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Insurance Processing

PROCEDURE MANUAL
CLER for Agencies

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Introduction

This procedure provides instructions for accessing and operating the Office of Personnel Management (OPM), Federal Employees Health Benefits (FEHB), Centralized Enrollment Clearinghouse System (CLER). The following information will help you use the procedure more effectively and locate further assistance if needed.

This section includes the following topics:

Overview.....1
System Capabilities and Interface.....1
Reports.....2
Forms.....2
Responsibilities.....3
Who to Contact for Help.....4

Overview

CLER receives electronic FEHB enrollment data from health insurance carriers and Federal payroll offices on a quarterly basis. The CLER database stores, maintains, processes, edits, and combines the data from the carriers and compares it to the data from the payroll offices. The National Finance Center (NFC) takes a proactive approach to resolve any discrepancies between the carrier data and the payroll office data identified during the operation of CLER by working with Federal Agencies (payroll offices and personnel offices) and carriers as needed.

Authorized users of CLER can access data when security access is requested by the security officer and clearance is provided by the NFC's Operations and Security Center (OSC).

System Capabilities and Interface

Payroll offices electronically submit quarterly FEHB enrollment data directly to NFC. Carriers submit their FEHB enrollment data quarterly to the OPM data hub which in turn submits the data to NFC. Upon receipt, the enrollment data is processed into NFC’s mainframe. The Mainframe database stores, maintains, processes, edits, matches, combines, and compares the enrollment data from the payroll offices to the data from the carriers using edit tables.

After the data is loaded into the Mainframe, the data is sent to the CLER Web server where the Agencies, carriers, OPM, and NFC access the data for inquiries, contact information updates, discrepancy corrections, and report generation.

Using the Web server, an Agency may query on its data. To assist the Agency with the reconciliation process, reports are developed using the report generation capabilities that are modeled on NFC's Reporting Center. Using the data that resides in CLER, users can tailor their reports to meet their specifications. Based on the Agency analysis, a discrepancy with the carrier data may be encountered. The Agency may submit forms requesting corrective action from the carrier electronically using the CLER Web server. The corrective action request file is forwarded from the Web server through the NFC mainframe, where it is processed and transmitted to the carrier through OPM's data hub.

Carriers respond to the corrective action request directly through the Web server. The carrier response and update is maintained on the database and is available for inquiry by the Agencies. To further assist the carrier in the response, the carrier may develop customized reports in CLER.

Agencies and carriers have primary contacts in each of their organizations and must maintain the contact information in CLER.

OPM oversees the operation of CLER. To perform this role, OPM has inquiry and report capabilities for all carriers and Agency participants. The system provides statistical information relative to the number of discrepancies, occurrence rates, corrective actions, enrollment changes, etc. This information provides OPM with data needed to effectively manage and oversee the FEHB reconciliation process.

NFC maintains the system, updates all tables and edits as necessary, and maintains system security.

Reports

CLER supports and facilitates report creation. CLER report creation is modeled on NFC's Reporting Center, which is an integral part of several other NFC applications.

Selection criteria, sorts, and formats are built into the CLER reporting database. With the flexibility of the reporting options offered, users are able to design custom reports from the options displayed on the Reports Selection page.

Forms

Forms associated with CLER activities are described below.

Standard Form (SF) 2809, Health Benefits Election Form. This form is used by Federal employees eligible to enroll in or currently enrolled in FEHB; and/or former spouses of Federal employees eligible to enroll in or currently enrolled in FEHB under the Spouse Equity law, and/or individuals eligible for temporary continuation of coverage under FEHB to:

- Enroll eligible persons in FEHB.
- Elect not to enroll in FEHB.
- Change an enrollee's plan.
- Change coverage within a plan.
- Cancel FEHB enrollment of an enrollee who elected to end his/her coverage though he/she continues to be eligible for it, and no extension of coverage is granted.

SF 2810, Notice of Change in Health Benefits Enrollment. This form is used to:

- Terminate the enrollment of an enrollee employed by the Federal Government who leaves Government service, or an enrollee employed by the Federal Government who exceeds 365 days in non-pay status and is eligible for a 31-day extension of coverage.
- Reinstate enrollment.
- Change the name of an enrollee.
- Change the enrollment to a survivor annuitant.

Note: The 2809 and 2810 options in CLER are formatted to include data elements from the forms listed above, as well as the data elements from the 2809 and 2810 options on the Employee Personal Page (EPP).

CLERP, Security Access Form, Health Benefit Agencies. This form is completed by the Agency's security officer and submitted to NFC's OSC to request CLER access for the Agency's personnel.

Responsibilities

The following are the general responsibilities of the primary organizations involved in the operation of CLER:

Agency:

- Appoints a primary and an alternate security officer who coordinates all requests with NFC for CLER access authorization
- Transmits FEHB enrollment data to NFC.
- Establishes and maintains payroll and personnel office contact information in CLER.
- Reviews and researches current and/or prior quarter enrollee transmission records.
- Reviews and researches current and/or prior quarter enrollee discrepancy records.
- Enters reconciliation action codes to record corrective actions.
- Enters reconciliation reason codes for discrepancies.
- Views responses from the carrier on corrective action taken.
- Inputs, faxes, or mails 2809 and 2810 data for carrier corrective action/corrections.
- Verifies that corrective actions/corrections have resolved discrepancies.

Carrier:

- Appoints a primary and an alternate security officer, who coordinates all requests with NFC for CLER access authorization.
- Transmits FEHB enrollment data to the OPM data hub.
- Establishes and maintains carrier and carrier plan contact information in CLER.
- Reviews and researches current and/or prior quarter enrollee transmission records.
- Reviews and researches current and/or prior quarter enrollee discrepancy records.
- Enters response codes to respond to the corrective action requests from Agencies.

Note: The carrier takes no action unless authorized by the responsible Agency.

OPM:

- Oversees and manages the reconciliation process.
- Views all carrier and Agency enrollment records.
- Views all contact information.
- Views all table information.
- Takes action to ensure user compliance.

NFC:

- Operates CLER.
- Provides operational support to resolve reconciliation problems.
- Researches and resolves system inquiries.
- Provides subject matter expertise.
- Provides training to CLER users.
- Coordinates system/user compliance issues with OPM.
- Maintains security over all data residing in CLER.

Who to Contact for Help

For questions about requesting access to CLER, contact the CLER Operations and Reconciliation Unit at **1-855-632-4468**.

For questions about CLER processing (including help with unusual conditions), contact the CLER Operations and Reconciliation Unit at **1-855-632-4468**.

For questions about access authority, contact your organization's security officer. When necessary, your security officer may contact NFC's OSC at **1-800-767-9641** or via email *osc.etix@usda.gov*.

System Access

At the request of OPM or OPM's delegated authority, NFC grants users the authority to access CLER. Users request access through their security officer. Each user (Agencies and carriers) is required to establish a primary and an alternate security officer, who coordinate all requests with NFC for CLER access authorization. Users, with approval from their organizations, are allowed to have access to appropriate resources, and OPM may grant access permission to other users or groups of users. Resource access permission is limited to the extent determined by OPM, NFC, and the approved user organizations (e.g., participating Agencies, carriers, or auditors).

This section includes the following topics:

Requesting Access to CLER 7
Viewing the Online Application 7
Browser Information 8
Security Officer Responsibilities 8
Changing Your Password 9
Logging On to CLER 11
Logging Off of CLER 14

Requesting Access to CLER

NFC will grant authority to use/access its facilities to individual users at the request of OPM and the user's security officer. Every user is assigned a unique ID number which defines the specific information a user has access to based on job responsibilities, need to know, and the user's security policy. Communications related to gaining access to CLER must go through the user's security officer to NFC. To gain access to CLER, the user's security officer must complete the Form CLERP, CLER Security Access Form, Payroll Office Personnel, and send it to NFC's CLER Operations and Reconciliation Unit via email address *NFC.CLER@nfc.usda.gov*.

For an electronic and/or paper copy of Form CLERP, CLER Security Access Form, Payroll Office Personnel, ask your organization's security officer to contact the CLER Operations and Reconciliation Unit at **1-855-632-4468**. For questions about access authority, contact your security officer. When necessary, your security officer may contact NFC's OSC at **1-800-767-9641** or via email at *osc.etix@usda.gov*.

Viewing the Online Application

CLER was designed to use a screen resolution of 1024 X 768 dpi. The resolution you see is controlled by your personal computer's monitor and video card settings. Any resolution can be

used; however, lower resolutions may force you to scroll the screen to view all data on the screen.

The appearance of the page is also controlled by your browser's font setting. If the words on the screen appear too large or too small, you can adjust them yourself by using the browser font adjustments.

Browser Information

This application is currently compatible with current versions of Microsoft Internet Explorer (IE), Microsoft Edge, Google Chrome and Mozilla Firefox. Some successful testing has been done with Opera Version 6, however CLER may not be completely compatible with this browser.

This application performs best when using IE because the type of tabular data displayed on most CLER pages usually appears twice as fast in an IE browser than in other browsers. Other browsers can be used; however, IE should provide better performance.

The CLER application requires that your browser settings allow the use of JavaScript and cookies. These tools are used to perform local entry edits on the input screens and to ensure that NFC sends the correct data to the correct user each time you click an option in the application. Some browsers may show the JavaScript option as Jscript or Active Scripting.

For best results, the browser cache settings should never be set to **`zero`**. This option may be listed as amount of disk space in some browsers.

Some browsers may also perform poorly if the document in cache should be compared to the document on the server or the Check for newer versions of stored pages option is set to NEVER. Any other setting will provide better performance.

Security Officer Responsibilities

The User's Security Officer will:

- Obtain organization and/or owner authorization approval(s) and request user identifications (IDs) according to the user's security policy.
- Submit the request for access to CLER to NFC's OSC.
- Suspend user IDs upon the employee's termination or assignment change.
- Notify NFC of any changes in the authority or of the termination of an employee in their organization.

- Consult with NFC's OSC on security matters related to the use of NFC's facilities.
- Monitor users' activity for access violations.

NFC's Security Officer will:

- Grant authority to use/access the computer facilities based on OPM's authority and the user's requirements.
- Establish, control, and maintain user ID.
- Log all unauthorized access attempts and furnish reports to the respective user security officer for appropriate action.

Monitor security concerns of OPM and the user security officer related to NFC's facilities and resources.

Changing Your Password

To change your password:

1. Access the Internet and go to the ***NFC Home Page https://www.nfc.usda.gov/***.
2. Select the ***CLER*** icon on the Application Launchpad. The CLER Logon page is displayed.

Note: To display information about the CLER application's accessibility and security, select Accessibility or Security, as applicable.

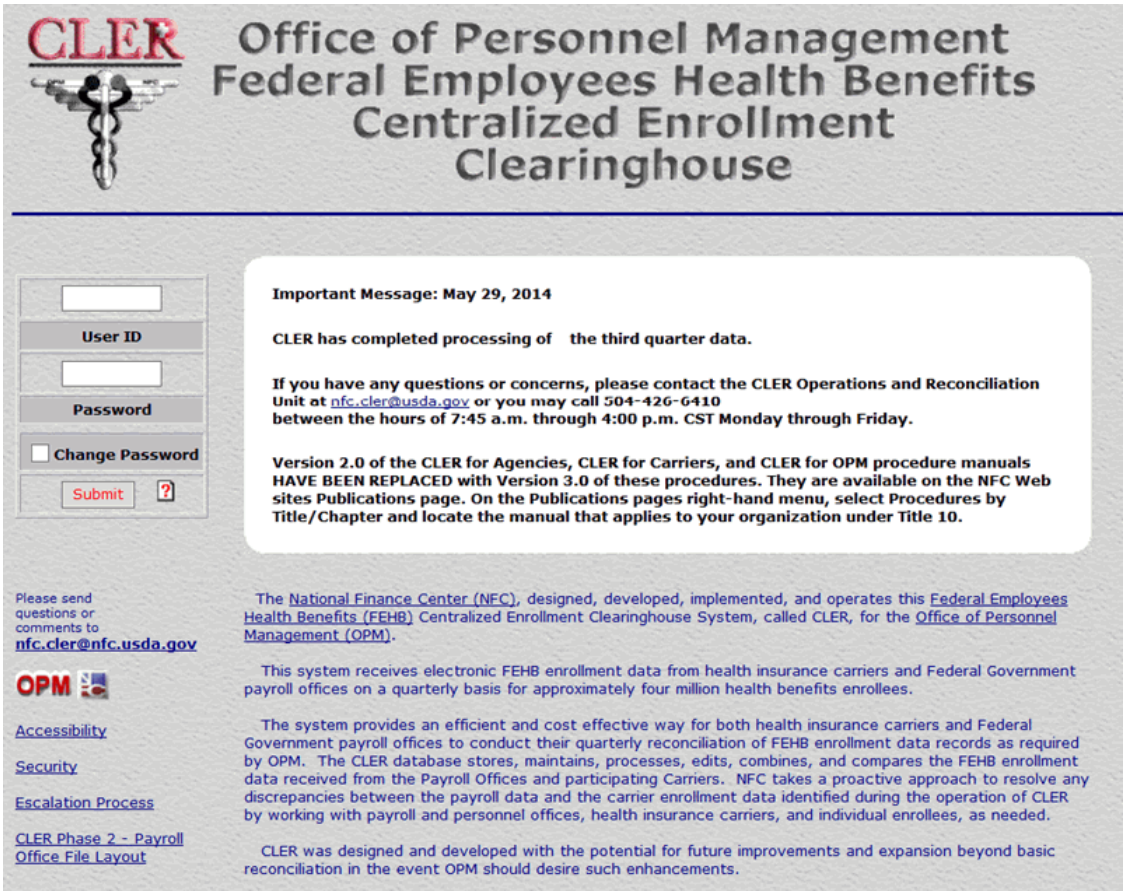


Figure 1: CLER Logon Page

3. Complete the following fields and select the **Submit** button:

   User ID (on page 455)

   Password (see "***Change Password - Field Instruction***" on page 347)

   Change Password (see "***Change Password - Field Instruction***" on page 347)

A popup appears for the user to enter a new password.

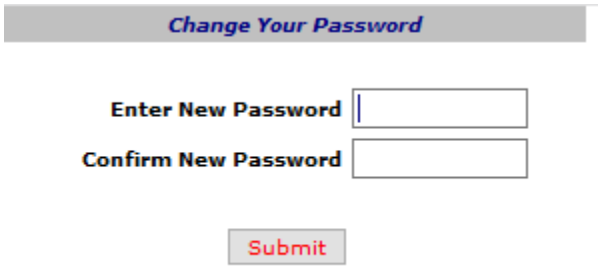


Figure 2: Change Your Password

4. Type the new password in the Enter New Password and Confirm New Password fields and select the **Submit** button.

Logging On to CLER

To log on:

1. Access the Internet and go to the ***NFC Home Page https://www.nfc.usda.gov/***. Select the ***CLER*** icon on the Application Launchpad. The CLER Logon page is displayed.

Note: To display information about the CLER application's accessibility and security, select Accessibility or Security, as applicable.

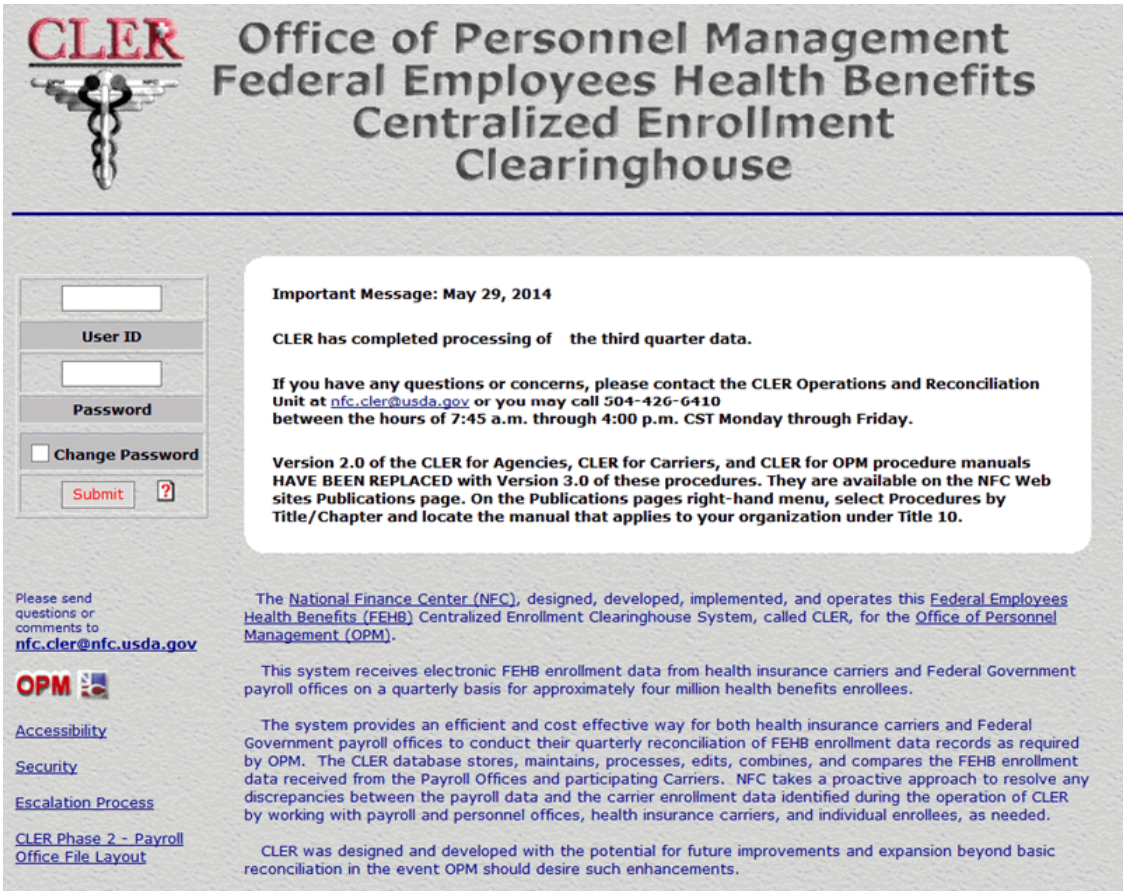


Figure 3: CLER Logon Page

2. Complete the following fields and select the **Submit** button:

   User ID (on page 455)

   Password (see "***Password - Field Instruction***" on page 417)

If the proper User ID and password are entered, the CLER Main Menu is displayed.

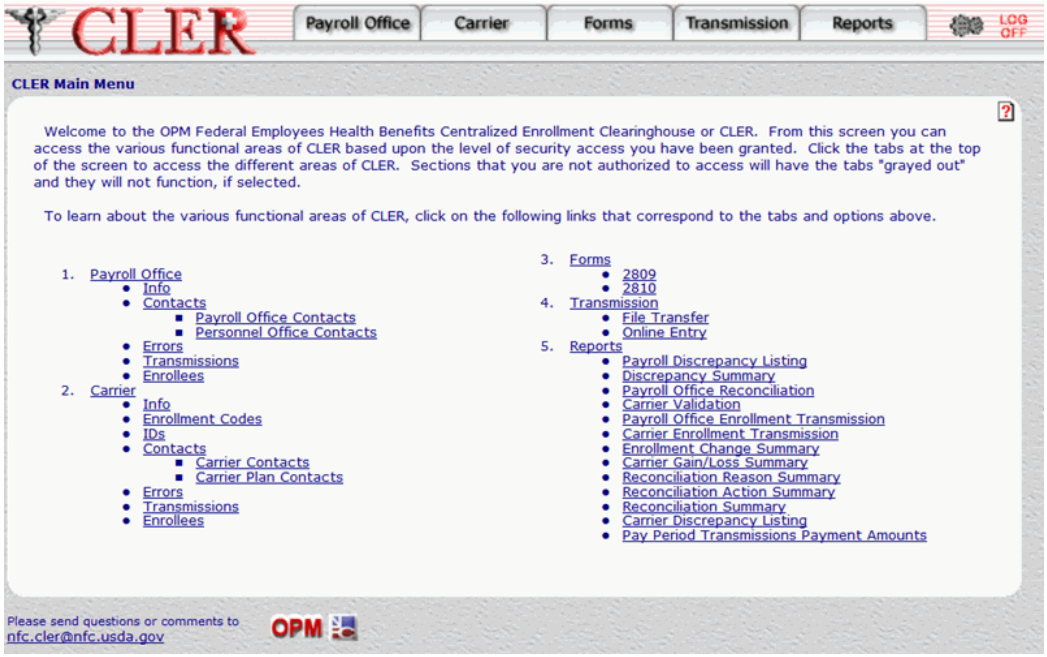


Figure 4: CLER Main Menu

A brief description of each option displayed on the CLER Main Menu is listed as follows:

- ***Payroll Office*** **-** Used to view and maintain payroll office FEHB enrollment information.
- ***Carrier*** **-** Used to view and maintain carrier FEHB enrollment information.
- ***Forms*** **-** Used to view/enter 2809 and 2810 information.
- ***Transmission*** **-** Used to view/enter transmission information.
- ***Reports*** **-** Used to produce reports.
- ***Gears (icon)*** **-** Used to view CLER processing schedules and system codes information.

Logging Off of CLER

To exit CLER, select **Log Off** on any CLER page. The CLER Log Off page is displayed, and the current session is terminated. For the highest security when logging off, close the browser to keep another user from accessing pages in the browser memory.

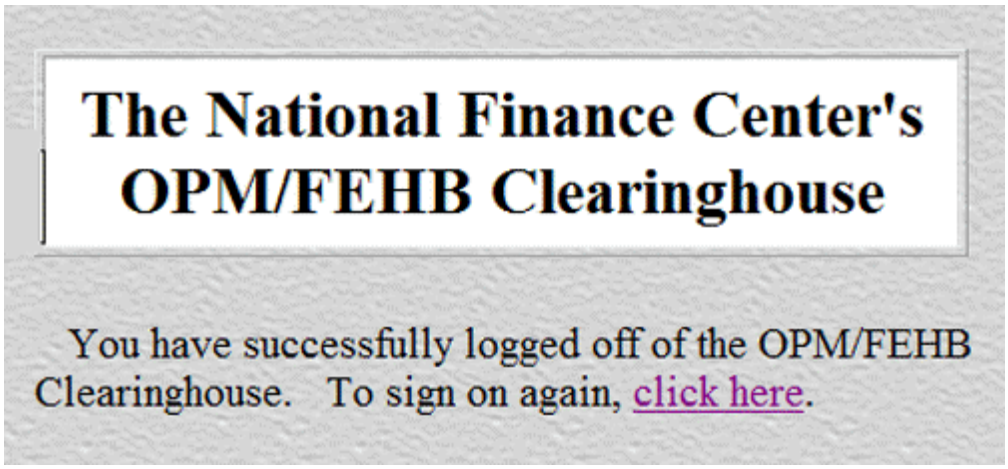


Figure 5: CLER Log off

Operating Features

CLER is designed in a Web format providing mouse-driven point-and-click functionality, command buttons, and other Web features. This section reviews these basic features and describes other features that are specific to CLER.

This section includes the following topics:

Command Buttons 15
Popups 16
Search Criteria 16
Drop-Down Menu 17
Radio Buttons 17

Command Buttons

CLER command buttons carry out the action described in the button's name. The following command buttons are used throughout CLER:

- **Add** - Opens a page to add records
- **View** - Opens a page to view data on existing records
- **Update** - Opens a page to update data on existing records
- **Delete** - Deletes an existing record
- **Release** - Releases a record for processing
- **Add Record** - Adds data entered on a page
- **Update Record** - Updates an existing record
- **Clear Data** - Refreshes a page
- **Submit** - Submits criteria to search for records
  - If the fields for all search criteria are optional, the user may leave those fields empty and submit to display all records
- **Reset** - Refreshes search criteria pages forms
  - Used to view and transmit Forms SF 2809 and SF 2810 information
- **Save Form** - Saves data entered on Forms SF 2809 and SF 2810 pages
- **Update Form** - Updates data on existing Forms SF 2809 and SF 2810 pages

- **Cancel** - Returns to the previous page or to refresh payroll and personnel office contact data entry pages
- **Reconcile** - Allows Agencies to open a page to reconcile FEHB enrollee records
- **Reconcile Record** - Allows Agencies to save information entered on the Payroll Office Enrollees Reconcile page

Popups

Throughout CLER, popups appear when certain actions are performed. These popups notify the user of an action that must be taken and/or an error condition that must be corrected. Command buttons are used on these popups to accept or cancel the message. You must select a command button for the popup to disappear and to be returned to the active page. The following figure is an example of a popup.

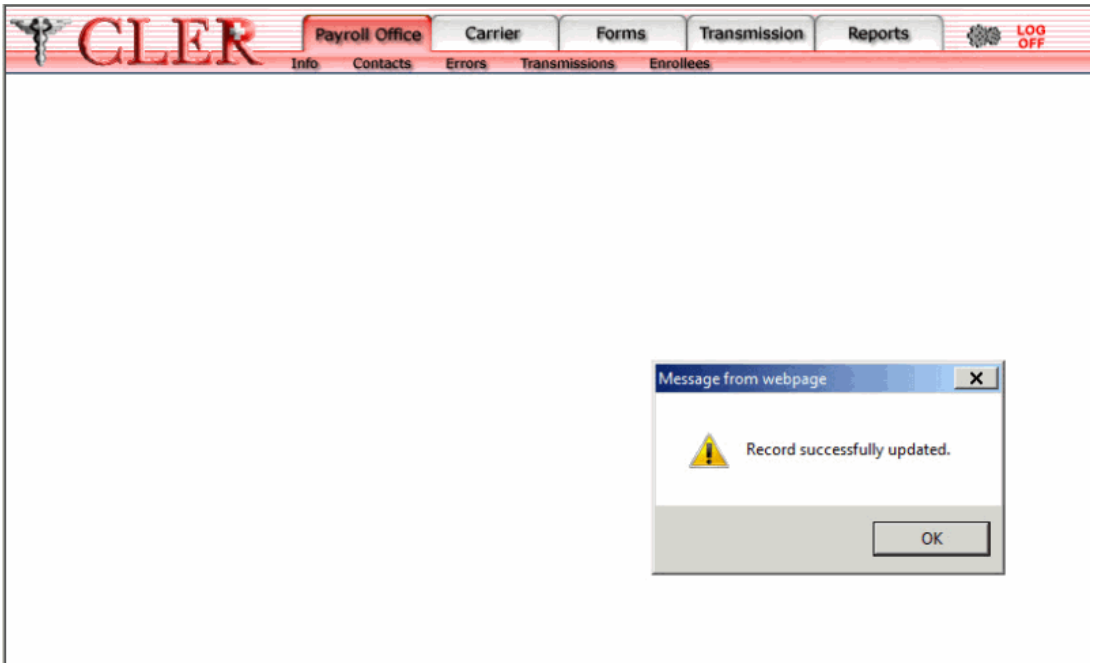


Figure 6: Payroll Office Contacts Update Popup Page

Search Criteria

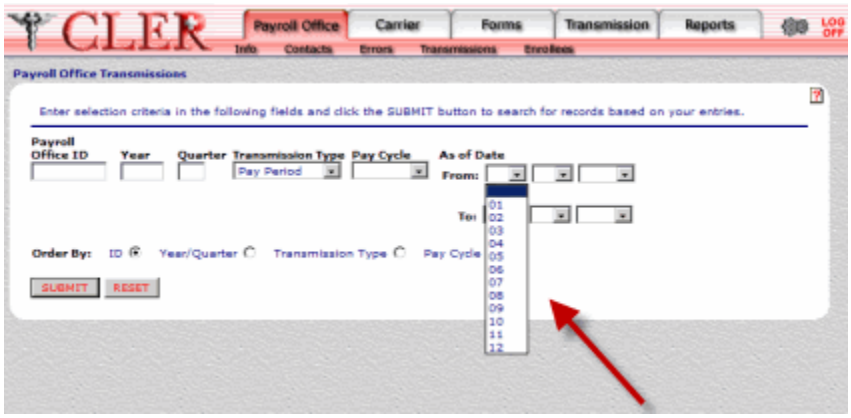
There are certain CLER pages that are used to search for and display data records. The search criteria data entry fields displayed on these pages are completed to display records that contain data related to the search criteria entries. Also, the search criteria data entry fields on these pages may be partially completed to display a wider range of data records. For example, if you are searching for all data records that contain a payroll office ID number that begins with the number

2, enter **2** in the Payroll Office ID field to display data records that contain a payroll office ID number that begins with the number **2**.

Note: To display all data records for a search criteria page that has no required fields, select **Submit** without completing any of the fields.

Drop-Down Menu

Many CLER pages have drop-down menu data entry fields that allow you to select the correct entry value from a list of valid values for that field.



To Complete a Drop-down Menu Data Entry Field:

1. Select the arrow displayed next to the drop-down menu data entry field and the drop-down menu of valid values for that field is displayed.

2. Select the arrows that are displayed at the top and bottom of the drop-down menu to scroll through the menu and locate the appropriate value.

3. Select the appropriate value and that value is entered into the field.

Note: The values displayed in the drop-down menus are listed in numeric/alphabetical order. You may enter the first character of a value in the field displayed next to the arrow in order to display the first value that begins with that character. For example, if you are searching for a payroll office ID number that begins with the number 2, enter **2** in the field displayed next to the arrow and the first payroll office ID number from the drop-down menu that begins with the number 2 is displayed. If you select the arrow after typing **2** in the field, the payroll office ID numbers that begin with the number 2 will be displayed in numerical order.

Radio Buttons

Round buttons, called radio buttons, are used throughout CLER.

Radio buttons are used to:

- Select the data that will be placed in a field.
- Select options such as a data category.
- Specify selection criteria such as display and sort criteria for a particular search.

To select a radio button, point and select the applicable radio button.

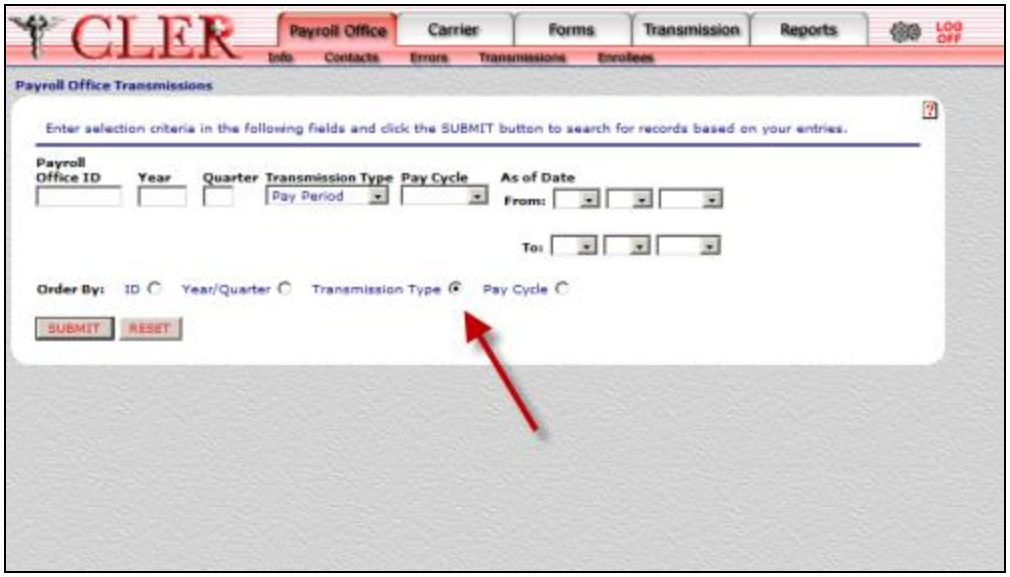


Figure 7: Radio Buttons Example Page

Transmission of Enrollment Data

Carriers transmit FEHB enrollment data files to OPM's data hub which, in turn, transmits the data to CLER via existing connectivity to NFC.

This section includes the following topics:

Timeline for CLER Quarterly Reconciliation 19

Timeline for CLER Quarterly Reconciliation

The CLER reconciliation process includes 4 reconciliation quarters per year. The first quarter begins on March 1; the second quarter begins on June 1; the third quarter begins on September 1; and the fourth quarter begins on December 1. Weeks before a quarter begins, the CLER Operations and Reconciliation Unit sends a copy of the quarterly reconciliation timeline for that quarter to Agencies and carriers via email. Please refer questions about the quarterly reconciliation timeline to the CLER Operations and Reconciliation Unit at **1-855-632-4468**. A sample of the quarterly reconciliation timeline for the second quarter is described in the table listed below.

Note: In the sample timeline listed below, payroll office enrollment data is transmitted directly to CLER , and consists of data as current as the most recent pay period that was paid by the payroll offices between March 1 and May 31.

Quarterly Reconciliation Timeline

Date (Month/Day)	Description

Date (Month/Day)	Description
3/1	Carriers and payroll offices may begin transmitting enrollment data to CLER via electronic input files. Reminders are emailed to carriers and payroll offices regarding the current quarterly due date for the submission of enrollment data to be reconciled. Note: The header record submitted by the carriers and payroll offices must include an as-of-date that corresponds with your pay period ending date. The enrollment data that is extracted from the carrier and payroll office's records must be those enrollments that are actually in effect that day. Effective March 1, all payroll offices must send a transmission every pay period. Data will be extracted according to the timeline defined by OPM as follows: • Payroll offices with monthly pay cycles or monthly premium collection cycles, must use the as-of-date equal to the first of the month following the end of month pay cycle. Any data, subsequent to **March 1**, may cause unmatched errors when compared to enrollee records submitted by carriers. Please do not report changes effective after **March 1**. • Payroll offices with pay cycles other than monthly, must extract data effective as of the last pay period that falls between **March 1** and **March 15**. The end of the pay period date must be reflected in the header as the as-of-date. Note: Transmissions received with the as-of-dates between March 1 through March 15 will be used as the 1st quarter reconciliation file. A transmission must be sent for every pay period. • Carriers must extract data effective as of **March 1**. There are no changes to the frequency of transmissions from the Carriers. Carriers and payroll offices must include the correct submission date in the header record they transmit to CLER. The following are valid submission dates: • For a payroll office, the submission date is the date they send their file to ***NFC***[1]. • For a carrier, the submission date is the date they send their file to the OPM Data Hub. For more information about as-of-dates and the submission date, see the CLER Carrier Enrollment File Layout or CLER Payroll Office Enrollment File Layout, as applicable. Payroll Offices please assure you are referencing version 3.3. These documents are available through the CLER Operations and Reconciliation Unit.

Date (Month/Day)	Description
3/10	Reminders are emailed to the carriers that have not submitted their quarterly enrollment data.
3/15	This is the current quarterly due date (last day) for carriers and payroll offices to transmit their quarterly enrollment data to CLER. Please transmit your enrollment file immediately.
3/15	Enrollment data transmitted from carriers must be received by **noon Eastern Time (ET)** at the OPM Data Hub on this date to be accepted for inclusion into the reconciliation process. **Payroll office** transmissions must be received at ***NFC***[2] by **5:00 p.m. Central Time (CT) within 7 business days after the pay period end date**. Any transmissions of enrollment data that are received after these times may not be included in the reconciliation process for this quarterly cycle. An email informing the submitter that the transmission is accepted or rejected is generated within 1 workday after receipt.
3/15	The OPM data hub provides CLER with the last files transmitted by carriers at approximately **3:00 p.m. (ET)**.
3/15 - 3/19	The information required to produce discrepancy reports is processed and made available to Agencies and carriers through CLER, **provided all Agencies and carriers submit their file by the deadline**. The discrepancy report information will remain available until further notice. The Agencies have approximately 30 days to research discrepancies and respond with resolutions.
3/19	Lists of carriers and payroll offices that have not submitted their quarterly enrollment data are made available to OPM through CLER.
4/22	Reminders are emailed to the Agencies that responses are due on discrepancies by **8:00 a.m. (CT)** on **May 1**.
5/1	Responses from Agencies are due by **8:00 a.m. (CT)**. • If the research shows that the payroll or personnel office records are incorrect, the payroll or personnel office will correct the error(s) in their payroll/personnel system and enter the reconciliation reason code in CLER. • If the research shows that the carrier's records are incorrect, the Agency will enter the results of their research in CLER for carrier correction. The Agency will submit supporting data through CLER or hard copy to the carrier.

