04:53:55 PM	DSanford	63.159.148.234	CL	

C. EMPLOYEE BENEFITS

- a. You will see Requested Benefits as the first sections
 - i. A benefit request made outside of Open Enrollment. If there is an elected benefit in this area, it is pending approval.

Form 13 - Employee Benefits

Benefits Eligibility Profile [LAY] Lay [View Change History](#)

Employee Benefits | Dependent Benefits | Beneficiary Benefits | Enrollment | Qualifying Events

Show **Current Plans** [Batch Actions](#)

Requested Benefits

Search

Plan Name	Plan Year(s)	Payroll Deduction	Deduction Start Date	Deduction Stop Date	Coverage Level	Monthly 100% Amount	Employee Cost	Coverage Start Date	Edit	Delete
No Records Found										

Approved Benefits

Search

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Flexible Spending Account Limited Employee (FL21)	2021 - 2022	FSA Limited (LFS)	07/01/2021	06/30/2022		\$1,062.50	\$0.00	\$62.50	07/01/2021	Yes		

- b. Once the benefit election is approved, it will fall under APPROVED BENEFITS section.
 - i. These are benefits that are approved, their effective date, pay deduction start and stop dates, coverage level, total monthly premium, and the employee per pay amount.
- D. As you scroll down the screen you will see COBRA BENEFITS which do not apply to the Archdiocese.
- E. **TERMINATED BENEFITS**
 - a. These are benefit elections that are stopped mid plan year. Such as Life Status Changes to coverage, an employee who was eligible for benefits and changed to not eligible all terminated benefits would show here.

Terminated Benefits

Search

Plan Name	Plan Year(s)	Payroll Deduction	Deduction Start Date	Deduction Stop Date	Coverage Level	Monthly 100% Amount	Employee Cost	Coverage Start Date	Coverage End Date	Edit	Delete
No Records Found											

Declined and Denied Benefits

Search

Plan Name	Plan Year(s)	Payroll Deduction	Coverage Start Date	Status	Decline Reason	Employee Comment	Enroll	Edit	Delete
Christian Brothers Standard Plan (CS21)	2021 - 2022	Christian Brothers Standard (CBS)	12/31/2021	EE Declined					
Critical Illness Child (CC21)	2021 - 2022	Critical Illness Child (CIC)	12/31/2021	EE Declined					
Critical Illness Employee (CE21)	2021 - 2022	Critical Illness Employee (CIE)	12/31/2021	EE Declined					
Critical Illness Spouse (CP21)	2021 - 2022	Critical Illness Spouse (CIS)	12/31/2021	EE Declined					

- F. The last section is Declined and Denied Benefits
 - a. These are benefit options that were not selected or were declined by the employee.

The next important tab you need to be aware of is the QUALIFYING EVENTS

The screenshot shows the 'Form 13 - Employee Benefits' interface. At the top, there's a green header bar. Below it, the 'Benefits Eligibility Profile' section includes a '[LAY] Lay' button and a 'View Change History' button. A navigation bar contains tabs for 'Employee Benefits', 'Dependent Benefits', 'Beneficiary Benefits', 'Enrollment', and 'Qualifying Events'. The 'Qualifying Events' tab is highlighted with a yellow box. Below the tabs is an 'Employee Listing' table with the following data:

Event Type	Date Entered	Event Date	Entered By	Last Date for Changes	Prior Events	Status
Eligible for Other Agency Benefits	12/23/2021	12/31/2021	OTT53E234	01/31/2022	2	Approved
Adoption	03/09/2022	02/11/2022	OTT53E234	04/12/2022	2	Approved

- G. This shows all Life Status Change requests. This tells you the Event the employee is using to request an IRS Qualified Life Event, the date it was entered, the effective date of the change, the employee number who entered the change, the IRS allotted date the change can be made and if it was approved, denied, or sent back with more questions.

TROUBLESHOOTING FORM 13

Troubleshooting Items:

Problem	Cause	Path to Solution
An employee labeled as NEL-Active Not Eligible and still showing benefit deductions on Form 2.	The Benefits Office was not used to make the change. PAF was filed and was approved by HR to change the benefit eligibility profile.	Notify the Benefits Services Office.