[1] National Finance Center
[2] National Finance Center

Date (Month/Day)	Description
5/1	On **May 1**, after **8:00 a.m. (CT)**, CLER will initiate the process of transferring the Corrective Action Request file to the OPM Data Hub for the retrieval of the file by carriers. CLER will notify carriers via email when the data is available after the OPM Data Hub has completed its processing.
5/1 - 5/31	Carriers enter Corrective Action Codes in CLER to indicate what actions were taken to resolve the discrepancies.
5/20	Reminders are emailed to the carriers that confirmation of the Corrective Actions must be completed by the beginning of the next month.

CLER Processing Instructions

CLER allows authorized personnel to keep FEHB enrollment data updated by entering the most current information for enrollees and work collaboratively with FEHB carriers to reconcile and perform corrective actions, if necessary, to any discrepancies in enrollee records.

This section includes the following topics:

Maintaining Payroll Office Information Records 23
Maintaining Payroll and Personnel Office Contact Records 27
Maintaining Payroll Office Enrollee Records 56
Viewing Carrier Records 81
Viewing Carrier and Carrier Plan Contact Record 91
Viewing Carrier Transmissions Records 99
Maintaining Carrier Enrollee Records (Marked with Discrepancy Code 160) 103
Maintaining Forms Records 115
Viewing Payroll Office Error Records 185
Maintaining Transmission Records 191
Maintaining Online Entry Records 195
Reports 231
Viewing Maintenance Records 279

Maintaining Payroll Office Information Records

The ***Info*** option on the Payroll Office Main Page allows users to view information about each payroll office.

For more information see:

Viewing Payroll Office Information Records 24

Viewing Payroll Office Information Records

To view a payroll office's information record:

1. Select Payroll Office on the CLER Main Menu. The Payroll Office Main Page is displayed.

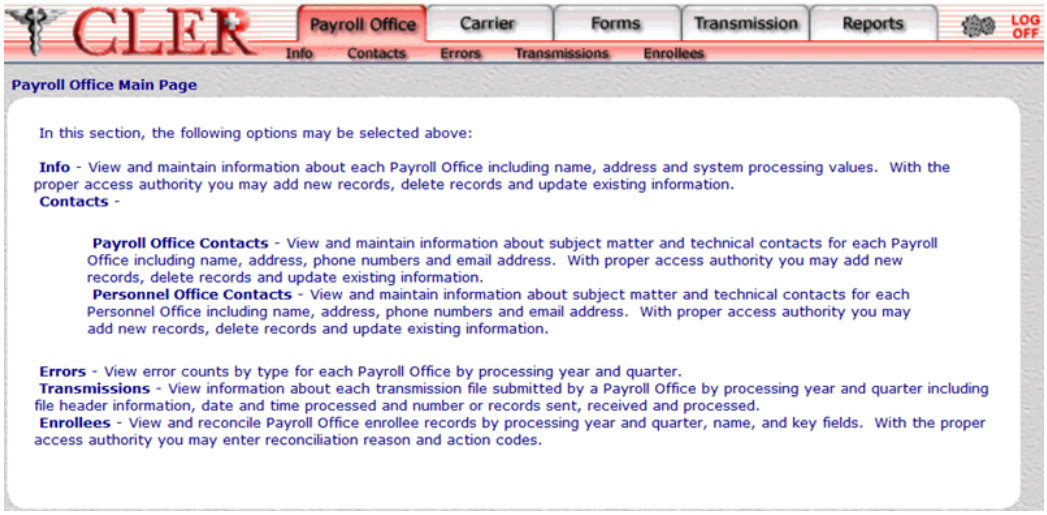


Figure 8: Payroll Office Main Page

2. Select Info on the Payroll Office tab. The Payroll Office Information page is displayed.

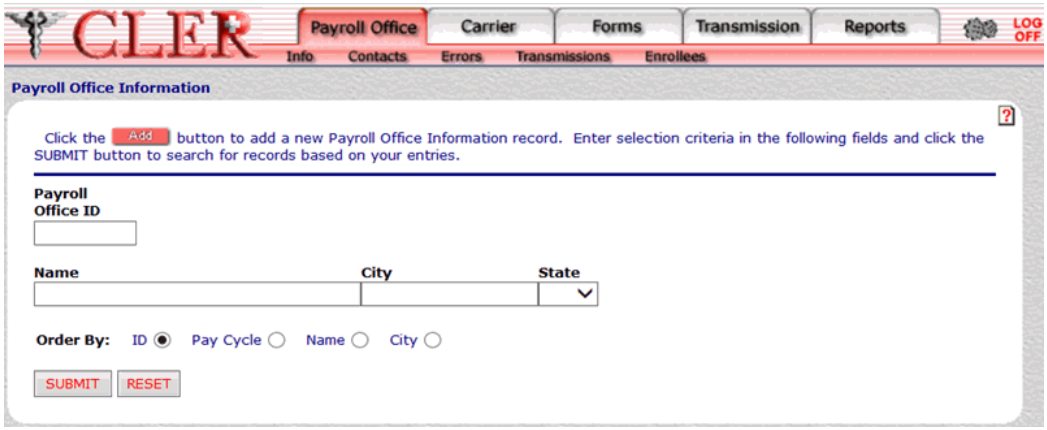


Figure 9: Payroll Office Information Page

3. Complete the following fields on the Payroll Office Information page as indicated and select the Submit button to confirm the data entered:

OR

Select the Reset button to clear all data entered.

Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

Name

City (see "***City - Payroll Office Field Instruction***" on page 351)

State (see "***State - (Payroll Office) Field Instruction***" on page 443)

Order By (see "***Order By - (Payroll Office Information) Field Instruction***" on page 397)

The Payroll Office Information search results page is displayed.

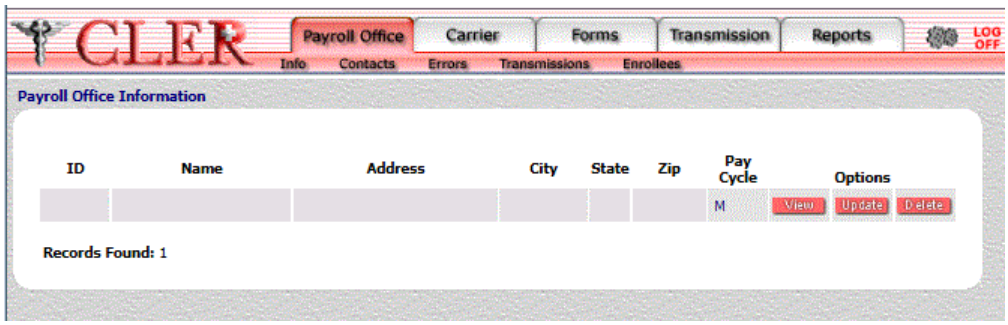


Figure 10: Payroll Office Information Search Results Page

The data on the Payroll Office Information search results page is categorized into the following fields:

ID (see "***ID - Field Description***" on page 379)

Name (see "***Name - (Payroll Office) Field Description***" on page 389)

Address (see "***Address - Payroll Office Field Description***" on page 331)

City (see "***City - Payroll Office Field Description***" on page 350)

State (see "***State - Payroll Office Field Description***" on page 443)

Zip (see "***ZIP - Payroll Office Field Description***" on page 460)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

Options (see "***Options - (View, Update, Delete) Field Description***" on page 394)

4. Select View next to the applicable record. The Payroll Office Information View page is displayed.

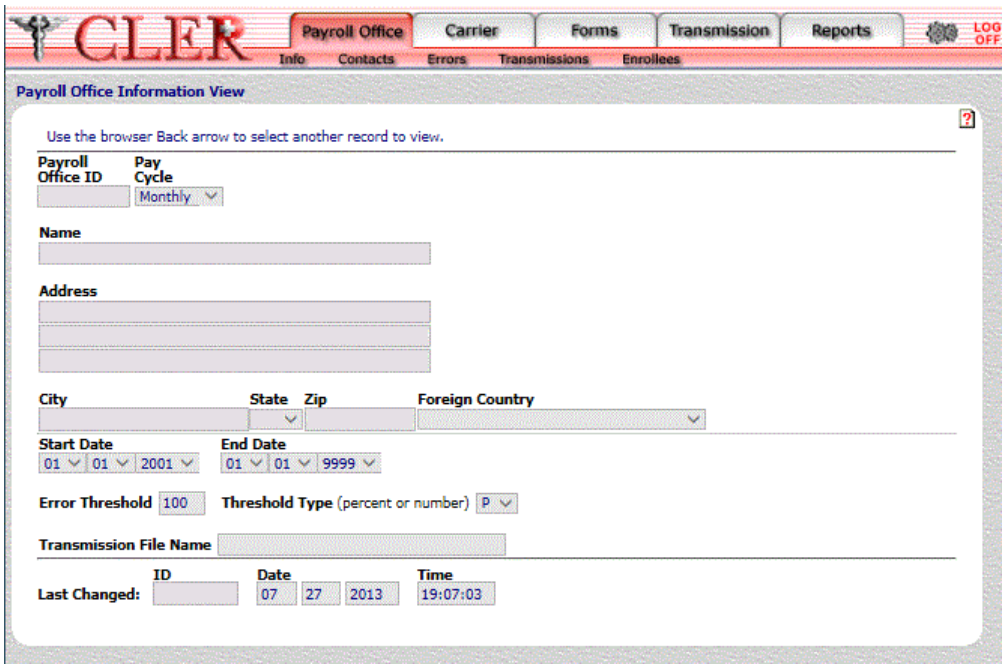


Figure 11: Payroll Office Information View Page

The data on the Payroll Office Information View page is categorized into following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

Name (see "***Name - (Payroll Office) Field Description***" on page 389)

Address Line 1 (see "***Address Line 1 - Payroll Office Field Description***" on page 333)

Address Line 2 (see "***Address Line 2 - Payroll Office Field Description***" on page 335)

Address Line 3 (see "***Address Line 3 - Payroll Office Field Description***" on page 338)

City (see "***City - Payroll Office Field Description***" on page 350)

State (see "***State - Payroll Office Field Description***" on page 443)

Zip (see "***ZIP - Payroll Office Field Description***" on page 460)

Foreign Country (see "***Foreign Country - (Payroll Office) Field Description***" on page 377)

Start Date (see "***Start Date - Payroll Office Field Description***" on page 441)

End Date (see "***End Date - (Payroll Office) Field Description***" on page 369)

Error Threshold (see "***Error Threshold - (Payroll Office) Field Description***" on page 372)

Threshold Type (see "***Threshold Type - (Payroll Office) Field Description***" on page 447)

Transmission File Name (see "***Transmission File Name - (Payroll Office) Field Description***" on page 451)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 381)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 381)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 381)

Note: To view another record, select your browser's Back button to return to the Payroll Office Information search results page and select the **View** button next to the applicable record.

Maintaining Payroll and Personnel Office Contact Records

The ***Contacts*** option on the Payroll Office Main Page allows users to add, view, activate/inactivate, or update information about payroll and personnel office contacts.

For more information see:

Adding a Payroll Office Contact Record.....27
Adding a Personnel Office Contact Record 31
Viewing a Payroll Office Contact Record 33
Viewing a Personnel Office Contact Record 37
Activating or Inactivating a Payroll Office Contact Record 41
Activating or Inactivating a Personnel Office Contact Record 44
Updating a Payroll Office Contact Record 47
Updating a Personnel Office Contact Record 52

Adding a Payroll Office Contact Record

The Add function allows users to add payroll office contact records.

To Add a Payroll Office Contact Record:

1. Select the ***Payroll Office*** tab on the CLER Main Menu.

2. Select ***Contacts*** on the Payroll Office tab. The Contacts Main Page is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

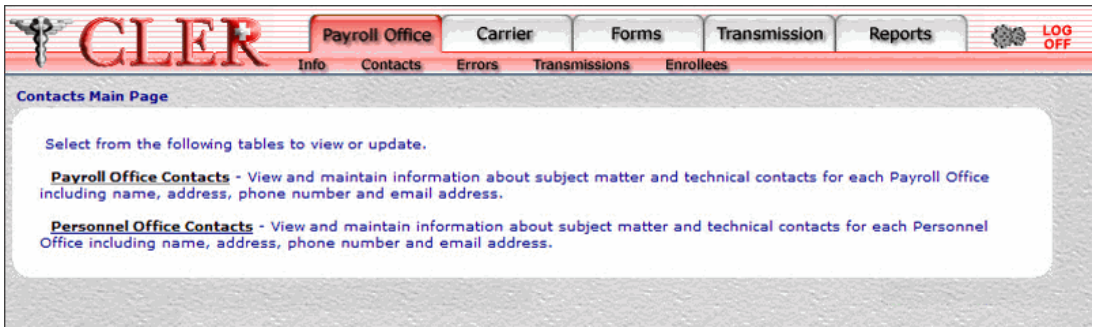


Figure 12: Contacts Main Page

3. Select ***Payroll Office Contacts*** on the Contacts Main Page to display the Payroll Office Contacts page.

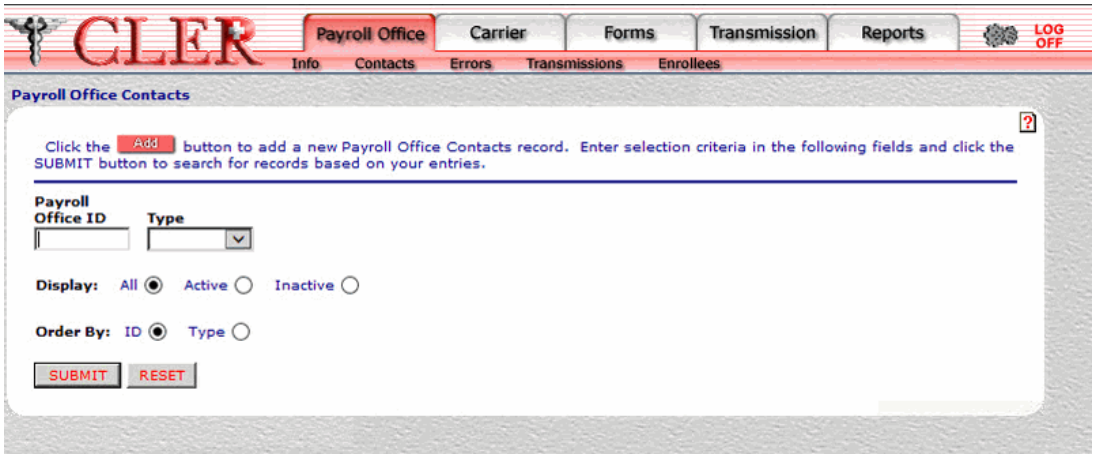


Figure 13: Payroll Office Contacts Page

4. Select the **Add** button on the Payroll Office Contacts page to display the Payroll Office Contacts Add page.

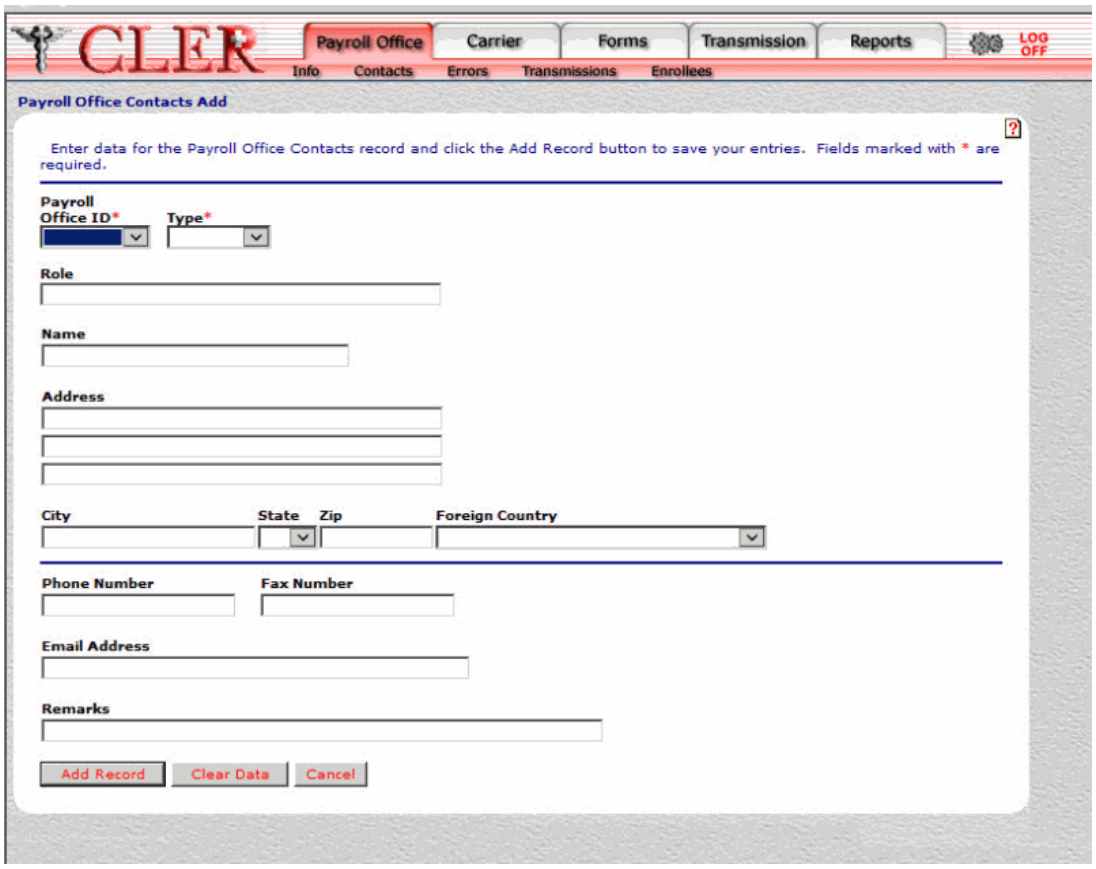


Figure 14: Payroll Office Contacts Add Page

5. Complete the following fields on the Payroll Office Contacts Add page:

OR

Select the **Clear Data** button to clear all data entered.

OR

Select the **Cancel** button to return to previous screen.

Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

Type (see "***Type - (Payroll Office Contacts Add) Field Instruction***" on page 453)

Role (see "***Role - (Payroll Office Contacts Add) Field Instruction***" on page 437)

Name (see "***Name - (Payroll Office) Field Instruction***" on page 389)

Address Line 1 (see "***Address Line 1 - Payroll Office Contacts Add Field Instruction***" on page 333)

Address Line 2 (see "***Address Line 2 - Payroll Office Contacts Add Field Instruction***" on page 335)

Address Line 3 (see "***Address Line 3 - Payroll Office Contacts Add Field Instruction***" on page 337)

City (see "***City - Payroll Office Field Instruction***" on page 351)

State (see "***State - (Payroll Office) Field Instruction***" on page 443)

Zip (see "***ZIP - (Payroll Office Contacts Add) Field Instruction***" on page 460)

Foreign Country (see "***Country - (Payroll Office Contacts Add) Field Instruction***" on page 357)

Phone Number (see "***Phone Number - (Payroll Office Contacts Add) Field Instruction***" on page 423)

Fax Number (see "***Fax Number - (Payroll Office Contacts Add) Field Instruction***" on page 374)

Email Address (see "***Email Address - (Payroll Office Contacts Add) Field Instruction***" on page 367)

Remarks (see "***Remarks - Field Instruction***" on page 436)

6. Select the **Add Record** button. If no errors occur, a popup appears to confirm the record has been added.

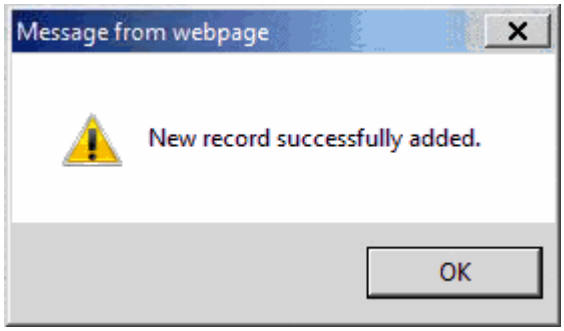


Figure 15: Transmission Online Entry Add Popup

7. Select the **OK** button to close the popup.

Note: To add another record, select the **Cancel** button to refresh the Personnel Office Contacts Add page and complete the fields for the new record.

Adding a Personnel Office Contact Record

The Add function allows users to add personnel office contact records.

To Add a Personnel Office Contact Record:

1. Select the ***Payroll Office*** tab on the CLER Main Menu.

2. Select ***Contacts*** on the Payroll Office tab. The Contacts Main Page is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

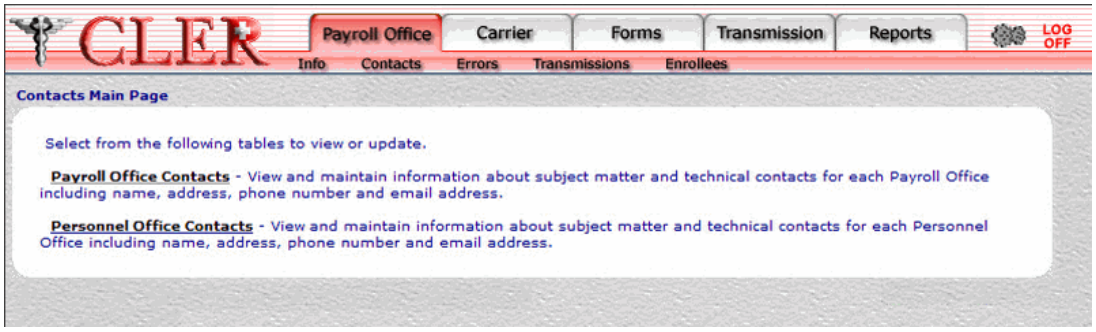


Figure 16: Contacts Main Page

3. Select ***Personnel Office Contacts*** on the Contacts Main Page to display the Personnel Office Contacts page.

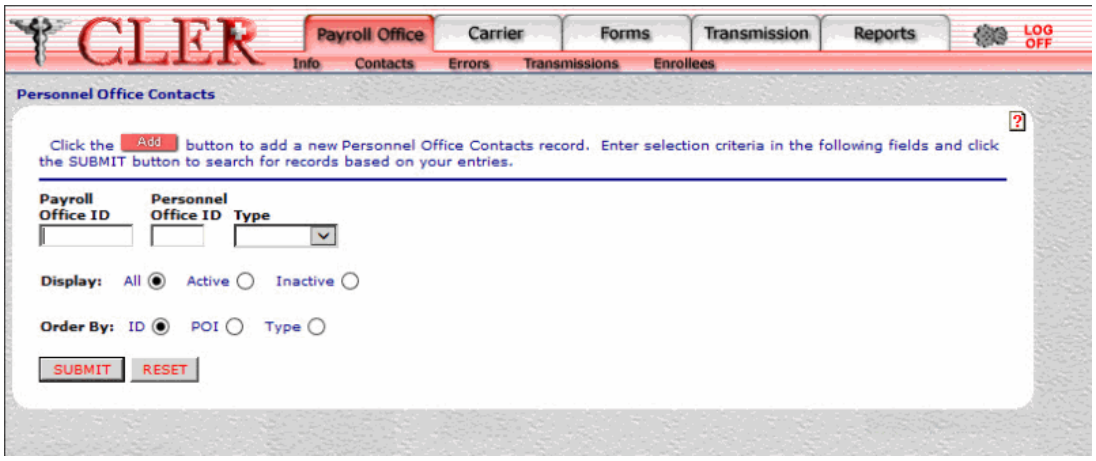


Figure 17: Personnel Office Contacts Page

4. Select the **Add** button on the Personnel Office Contacts page to display the Personnel Office Contacts Add page.

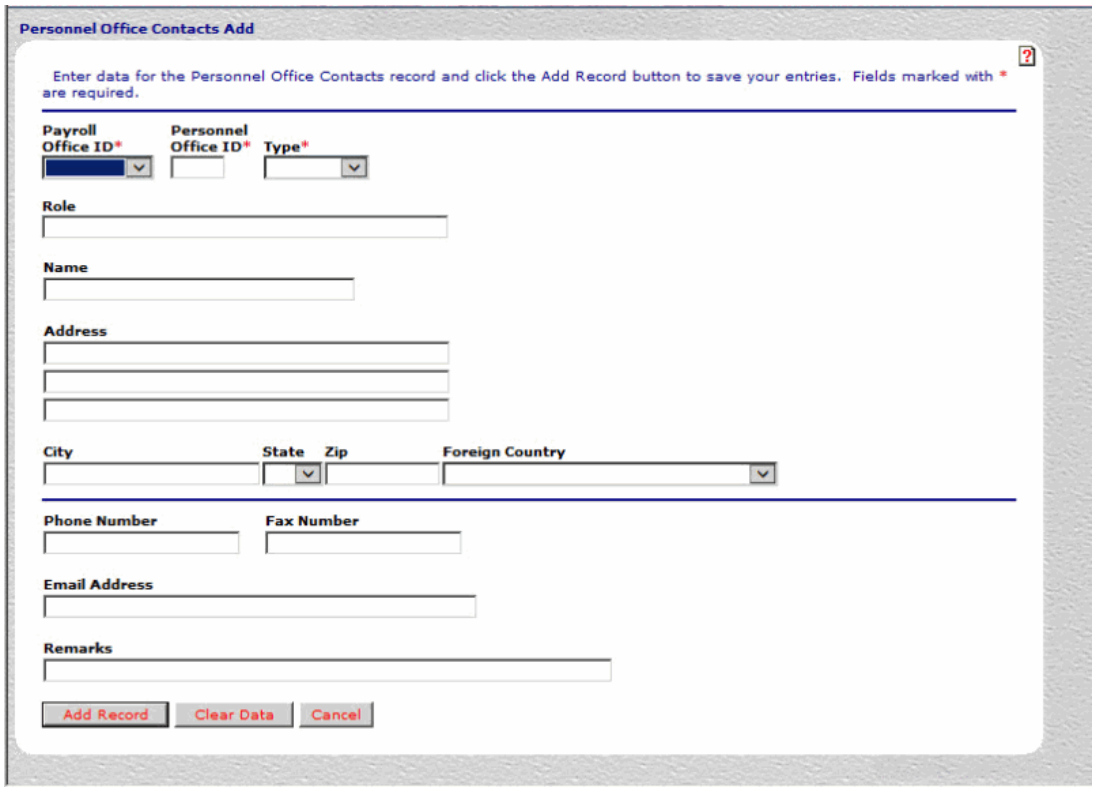


Figure 18: Personnel Office Contacts Add Page

5. Complete the following fields on the Personnel Office Contacts Add page:

   Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

   Personnel Office ID (see "***Personnel Office ID - (Required) Field Instruction***" on page 421)

   Type (see "***Type - Personnel Office Contacts Field Instruction***" on page 454)

   Role (see "***Role - (Personnel Office Contacts Add) Field Instruction***" on page 437)

   Name (see "***Name - Personnel Office Contacts Add Field Instruction***" on page 391)

   Address Line 1

   Address Line 2 (see "***Address Line 2 - Personnel Office Contacts Add Field Instruction***" on page 335)

   Address Line 3

City (see "***City - Personnel Office Contacts Add Field Instruction***" on page 351)

State (see "***State - Personnel Office Contacts Add Field Instruction***" on page 443)

Zip

Foreign Country (see "***Country - Personnel Office Contacts Add Field Instruction***" on page 358)

Phone Number (see "***Phone Number - Personnel Office Contacts Add Field Instruction***" on page 423)

Fax Number (see "***Fax Number - (Personnel Office Contacts Add) Field Instruction***" on page 375)

Email Address (see "***Email Address - (Personnel Office Contacts Add) Field Instruction***" on page 368)

Remarks (see "***Remarks - Field Instruction***" on page 436)

6. Select the **Add Record** button. If no errors occur, a popup appears to confirm the record has been added.

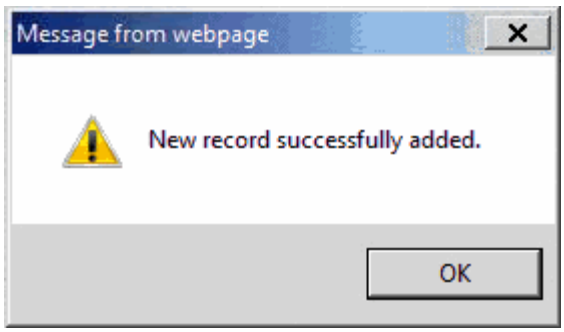


Figure 19: Transmission Online Entry Add Popup

7. Select the **OK** button to close the popup.

Note: To add another record, select the **Cancel** button to refresh the Personnel Office Contacts Add page and complete the fields for the new record.

Viewing a Payroll Office Contact Record

The View function allows users to view payroll office contact records.

To View a Payroll Office Contact Record:

1. Select the ***Payroll Office*** tab on the CLER Main Menu.

2. Select ***Contacts*** on the Payroll Office tab. The Contacts Main Page is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

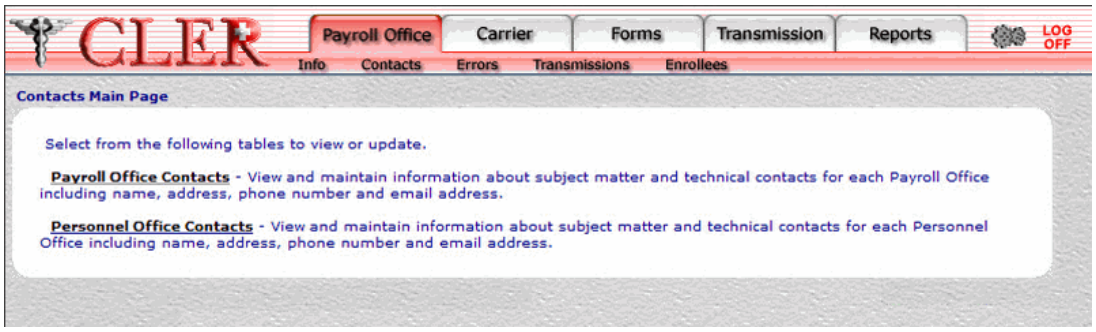


Figure 20: Contacts Main Page

3. Select ***Payroll Office Contacts*** to display the Payroll Office Contacts page.

Figure 21: Payroll Office Contacts Page

4. Complete the following fields on the Payroll Office Contacts page and select the **Submit** button to confirm the data entered:

OR

Select **Reset** to clear all data entered.

Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

Type (see "***Type - (Payroll Office Contact) Field Instruction***" on page 453)

Display (see "***Display - Payroll Office Contact Field Instruction***" on page 365)

Order By (see "***Order By - (Payroll Office Contact) Field Instruction***" on page 396)

The Payroll Office Contacts search results page is displayed.

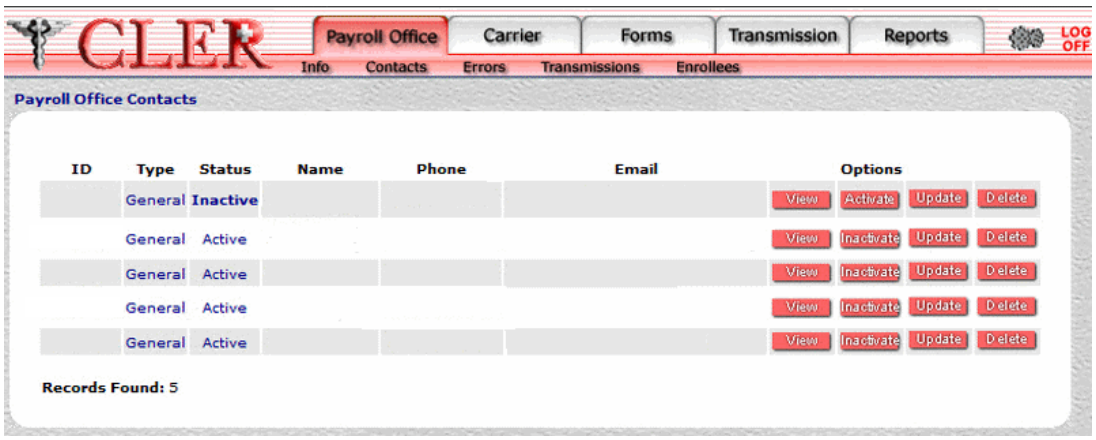


Figure 22: Payroll Office Contacts Search Results Page

The data on the Payroll Office Contacts search results page is categorized into the following fields:

ID (see "***ID - (Payroll Office) Field Description***" on page 379)

Type (see "***Type - (Payroll Office Contact) Field Description***" on page 453)

Status (see "***Status - (Payroll Office Contacts) Search Results Field Description***" on page 444)

Name (see "***Name - Payroll Office Contact Field Description***" on page 390)

Phone (see "***Maintaining Payroll Office Enrollee Records***" on page 56)

Email (see "***Email Address - (Payroll Office Contact) Field Description***" on page 367)

Options (see "***Options - (View, Activate, Update, Delete) Field Description***" on page 393)

5. Select the **View** button next to the applicable Payroll Office Contact. The Payroll Office Contacts View page is displayed.

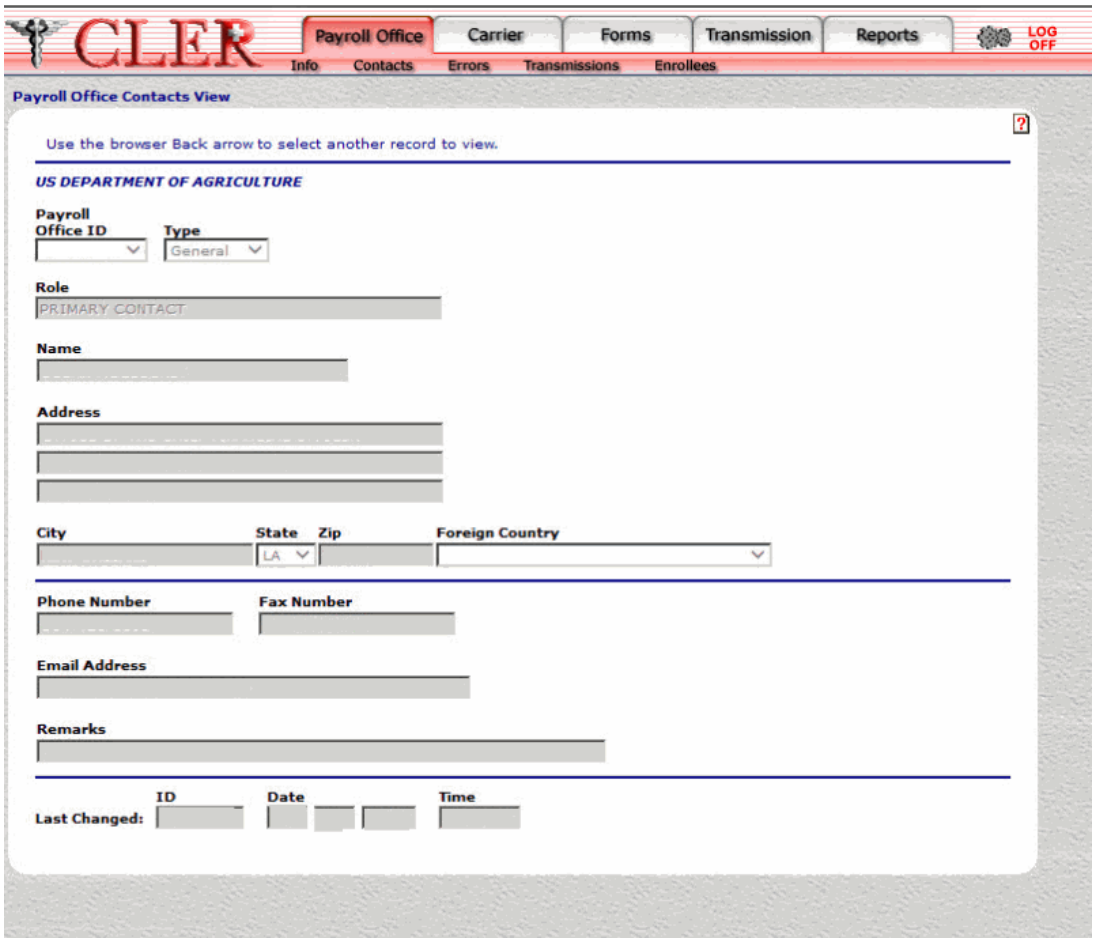


Figure 23: Payroll Office Contacts View Page

The data on the Payroll Office Contacts View page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Type (see "***Type - (Payroll Office Contact) Field Description***" on page 453)

Role (see "***Role - (Payroll Office Contact) Field Description***" on page 437)

Name (see "***Name - Payroll Office Contact Field Description***" on page 390)

Address Line 1 (see "***Address Line 1 - Payroll Office Contact Field Description***" on page 333)

Address Line 2 (see "***Address Line 2 - Payroll Office Contact Field Description***" on page 335)

Address Line 3 (see "***Address Line 3 - Payroll Office Contact Field Description***" on page 337)

City (see "***City - Payroll Office Field Description***" on page 350)

State (see "***State - Payroll Office Field Description***" on page 443)

Zip (see "***ZIP - Payroll Office Field Description***" on page 460)

Foreign Country (see "***Foreign Country - (Payroll Office) Field Description***" on page 377)

Phone Number (see "***Phone Number - (Payroll Office Contact) Field Description***" on page 423)

Fax Number (see "***Fax Number - (Payroll Office Contact) Field Description***" on page 374)

Email Address (see "***Email Address - (Payroll Office Contact) Field Description***" on page 367)

Remarks (see "***Remarks - Field Description***" on page 436)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 381)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 381)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 381)

Note: To view another record, select your browser's **Back** button to return to the Payroll Office Contact search results page and select the **View** button next to the applicable record.

Viewing a Personnel Office Contact Record

The View function allows users to view personnel office contact records.

To View a Personnel Office Contact Record:

1. Select ***Payroll Office*** tab on the CLER Main Menu.

2. Select ***Contacts*** on the Payroll Office tab. The Contacts Main Page is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

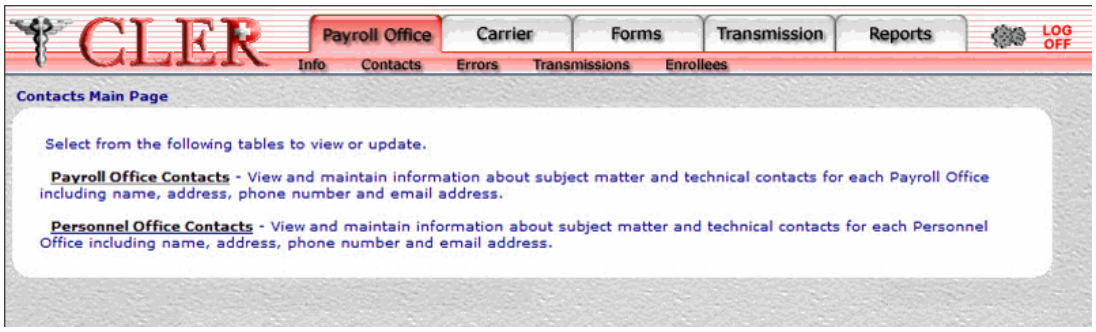


Figure 24: Contacts Main Page

3. Select ***Personnel Office Contacts*** on the Contacts Main Page. The Personnel Office Contacts page is displayed.

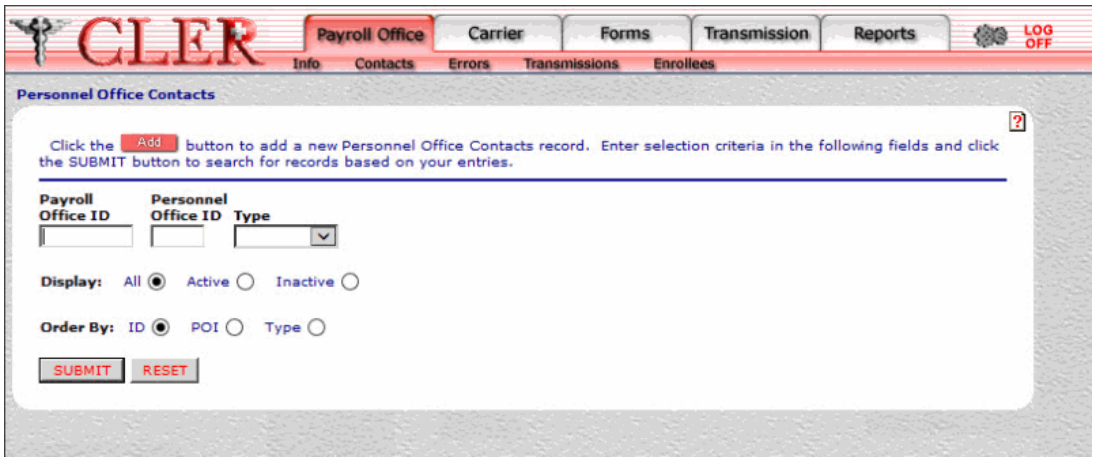


Figure 25: Personnel Office Contacts Page

4. Complete the following fields on the Personnel Office Contacts page:

   Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

   Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

   Type (see "***Type - (Personnel Office Contact - Optional) Field Instruction***" on page 453)

   Display (see "***Display - (Personnel Office Contact) Field Instruction***" on page 364)

   Order By (see "***Order By - (Personnel Office Contact) Field Instruction***" on page 397)

5. Select the **Submit** button to confirm all data entered.

OR

Select the **Reset** button to clear all data entered.

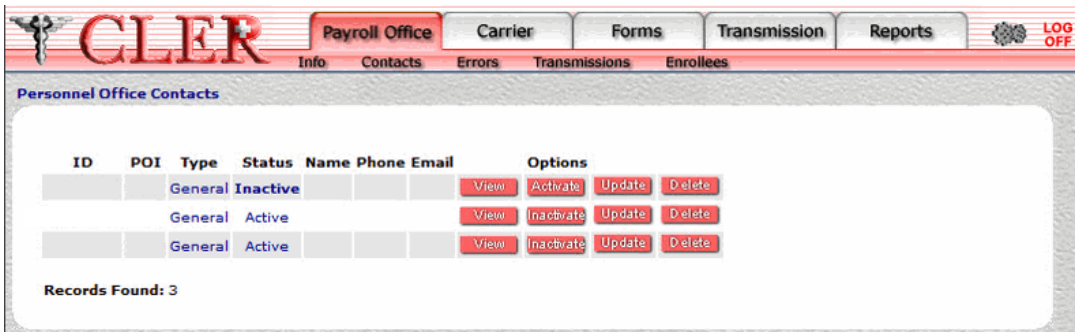


Figure 26: Personnel Office Contacts Inactive Search Results Page

The data on the Personnel Office Contacts search results page is categorized into the following fields:

ID (see "***ID - (Payroll Office) Field Description***" on page 379)

POI (see "***POI - (Personnel Office Contact) Field Description***" on page 424)

Type (see "***Type - Personnel Office Contacts Search Results Field Description***" on page 454)

Status (see "***Status - (Payroll Office Contacts) Search Results Field Description***" on page 444)

Name (see "***Name - Personnel Office Contact Field Description***" on page 390)

Phone (see "***Phone - (Personnel Office Contact) Field Description***" on page 422)

Email (see "***Email Address - (Personnel Office Contact) Field Description***" on page 367)

Options (see "***Options - (View, Activate, Update, Delete) Field Description***" on page 393)

6. Select the **View** button next to the applicable record. The Personnel Office Contacts View page is displayed.

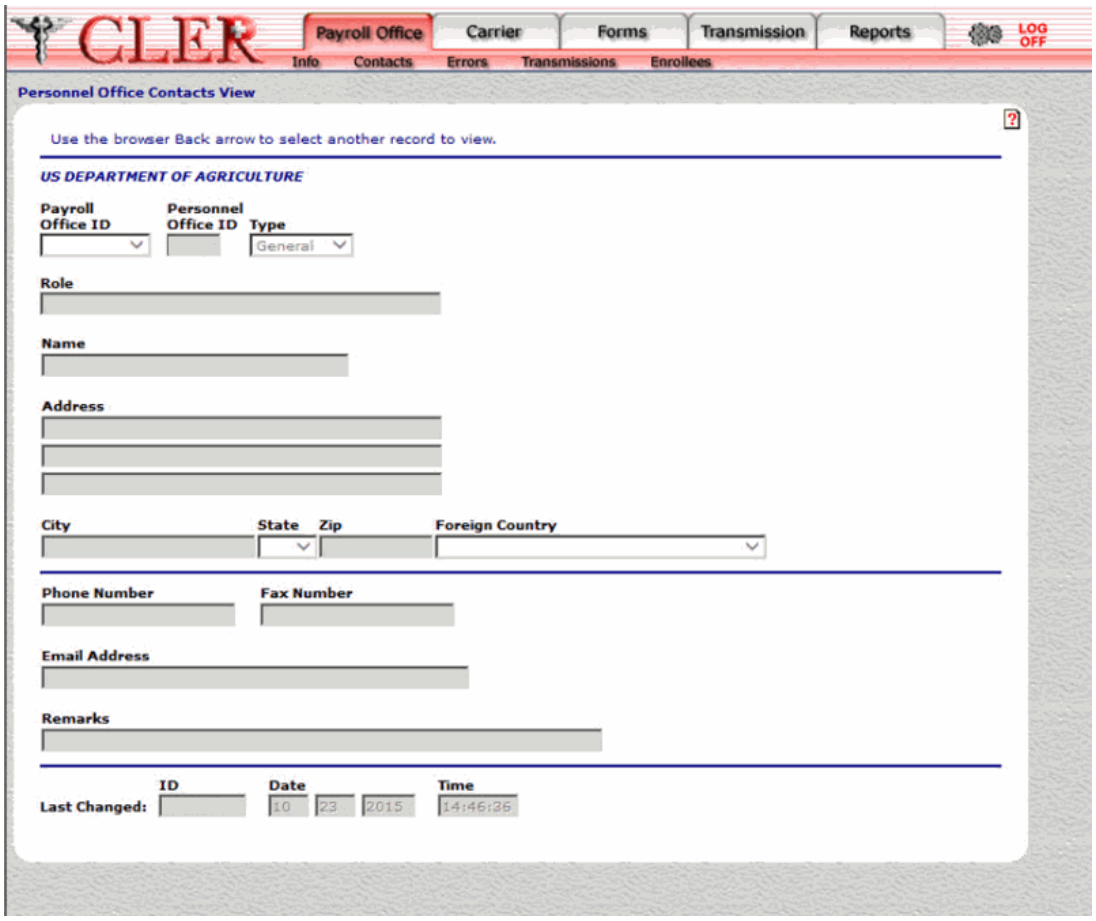


Figure 27: Personnel Office Contacts View Page

The data on the Personnel Office Contacts View page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Personnel Office ID (see "***Personnel Office ID - Field Description***" on page 422)

Type (see "***Type - (Personnel Office Contact) Field Description***" on page 453)

Role (see "***Role - (Personnel Office Contact) Field Description***" on page 437)

Name (see "***Name - Personnel Office Contact Field Description***" on page 390)

Address Line 1 (see "***Address Line 1 - Personnel Office Contact Field Description***" on page 333)

Address Line 2 (see "***Address Line 2 - Personnel Office Contact Field Description***" on page 335)

Address Line 3 (see "***Address Line 3 - Personnel Office Contact Field Description***" on page 338)

City (see "***City - Personnel Office Contact Field Description***" on page 351)

State (see "***State - (Personnel Office Contact) Field Description***" on page 443)

Zip (see "***ZIP - (Personnel Office Contact) Field Description***" on page 460)

Foreign Country (see "***Foreign Country - (Personnel Office) Field Description***" on page 377)

Phone Number (see "***Phone Number - (Personnel Office Contact) Field Description***" on page 423)

Fax Number (see "***Fax Number - (Personnel Office Contact) Field Description***" on page 374)

Email Address (see "***Email Address - (Personnel Office Contact) Field Description***" on page 368)

Remarks (see "***Remarks - Field Description***" on page 436)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 381)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 381)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 381)

Note: To view another record select your browser's **Back** button to return to the Personnel Office Contacts search results page and select the **View** button next to the applicable record.

Activating or Inactivating a Payroll Office Contact Record

The Activate/Inactivate function allows users to activate or inactivate payroll office contact records.

To Activate or Inactivate a Payroll Office Contact Record:

1. Select the ***Payroll Office*** tab on the CLER Main Menu.

2. Select ***Contacts*** on the Payroll Office tab. The Contacts Main Page is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

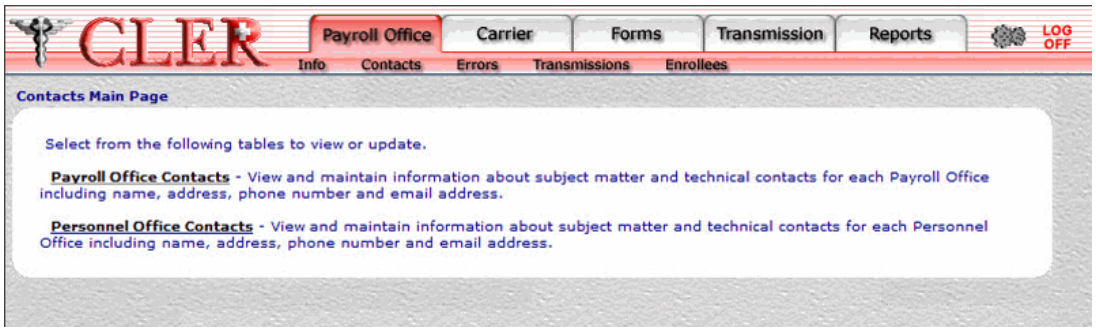


Figure 28: Contacts Main Page

3. Select ***Payroll Office Contacts*** on the Contacts Main Page. The Payroll Office Contacts Page is displayed.

Figure 29: Payroll Office Contacts Page

4. Complete the following fields on the Payroll Office Contacts page and select the **Submit** button to confirm all data entered:

OR

Select **Reset** to clear all data entered.

Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

Type (see "***Type - (Payroll Office Contact) Field Instruction***" on page 453)

Display (see "***Display - (Payroll Office Contact) Field Instruction***" on page 364)

Order By (see "***Order By - (Payroll Office Contact) Field Instruction***" on page 396)

The Payroll Office Contacts search results page is displayed.

Note: The **Inactivate** button is displayed next to records that have been activated. The **Activate** button is displayed next to records that have been inactivated.

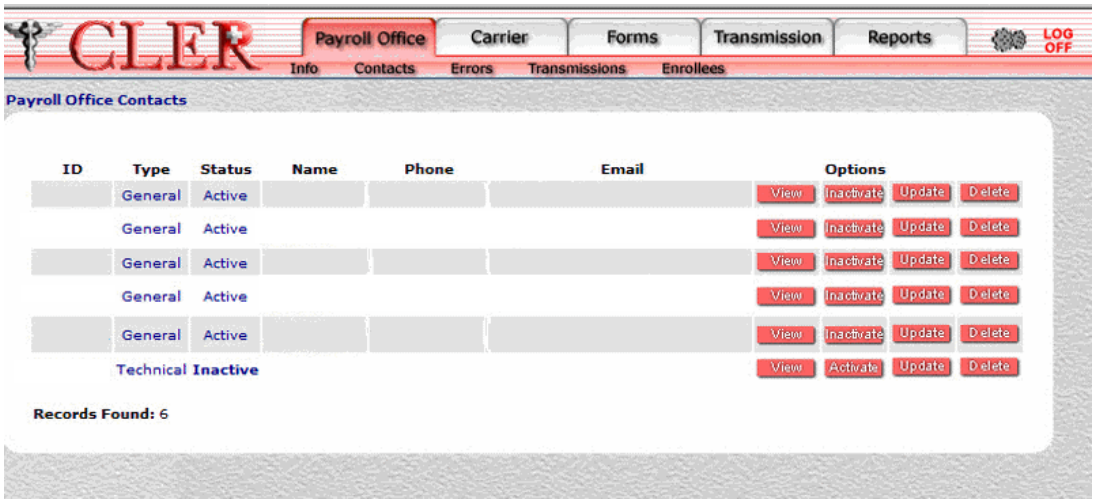


Figure 30: Payroll Office Contacts Search Results Page

The data on the Payroll Office Contacts search results page is categorized into the following fields:

ID (see "***ID - (Payroll Office) Field Description***" on page 379)

Type (see "***Type - (Payroll Office Contact) Field Description***" on page 453)

Status (see "***Status - (Payroll Office Contacts) Search Results Field Description***" on page 444)

Name (see "***Name - Payroll Office Contact Field Description***" on page 390)

Phone (see "***Phone - (Payroll Office Contact) Field Description***" on page 422)

Email (see "***Email Address - (Payroll Office Contact) Field Description***" on page 367)

Options (see "***Options - (View, Activate, Update, Delete) Field Description***" on page 393)

5. Select the **Activate** button to activate an inactive record. A popup appears to confirm the record has been activated.

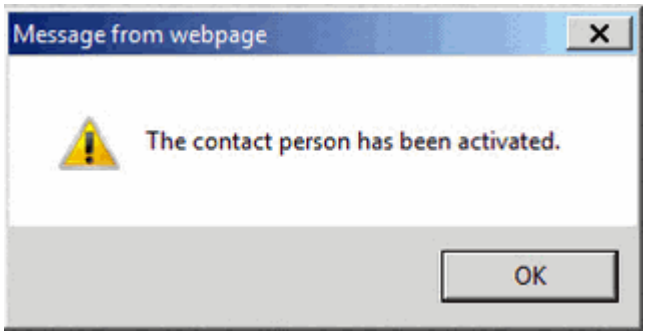


Figure 31: Personnel Office Contacts Activate popup

6. Select the **OK** button to close the popup and return to the Payroll Office Contacts search results page.

7. Select the **Inactivate** button to inactivate an activated record. A popup appears to confirm the record has been inactivated.

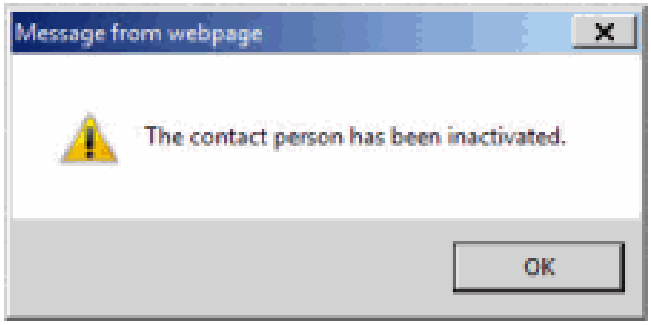


Figure 32: Payroll Office Contacts Inactivate Popup

8. Select the **OK** button to close the popup and return to the Payroll Office Contacts search results page.

Activating or Inactivating a Personnel Office Contact Record

The Activate/Inactivate function allows users to activate and inactivate personnel office contact records.

To Activate or Inactivating a Personnel Office Contact Record:

1. Select the ***Payroll Office*** tab on the CLER Main Menu.

2. Select ***Contacts*** on the Payroll Office tab.The Contacts Main Page is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

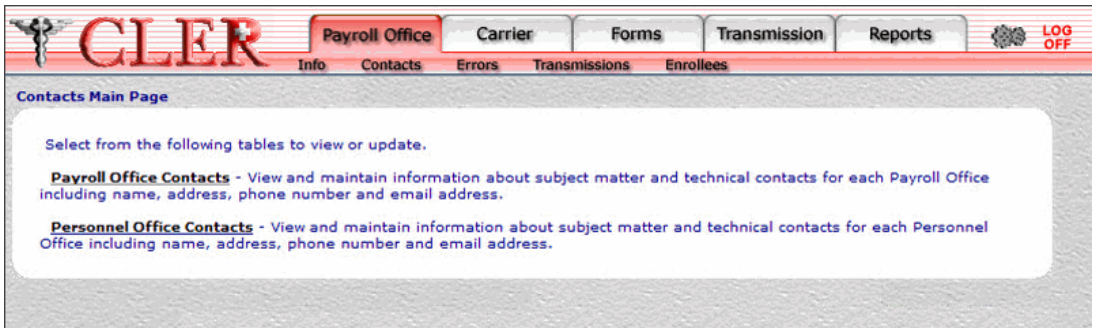


Figure 33: Contacts Main Page

3. Select ***Personnel Office Contacts*** on the Contacts Main Page. The Personnel Office Contacts page is displayed.

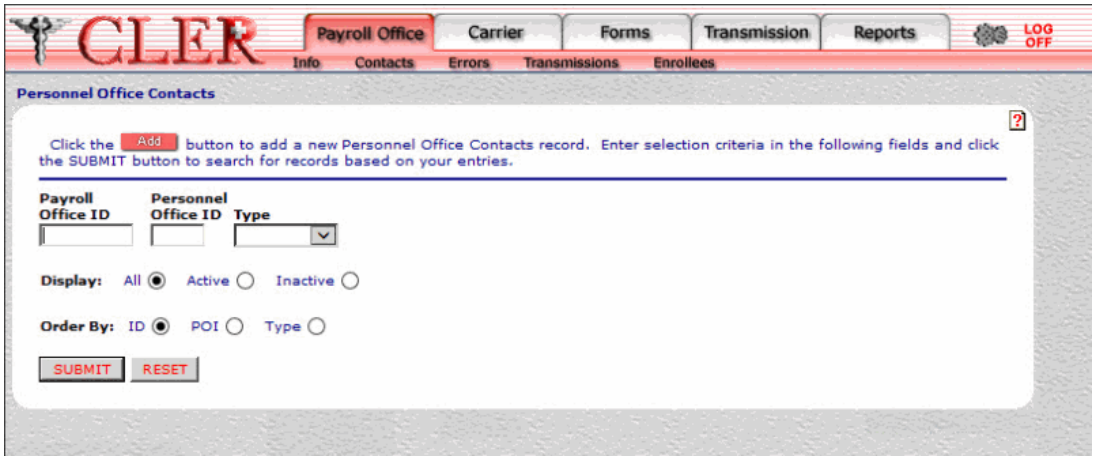


Figure 34: Personnel Office Contacts Page

4. Complete the following fields on the Personnel Office Contacts page:

   Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

   Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

   Type (see "***Type - (Personnel Office Contact - Optional) Field Instruction***" on page 453)

   Display (see "***Display - (Personnel Office Contact) Field Instruction***" on page 364)

   Order By (see "***Order By - (Personnel Office Contact) Field Instruction***" on page 397)

5. Select the **Submit** button to confirm all data entered. The Personnel Office Contacts Search Results page is displayed.

OR

Select the **Reset** button to clear all data entered.

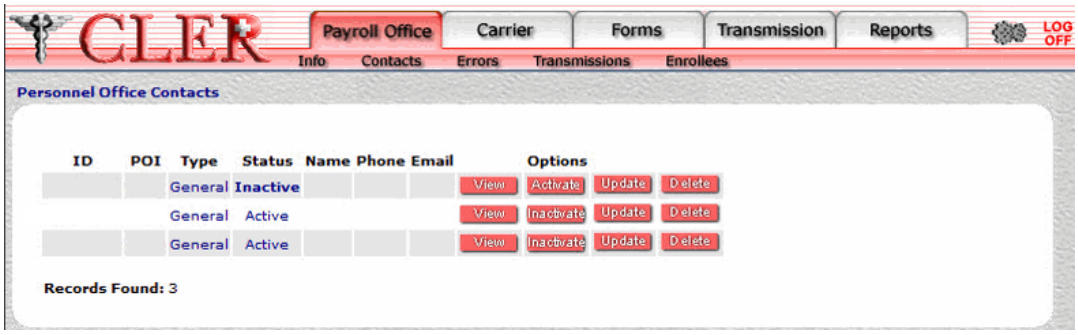


Figure 35: Personnel Office Contacts Inactive Search Results Page

The data on the Personnel Office Contacts search results page is categorized into the following fields:

ID (see "***ID - Field Description***" on page 379)

POI (see "***POI - (Personnel Office Contact) Field Description***" on page 424)

Type (see "***Type - Personnel Office Contacts Search Results Field Description***" on page 454)

Status (see "***Status - (Active/Inactive) Field Description***" on page 444)

Name (see "***Name - Personnel Office Contact Field Description***" on page 390)

Phone (see "***Phone - (Personnel Office Contact) Field Description***" on page 422)

Email (see "***Email Address - (Personnel Office Contact) Field Description***" on page 367)

Options (see "***Options - (View, Activate, Update, Delete) Field Description***" on page 393)

Note: The **Inactivate** button is displayed next to records that have been activated. The **Activate** button is displayed next to records that have been activated.

6. Select the **Activate** button to activate an inactive record. A popup appears to confirm the record has been activated.

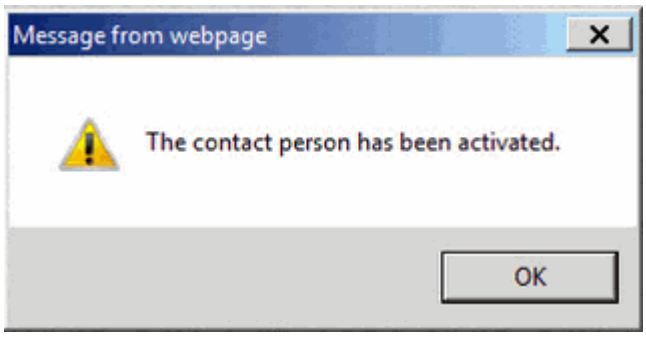


Figure 36: Personnel Office Contacts Activate popup

7. Select the **OK** button to close the popup and return to the Personnel Office Contacts search results page.

8. Select the **Inactivate** button to inactivate an activated record. A popup appears to confirm the record has been inactivated.

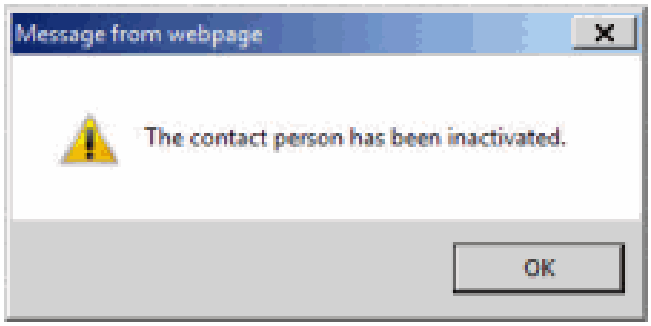


Figure 37: Payroll Office Contacts Inactivate Popup

9. Select the **OK** button to close the popup and return to the Personnel Office Contacts search results page.

Updating a Payroll Office Contact Record

The Update function allows users to update payroll office contact records.

To Update a Payroll Office Contact Record:

1. Select the ***Payroll Office*** tab on the CLER Main Menu.

2. Select ***Contacts*** on the Payroll Office Main page.The Contacts Main Page is displayed.

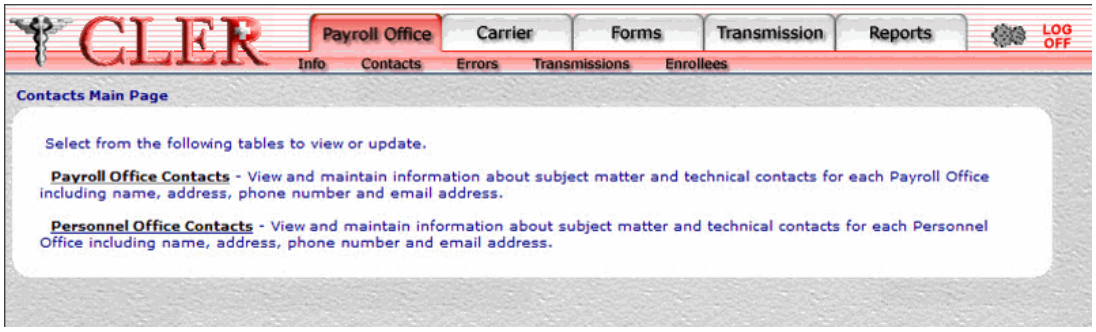


Figure 38: Contacts Main Page

3. Select ***Payroll Office Contacts***. The Payroll Office Contacts page is displayed.

Figure 39: Payroll Office Contacts Page

4. Complete the following fields on the Payroll Office Contacts page:

   Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

   Type (see "***Type - (Payroll Office Contact) Field Instruction***" on page 453)

   Display (see "***Display - Payroll Office Contact Field Instruction***" on page 365)

   Order By (see "***Order By - (Payroll Office Contact) Field Instruction***" on page 396)

5. Select the **Submit** button to confirm all data entered. The Payroll Office Contacts Search Results page is displayed.

OR

Select the **Reset** button to clear all data entered.

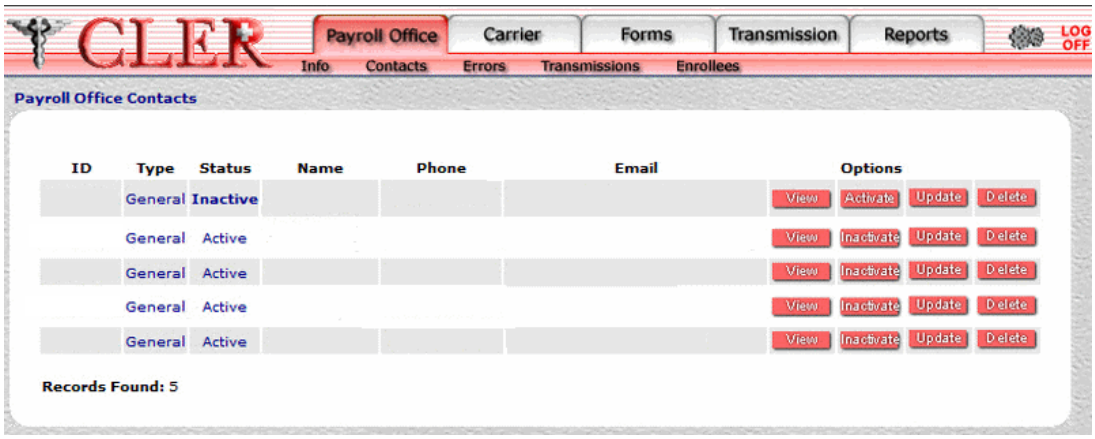


Figure 40: Payroll Office Contacts Search Results Page

The data on the Payroll Office Contacts search results page is categorized into the following fields:

ID (see "***ID - (Payroll Office) Field Description***" on page 379)

Type (see "***Type - (Payroll Office Contact) Field Description***" on page 453)

Status (see "***Status - (Payroll Office Contacts) Search Results Field Description***" on page 444)

Name (see "***Name - Payroll Office Contact Field Description***" on page 390)

Phone (see "***Maintaining Payroll Office Enrollee Records***" on page 56)

Email (see "***Email Address - (Payroll Office Contact) Field Description***" on page 367)

Options (see "***Options - (View, Activate, Update, Delete) Field Description***" on page 393)

6. Select the **Update** button next to the applicable record.The Payroll Office Contacts Update page is displayed.

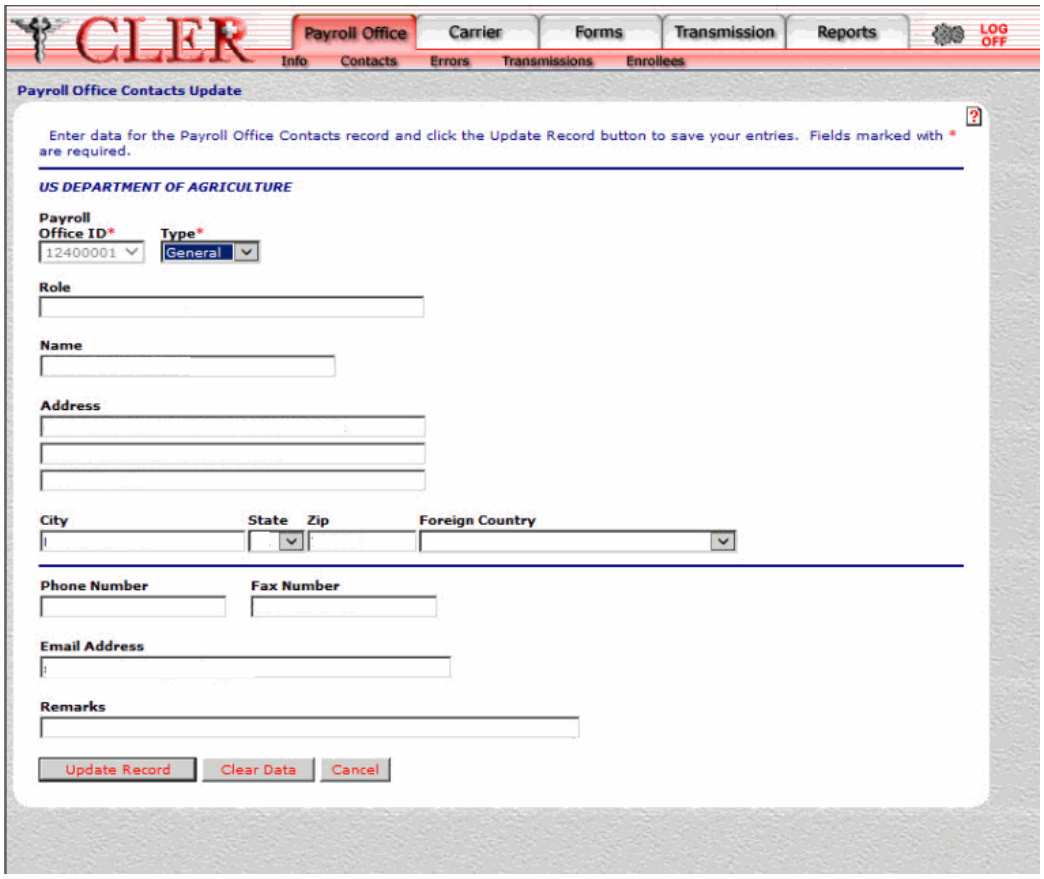


Figure 41: Payroll Office Contacts Update Page

7. Complete the following fields to update the applicable information:

   Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

   Type (see "***Type - (Payroll Office Contact) Field Instruction***" on page 453)

   Role (see "***Role - (Payroll Office Contacts Add) Field Instruction***" on page 437)

   Name (see "***Name - (Payroll Office) Field Instruction***" on page 389)

   Address Line 1 (see "***Address Line 1 - Payroll Office Contacts Add Field Instruction***" on page 333)

   Address Line 2 (see "***Address Line 2 - Payroll Office Contacts Add Field Instruction***" on page 335)

Address Line 3 (see "***Address Line 3 - Payroll Office Contacts Add Field Instruction***" on page 337)

City (see "***City - Payroll Office Field Instruction***" on page 351)

State (see "***State - (Payroll Office) Field Instruction***" on page 443)

Zip (see "***ZIP - (Payroll Office Contacts Add) Field Instruction***" on page 460)

Foreign Country (see "***Country - (Payroll Office Contacts Add) Field Instruction***" on page 357)

Phone Number (see "***Phone Number - (Payroll Office Contacts Add) Field Instruction***" on page 423)

Fax Number (see "***Fax Number - (Payroll Office Contacts Add) Field Instruction***" on page 374)

Email Address (see "***Email Address - (Payroll Office Contacts Add) Field Instruction***" on page 367)

Remarks (see "***Remarks - Field Instruction***" on page 436)

8. Select the **Update Record** button. A popup appears to confirm the record has been updated.

   OR

   Select the **Clear Data** button to clear all data entered.

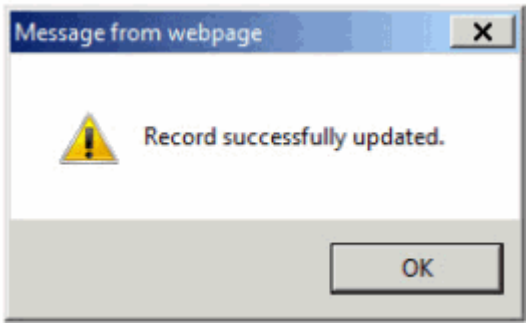


Figure 42: Payroll Office Contact Update Popup

9. Select the **OK** button to close the popup.

Note: To update another record, select the **Cancel** button to return to the Payroll Office Contacts Search Results page and select the **Update** button next to the applicable record.

Updating a Personnel Office Contact Record

The **Update** function allows users to update personnel office contact records.

To Update a Personnel Office Contact Record:

1. Select the ***Payroll Office*** tab on the CLER Main Menu.

2. Select ***Contacts*** on the Payroll Office tab. The Contacts Main Page is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

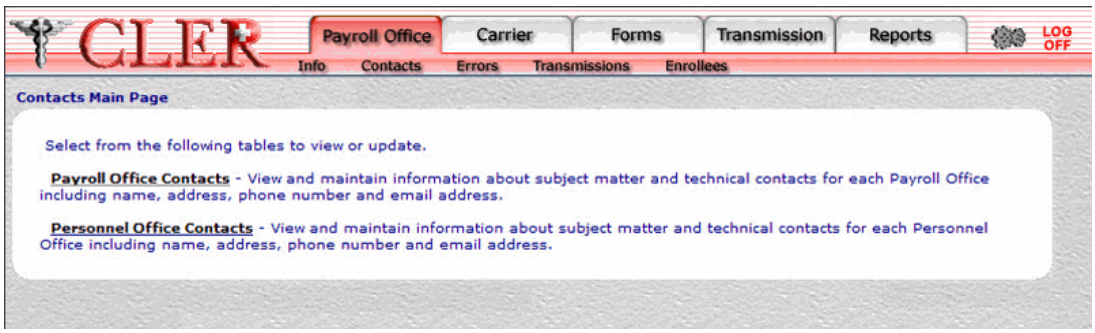


Figure 43: Contacts Main Page

3. Select ***Personnel Office Contacts*** on the Contacts Main Page. The Personnel Office Contacts page is displayed.

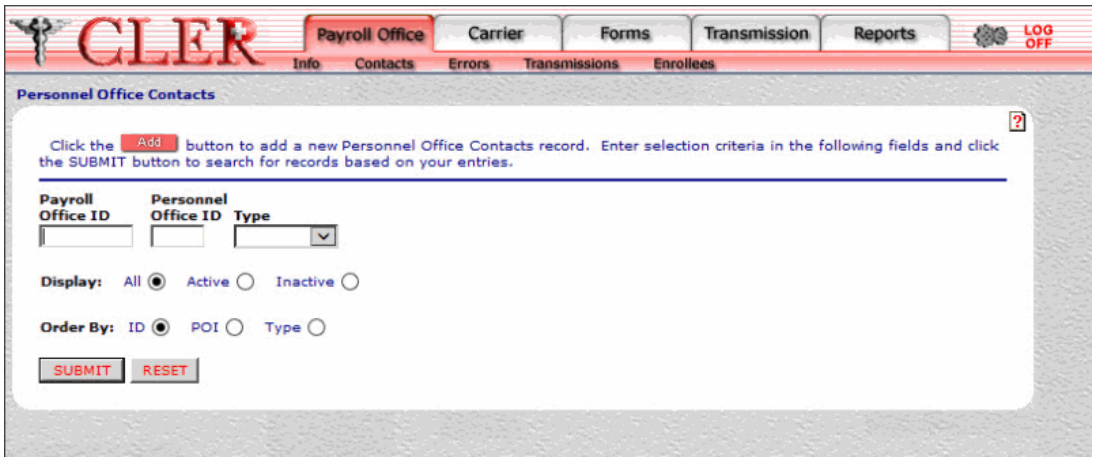


Figure 44: Personnel Office Contacts Page

4. Complete the following fields on the Personnel Office Contacts page:

   Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

   Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

Type (see "***Type - (Personnel Office Contact - Optional) Field Instruction***" on page 453)

Display (see "***Display - (Personnel Office Contact) Field Instruction***" on page 364)

Order By (see "***Order By - (Personnel Office Contact) Field Instruction***" on page 397)

5. Select the **Submit** button to confirm all data entered. The Personnel Office Contacts Search Results page is displayed.

OR

Select the **Reset** button to clear all data entered.

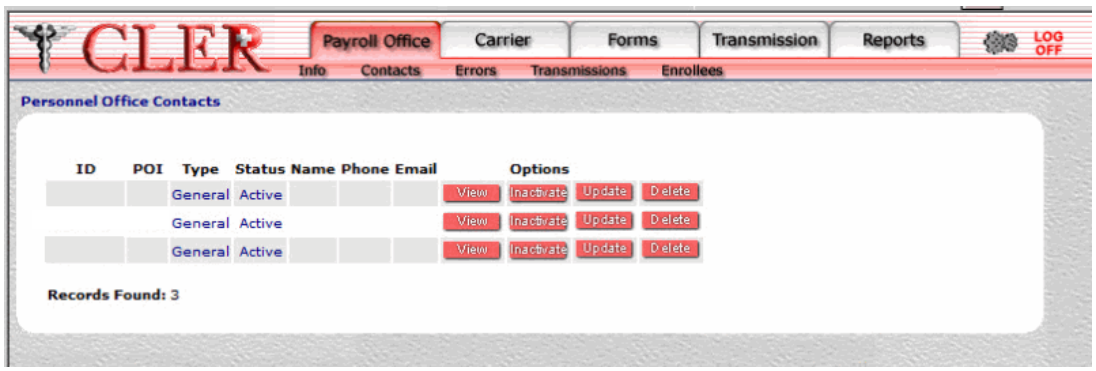


Figure 45: Personnel Office Contacts Search Results Page

The data on the Personnel Office Contacts search results page is categorized into the following fields:

ID (see "***ID - (Payroll Office) Field Description***" on page 379)

POI (see "***POI - (Personnel Office Contact) Field Description***" on page 424)

Type (see "***Type - Personnel Office Contacts Search Results Field Description***" on page 454)

Status (see "***Status - (Payroll Office Contacts) Search Results Field Description***" on page 444)

Name (see "***Name - Personnel Office Contact Field Description***" on page 390)

Phone (see "***Phone - (Personnel Office Contact) Field Description***" on page 422)

Email (see "***Email Address - (Personnel Office Contact) Field Description***" on page 367)

Options (see "***Options - (View, Activate, Update, Delete) Field Description***" on page 393)

6. Select the **Update** button next to the applicable record. The Personnel Office Contacts Update page is displayed.

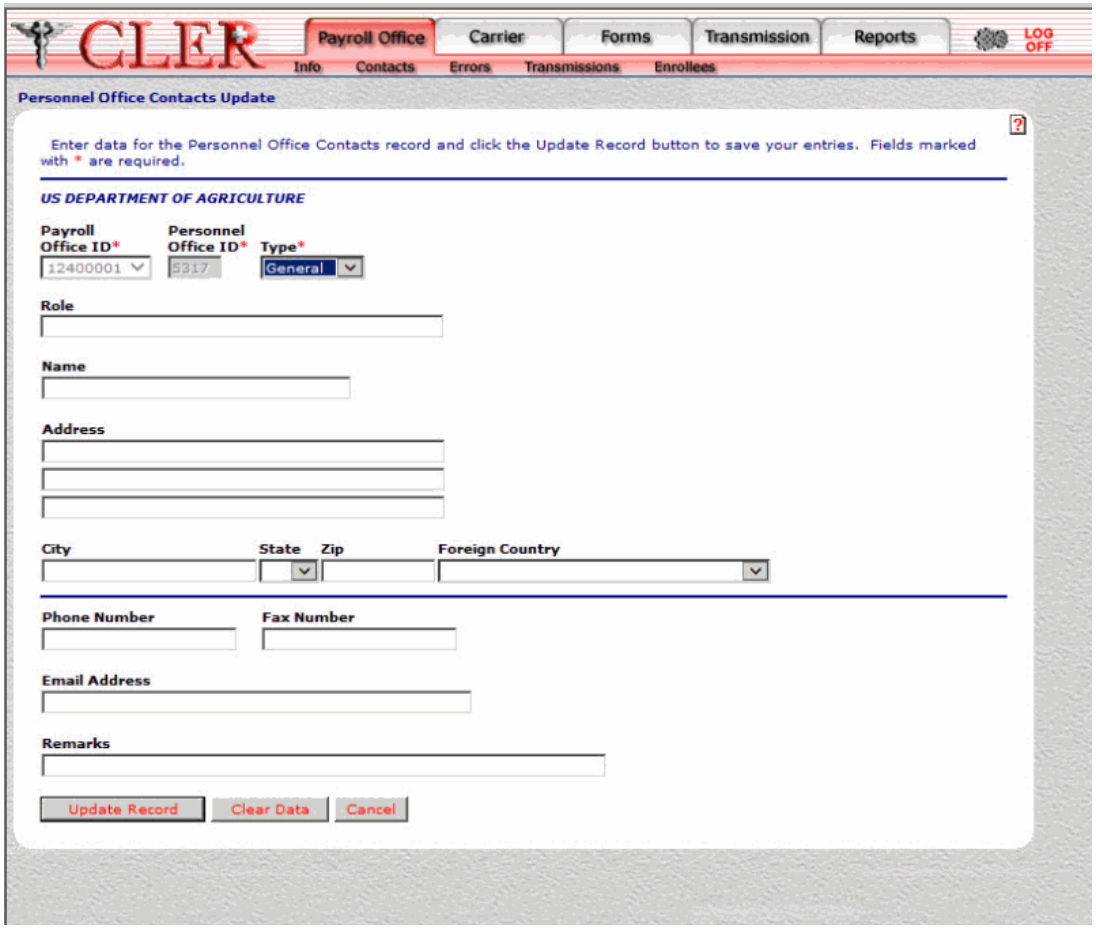


Figure 46: Personnel Office Contacts Update Page

7. Complete the following applicable fields on the Personnel Office Contacts Update page:

   Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

   Personnel Office ID (see "***Personnel Office ID - Field Description***" on page 422)

   Type (see "***Type - Personnel Office Contacts Field Instruction***" on page 454)

   Role (see "***Role - (Personnel Office Contacts Add) Field Instruction***" on page 437)

   Name (see "***Name - Personnel Office Contacts Add Field Instruction***" on page 391)

   Address Line 1

   Address Line 2 (see "***Address Line 2 - Personnel Office Contacts Add Field Instruction***" on page 335)

Address Line 3

City (see "***City - Personnel Office Contacts Add Field Instruction***" on page 351)

State (see "***State - Personnel Office Contacts Add Field Instruction***" on page 443)

Zip

Foreign Country (see "***Country - Personnel Office Contacts Add Field Instruction***" on page 358)

Phone Number (see "***Phone Number - Personnel Office Contacts Add Field Instruction***" on page 423)

Fax Number (see "***Fax Number - (Personnel Office Contacts Add) Field Instruction***" on page 375)

Email Address (see "***Email Address - (Personnel Office Contacts Add) Field Instruction***" on page 368)

Remarks (see "***Remarks - Field Instruction***" on page 436)

8. Select the **Update Record** button. A popup appears to confirm the record has been updated.

OR

Select the **Clear Data** button to clear all data entered.

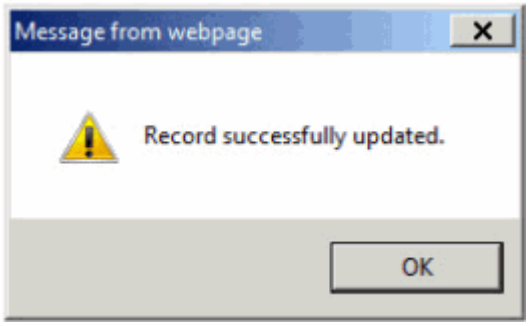


Figure 47: Payroll Office Contact Update Popup

9. Select the **OK** button to close the popup.

Note: To update another record, select the **Cancel** button to return to the Personnel Office Contacts Search Results page and select the **Update** button next to the applicable record.

Maintaining Payroll Office Enrollee Records

The ***Enrollees*** option on the Payroll Office Main Page allows users to view and/or reconcile payroll office enrollee records. With the proper access authority, reconciliation reason and reconciliation action codes may be entered.

For more information see:

Viewing a Payroll Office Enrollee Record **56**
Reconciling a Payroll Office Enrollee Record **63**
Viewing a Matching Carrier Enrollee Record or Duplicate Payroll Office Enrollee Record **71**

Viewing a Payroll Office Enrollee Record

The View function allows the users to view payroll office enrollee records.

To View a Payroll Office Enrollee Record:

1. Select the ***Payroll Office*** tab on the CLER Main Menu.

2. Select ***Enrollees*** on the Payroll Office tab. The Payroll Office Enrollees page is displayed.

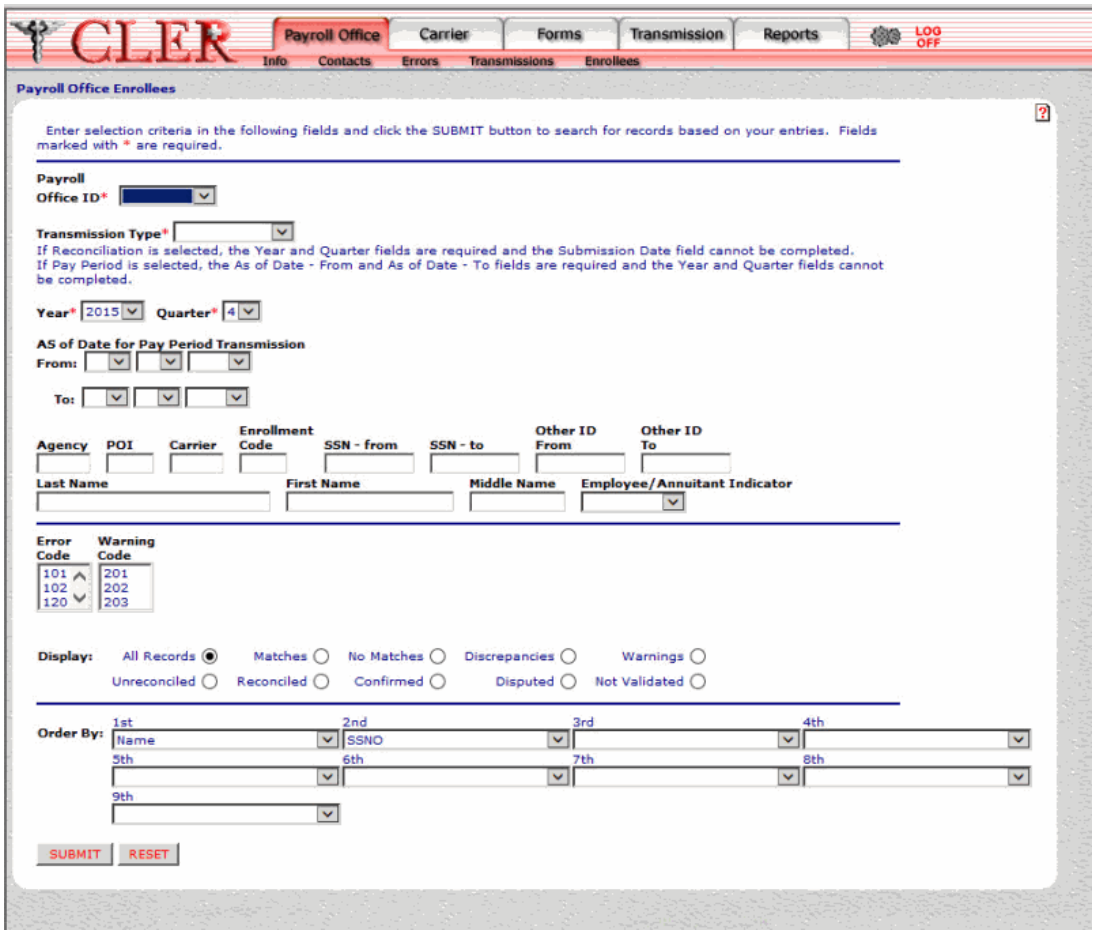


Figure 48: Payroll Office Enrollees Page

3. Complete the following fields on the Payroll Office Enrollees page:

Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

Transmission Type (see "***Transmission Type - (Required) Field Instruction***" on page 451)

Year (see "***Year - (Required) Field Instruction***" on page 457)

Quarter (see "***Quarter - (Select - Reconciliation) Field Instruction***" on page 429)

As of Date for Pay Period Transmission From (see "***As of Date for Pay Period Transmission From - Field Instruction***" on page 342)

As of Date for Pay Period Transmission To (see "***As of Date for Pay Period Transmission To - Field Instruction***" on page 342)

Agency (see "***Agency - Field Instruction***" on page 339)

POI (see "***POI - Payroll Office Enrollee Field Instruction***" on page 424)

Carrier (see "***Carrier - Field Instruction***" on page 345)

Enrollment Code (see "***Enrollment Code - Field Instruction***" on page 371)

SSN - from

SSN - to (see "***SSN To - Field Instruction***" on page 440)

Other ID From (see "***Other ID From - Field Instruction***" on page 414)

Other ID To (see "***Other ID To - Field Instruction***" on page 415)

Last Name (see "***Last Name - Enrollee Field Instruction***" on page 385)

First Name (see "***First Name - Enrollee Field Instruction***" on page 375)

Middle Name (see "***Middle Name - Enrollee Field Instruction***" on page 389)

Employee/Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Instruction***" on page 368)

Error Code (see "***Error Code - (Select) Field Instruction***" on page 371)

Warning Code (see "***Warning Code - (Select) Field Instruction***" on page 455)

Display (see "***Display - (All Records) Field Instruction***" on page 363)

Order By 1st (see "***Order By 1st - (Enrollee) Field Instruction***" on page 399)

Order By 2nd (see "***Order By 2nd - Field Instruction***" on page 403)

Order By 3rd (see "***Order By 3rd - Field Instruction***" on page 406)

Order By 4th (see "***Order By 4th - Field Instruction***" on page 408)

Order By 5th (see "***Order By 5th - Field Instruction***" on page 410)

Order By 6th (see "***Order By 6th - Field Instruction***" on page 411)

Order By 7th (see "***Order By 7th - Agency Field Instruction***" on page 412)

Order By 8th (see "***Order By 8th - Agency Field Instruction***" on page 412)

Order By 9th (see "***Order by 9th - Agency Field Instruction***" on page 413)

4. Select the **Submit** button to confirm the data entered. The Payroll Office Enrollees Search Results page is displayed.

   OR

   Select the **Reset** button to clear all data entered.

Note: The Payroll Office Enrollees Search Results (Other ID) page is displayed when **24900002**, **24900003**, or **160099XX** is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

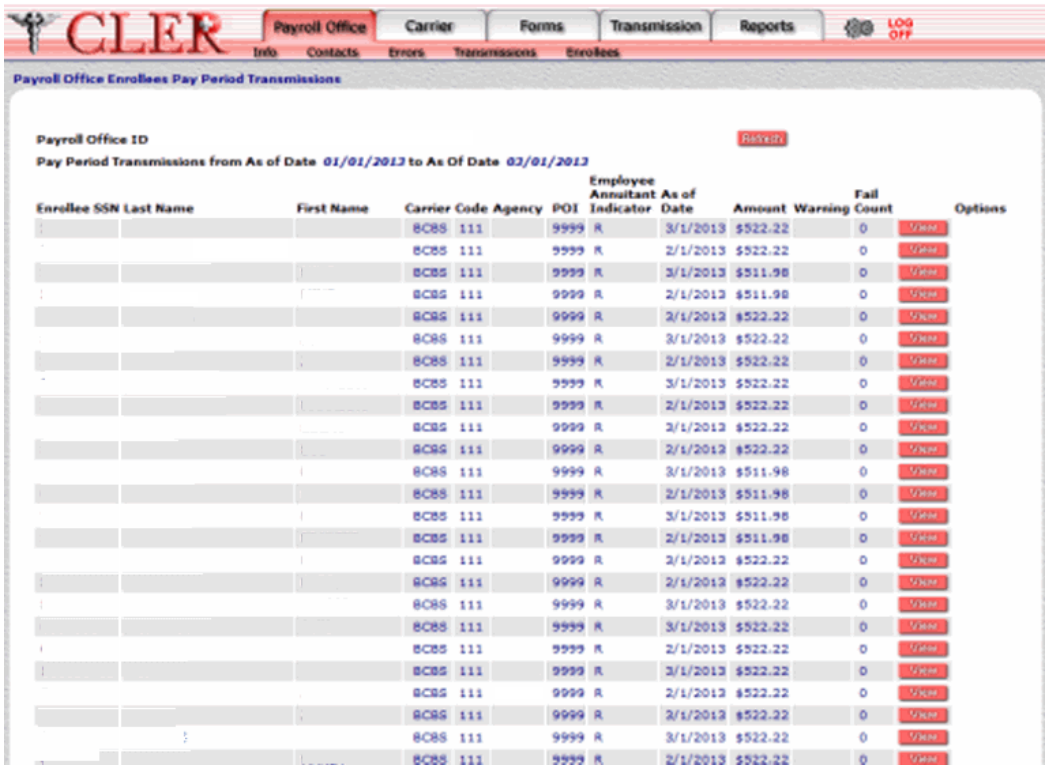


Figure 49: Payroll Office Enrollees Pay Period Transmissions Search Results Page

The data on the Payroll Office Enrollees search results page is categorized into the following fields:

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Carrier (see "***Carrier - Field Description***" on page 345)

Code (see "***Code - Field Description***" on page 352)

Agency (see "***Agency - Enrollee Field Description***" on page 338)

POI (see "***POI - Field Description***" on page 424)

Employee Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Description***" on page 368)

As of Date (see "***As of Date - Carrier Transmissions Field Description***" on page 342)

Amount (see "***Amount - Field Description***" on page 340)

Warning

Fail Count (see "***Fail Count - Field Description***" on page 373)

Options (see "***Options - (View Only) Field Description***" on page 393)

5. Select the **View** button next to the applicable record. The Payroll Office Enrollees View page is displayed.

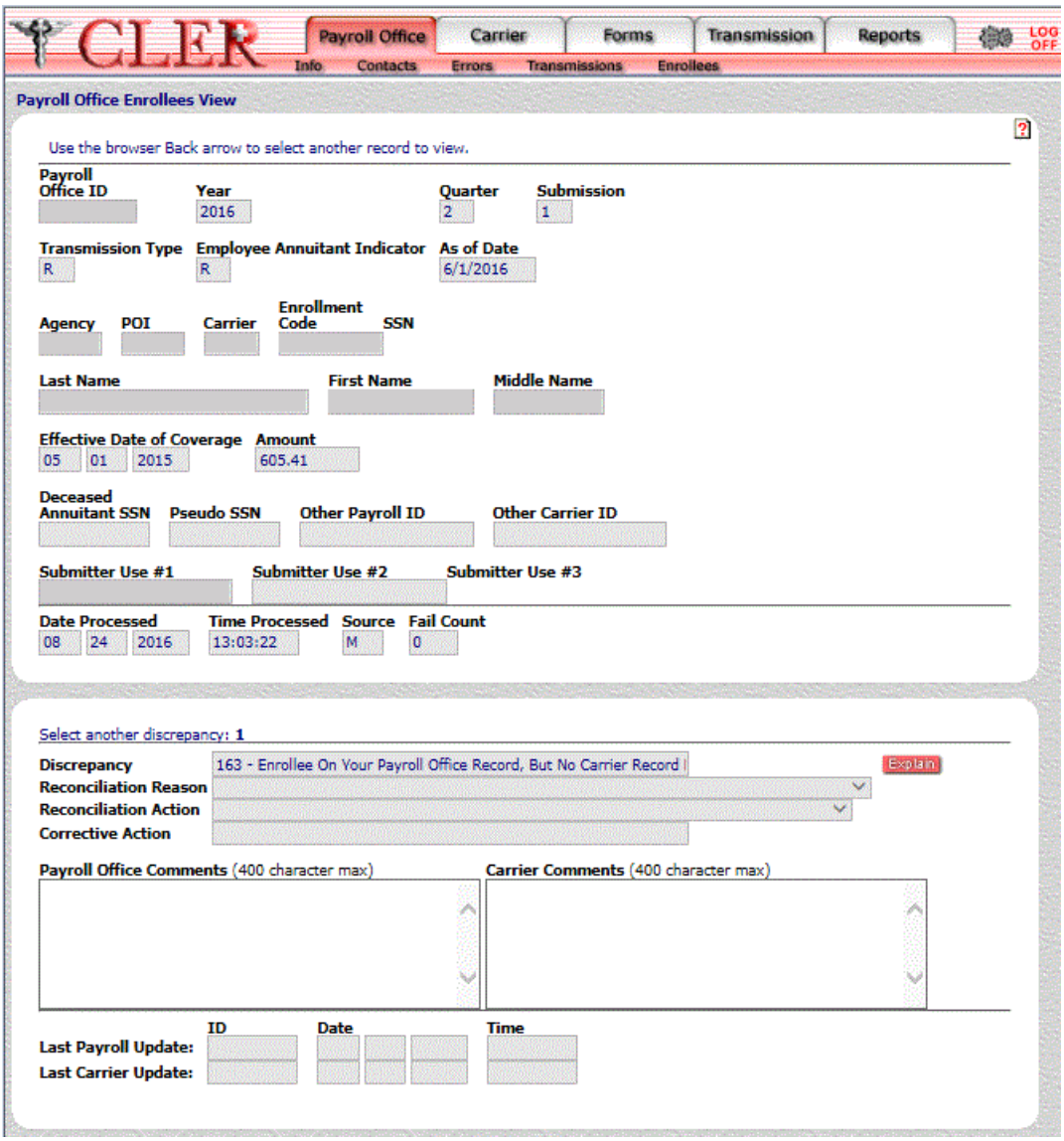


Figure 50: Payroll Office Enrollees View Page

The data on the Payroll Office Enrollees View page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year (see "***Year - Field Description***" on page 457)

Quarter (see "***Quarter - Field Description***" on page 429)

Submission (see "***Submission - (Payroll Office Enrollees) Reconcile Field Description***" on page 445)

Transmission Type (see "***Transmission Type - Field Description***" on page 451)

Employee Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Description***" on page 368)

As of Date (see "***As of Date - Carrier Transmissions Field Description***" on page 342)

Agency (see "***Agency - Enrollee Field Description***" on page 338)

POI (see "***POI - Field Description***" on page 424)

Carrier (see "***Carrier - Field Description***" on page 345)

Enrollment Code (see "***Enrollment Code - Field Description***" on page 371)

SSN (see "***SSN - (Enrollee) Field Description***" on page 439)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Middle Name (see "***Middle Name - Enrollee Field Description***" on page 388)

Effective Date of Coverage (see "***Effective Date of Coverage - Field Description***" on page 366)

Amount (see "***Amount - Pay Period Field Description***" on page 340)

Deceased Annuitant SSN (see "***Deceased Annuitant SSN - Field Description***" on page 361)

Pseudo SSN (see "***Pseudo SSN - Field Description***" on page 428)

Other Payroll ID (see "***Other Payroll ID - Field Description***" on page 415)

Other Carrier ID (see "***Other Carrier ID - Field Description***" on page 414)

Submitter Use #1 (see "***Submitter Use #1 - Field Description***" on page 446)

Submitter Use #2 (see "***Submitter Use #2 - Field Description***" on page 446)

Submitter Use #3 (see "***Submitter Use #3 - Field Description***" on page 447)

Date Processed (see "***Date Processed - (Processed Run) Field Description***" on page 360)

Time Processed (see "***Time Processed - (Process Run) Field Description***" on page 448)

Source (see "***Source - Field Description***" on page 439)

Fail Count (see "***Fail Count - Field Description***" on page 373)

Discrepancy (see "***Discrepancy - (Explain/Duplicate - Code 166) Field Description***" on page 362)

Reconciliation Reason (see "***Reconciliation Reason - Field Description***" on page 432)

Reconciliation Action (see "***Reconciliation Action - Field Description***" on page 431)

Corrective Action (see "***Corrective Action (Code) - Field Description***" on page 356)

Payroll Office Comments (see "***Payroll Office Comments - Field Description***" on page 419)

Carrier Comments (see "***Carrier Comments - Field Description***" on page 345)

Last Payroll Update ID (see "***Last Payroll Update ID - Field Description***" on page 386)

Last Payroll Update Date (see "***Last Payroll Update Date - Field Description***" on page 386)

Last Payroll Update Time (see "***Last Payroll Update Time - Field Description***" on page 386)

Last Carrier Update ID (see "***Last Carrier Update ID - Field Description***" on page 380)

Last Carrier Update Date (see "***Last Carrier Update Date - Field Description***" on page 380)

Last Carrier Update Time (see "***Last Carrier Update Time - Field Description***" on page 381)

Note: To view another record, select your browser's **Back** button to return to the Payroll Office Enrollees Search Results page and select the **View** button next to the applicable record.

Reconciling a Payroll Office Enrollee Record

The **Reconcile** function allows users to reconcile payroll office enrollee records.

To Reconcile a Payroll Office Enrollee Record:

1. On the CLER Main Menu - Payroll Office tab, select ***Enrollees***. The Payroll Office Enrollees Page is displayed.

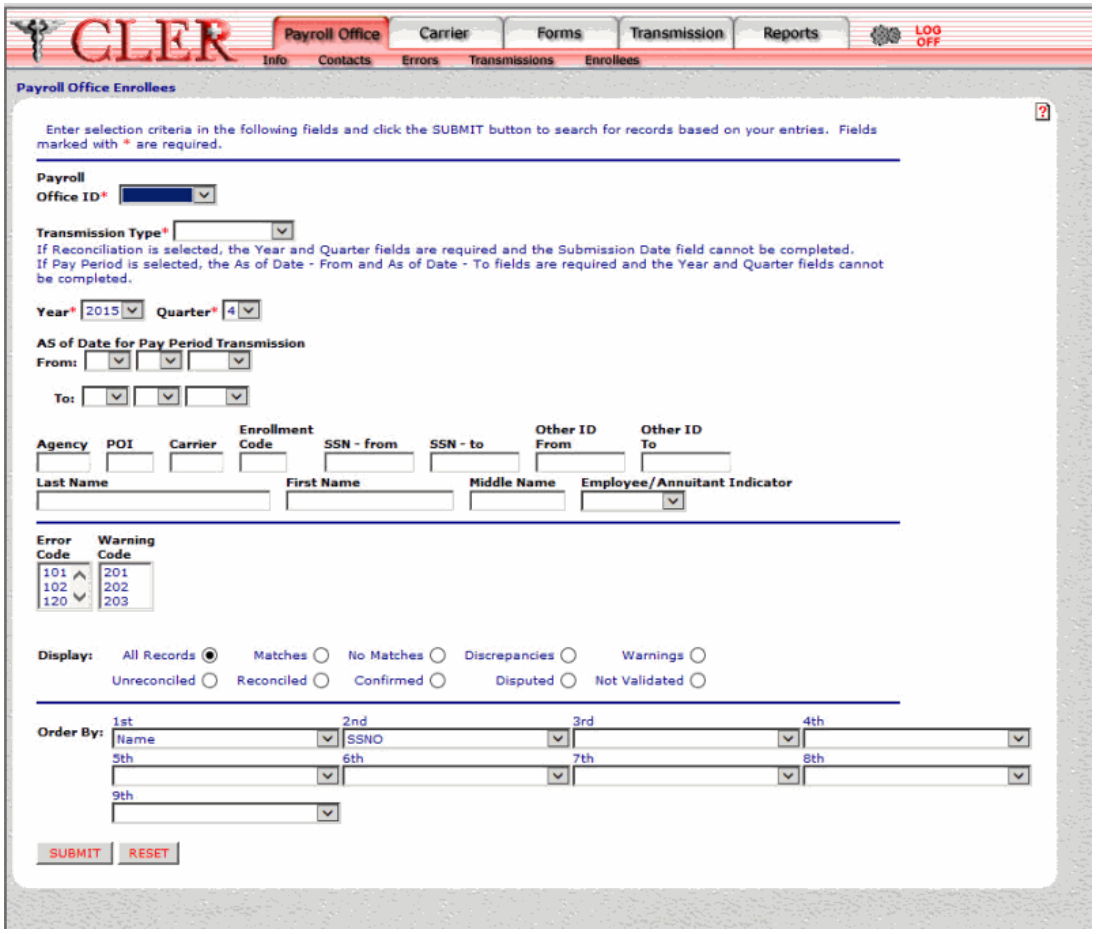


Figure 51: Payroll Office Enrollees Page

2. Complete the following fields on the Payroll Office Enrollees page:

   Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

   Transmission Type (see "***Transmission Type - (Required) Field Instruction***" on page 451)

   Year (see "***Year - (Required) Field Instruction***" on page 457)

   Quarter (see "***Quarter - (Select - Reconciliation) Field Instruction***" on page 429)

   As of Date for Pay Period Transmission From (see "***As of Date for Pay Period Transmission From - Field Instruction***" on page 342)

As of Date for Pay Period Transmission To (see "***As of Date for Pay Period Transmission To - Field Instruction***" on page 342)

Agency (see "***Agency - Field Instruction***" on page 339)

POI (see "***POI - Payroll Office Enrollee Field Instruction***" on page 424)

Carrier (see "***Carrier - Field Instruction***" on page 345)

Enrollment Code (see "***Enrollment Code - Field Instruction***" on page 371)

SSN - from

SSN - to (see "***SSN To - Field Instruction***" on page 440)

Other ID From (see "***Other ID From - Field Instruction***" on page 414)

Other ID To (see "***Other ID To - Field Instruction***" on page 415)

Last Name (see "***Last Name - Enrollee Field Instruction***" on page 385)

First Name (see "***First Name - Enrollee Field Instruction***" on page 375)

Middle Name (see "***Middle Name - Enrollee Field Instruction***" on page 389)

Employee/Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Instruction***" on page 368)

Error Code (see "***Error Code - (Select) Field Instruction***" on page 371)

Warning Code (see "***Warning Code - (Select) Field Instruction***" on page 455)

Display (see "***Display - (All Records) Field Instruction***" on page 363)

Order By 1st (see "***Order By 1st - (Enrollee) Field Instruction***" on page 399)

Order By 2nd (see "***Order By 2nd - Field Instruction***" on page 403)

Order By 3rd (see "***Order By 3rd - Field Instruction***" on page 406)

Order By 4th (see "***Order By 4th - Field Instruction***" on page 408)

Order By 5th (see "***Order By 5th - Field Instruction***" on page 410)

Order By 6th (see "***Order By 6th - Field Instruction***" on page 411)

Order By 7th (see "***Order By 7th - Agency Field Instruction***" on page 412)

Order By 8th (see "***Order By 8th - Agency Field Instruction***" on page 412)

Order By 9th (see "***Order by 9th - Agency Field Instruction***" on page 413)

3. Select the **Submit** button to confirm all data entered. The Payroll Office Enrollees Search Results is displayed.

OR

Select the **Reset** button to clear all data entered.

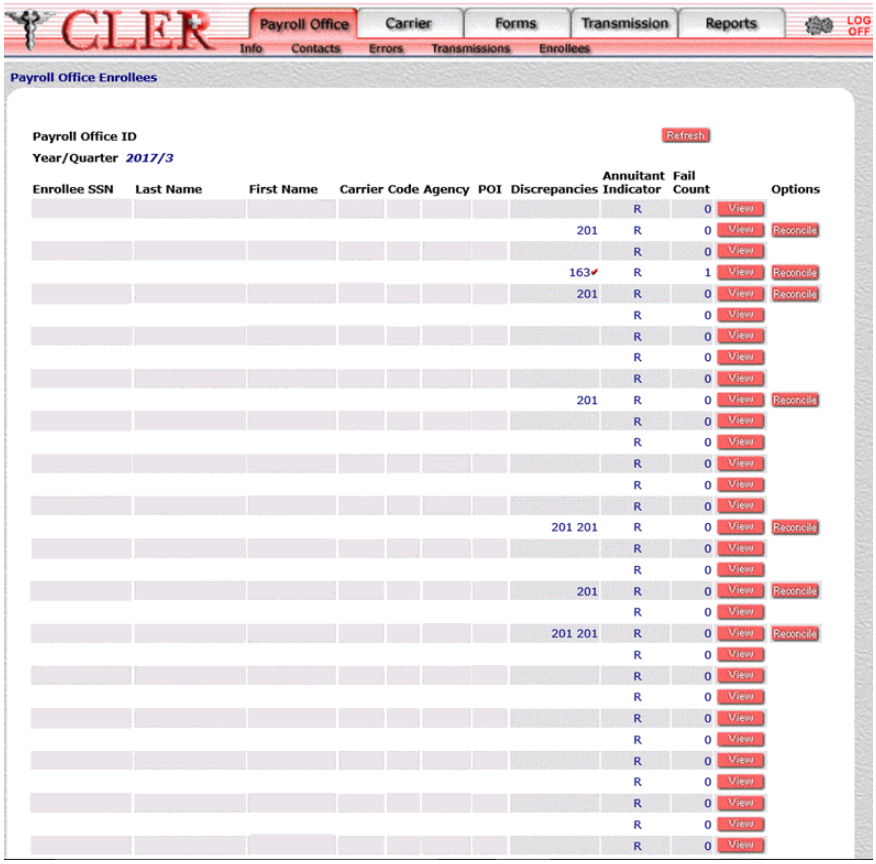


Figure 52: Payroll Office Enrollees Reconcile Search Results Page

The data on the Payroll Office Enrollees search results page is categorized into the following fields:

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Carrier (see "***Carrier - Field Description***" on page 345)

Code (see "***Code - Field Description***" on page 352)

Agency (see "***Agency - Enrollee Field Description***" on page 338)

POI (see "***POI - Field Description***" on page 424)

Discrepancies (see "***Discrepancies - Field Description***" on page 362)

Annuitant Indicator (see "***Annuitant Indicator - Field Description***" on page 341)

Fail Count (see "***Fail Count - Field Description***" on page 373)

Options (see "***Options - (View, Reconcile) Field Description***" on page 394)

Note: The **Reconcile** button on the Payroll Office Enrollees search results page is only displayed next to records with discrepancies.

4. Select the **Reconcile** button next to the applicable record. The Payroll Office Enrollees Reconcile page is displayed.

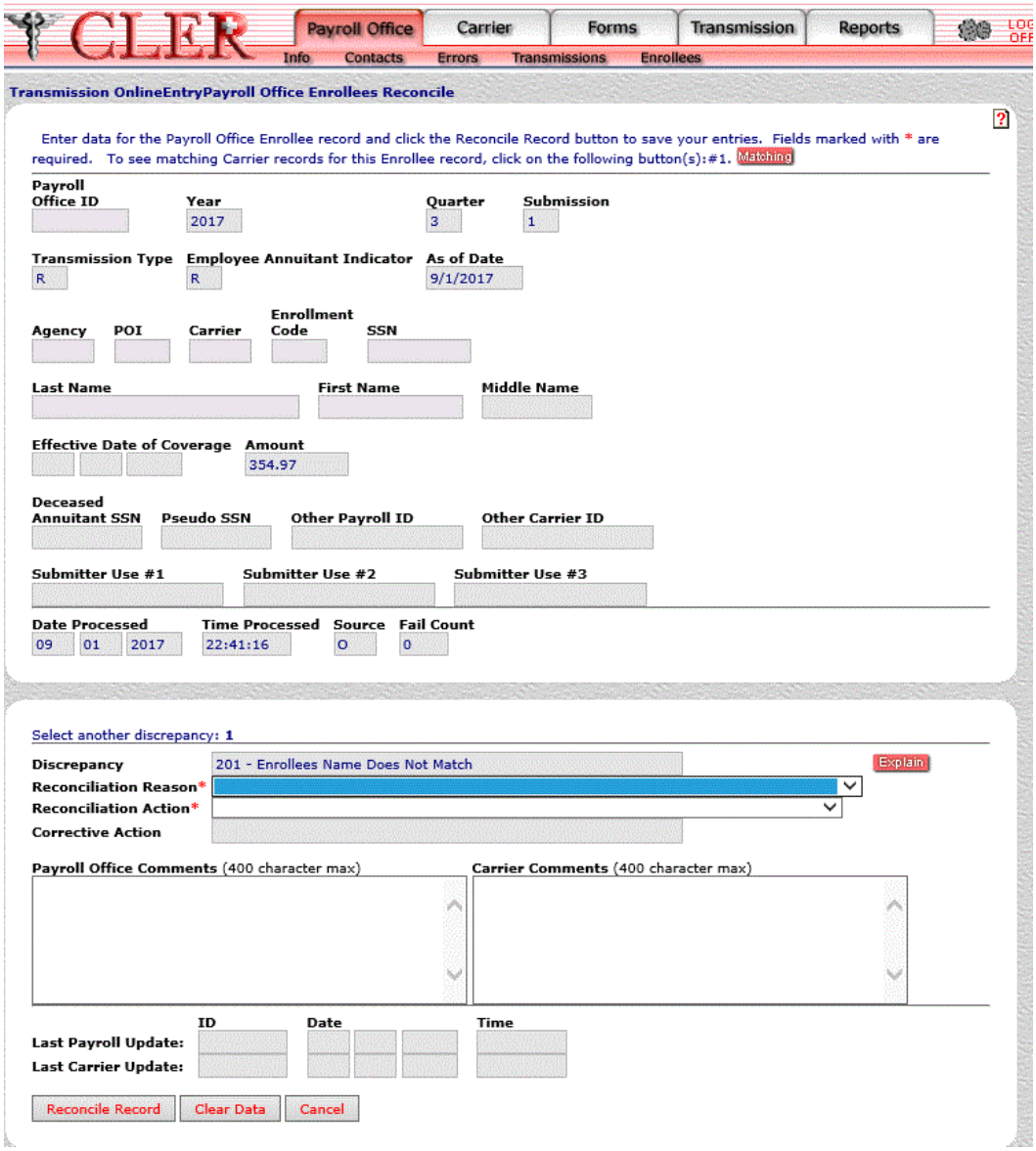


Figure 53: Payroll Office Enrollees Reconcile Page

Note: To view matching carrier records for this enrollee record, select the **Matching** button.

The data on the Payroll Office Enrollees Reconcile page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year (see "***Year - Field Description***" on page 457)

Quarter (see "***Quarter - Field Description***" on page 429)

Submission (see "***Submission - (Payroll Office Enrollees) Reconcile Field Description***" on page 445)

Transmission Type (see "***Transmission Type - Field Description***" on page 451)

Employee Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Description***" on page 368)

As of Date (see "***As of Date - Carrier Transmissions Field Description***" on page 342)

Agency (see "***Agency - Enrollee Field Description***" on page 338)

POI (see "***POI - Field Description***" on page 424)

Carrier (see "***Carrier - Field Description***" on page 345)

Enrollment Code (see "***Enrollment Code - Field Description***" on page 371)

SSN (see "***SSN - (Enrollee) Field Description***" on page 439)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Middle Name (see "***Middle Name - Enrollee Field Description***" on page 388)

Effective Date of Coverage (see "***Effective Date of Coverage - Field Description***" on page 366)

Amount (see "***Amount - Pay Period Field Description***" on page 340)

Deceased Annuitant SSN (see "***Deceased Annuitant SSN - Field Description***" on page 361)

Pseudo SSN (see "***Pseudo SSN - Field Description***" on page 428)

Other Payroll ID (see "***Other Payroll ID - Field Description***" on page 415)

Other Carrier ID (see "***Other Carrier ID - Field Description***" on page 414)

Submitter Use #1 (see "***Submitter Use #1 - Field Description***" on page 446)

Submitter Use #2 (see "***Submitter Use #2 - Field Description***" on page 446)

Submitter Use #3 (see "***Submitter Use #3 - Field Description***" on page 447)

Date Processed (see "***Date Processed - (Processed Run) Field Description***" on page 360)

Time Processed (see "***Time Processed - (Process Run) Field Description***" on page 448)

Source (see "***Source - Field Description***" on page 439)

Fail Count (see "***Fail Count - Field Description***" on page 373)

Discrepancy (see "***Discrepancy - (Explain/Duplicate - Code 166) Field Description***" on page 362)

Reconciliation Reason (see "***Reconciliation Reason - Field Instruction***" on page 432)

Reconciliation Action (see "***Reconciliation Action - Field Instruction***" on page 431)

Corrective Action (see "***Corrective Action (Code) - Field Description***" on page 356)

Payroll Office Comments (see "***Payroll Office Comments - Field Instruction***" on page 419)

Carrier Comments (see "***Carrier Comments - Field Instruction***" on page 345)

Last Payroll Update ID (see "***Last Payroll Update ID - Field Description***" on page 386)

Last Payroll Update Date (see "***Last Payroll Update Date - Field Description***" on page 386)

Last Payroll Update Time (see "***Last Payroll Update Time - Field Description***" on page 386)

Last Carrier Update ID (see "***Last Carrier Update ID - Field Description***" on page 380)

Last Carrier Update Date (see "***Last Carrier Update Date - Field Description***" on page 380)

Last Carrier Update Time (see "***Last Carrier Update Time - Field Description***" on page 381)

5. Select the **Reconcile Record button**. If no errors occur, a popup appears to confirm the record has been reconciled.

   OR

   Select the **Clear Data** button to clear all data entered.

6. Select the **OK** button to close the popup.

Note: To view another record, select the **Cancel** button to return to the Payroll Office Enrollees search results page and select the **Reconcile** button next to the applicable record.

Viewing a Matching Carrier Enrollee Record or Duplicate Payroll Office Enrollee Record

The **Matching** button on the Payroll Office Enrollees View page allows users to view certain enrollee data from a carrier enrollee record that matches a selected payroll office enrollee record. Since there may be more than one matching carrier enrollee record, a Matching button is displayed for each matching record.

The **Duplicate** button next to the Discrepancy field on the Payroll Office Enrollees View page allows users to view data from another payroll office enrollee record that was submitted for the same enrollee. The Matching and Duplicate functions facilitate the reconciliation process.

To View Matching Carrier Enrollee Records or Duplicate Payroll Office Enrollee Records:

1. Select the ***Payroll Office*** tab on the CLER Main Menu.

2. Select ***Enrollees*** on the Payroll Office Main page. The Payroll Office Enrollees page is displayed.

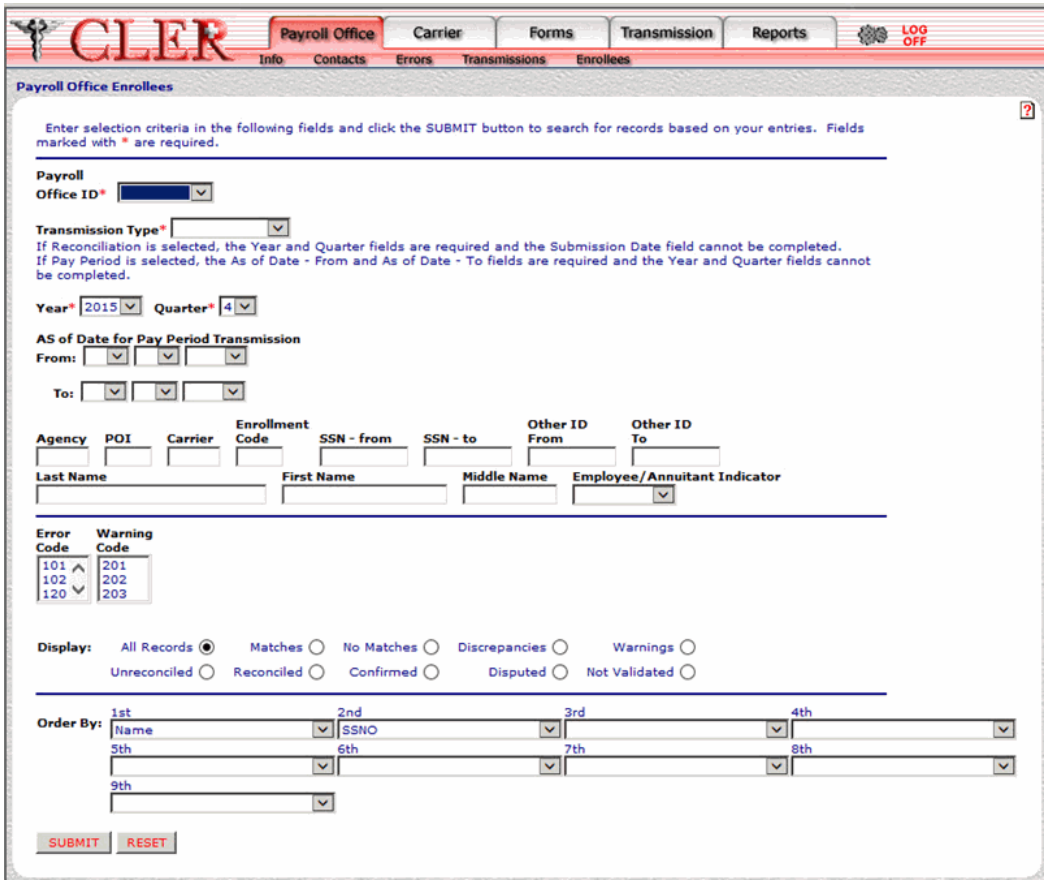


Figure 54: Payroll Office Enrollees Page

3. Complete the following fields on the Payroll Office Enrollees page:

Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

Transmission Type (see "***Transmission Type - (Required) Field Instruction***" on page 451)

Year (see "***Year - (Required) Field Instruction***" on page 457)

Quarter (see "***Quarter - (Select - Reconciliation) Field Instruction***" on page 429)

As of Date for Pay Period Transmission From (see "***As of Date for Pay Period Transmission From - Field Instruction***" on page 342)

As of Date for Pay Period Transmission To (see "***As of Date for Pay Period Transmission To - Field Instruction***" on page 342)

Agency (see "***Agency - Field Instruction***" on page 339)

POI (see "***POI - Payroll Office Enrollee Field Instruction***" on page 424)

Carrier (see "***Carrier - Field Instruction***" on page 345)

Enrollment Code (see "***Enrollment Code - Field Instruction***" on page 371)

SSN - from

SSN - to (see "***SSN To - Field Instruction***" on page 440)

Other ID From (see "***Other ID From - Field Instruction***" on page 414)

Other ID To (see "***Other ID To - Field Instruction***" on page 415)

Last Name (see "***Last Name - Enrollee Field Instruction***" on page 385)

First Name (see "***First Name - Enrollee Field Instruction***" on page 375)

Middle Name (see "***Middle Name - Enrollee Field Instruction***" on page 389)

Employee/Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Instruction***" on page 368)

Error Code (see "***Error Code - (Select) Field Instruction***" on page 371)

Warning Code (see "***Warning Code - (Select) Field Instruction***" on page 455)

Display (see "***Display - (All Records) Field Instruction***" on page 363)

Order By 1st (see "***Order By 1st - (Enrollee) Field Instruction***" on page 399)

Order By 2nd (see "***Order By 2nd - Field Instruction***" on page 403)

Order By 3rd (see "***Order By 3rd - Field Instruction***" on page 406)

Order By 4th (see "***Order By 4th - Field Instruction***" on page 408)

Order By 5th (see "***Order By 5th - Field Instruction***" on page 410)

Order By 6th (see "***Order By 6th - Field Instruction***" on page 411)

Order By 7th (see "***Order By 7th - Agency Field Instruction***" on page 412)

Order By 8th (see "***Order By 8th - Agency Field Instruction***" on page 412)

Order By 9th (see "***Order by 9th - Agency Field Instruction***" on page 413)

4. Select the **Submit** button to confirm all data entered. The Payroll Office Enrollees search results page is displayed.

OR

Select the **Reset** button to clear all data entered.

Note: The Payroll Office Enrollees Search results (Other ID) page is displayed when **24900002**, **24900003**, or **160099XX** is entered in the Payroll Office ID field on the Payroll Office Enrollee's page.

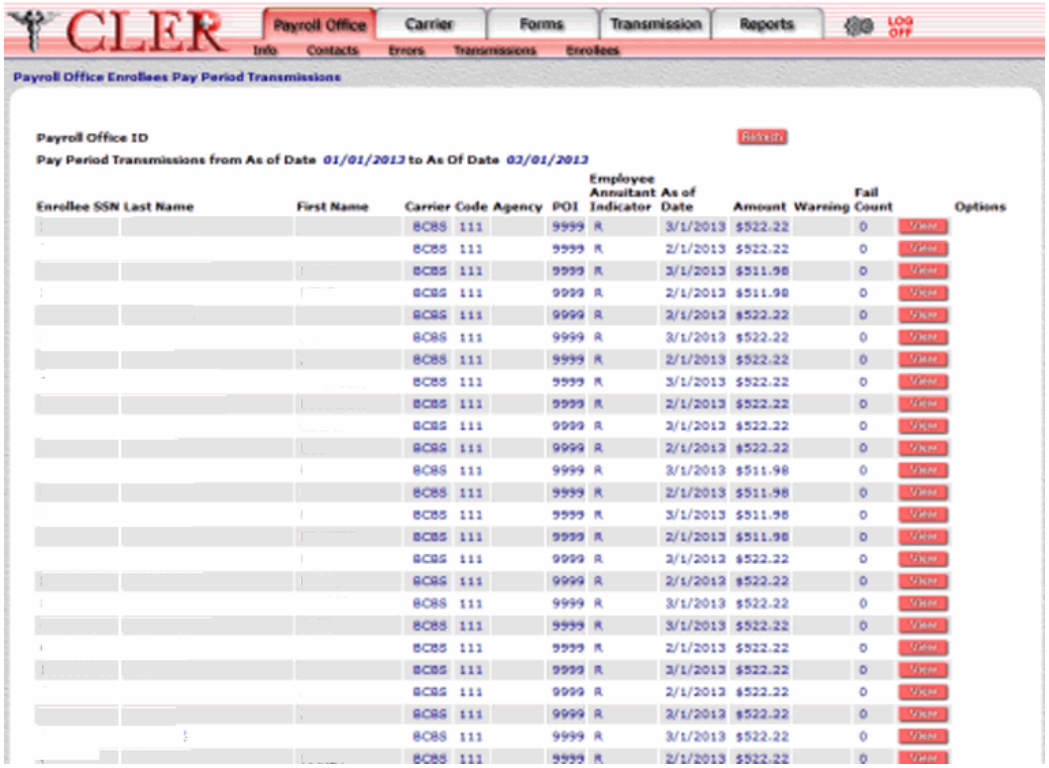


Figure 55: Payroll Office Enrollees Pay Period Transmissions Search Results Page

The data on the Payroll Office Enrollees search results page is categorized into the following fields:

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Carrier (see "***Carrier - Field Description***" on page 345)

Code (see "***Code - Field Description***" on page 352)

Agency (see "***Agency - Enrollee Field Description***" on page 338)

POI (see "***POI - Field Description***" on page 424)

Employee Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Description***" on page 368)

As of Date (see "***As of Date - Carrier Transmissions Field Description***" on page 342)

Amount (see "***Amount - Field Description***" on page 340)

Warning

Fail Count (see "***Fail Count - Field Description***" on page 373)

Options (see "***Options - (View Only) Field Description***" on page 393)

5. Select the **View** button next to the applicable record. The Payroll Office Enrollees View page is displayed.

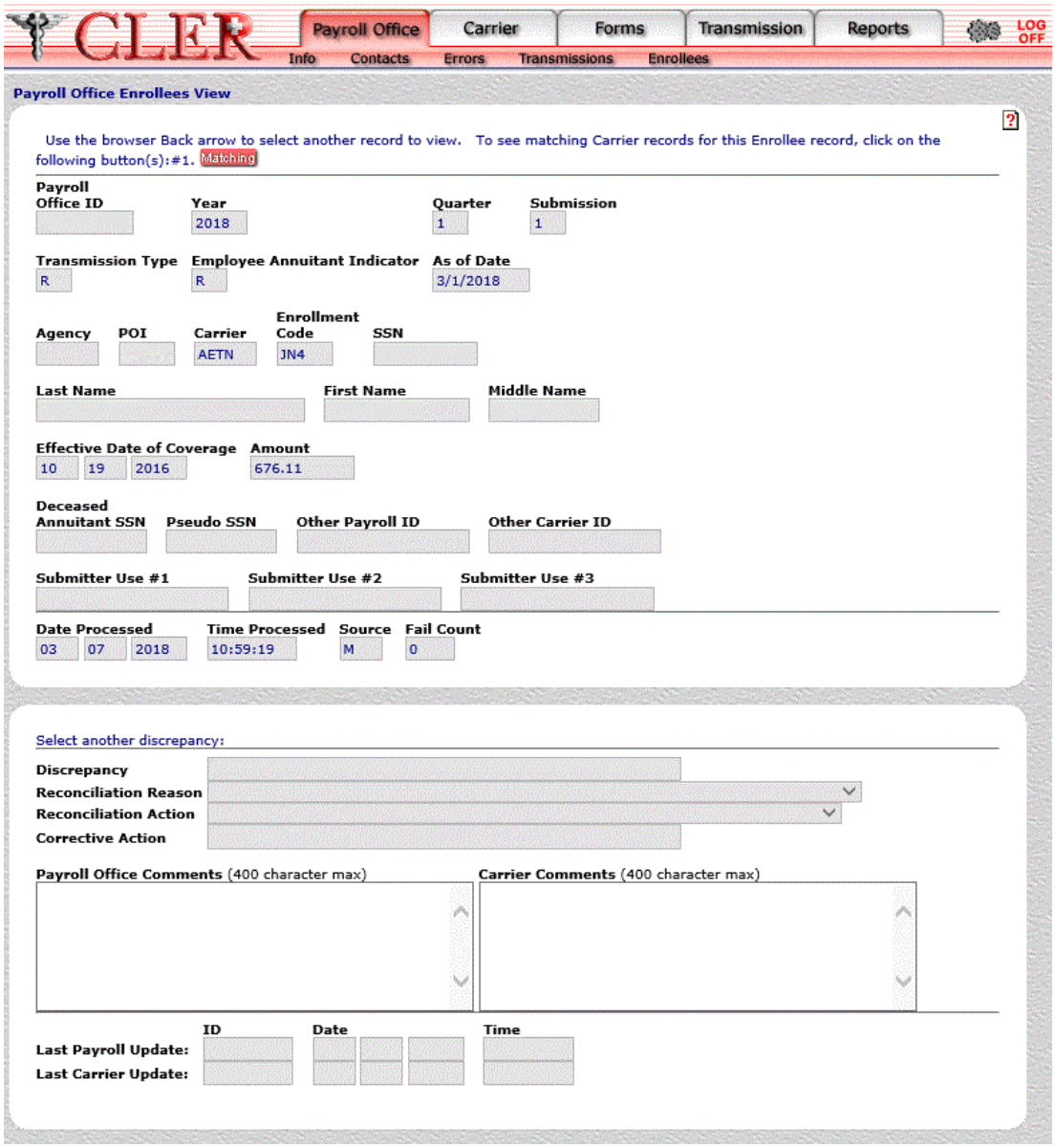


Figure 56: Payroll Office Enrollees with Matching Carrier Record - Payroll Office Page

6. Select the **Matching** button on the Payroll Office Enrollees View page. The Carrier Enrollees View page containing the data from the matching carrier enrollee record is displayed. The data displayed on the Carrier Enrollees View page is limited to the payroll office identification number, carrier identifier, enrollment effective date, and the year and quarter the carrier enrollee record was submitted.

Note: If the payroll enrollee record data displayed on the Payroll Office Enrollees View page is matched with the data from another payroll office enrollee record, Discrepancy Code **165** or **167** is

displayed in the Discrepancy field. When these discrepancies occur, the Duplicate button is displayed next to the Discrepancy field. Select the **Duplicate** button to display the Payroll Office Enrollees View page containing the data from the matching payroll office enrollee record. The data displayed on the Payroll Office Enrollees View page is limited to the payroll office identification number, carrier identifier, enrollment effective date, and the year and quarter the payroll office enrollee record was submitted.

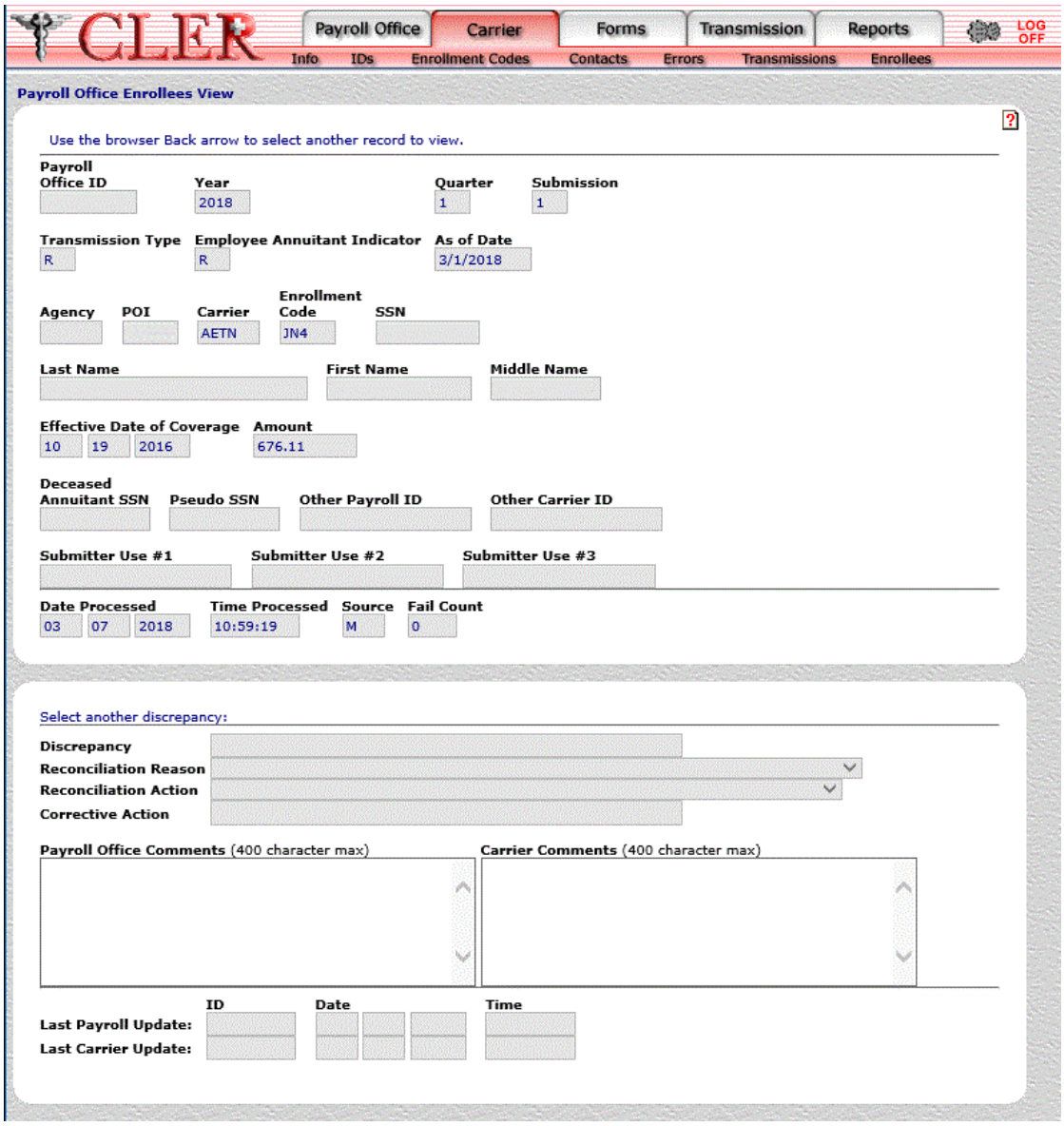


Figure 57: Payroll Office Enrollees with Matching Carrier Record Page - Carrier View

The data on the Payroll Office Enrollees View page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year (see "***Year - Field Description***" on page 457)

Quarter (see "***Quarter - Field Description***" on page 429)

Submission (see "***Submission - (Payroll Office Enrollees) Reconcile Field Description***" on page 445)

Transmission Type (see "***Transmission Type - Field Description***" on page 451)

Employee Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Description***" on page 368)

As of Date (see "***As of Date - Carrier Transmissions Field Description***" on page 342)

Agency (see "***Agency - Enrollee Field Description***" on page 338)

POI (see "***POI - Field Description***" on page 424)

Carrier (see "***Carrier - Field Description***" on page 345)

Enrollment Code (see "***Enrollment Code - Field Description***" on page 371)

SSN (see "***SSN - (Enrollee) Field Description***" on page 439)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Middle Name (see "***Middle Name - Enrollee Field Description***" on page 388)

Effective Date of Coverage (see "***Effective Date of Coverage - Field Description***" on page 366)

Amount (see "***Amount - Pay Period Field Description***" on page 340)

Deceased Annuitant SSN (see "***Deceased Annuitant SSN - Field Description***" on page 361)

Pseudo SSN (see "***Pseudo SSN - Field Description***" on page 428)

Other Payroll ID (see "***Other Payroll ID - Field Description***" on page 415)

Other Carrier ID (see "***Other Carrier ID - Field Description***" on page 414)

Submitter Use #1 (see "***Submitter Use #1 - Field Description***" on page 446)

Submitter Use #2 (see "***Submitter Use #2 - Field Description***" on page 446)

Submitter Use #3 (see "***Submitter Use #3 - Field Description***" on page 447)

Date Processed (see "***Date Processed - (Processed Run) Field Description***" on page 360)

Time Processed (see "***Time Processed - (Process Run) Field Description***" on page 448)

Source (see "***Source - Field Description***" on page 439)

Fail Count (see "***Fail Count - Field Description***" on page 373)

Discrepancy (see "***Discrepancy - (Explain/Duplicate - Code 166) Field Description***" on page 362)

Reconciliation Reason (see "***Reconciliation Reason - Field Description***" on page 432)

Reconciliation Action (see "***Reconciliation Action - Field Description***" on page 431)

Corrective Action (see "***Corrective Action (Code) - Field Description***" on page 356)

Payroll Office Comments (see "***Payroll Office Comments - Field Description***" on page 419)

Carrier Comments (see "***Carrier Comments - Field Description***" on page 345)

Last Payroll Update ID (see "***Last Payroll Update ID - Field Description***" on page 386)

Last Payroll Update Date (see "***Last Payroll Update Date - Field Description***" on page 386)

Last Payroll Update Time (see "***Last Payroll Update Time - Field Description***" on page 386)

Last Carrier Update ID (see "***Last Carrier Update ID - Field Description***" on page 380)

Last Carrier Update Date (see "***Last Carrier Update Date - Field Description***" on page 380)

Last Carrier Update Time (see "***Last Carrier Update Time - Field Description***" on page 381)

Note: To view another record select your browser's **Back** button to return to the Payroll Office Enrollees search results page and select the **View** button next to the applicable record.

Viewing Carrier Records

The ***Carrier*** option allows users to view information about each carrier office.

This section includes the following topics:

Viewing Carrier Enrollment Code Records 81
Viewing Carrier Information Records 84
Viewing Carrier ID Records 87

Viewing Carrier Enrollment Code Records

The ***Enrollment Codes*** option on the Carrier Main Page allows users to view information about each carrier's enrollment codes. This information includes plan, option, and valid date ranges.

To View a Carrier Enrollment Code Record:

1. Select the ***Carrier*** tab on the CLER Main Menu. The Carrier Main Page is displayed.

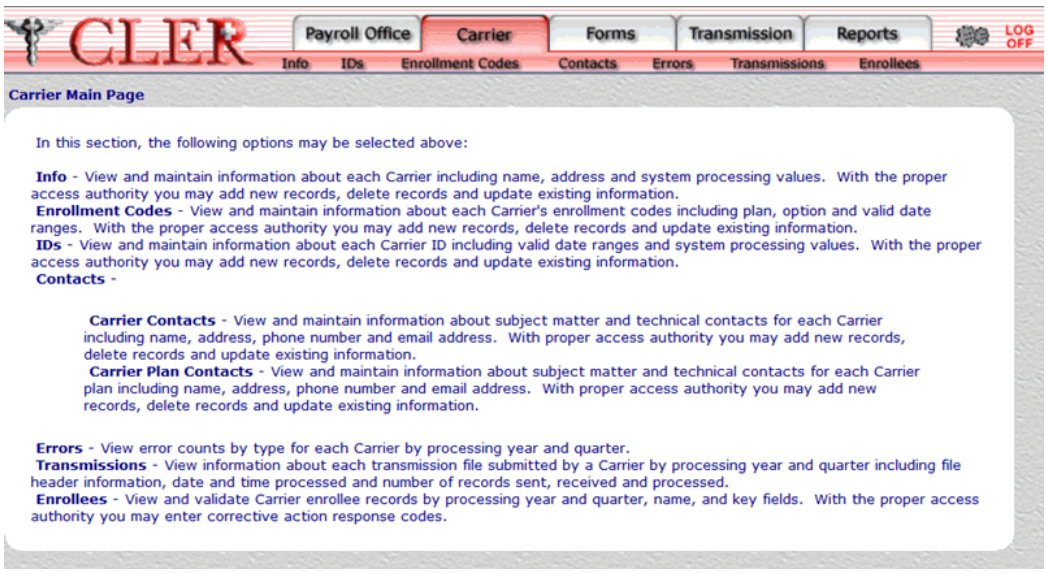


Figure 58: Carrier Main Page

2. Select ***Enrollment Codes*** on the Carrier Main Page. The Carrier Enrollment Codes page is displayed.

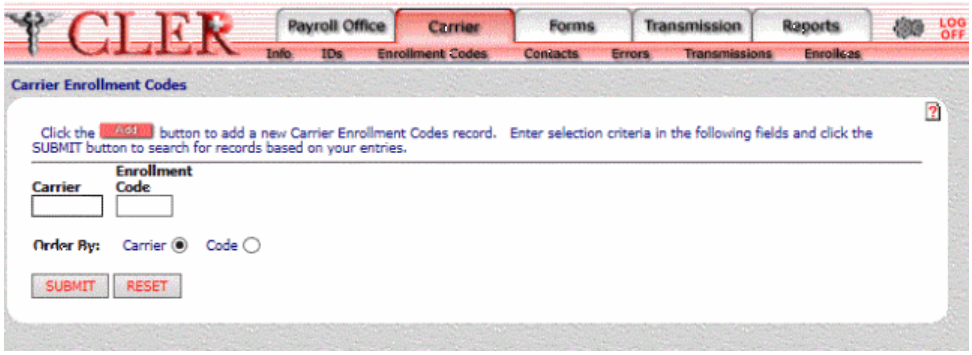


Figure 59: Carrier Enrollment Codes Search Page

3. Complete the following fields on the Carrier Enrollment Codes page:

   Carrier (see "***Carrier - Field Instruction***" on page 345)

   Enrollment Code (see "***Enrollment Code - Field Instruction***" on page 371)

   Order By (see "***Order By - (Carrier - Code Sort) Field Instruction***" on page 395)

4. Select the **Submit** button to confirm the data entered. The Carrier Enrollment Codes Search Results page is displayed.

   OR

   Select the **Reset** button to clear all data entered.

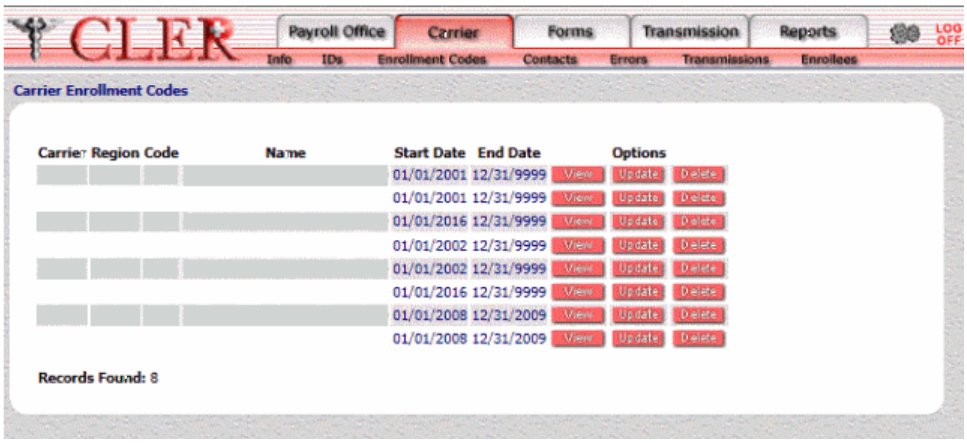


Figure 60: Carrier Enrollment Codes Search Results Page

The data on the Carrier Enrollment Codes Search Results page is categorized into the following fields:

Carrier (see "***Carrier - Field Description***" on page 345)

Region (see "***Region - Field Description***" on page 434)

Code (see "***Code - Field Description***" on page 352)

Name (see "***Name - Carrier Field Description***" on page 390)

Start Date (see "***Start Date - (Carrier Enrollment Code) Field Description***" on page 440)

End Date (see "***End Date - (Carrier Enrollment Code) Field Description***" on page 369)

Options (see "***Options - (View, Update, Delete) Field Description***" on page 394)

5. Select the **View** button next to the applicable record. The Carrier Identifiers View page is displayed.

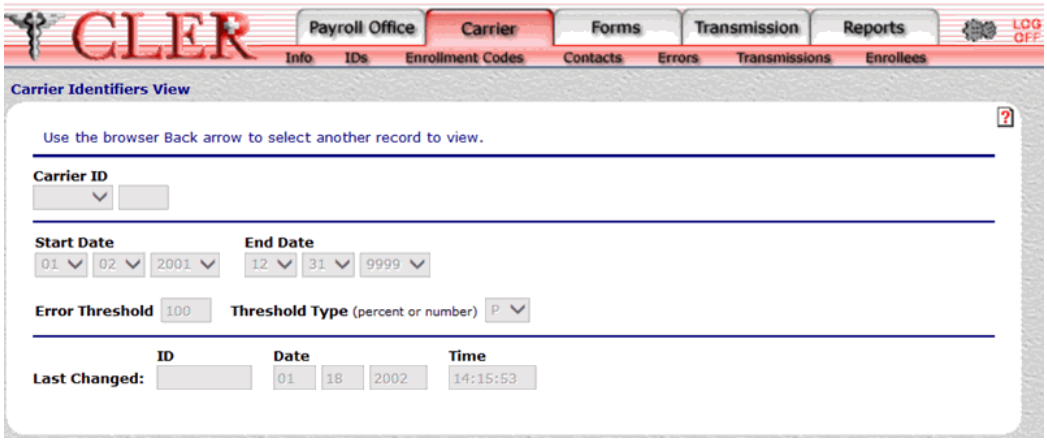


Figure 61: Carrier Identifiers View Page

The data on the Payroll Office Contacts Search Results page is categorized into the following fields:

Carrier ID (see "***Carrier ID - Field Description***" on page 346)

Start Date (see "***Start Date - (Carrier Enrollment Code) Field Description***" on page 440)

End Date (see "***End Date - (Carrier Enrollment Code) Field Description***" on page 369)

Error Threshold (see "***Error Threshold - (Carrier) Field Description***" on page 372)

Threshold Type (see "***Threshold Type - Field Description***" on page 448)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 381)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 381)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 381)

Note: To view another record select your browser's **Back** button to return to the Payroll Office Enrollees Search Results page to view another record, then select the **View** button next to the applicable record.

Viewing Carrier Information Records

The ***Info*** option on the Carrier Main Page allows users to view information about each carrier office.

To View a Carrier Information Record:

1. Select the ***Carrier*** tab on the CLER Main Menu. The Carrier Main Page is displayed.

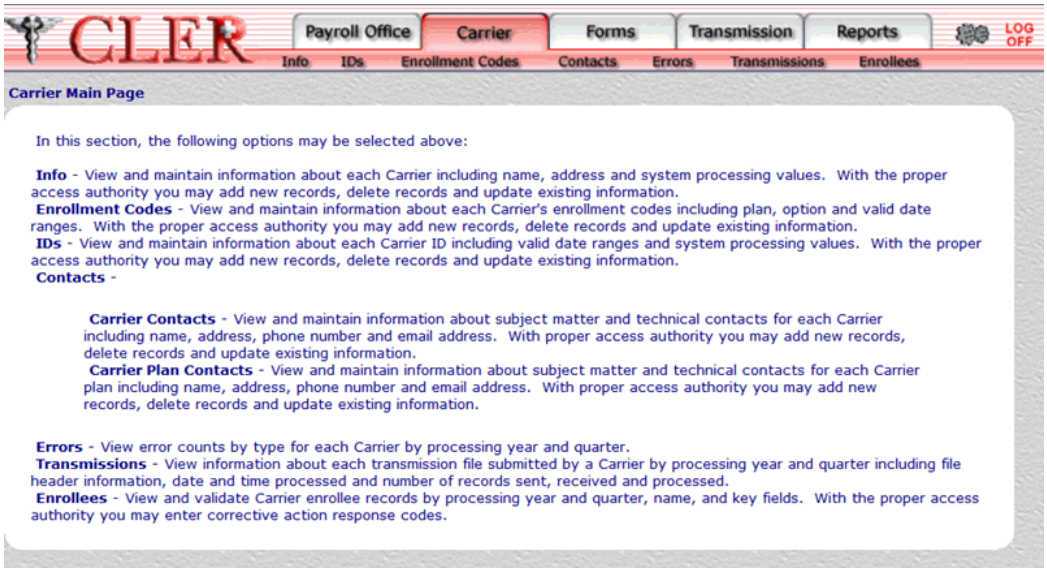


Figure 62: Carrier Main Page

2. Select ***Info*** on the Carrier Main Page. The Carrier Information page is displayed.

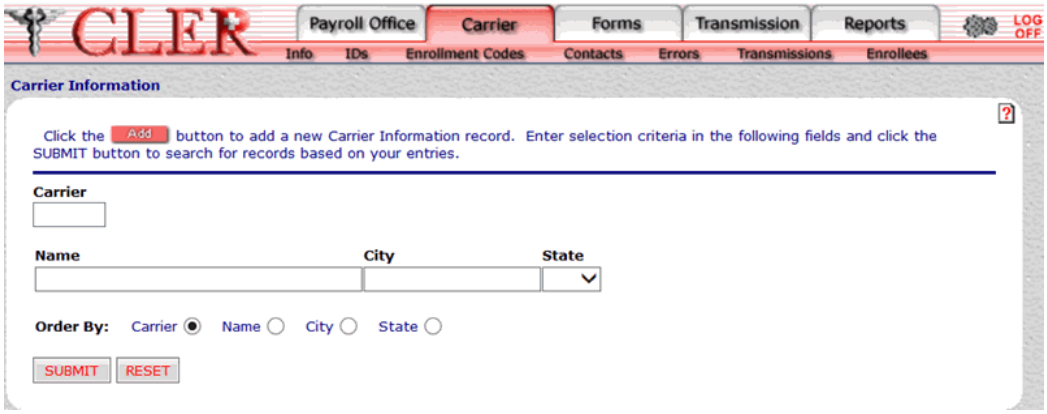


Figure 63: Carrier Information Page

3. Complete the following fields on the Carrier Information page:

   Carrier (see "***Carrier - Field Instruction***" on page 345)

   Name (see "***Name - (Carrier) Field Instruction***" on page 389)

   City (see "***City - Carrier Field Instruction***" on page 348)

   State (see "***State - (Carrier) Field Instruction***" on page 442)

   Order By (see "***Order By - (Carrier, Name, City, State Sorts) Field Instruction***" on page 396)

4. Select the **Submit** button to confirm the data entered. The Carrier Information Search Results page is displayed.

   OR

   Select the **Reset** button to clear all data entered.

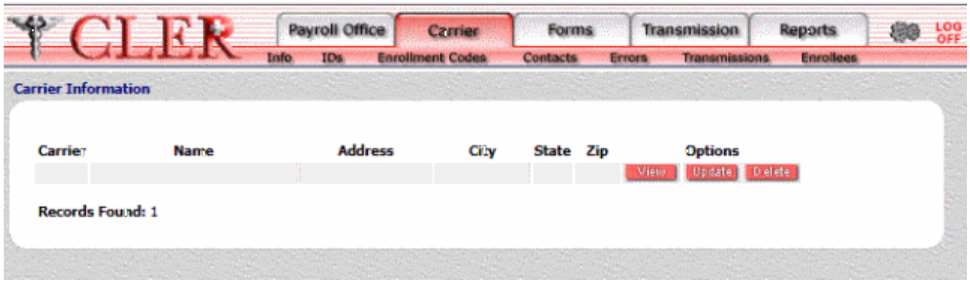


Figure 64: Carrier Information Search Results Page

The data on the Carrier Information Search Results page is categorized into the following fields:

Carrier (see "***Carrier - Field Description***" on page 345)

Name (see "***Name - Carrier Field Description***" on page 390)

Address (see "***Address - Carrier Field Description***" on page 331)

City (see "***Viewing Reconciliation Action Summary (Report 10)***" on page 263)

State (see "***State - (Carrier) Field Description***" on page 441)

Zip (see "***ZIP - (Carrier) Field Description***" on page 459)

Options (see "***Options - (View, Update, Delete) Field Description***" on page 394)

5. Select the **View** button next to the applicable record. The Carrier Information View page is displayed.

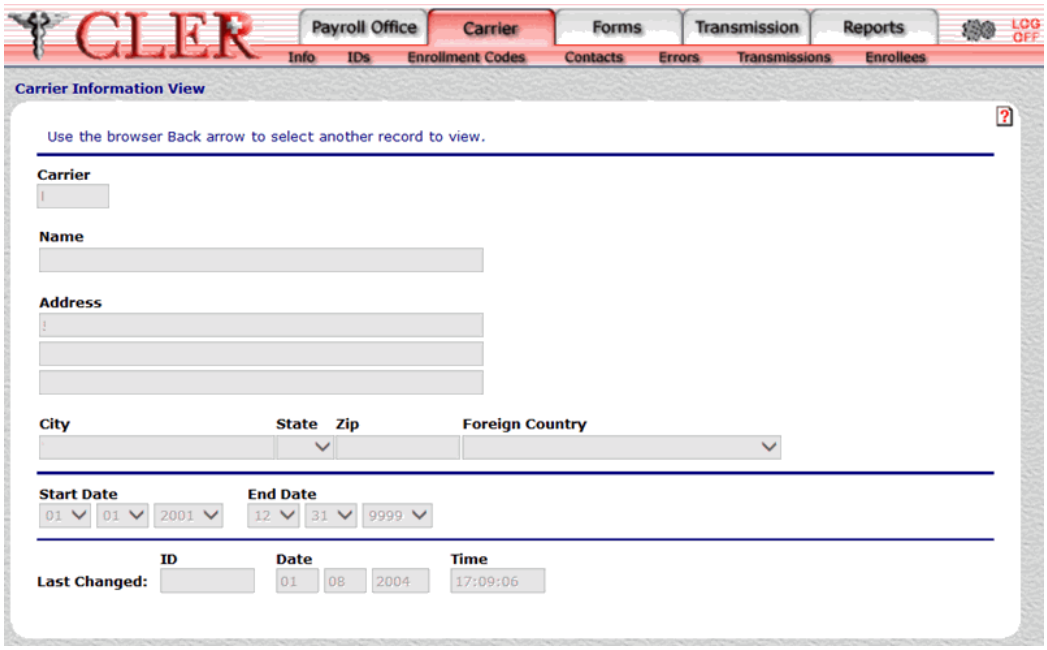


Figure 65: Carrier Information View Page

The data on the Carrier Information View page is categorized into the following fields:

Carrier (see "***Carrier - Field Description***" on page 345)

Name (see "***Name - Carrier Field Description***" on page 390)

Address Line 1 (see "***Address Line 1 - Carrier Field Description***" on page 331)

Address Line 2 (see "***Address Line 2 - Carrier Field Description***" on page 333)

Address Line 3 (see "***Address Line 3 - Carrier Field Description***" on page 336)

City (see "***City - Carrier Field Description***" on page 348)

State (see "***State - (Carrier) Field Description***" on page 441)

Zip (see "***ZIP - (Carrier) Field Description***" on page 459)

Foreign Country (see "***Foreign Country - (Carrier) Field Description***" on page 376)

Start Date (see "***Start Date - (Carrier) Field Description***" on page 441)

End Date (see "***End Date - (Carrier) Field Description***" on page 369)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 381)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 381)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 381)

Note: To view another record, select your browser's **Back** button to return to the Carrier Information Search Results page, then select the **View** button next to the applicable record.

Viewing Carrier ID Records

The ***IDs*** option on the Carrier Main Page allows users to view information about each carrier identification number. NFC's CLER Operations and Reconciliation Unit personnel assign a number for each carrier transmitting location.

To View a Carrier ID Record:

1. Select the ***Carrier*** tab on the CLER Main Menu. The Carrier Main Page is displayed.

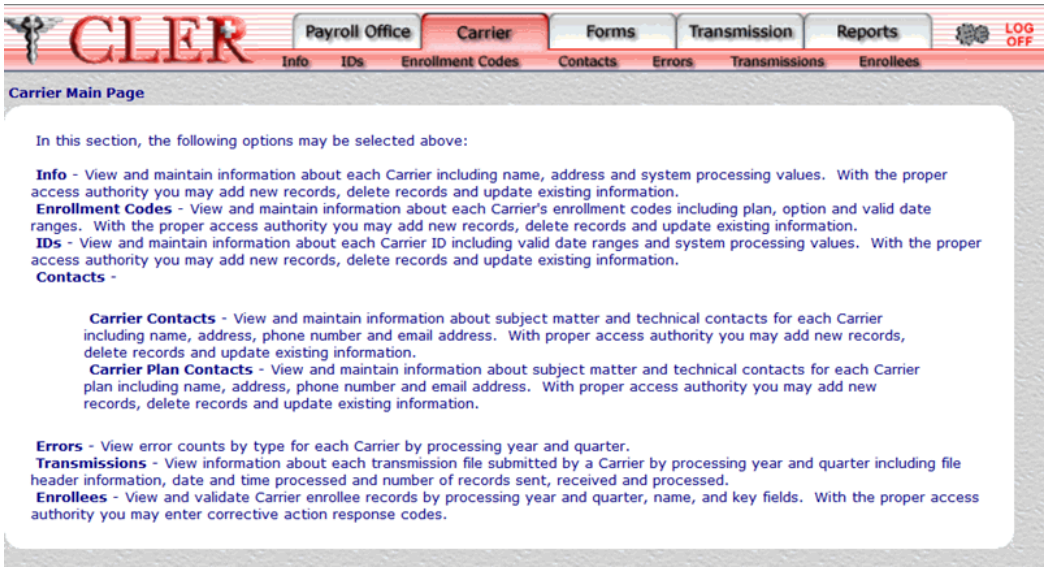


Figure 66: Carrier Main Page

2. Select ***IDs*** on the Carrier Main Page. The Carrier Identifiers page is displayed.

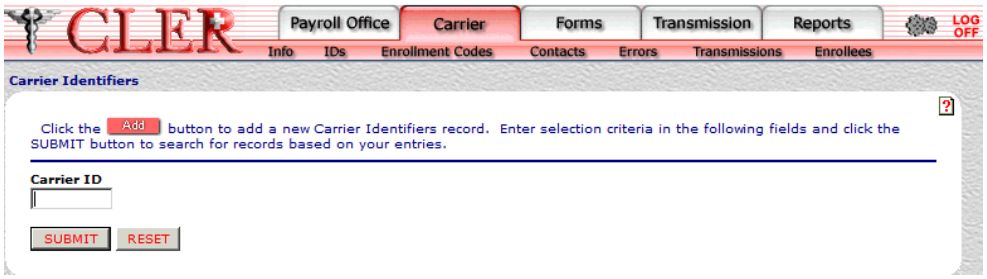


Figure 67: Carrier Identifiers Page

3. Complete the following field on the Carrier Identifiers page:

   Carrier ID (see "***Carrier ID - Field Instruction***" on page 346)

4. Select the **Submit** button to confirm the data entered. The Carrier Identifiers Search Results page is displayed.

OR

Select the **Reset** button to clear all data entered.

Figure 68: Carrier Identifiers Search Results Page

The data on the Payroll Office Contacts Search Results page is categorized into the following fields:

Carrier ID (see "***Carrier - Field Description***" on page 345)

Name (see "***Name - Carrier Field Description***" on page 390)

Start Date (see "***Start Date - (Carrier) Field Description***" on page 441)

End Date (see "***End Date - (Carrier) Field Description***" on page 369)

Options (see "***Options - (View, Update, Delete) Field Description***" on page 394)

5. Select the **View** button next to the applicable record. The Carrier Identifiers View page is displayed.

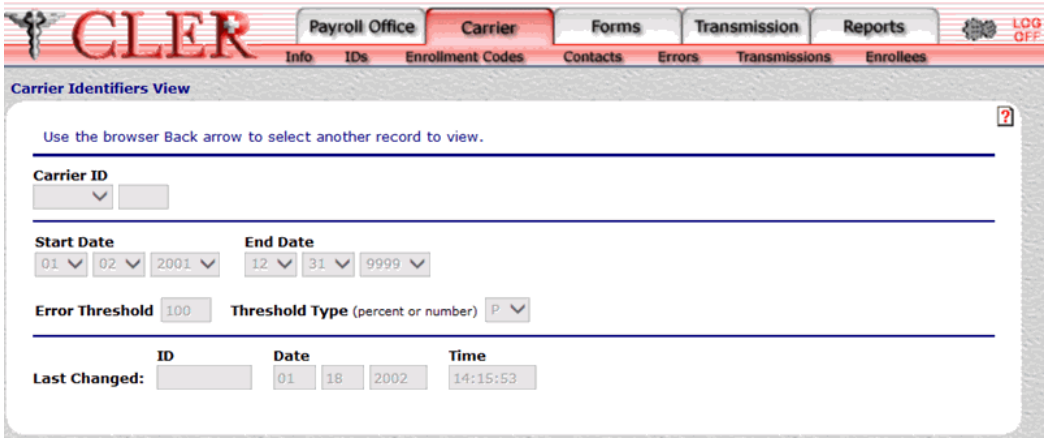


Figure 69: Carrier Identifiers View Page

The data on the Carrier Identifiers View page is categorized into the following fields:

Carrier ID (see "***Carrier ID - Field Description***" on page 346)

Start Date (see "***Start Date - (Carrier Plan) Field Description***" on page 440)

End Date (see "***End Date - (Carrier Plan) Field Description***" on page 369)

Error Threshold (see "***Error Threshold - (Carrier) Field Description***" on page 372)

Threshold Type (see "***Threshold Type - Field Description***" on page 448)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 381)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 381)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 381)

Note: To view another record select your browser's **Back** button to return to the Payroll Office Enrollees Search Results page, then select the **View** button next to the applicable record.

Viewing Carrier and Carrier Plan Contact Record

The ***Contacts*** option on the Carrier Main page allows users to view information about subject matter and technical contacts for each carrier.

This section includes the following topics:

Viewing a Carrier Contact Record.....91
Viewing a Carrier Plan Contact Record 95

Viewing a Carrier Contact Record

The **View** function allows users to view carrier contact records.

To View a Carrier Contact Record:

1. Select the ***Carrier*** tab on the CLER Main Menu. The Carrier Main Page is displayed.

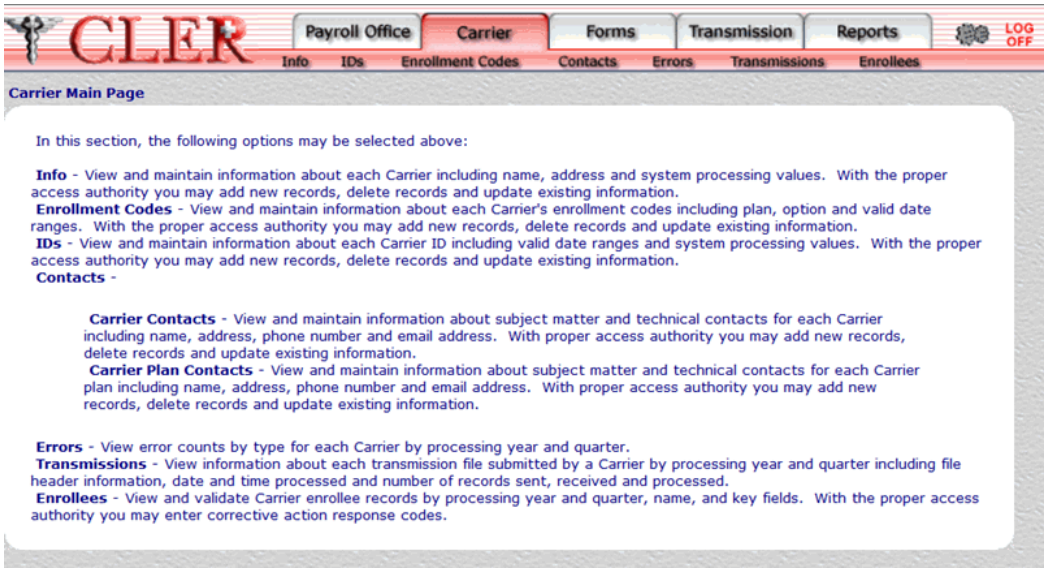


Figure 70: Carrier Main Page

2. Select ***Contacts*** on the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.

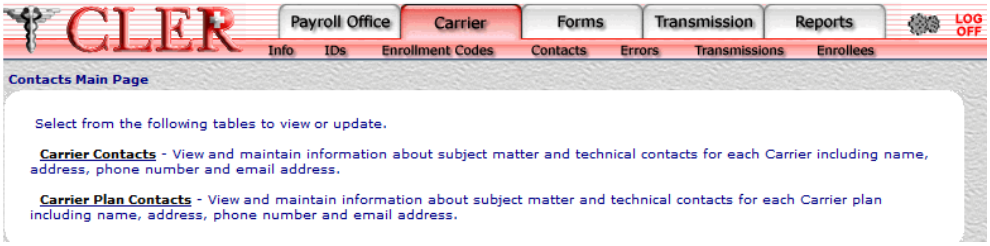


Figure 71: Contacts Main Page

3. Select the ***Carrier Contacts*** link to display the Carrier Contacts page.

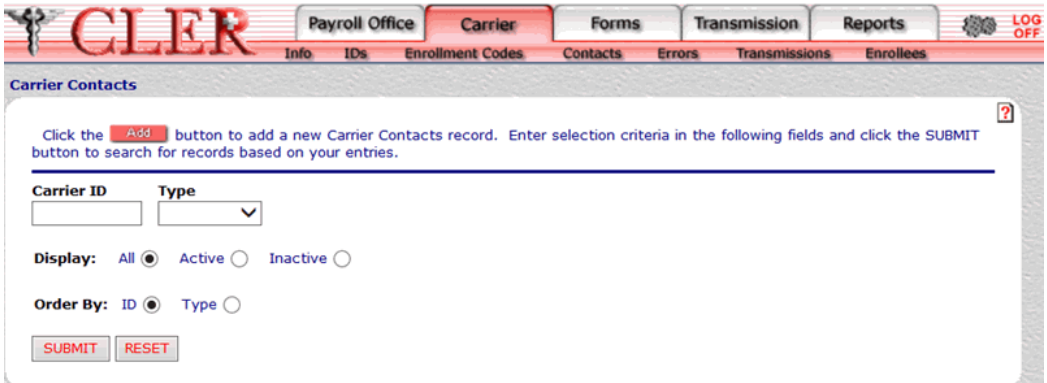


Figure 72: Carrier Contacts Page

4. Complete the following fields on the Carrier Contacts page:

   Carrier ID (see "***Carrier ID - Field Instruction***" on page 346)

   Type (see "***Type - (Carrier Contact) Field Instruction***" on page 452)

   Display (see "***Display - (Carrier Code) Field Instruction***" on page 363)

   Order By (see "***Order By - (Carrier ID - Type Sort) Field Instruction***" on page 395)

5. Select the **Submit** button to confirm data entered. The Carrier Contacts search results page is displayed.

OR

Select the **Reset** button to clear all data entered.

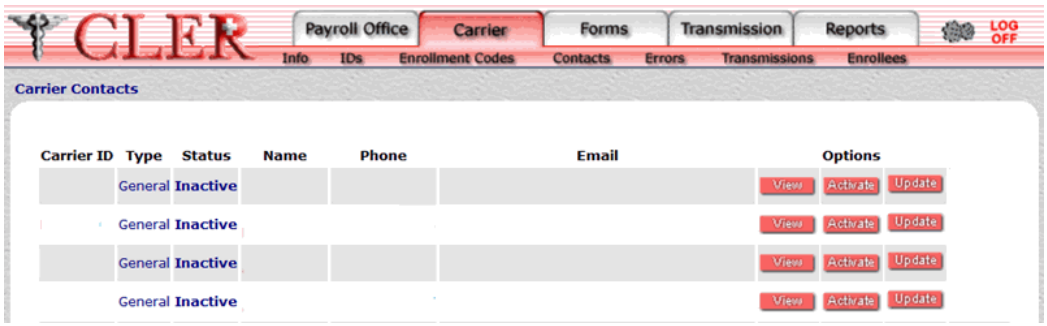


Figure 73: Carrier Contacts Search Results Page

The data on the Carrier Contacts search results page is categorized into the following fields:

Carrier ID (see "***Carrier ID - Field Description***" on page 346)

Type (see "***Type - (Carrier Contact) Field Description***" on page 452)

Status (see "***Status - (Active/Inactive) Field Description***" on page 444)

Name (see "***Name - (Carrier Contact) Field Description***" on page 389)

Phone (see "***Phone - (Carrier Contact) Field Description***" on page 422)

Email (see "***Email - (Carrier Contact) Field Description***" on page 367)

Options (see "***Options - (View, Activate, Update) Field Description***" on page 393)

6. Select the **View** button next to the applicable record. The Carrier Contacts View page is displayed.

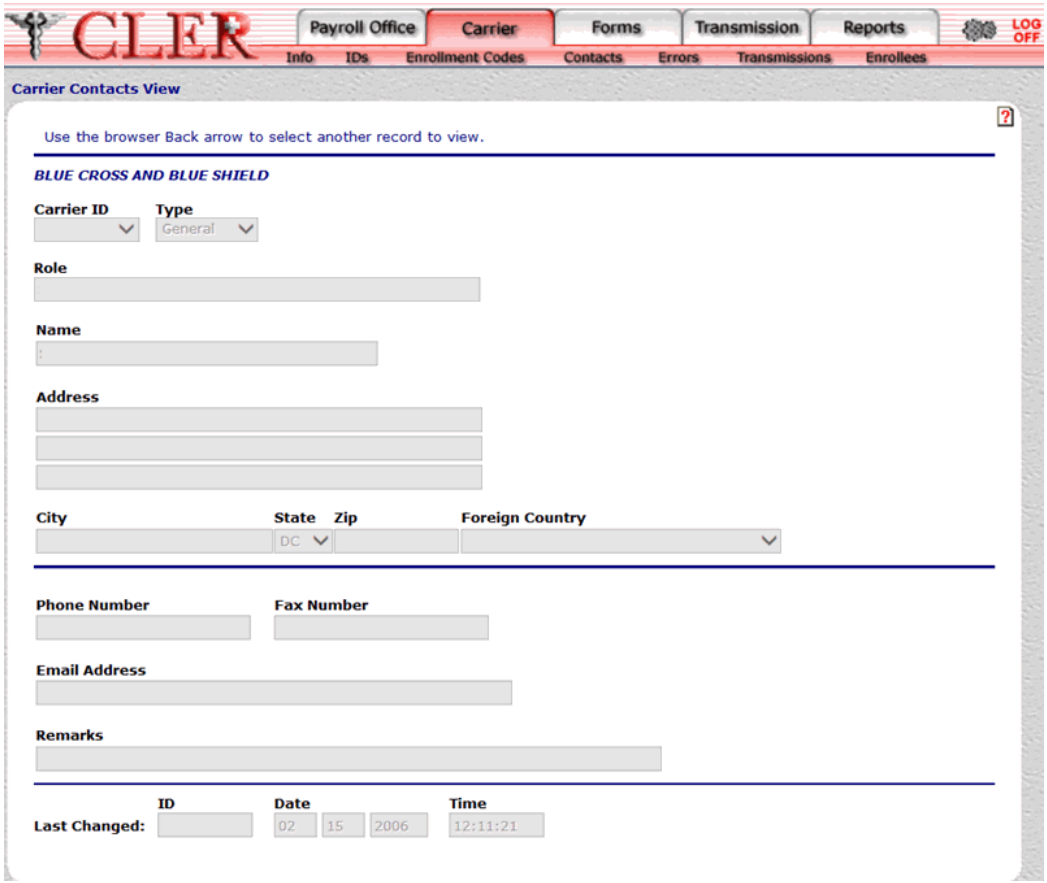


Figure 74: Carrier Contacts View Page

The data on the Carrier Contacts View page is categorized into the following fields:

Carrier ID (see "***Carrier ID - Field Description***" on page 346)

Type (see "***Type - (Carrier Contact) Field Description***" on page 452)

Role (see "***Role - (Carrier Contact) Field Description***" on page 437)

Name (see "***Name - (Carrier Contact) Field Description***" on page 389)

Address Line 1 (see "***Address Line 1 - Carrier Contact Field Description***" on page 331)

Address Line 2 (see "***Address Line 2 - Carrier Contact Field Description***" on page 333)

Address Line 3 (see "***Address Line 3 - Carrier Contact Field Description***" on page 336)

City (see "***City - Carrier Contact Field Description***" on page 348)

State (see "***State - (Carrier Contact) Field Description***" on page 441)

Zip (see "***ZIP - (Carrier Contact) Field Description***" on page 458)

Foreign Country (see "***Foreign Country - (Carrier Contact) Field Description***" on page 376)

Phone Number (see "***Phone - (Carrier Contact) Field Description***" on page 422)

Fax Number (see "***Fax Number - (Carrier Contact) Field Description***" on page 374)

Email Address (see "***Email Address - (Carrier Contact) Field Description***" on page 367)

Remarks (see "***Remarks - Field Description***" on page 436)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 381)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 381)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 381)

Note: To view another record select your browser's **Back** button to return to the Carrier Contacts search results page, then select the **View** button next to the applicable record.

Viewing a Carrier Plan Contact Record

The **View** function allows users to view carrier plan contact records.

To View a Carrier Plan Contact Record:

1. Select the ***Carrier*** tab on the CLER Main Menu. The Carrier Main Page is displayed.

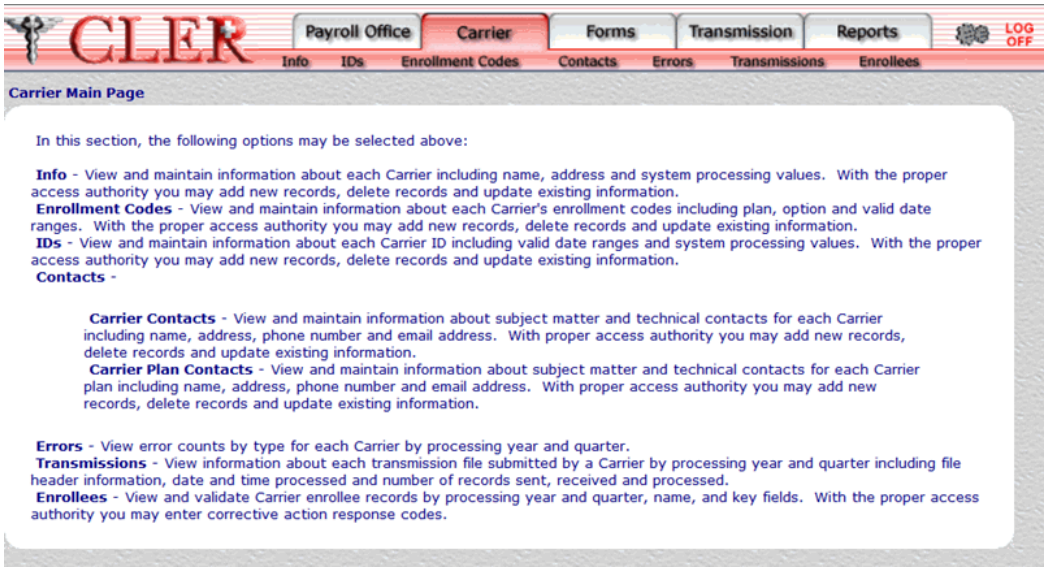


Figure 75: Carrier Main Page

2. Select ***Contacts*** on the Carrier Main Page. The Contacts Main Page is displayed.

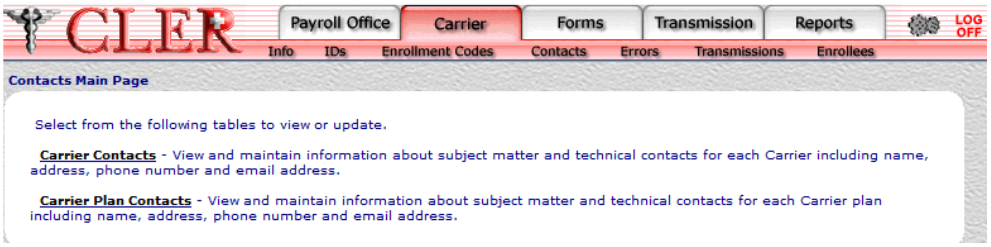


Figure 76: Contacts Main Page

3. Select the ***Carrier Plan Contacts*** link to display the Carrier Plan Contacts page.

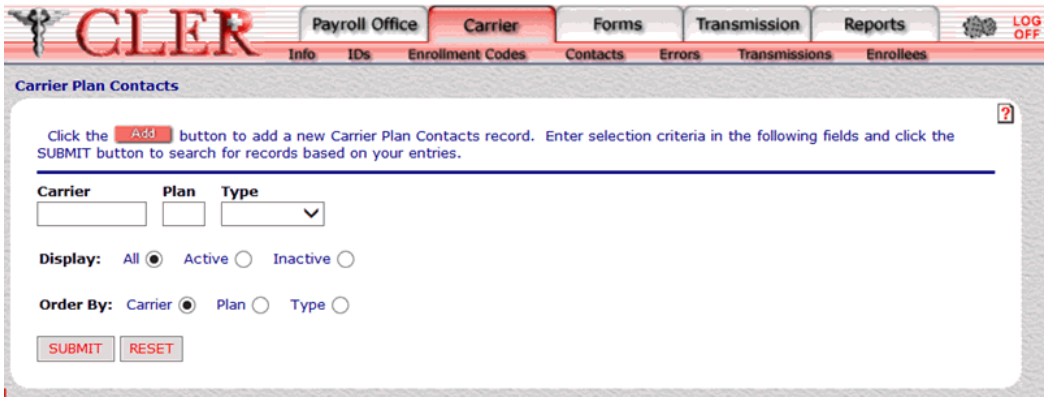


Figure 77: Carrier Plan Contacts Page

4. Complete the following fields on the Carrier Plan Contacts page:

   Carrier (see "***Carrier - Field Instruction***" on page 345)

   Plan (see "***Plan - Field Instruction***" on page 424)

   Type (see "***Type - (Carrier Contact) Field Instruction***" on page 452)

   Display (see "***Display - (Carrier Code) Field Instruction***" on page 363)

   Order By (see "***Order By - (Carrier - Plan Sort) Field Instruction***" on page 395)

5. Select the **Submit** button to confirm all data entered. The Carrier Plan Contacts Search Results page is displayed.

   OR

   Select the **Reset** button to clear all data entered.

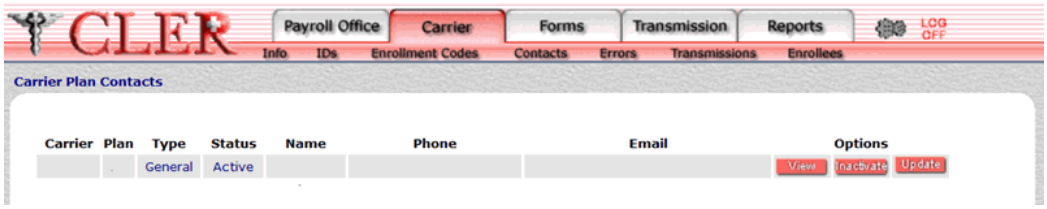


Figure 78: Carrier Plan Contacts Search Results Page

The data on the Carrier Plan Contacts search results page is categorized into the following fields:

Carrier (see "***Carrier - Field Description***" on page 345)

Plan (see "***Plan - (Carrier) Field Description***" on page 424)

Type (see "***Type - (Carrier Plan Contact) Field Instruction***" on page 452)

Status (see "***Status - (Active/Inactive) Field Description***" on page 444)

Name (see "***Name - Carrier Plan Contact Field Description***" on page 390)

Phone (see "***Phone Number - (Carrier Plan Contact) Field Description***" on page 423)

Email (see "***Email - (Carrier Plan Contact) Field Description***" on page 367)

Options (see "***Options - (View, Activate, Update) Field Description***" on page 393)

6. Select the **View** button next to the applicable record. The Carrier Plan Contacts View page is displayed.

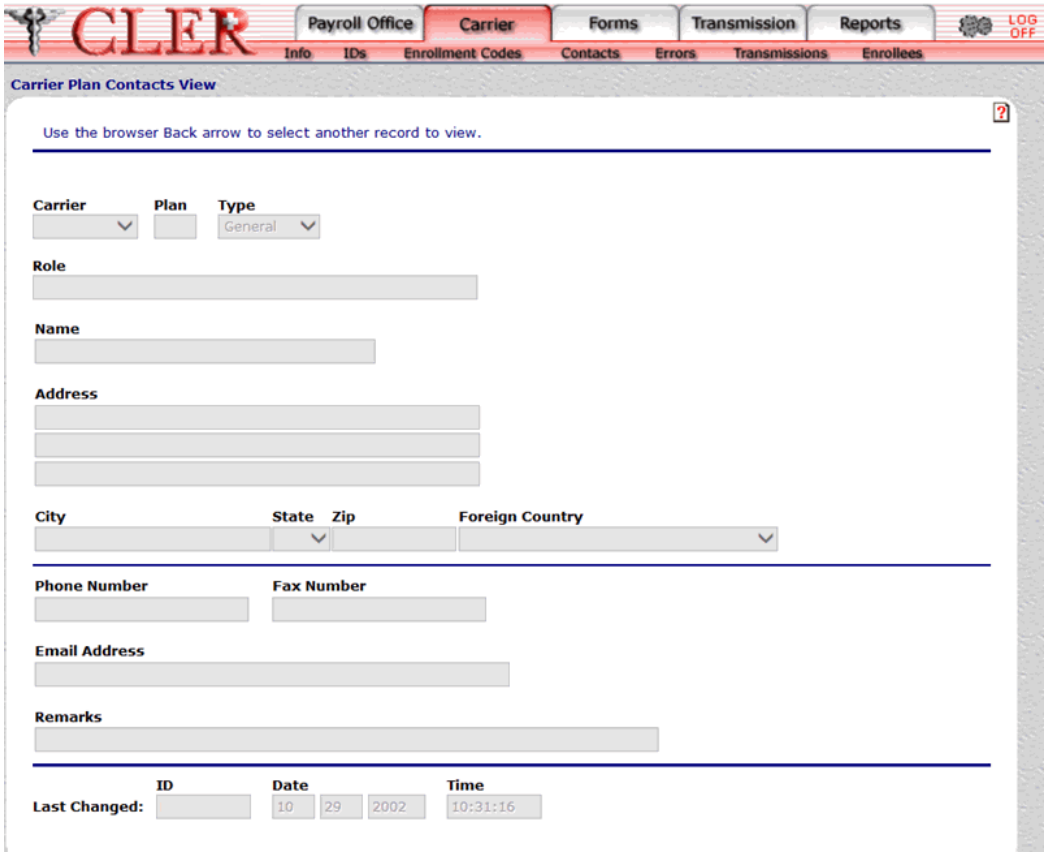


Figure 79: Carrier Plan Contacts View Page

The data on the Carrier Plan Contacts View page is categorized into the following fields:

Carrier ID (see "***Carrier ID - Field Description***" on page 346)

Plan (see "***Plan - (Carrier) Field Description***" on page 424)

Type (see "***Type - (Carrier Contact) Field Description***" on page 452)

Role (see "***Role - (Carrier Plan Contact) Field Description***" on page 437)

Name (see "***Name - Carrier Plan Contact Field Description***" on page 390)

Address Line 1 (see "***Address Line 1 - Carrier Plan Contact Field Description***" on page 331)

Address Line 2 (see "***Address Line 2 - Carrier Plan Contact Field Description***" on page 333)

Address Line 3 (see "***Address Line 3 - Carrier Plan Contact Field Description***" on page 336)

City (see "***City - Carrier Plan Contact Field Description***" on page 349)

State (see "***State - (Carrier Plan Contact) Field Description***" on page 441)

Zip (see "***ZIP - (Carrier Plan Contact) Field Description***" on page 458)

Foreign Country (see "***Foreign Country (Carrier Plan Contact) - Field Description***" on page 376)

Phone Number (see "***Phone Number - (Carrier Plan Contact) Field Description***" on page 423)

Fax Number (see "***Fax Number - (Carrier Plan Contact) Field Description***" on page 374)

Email Address (see "***Email Address - (Carrier Plan Contact) Field Description***" on page 367)

Remarks (see "***Remarks - Field Description***" on page 436)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 381)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 381)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 381)

Note: To view another record, select your browser's **Back** button to return to the Carrier Plan Contacts search results page, then select the **View** button next to the applicable record.

Viewing Carrier Transmissions Records

The ***Transmission*** option on the Carrier Main page allows users to view information about each transmission file submitted by a carrier by processing year and quarter. An Agency should view a carrier's transmission records before trying to resolve that carrier's enrollment record discrepancies. This will ensure an Agency that they have access to the most current data from the carrier.

To View a Carrier Transmissions Record:

1. On the CLER Main Page, select the ***Carrier*** tab, then select ***Transmissions***. The Carrier Transmissions page is displayed.

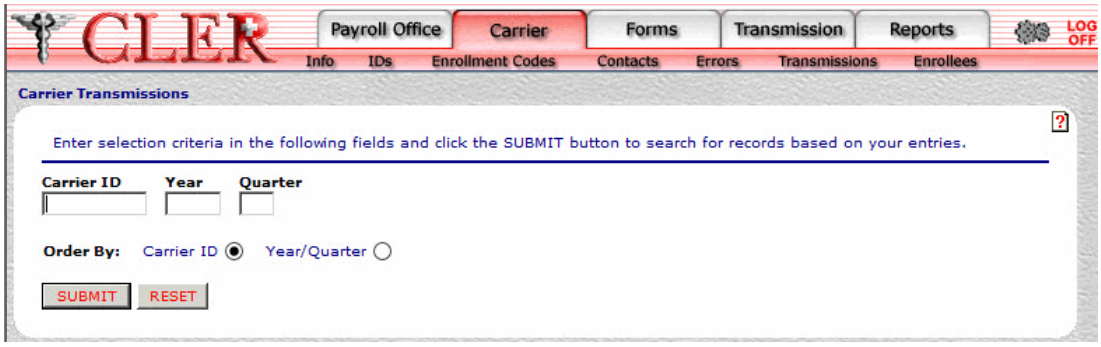


Figure 80: Carrier Transmissions Page

2. Complete the following fields on the Carrier Transmissions page:

   Carrier ID (see "***Carrier ID - Field Instruction***" on page 346)

   Year (see "***Year - (Reconciliation Year for Transmission Record) Field Instruction***" on page 456)

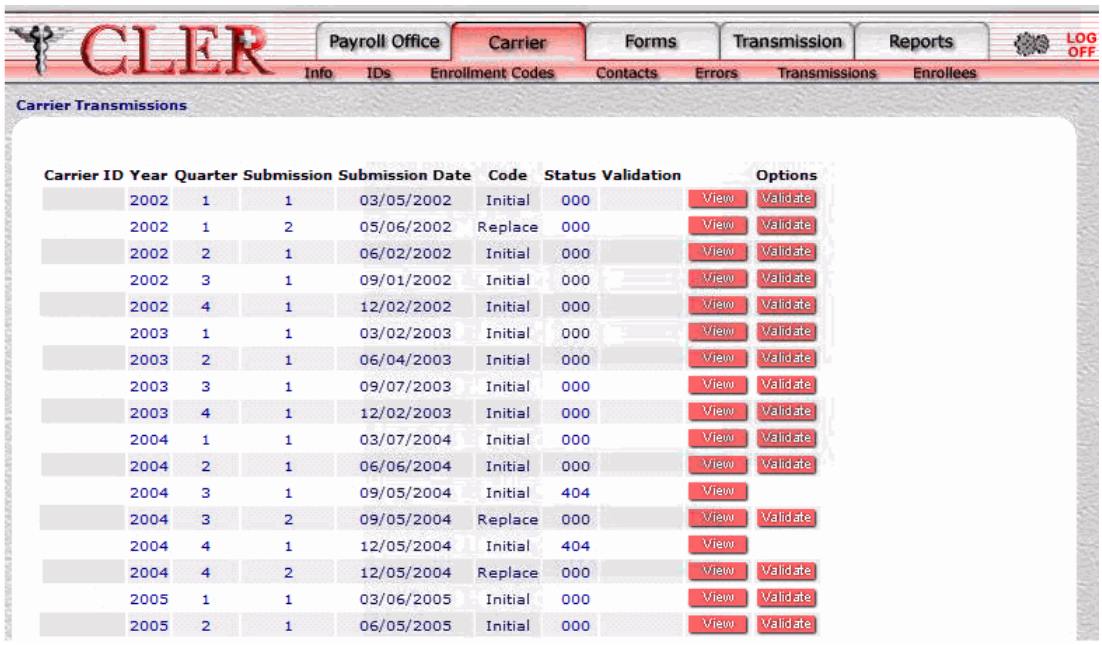
   Quarter (see "***Quarter - Field Instruction***" on page 429)

   Order By

3. Select the **Submit** button to confirm all data entered. The Carrier Transmissions Search Results page is displayed.

OR

Select the **Reset** button to clear all data entered.



Carrier ID	Year	Quarter	Submission	Submission Date	Code	Status	Validation		Options
	2002	1	1	03/05/2002	Initial	000		View	Validate
	2002	1	2	05/06/2002	Replace	000		View	Validate
	2002	2	1	06/02/2002	Initial	000		View	Validate
	2002	3	1	09/01/2002	Initial	000		View	Validate
	2002	4	1	12/02/2002	Initial	000		View	Validate
	2003	1	1	03/02/2003	Initial	000		View	Validate
	2003	2	1	06/04/2003	Initial	000		View	Validate
	2003	3	1	09/07/2003	Initial	000		View	Validate
	2003	4	1	12/02/2003	Initial	000		View	Validate
	2004	1	1	03/07/2004	Initial	000		View	Validate
	2004	2	1	06/06/2004	Initial	000		View	Validate
	2004	3	1	09/05/2004	Initial	404		View	
	2004	3	2	09/05/2004	Replace	000		View	Validate
	2004	4	1	12/05/2004	Initial	404		View	
	2004	4	2	12/05/2004	Replace	000		View	Validate
	2005	1	1	03/06/2005	Initial	000		View	Validate
	2005	2	1	06/05/2005	Initial	000		View	Validate

Figure 81: Carrier Transmissions Search Results Page

The data on the Carrier Transmissions view page is categorized into the following fields:

Carrier ID (see "***Carrier ID - Field Description***" on page 346)

Year (see "***Year - (Transmission Year Record) Field Description***" on page 457)

Quarter (see "***Quarter - Payroll Office Transmissions Search Results Field Description***" on page 430)

Submission (see "***Submission - (Number) Field Description***" on page 445)

Submission Date (see "***Submission Date - (Carrier Transmissions) Search Results Field Description***" on page 445)

Code (see "***Code - Carrier Transmissions Search Results Field Description***" on page 352)

Status (see "***Status - (Transmission Carrier) Field Description***" on page 444)

Validation (see "***Validation - Field Description***" on page 455)

Options (see "***Options - (View, Validate) Field Description***" on page 394)

4. Select the **View** button next to the applicable record. The Carrier Transmissions View page is displayed.

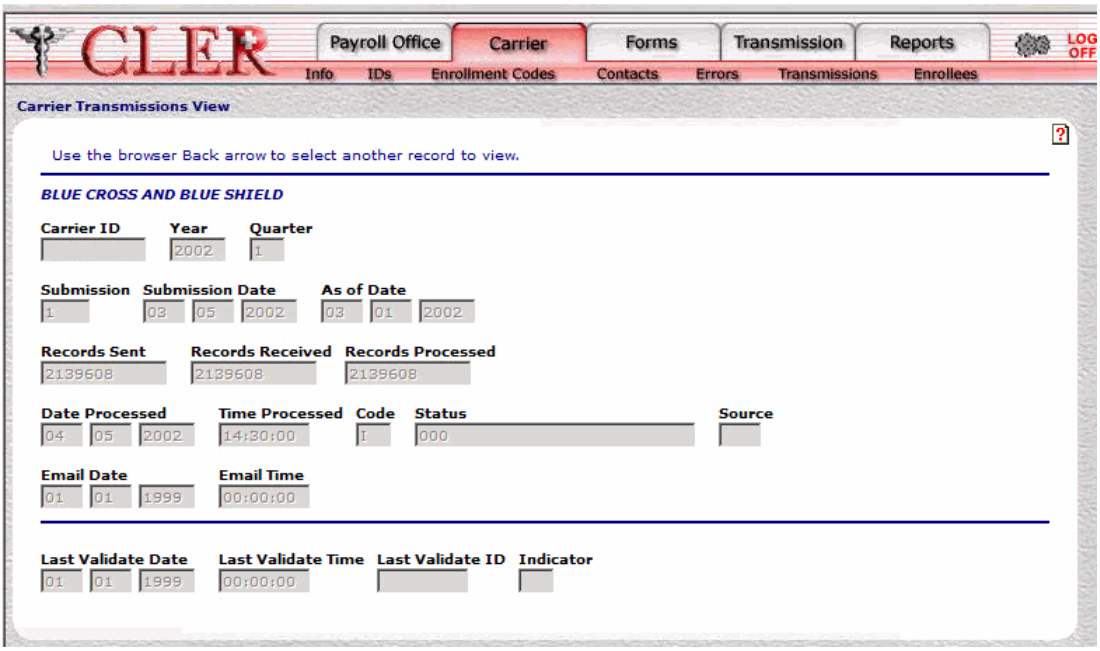


Figure 82: Carrier Transmissions View Page

The data on the Carrier Transmissions View page is categorized into the following fields:

Carrier ID (see "***Carrier ID - Field Description***" on page 346)

Year (see "***Year - (Transmission Year Record) Field Description***" on page 457)

Quarter (see "***Quarter - Field Description***" on page 429)

Submission (see "***Submission - Field Description***" on page 445)

Submission Date (see "***Submission Date - Field Description***" on page 446)

As of Date (see "***As of Date - Carrier Transmissions Field Description***" on page 342)

Records Sent (see "***Records Sent - Field Description***" on page 434)

Records Received (see "***Records Received - Field Description***" on page 434)

Records Processed (see "***Records Processed - Field Description***" on page 433)

Date Processed (see "***Date Processed - Field Description***" on page 360)

Time Processed (see "***Time Processed - Field Description***" on page 448)

Code (see "***Code - Carrier Transmissions View Field Description***" on page 352)

Status (see "***Status - (Transmission Carrier) Field Description***" on page 444)

Email Date (see "***Email Date - Field Description***" on page 368)

Email Time (see "***Email Time - Field Description***" on page 368)

Last Validate Date (see "***Last Validate Date - Field Description***" on page 387)

Last Validate Time (see "***Last Validate Time - Field Description***" on page 387)

Last Validate ID (see "***Last Validate ID - Field Description***" on page 387)

Indicator (see "***Indicator - Field Description***" on page 379)

Note: To view another record, select your browser's **Back** button to return to the Carrier Transmissions search results page, then select the **View** button next to the applicable record.

Maintaining Carrier Enrollee Records (Marked with Discrepancy Code 160)

The ***Enrollees*** option on the Carrier Main page allows Agency users to view and validate carrier enrollee records marked with Discrepancy Code `160`. For a description of Discrepancy Code `160`, see Discrepancy Codes Table.

Note: Carrier users are able to view and reconcile payroll office enrollee records marked with Discrepancy Code `163`. Thus, the Reconcile function allows carrier users to communicate with Agencies about payroll office enrollee records marked with Discrepancy Code `163`. For more information, see Discrepancy Codes Table.

For more information see:

Validating Carrier Enrollee Records (Marked with Discrepancy Code 160) 103
Viewing Carrier Enrollee Records (Marked with Discrepancy Code 160).....109

Validating Carrier Enrollee Records (Marked with Discrepancy Code 160)

The **Validate** function allows Agency users to communicate with carriers about carrier enrollee records with Discrepancy Code`160`. For a description, see Discrepancy Codes Table.

To Validate a Carrier Enrollee Record Marked With Discrepancy Code 160:

1. On the CLER Main Menu - ***Carrier*** tab, select ***Enrollees***. The Carrier Enrollees Page is displayed.

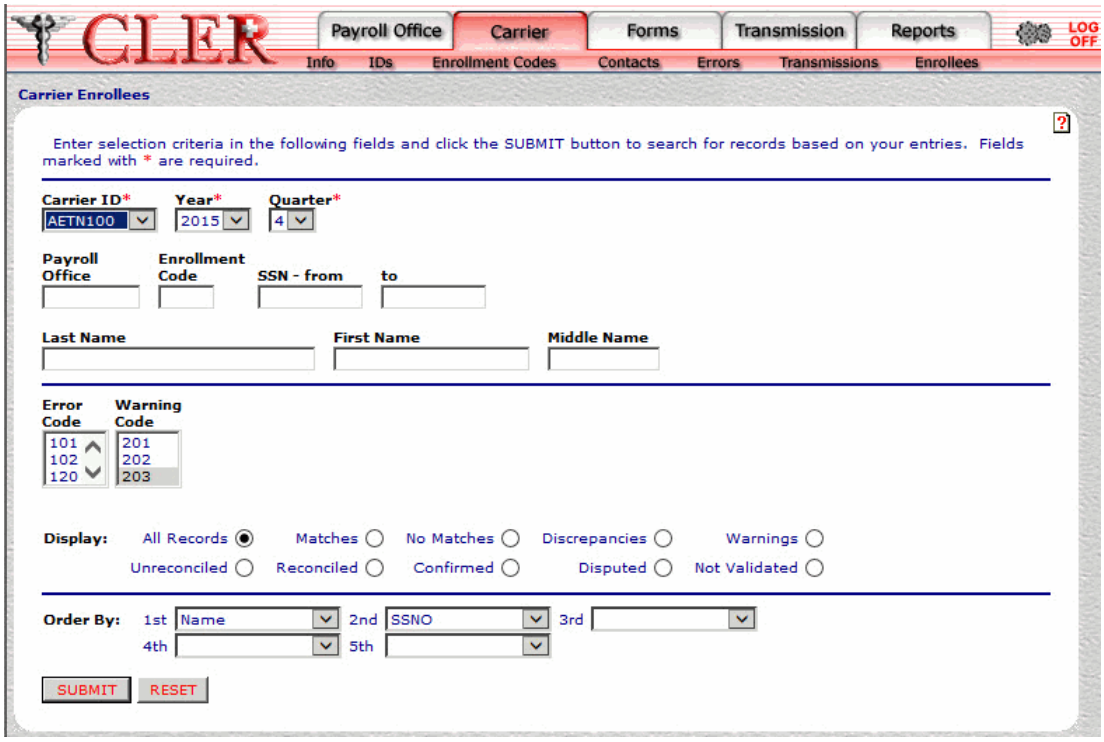


Figure 83: Carrier Enrollees Page (blank)

2. Complete the following fields on the Carrier Enrollees page:

   Carrier ID (see "***Carrier ID - (Carrier Enrollees) Field Instruction***" on page 346)

   Year (see "***Year - (Required) Field Instruction***" on page 457)

   Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

   Payroll Office (see "***Payroll Office - Field Instruction***" on page 419)

   Enrollment Code (see "***Enrollment Code - (Optional) Field Instruction***" on page 371)

   SSN - from (see "***SSN From - Field Instruction***" on page 440)

   SSN - to (see "***SSN To - Field Instruction***" on page 440)

   Last Name (see "***Last Name - Enrollee Field Instruction***" on page 385)

   First Name (see "***First Name - Enrollee Field Instruction***" on page 375)

Middle Name (see "***Middle Name - Field Instruction***" on page 389)

Error Code (see "***Error Code - (Select) Field Instruction***" on page 371)

Warning Code (see "***Warning Code - (Select) Field Instruction***" on page 455)

Display (see "***Display - (All Records) Field Instruction***" on page 363)

Order By 1st (see "***Order By 1st - (Enrollee) Field Instruction***" on page 399)

Order By 2nd (see "***Order By 2nd - Field Instruction***" on page 403)

Order By 3rd (see "***Order By 3rd - Field Instruction***" on page 406)

Order By 4th (see "***Order By 4th - Field Instruction***" on page 408)

Order By 5th (see "***Order By 5th - Field Instruction***" on page 410)

3. Select the **Submit** button to confirm all data entered. The Carrier Enrollees search results page is displayed.

OR

Select the **Reset** button to clear all data entered.

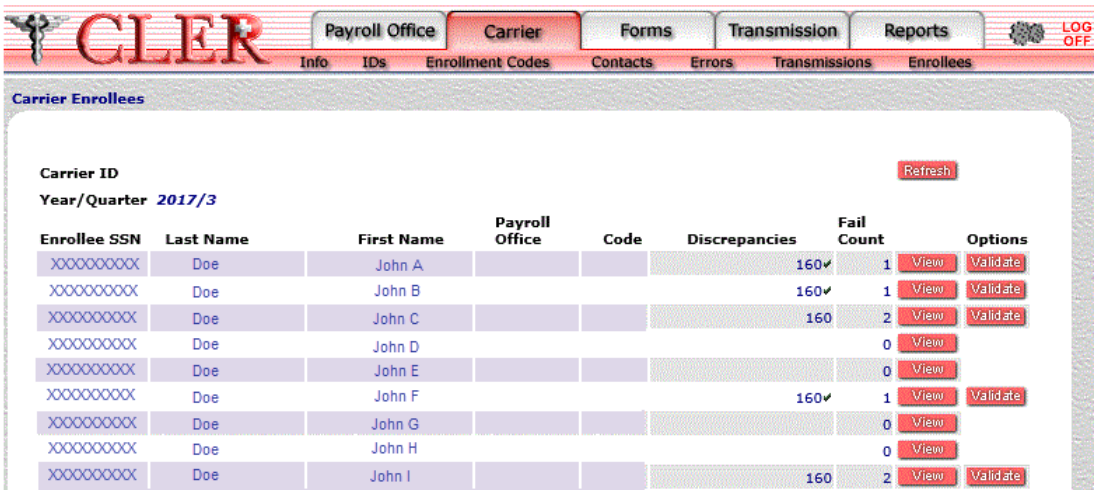


Figure 84: Carrier Enrollees Search Results Page

The data on the Carrier Enrollees search results page is categorized into the following fields:

Carrier ID (see "***Carrier ID - Field Description***" on page 346)

Year/Quarter (see "***Year/Quarter - Field Description***" on page 458)

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Payroll Office (see "***Payroll Office ID - Field Description***" on page 420)

Code (see "***Code - Field Description***" on page 352)

Discrepancies (see "***Discrepancies - Field Description***" on page 362)

Fail Count (see "***Fail Count - Field Description***" on page 373)

Options (see "***Options - (View, Validate) Field Description***" on page 394)

4. Select the **Validate** button next to the applicable record. The Carrier Enrollees Validate page is displayed.

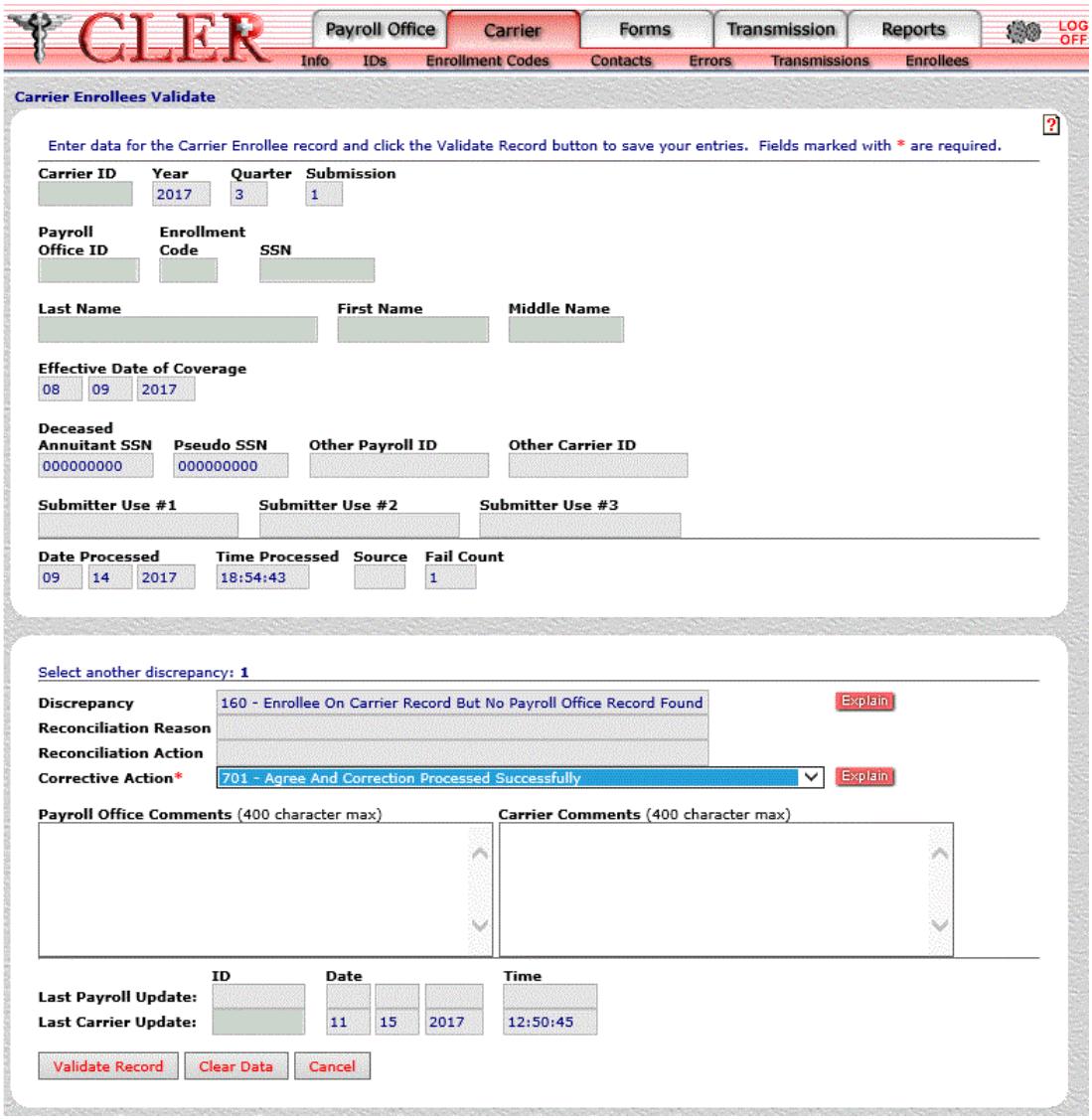


Figure 85: Carrier Enrollees Validate Page

The data on the Carrier Enrollees Validate page is categorized into the following fields:

Carrier ID (see "***Carrier ID - Field Description***" on page 346)

Year (see "***Year - Field Description***" on page 457)

Quarter (see "***Quarter - Field Description***" on page 429)

Submission (see "***Submission - (Payroll Office Enrollees) Reconcile Field Description***" on page 445)

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Enrollment Code (see "***Enrollment Code - Field Description***" on page 371)

SSN (see "***SSN - (Enrollee) Field Description***" on page 439)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Middle Name (see "***Middle Name - Enrollee Field Description***" on page 388)

Effective Date of Coverage (see "***Effective Date of Coverage - Field Description***" on page 366)

Deceased Annuitant SSN (see "***Deceased Annuitant SSN - Field Description***" on page 361)

Pseudo SSN (see "***Pseudo SSN - Field Description***" on page 428)

Other Payroll ID (see "***Other Payroll ID - Field Description***" on page 415)

Other Carrier ID (see "***Other Carrier ID - Field Description***" on page 414)

Submitter Use #1 (see "***Submitter Use #1 - Field Description***" on page 446)

Submitter Use #2 (see "***Submitter Use #2 - Field Description***" on page 446)

Submitter Use #3 (see "***Submitter Use #3 - Field Description***" on page 447)

Date Processed (see "***Date Processed - (Processed Run) Field Description***" on page 360)

Time Processed (see "***Time Processed - (Process Run) Field Description***" on page 448)

Source (see "***Source - Field Description***" on page 439)

Fail Count (see "***Fail Count - Field Description***" on page 373)

Discrepancy (see "***Discrepancy - (Explain/Duplicate - Code 166) Field Description***" on page 362)

Reconciliation Reason (see "***Reconciliation Reason - Field Description***" on page 432)

Reconciliation Action (see "***Reconciliation Action - Field Description***" on page 431)

Corrective Action (see "***Corrective Action - Field Instruction***" on page 357)

Payroll Office Comments (see "***Payroll Office Comments - Field Instruction***" on page 419)

Carrier Comments (see "***Carrier Comments - Field Instruction***" on page 345)

Last Payroll Update ID (see "***Last Payroll Update ID - Field Description***" on page 386)

Last Payroll Update Date (see "***Last Payroll Update Date - Field Description***" on page 386)

Last Payroll Update Time (see "***Last Payroll Update Time - Field Description***" on page 386)

Last Carrier Update ID (see "***Last Carrier Update ID - Field Description***" on page 380)

Last Carrier Update Date (see "***Last Carrier Update Date - Field Description***" on page 380)

Last Carrier Update Time (see "***Last Carrier Update Time - Field Description***" on page 381)

5. Select the **Validate Record** button. If no errors occur, a popup appears to confirm the record has been validated.

   OR

   Select the **Clear Data** button to clear all data entered.

6. Select the **OK** button to close the popup.

Note: To validate another record, select the **Cancel** button to return to the Carrier Enrollees Search Results page, then select the **Validate** button next to the applicable record.

Viewing Carrier Enrollee Records (Marked with Discrepancy Code 160)

The **View** function allows Agency users to view carrier enrollee records marked with Discrepancy Code `160`.

To View a Carrier Enrollee Record Marked With Discrepancy Code 160:

1. On the CLER Main Page - ***Carrier*** tab, select ***Enrollees***. The Carrier Enrollees page is displayed.

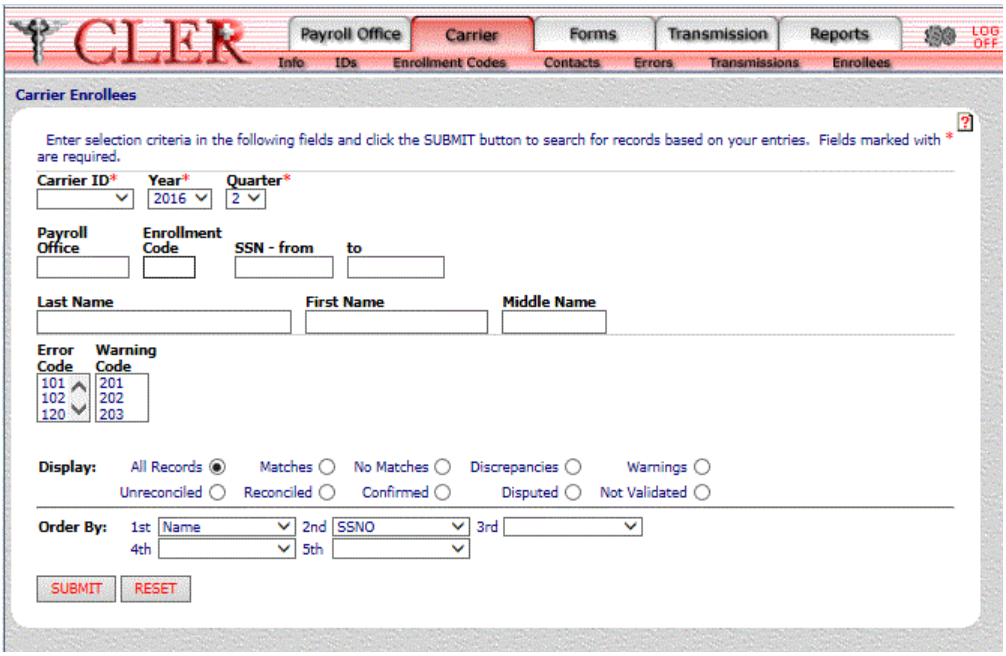


Figure 86: Carrier Enrollees Page

2. Complete the following fields on the Carrier Enrollees page:

   Carrier ID (see "***Carrier ID - (Carrier Enrollees) Field Instruction***" on page 346)

   Year (see "***Year - (Required) Field Instruction***" on page 457)

   Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

   Payroll Office (see "***Payroll Office - Field Instruction***" on page 419)

   Enrollment Code (see "***Enrollment Code - (Optional) Field Instruction***" on page 371)

   SSN - from (see "***SSN From - Field Instruction***" on page 440)

   SSN - to (see "***SSN To - Field Instruction***" on page 440)

   Last Name (see "***Last Name - Enrollee Field Instruction***" on page 385)

   First Name (see "***First Name - Enrollee Field Instruction***" on page 375)

   Middle Name (see "***Middle Name - Field Instruction***" on page 389)

Error Code (see "***Error Code - (Select) Field Instruction***" on page 371)

Warning Code (see "***Warning Code - (Select) Field Instruction***" on page 455)

Display (see "***Display - (All Records) Field Instruction***" on page 363)

Order By 1st (see "***Order By 1st - (Enrollee) Field Instruction***" on page 399)

Order By 2nd (see "***Order By 2nd - Field Instruction***" on page 403)

Order By 3rd (see "***Order By 3rd - Field Instruction***" on page 406)

Order By 4th (see "***Order By 4th - Field Instruction***" on page 408)

Order By 5th (see "***Order By 5th - Field Instruction***" on page 410)

3. Select the **Submit** button to confirm all data entered. The Carrier Enrollees Search Results page is displayed.

OR

Select the **Reset** button to clear all data entered.

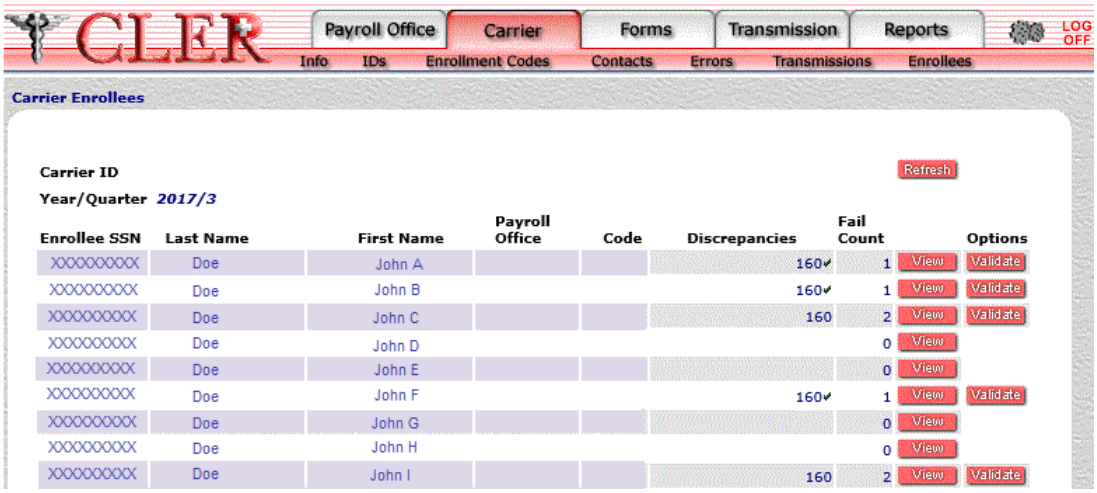


Figure 87: Carrier Enrollees Search Results Page

The data on the Carrier Enrollees search results page is categorized into the following fields:

Carrier ID (see "***Carrier ID - Field Description***" on page 346)

Year/Quarter (see "***Year/Quarter - Field Description***" on page 458)

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Payroll Office (see "***Payroll Office ID - Field Description***" on page 420)

Code (see "***Code - Field Description***" on page 352)

Discrepancies (see "***Discrepancies - Field Description***" on page 362)

Fail Count (see "***Fail Count - Field Description***" on page 373)

Options (see "***Options - (View, Validate) Field Description***" on page 394)

4. Select the **View** button next to the applicable record. The Carrier Enrollees View page is displayed.

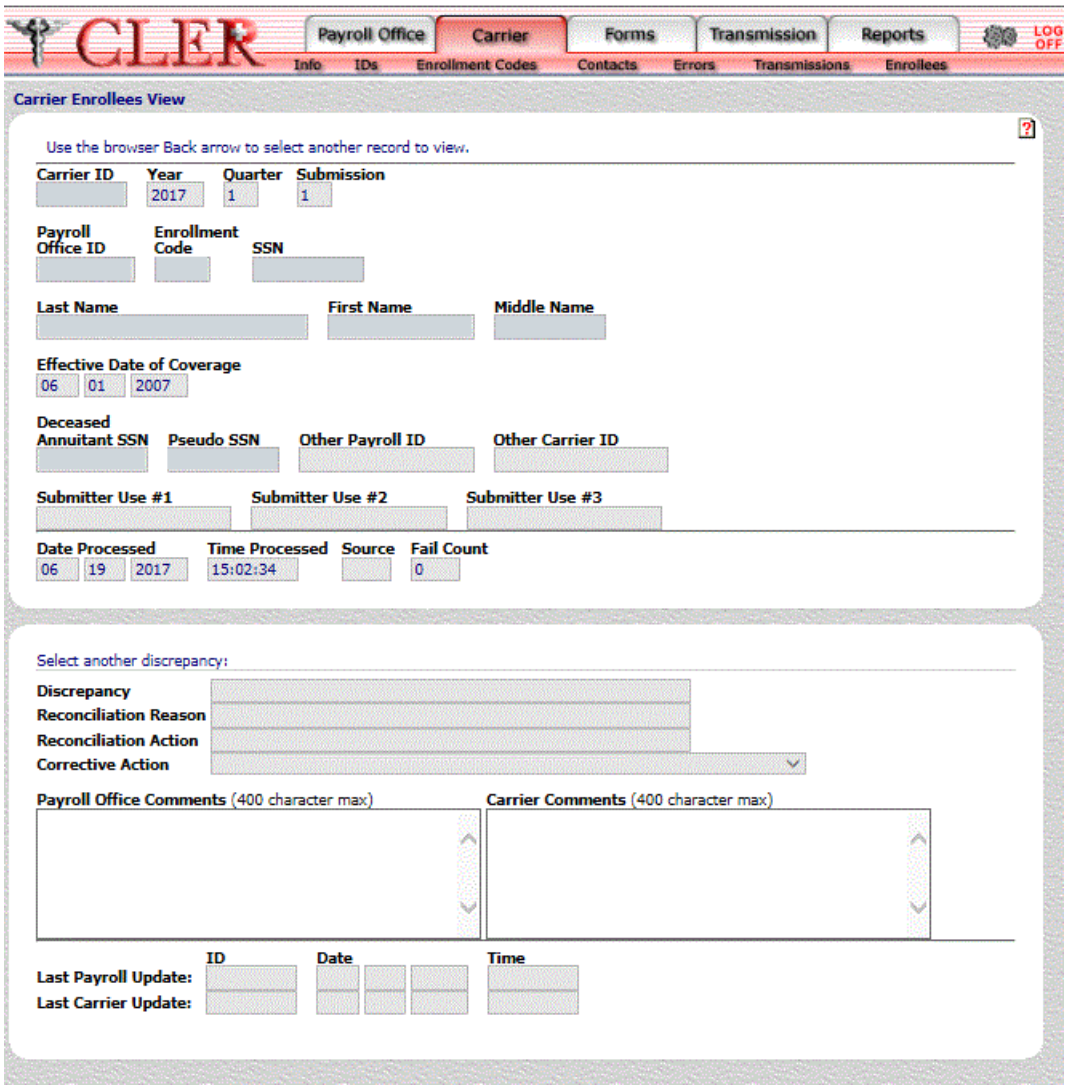


Figure 88: Carrier Enrollee Discrepancy Records View Page

The data on the Carrier Enrollees View page is categorized into the following fields:

Carrier ID (see "***Carrier ID - Field Description***" on page 346)

Year (see "***Year - Field Description***" on page 457)

Quarter (see "***Quarter - Field Description***" on page 429)

Submission (see "***Submission - (Payroll Office Enrollees) Reconcile Field Description***" on page 445)

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Enrollment Code (see "***Enrollment Code - Field Description***" on page 371)

SSN (see "***SSN - (Enrollee) Field Description***" on page 439)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Middle Name (see "***Middle Name - Enrollee Field Description***" on page 388)

Effective Date of Coverage (see "***Effective Date of Coverage - Field Description***" on page 366)

Deceased Annuitant SSN (see "***Deceased Annuitant SSN - Field Description***" on page 361)

Pseudo SSN (see "***Pseudo SSN - Field Description***" on page 428)

Other Payroll ID (see "***Other Payroll ID - Field Description***" on page 415)

Other Carrier ID (see "***Other Carrier ID - Field Description***" on page 414)

Submitter Use #1 (see "***Submitter Use #1 - Field Description***" on page 446)

Submitter Use #2 (see "***Submitter Use #2 - Field Description***" on page 446)

Submitter Use #3 (see "***Submitter Use #3 - Field Description***" on page 447)

Date Processed (see "***Date Processed - (Processed Run) Field Description***" on page 360)

Time Processed (see "***Time Processed - (Process Run) Field Description***" on page 448)

Source (see "***Source - Field Description***" on page 439)

Fail Count (see "***Fail Count - Field Description***" on page 373)

Discrepancy (see "***Discrepancy - (Explain/Duplicate - Code 166) Field Description***" on page 362)

Reconciliation Reason (see "***Reconciliation Reason - Field Description***" on page 432)

Reconciliation Action (see "***Reconciliation Action - Field Description***" on page 431)

Corrective Action (see "***Corrective Action (Code) - Field Description***" on page 356)

Payroll Office Comments (see "***Payroll Office Comments - Field Instruction***" on page 419)

Carrier Comments (see "***Carrier Comments - Field Instruction***" on page 345)

Last Payroll Update ID (see "***Last Payroll Update ID - Field Description***" on page 386)

Last Payroll Update Date (see "***Last Payroll Update Date - Field Description***" on page 386)

Last Payroll Update Time (see "***Last Payroll Update Time - Field Description***" on page 386)

Last Carrier Update ID (see "***Last Carrier Update ID - Field Description***" on page 380)

Last Carrier Update Date (see "***Last Carrier Update Date - Field Description***" on page 380)

Last Carrier Update Time (see "***Last Carrier Update Time - Field Description***" on page 381)

Note: To view another record, select your browser's **Back** button to return to the Carrier Enrollees search results page, then select the **View** button next to applicable record.

Maintaining Forms Records

The ***Forms*** option provides the Standard Form (SF) 2809and SF 2810 options. These options contain the same data fields as the SF 2809, Health Benefits Election Form, and the SF 2810, Notice of Change in Health Benefits Enrollment. With proper access authority, additional records may be added and current records may be updated or deleted.

This section includes the following topics:

Maintaining 2809 Records **115**
Maintaining 2810 Records **152**

Maintaining 2809 Records

The ***2809*** option on the Forms Main page allows Agency users to create a 2809 record in CLER. The CLER 2809 provides carriers with the information that they need to update their enrollee records. With the proper access authority, forms may be created, deleted, printed, and released for processing. From the input that creates the 2809, CLER will generate a corrective action file to the carrier through OPM. It should be noted that this is an option; Agencies may use other procedures such as fax, hardcopy, etc., to coordinate corrective action(s) with the carriers.

For more information see:

Adding a 2809 Record **115**
Viewing a 2809 Record **125**
Releasing a 2809 Record **137**
Canceling a 2809 Record **139**
Updating a 2809 Record **142**

Adding a 2809 Record

The **Add** function allows users to add 2809 records.

To Add a 2809 Record:

1. Select the ***Forms*** tab on the CLER Main Menu. The Forms Main Page is displayed.

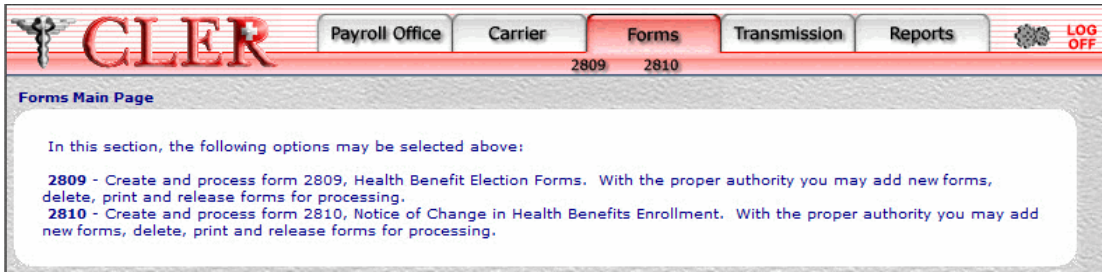


Figure 89: Forms Main Page

2. Select ***2809*** on the Forms tab. The Form 2809 page is displayed.

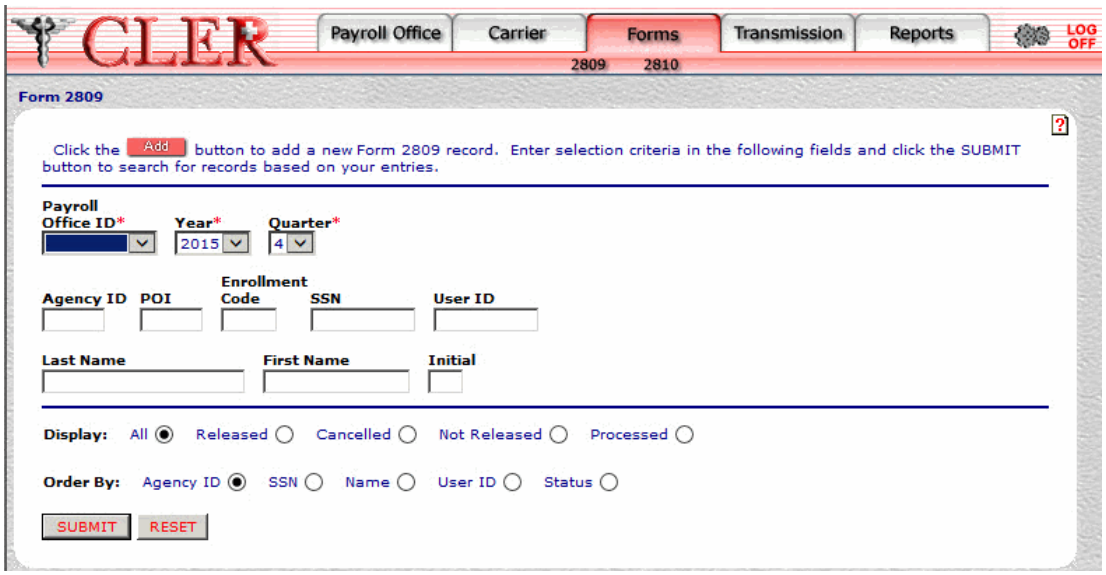


Figure 90: Form 2809 Page

3. Select the **Add** button on the Form 2809 page to display the Form 2809 Add (Part A) page.

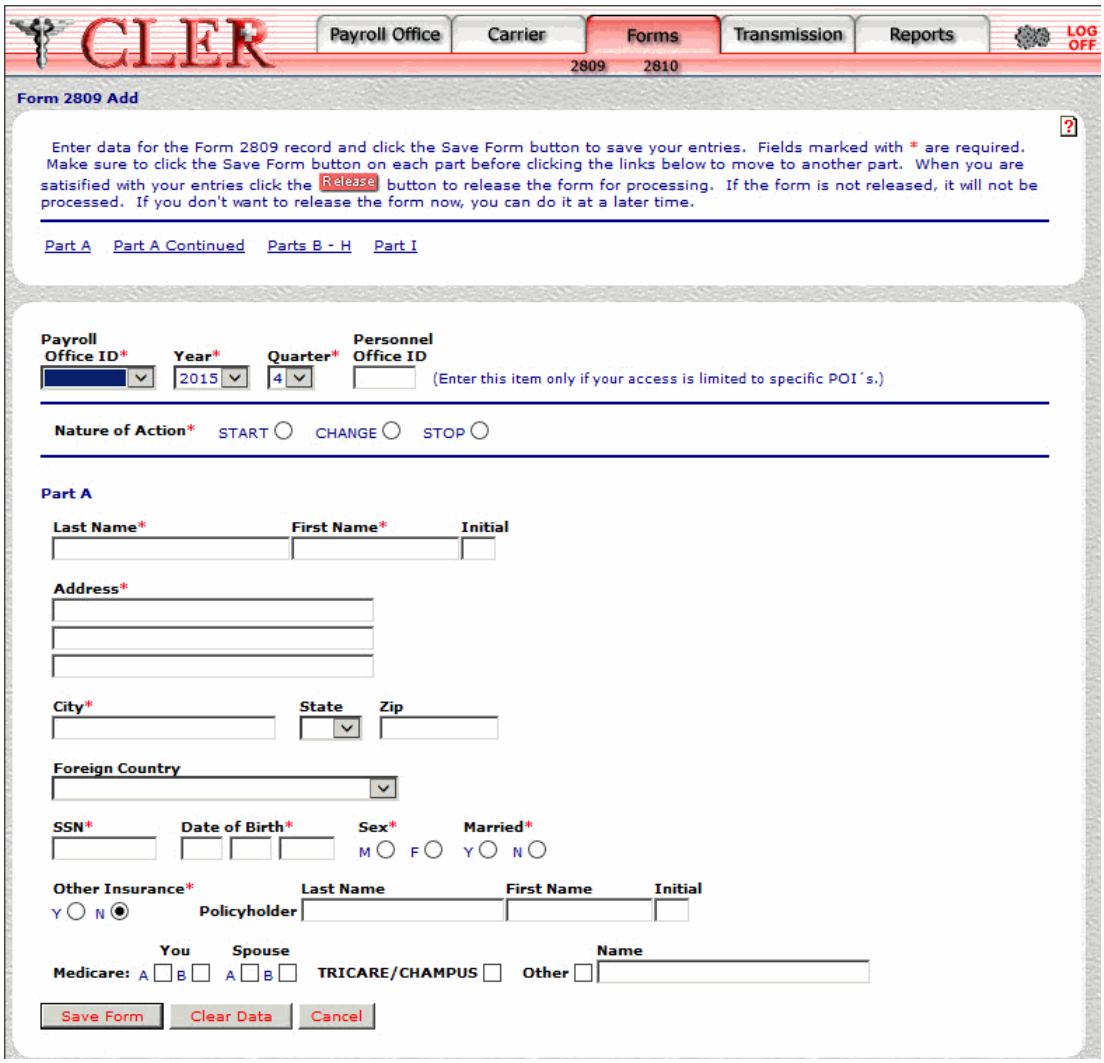


Figure 91: Form 2809 Add Page (Part A)

4. Complete the following fields for Form 2809 Part A:

   Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

   Year (see "***Year - (Required) Field Instruction***" on page 457)

   Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

   Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

   Nature of Action (see "***Nature of Action - Field Instruction***" on page 391)

Last Name (see "***Last Name - (Required) Field Instruction***" on page 385)

First Name (see "***First Name - (Required) Enrollee Field Instruction***" on page 375)

Initial (see "***Initial - Field Instruction***" on page 380)

Address Line 1 (see "***Address Line 1 - Form 2809 Add (Part A) Field Instruction***" on page 332)

Address Line 2 (see "***Address Line 2 - Form 2809 Add (Part A) Field Instruction***" on page 334)

Address Line 3 (see "***Address Line 3 - Form 2809 Add (Part A) Field Instruction***" on page 337)

City (see "***City - Form 2809/2810 Add (Part A) Field Instruction***" on page 350)

State (see "***State - (Enrollee) Field Description***" on page 442)

Zip (see "***ZIP - (Enrollee) Field Description***" on page 459)

Foreign Country (see "***Foreign Country - Form 2809/2810 Add (Part A) Field Instruction***" on page 378)

SSN (see "***SSN - (Required) Field Instruction***" on page 439)

Date of Birth (see "***Date of Birth - Form 2809/2810 Add (Part A) Field Instruction***" on page 360)

Sex (see "***Sex - (Enrollee - Required) Field Instruction***" on page 438)

Married (see "***Married - (Enrollee - Required) Field Instruction***" on page 387)

Other Insurance (see "***Other Insurance - (Enrollee - Required) Field Instruction***" on page 415)

Policyholder Last Name (see "***Policyholder Last Name - (Enrollee) Field Instruction***" on page 426)

Policyholder First Name (see "***Policyholder First Name - (Enrollee) Field Instruction***" on page 425)

Policyholder Initial (see "***Policyholder Initial - (Enrollee) Field Instruction***" on page 425)

Medicare You (see "***Medicare You - (Enrollee) Field Instruction***" on page 388)

Medicare Spouse (see "***Medicare Spouse - (Enrollee) Field Instruction***" on page 388)

TRICARE/CHAMPUS (see "***TRICARE/CHAMPUS - (Enrollee) Field Instruction***" on page 452)

Other (see "***Other - (Enrollee) Field Instruction***" on page 413)

5. Select the **Save Form** button. If no errors occur, a popup appears to confirm the record has been added.

   OR

   Select the **Clear Data** button to clear the form and select the **Cancel** button to return to the previous page.

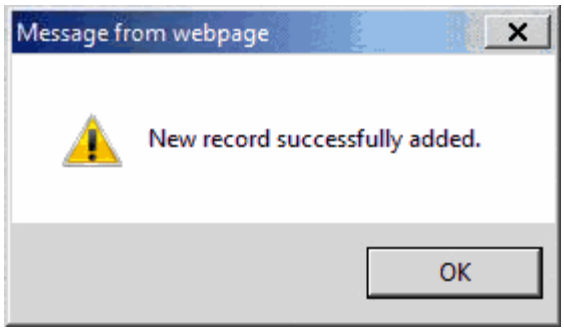


Figure 92: Transmission Online Entry Add Popup

6. Select the **OK** button to close the popup.

7. Select ***Part A Continued*** on the Form 2809 Add page (if applicable).

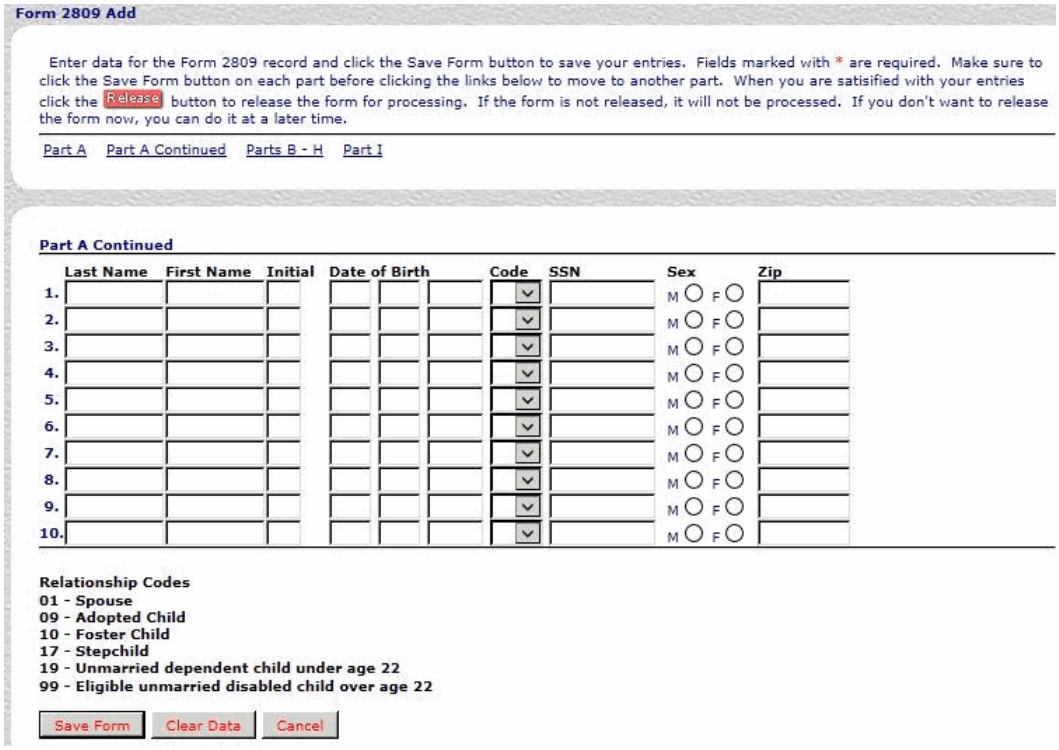


Figure 93: Form 2809 Add Page (Part A Continued)

8. Complete the following fields on the Form 2809 Add Part A Continued (if applicable):

   Last Name (see "***Last Name - (Form 2809 Part A Continued) Field Instruction***" on page 385)

   First Name (see "***First Name - (Form 2809 Part A Continued) Field Instruction***" on page 375)

   Initial (see "***Initial - (Form 2809 Part A Continued) Field Instruction***" on page 379)

   Date of Birth (see "***Date of Birth - (Form 2809 Part A Continued) Field Instruction***" on page 359)

   Code (see "***Code - (Form 2809 Part A Continued) Field Instruction***" on page 351)

   SSN (see "***SSN - (Form 2809 Part A Continued) Field Instruction***" on page 439)

   Sex (see "***Sex - (Form 2809 Part A Continued) Field Instruction***" on page 438)

   Zip (see "***Zip - (Form 2809 Part A Continued) Field Instruction***" on page 459)

Note: The process can be repeated on Lines 1-10 for additional family members of the enrolling employee.

9. Select the **Save Form** button to save changes.

   OR

   Select the **Clear Data** button to clear the form and select the **Cancel** button to return to the previous page.

10. Select ***Parts B - H*** on the Form 2809 Add page to display the Parts B - H page.

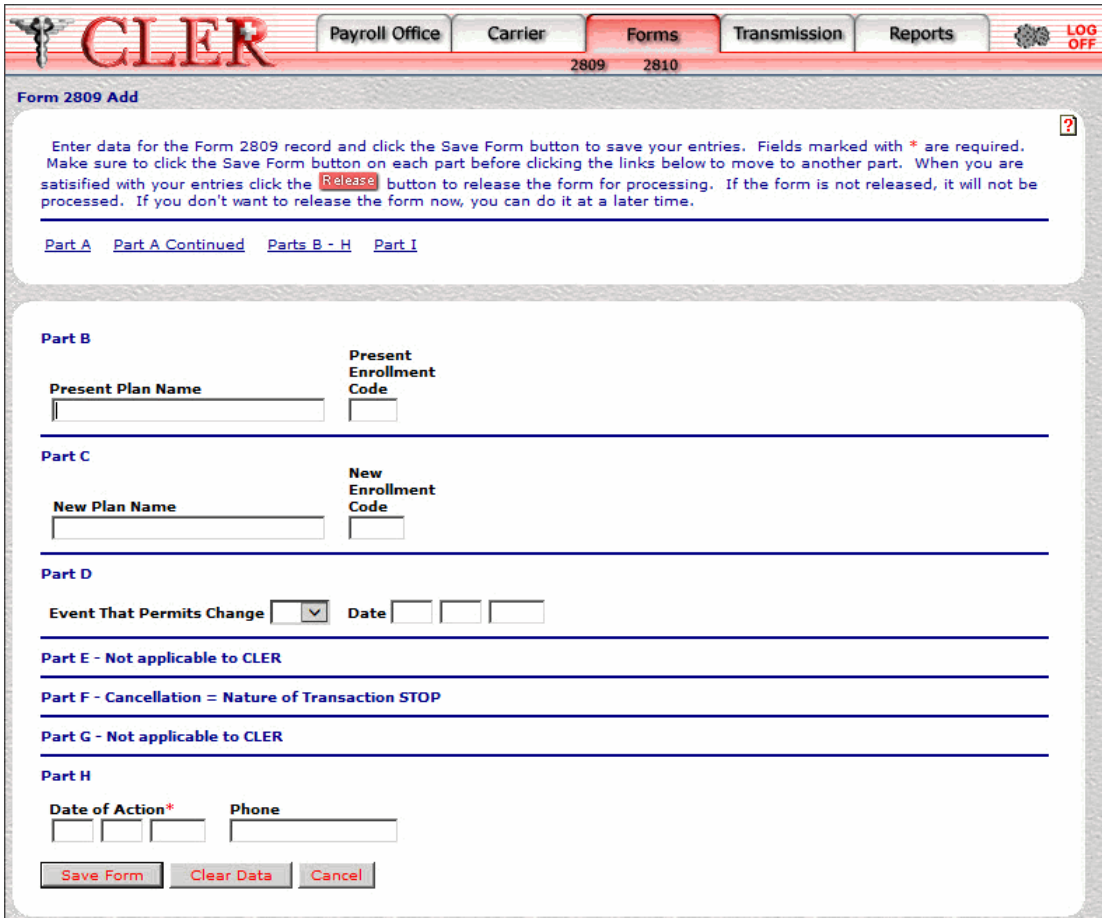


Figure 94: Form 2809 Add Page (Parts B-H)

11. Complete the following applicable fields on the Form 2809 Add Parts B - H page:

    Part B - Present Plan Name (see "***Present Plan Name - Form 2809 Add (Part B) Field Instruction***" on page 427)

    Part B - Present Enrollment Code (see "***Present Enrollment Code - Form 2809 Add (Part B) Field Instruction***" on page 426)

Part C - New Plan Name (see "***New Plan Name - Form 2809 Add (Part C) Field Instruction***" on page 392)

Part C - New Enrollment Code (see "***New Enrollment Code - Form 2809 Add (Part C) Field Instruction***" on page 391)

Part D - Event That Permits Change (see "***Event That Permits Change - Form 2809 (Part D) Field Instruction***" on page 373)

Part D - Date (see "***Date - Form 2809 Add (Part D) Field Instruction***" on page 358)

Part H - Date of Action (see "***Date of Action - Form 2809 Add (Part H) Field Instruction***" on page 359)

Part H - Phone (see "***Phone - Form 2809 (Part H) Field Instruction***" on page 422)

12. Select the **Save Form** button to save changes.

    OR

    Select the **Clear Data** button to clear the form and select the **Cancel** button to return to the previous page.

Note: An asterisk (*) indicates a required field. The Plan Name and Enrollment Code fields in Part B are marked with * when ***Start*** or ***Change*** is selected in the Nature of Action field in Part A. The Last Name, First Name, Date of Birth, Code, SSN, and Sex fields in Part B are marked with * when the third position of the enrollment code entered in the Enrollment Code field in Part B is 2 or 5, indicating family coverage.

13. Select ***Part I*** on the Form 2809 Add Page to display the Part I page.

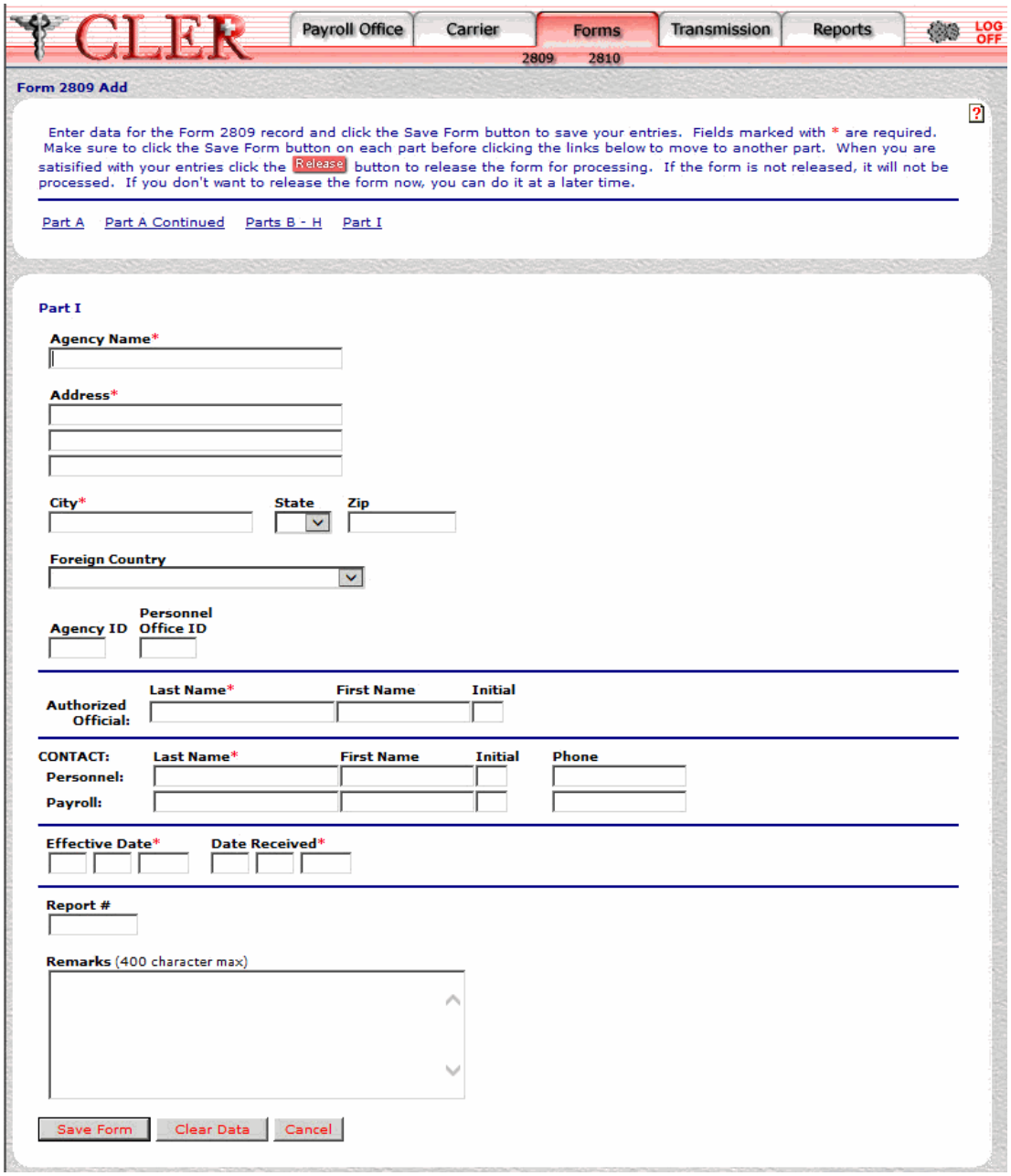


Figure 95: Form 2809 Page (Part I)

14. Complete the following fields on the Form 2809 Add Part I page if applicable:

Agency Name (see "***Agency Name - Form 2809 Add (Part I) Field Instruction***" on page 340)

Address Line 1 (see "***Address Line 1 - Form 2809 Add (Part I) Field Instruction***" on page 332)

Address Line 2 (see "***Address Line 2 - Form 2809 Add (Part I) Field Instruction***" on page 334)

Address Line 3 (see "***Address Line 3 - Form 2809 Add (Part I) Field Instruction***" on page 337)

City (see "***City - Form 2809 Add (Part I) Field Instruction***" on page 350)

State (on page 443)

Zip (see "***ZIP - (Coordinator) Field Instruction***" on page 459)

Foreign Country (see "***Foreign Country - Form 2809 Add (Part I) Field Instruction***" on page 377)

Agency ID (see "***Agency ID - Field Instruction***" on page 339)

Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

Authorized Official Last Name (see "***Authorized Official Last Name - Form 2809 Add (Part I) Field Instruction***" on page 344)

Authorized Official First Name (see "***Authorized Official First Name - Form 2809 Add (Part I) Field Instruction***" on page 344)

Authorized Official Initial (see "***Authorized Official Initial - Form 2809 Add (Part I) Field Instruction***" on page 344)

Contact (Personnel) Last Name (see "***Contact (Personnel) Last Name - Form 2809 Add (Part I) Field Instruction***" on page 356)

Contact (Personnel) First Name (see "***Contact (Personnel) First Name - Form 2809 Add (Part I) Field Instruction***" on page 355)

Contact (Personnel) Initial (see "***Contact (Personnel) Initial - Form 2809 Add (Part I) Field Instruction***" on page 355)

Contact (Personnel) Phone (see "***Contact (Personnel) Phone - Form 2809 Add (Part I) Field Instruction***" on page 356)

Contact (Payroll) Last Name (see "***Contact (Payroll) Last Name - Form 2809 Add (Part I) Field Instruction***" on page 354)

Contact (Payroll) First Name (see "***Contact (Payroll) First Name - Form 2809 Add (Part I) Field Instruction***" on page 353)

Contact (Payroll) Initial (see "***Contact (Payroll) Initial - Form 2809 Add (Part I) Field Instruction***" on page 354)

Contact (Payroll) Phone (see "***Contact (Payroll) Phone - Form 2809 Add (Part I) Field Instruction***" on page 355)

Effective Date (see "***Effective Date - Form 2809 View (Part I) Field Instruction***" on page 366)

Date Received (see "***Date Received - Form 2809 Add (Part I) Field Instruction***" on page 361)

Report # (see "***Report # - Field Instruction***" on page 436)

Remarks (see "***Remarks - (400 Max) Field Instruction***" on page 436)

15. Select the **Save Form** button. If no errors occur, a popup appears to confirm the record has been added.

    OR

    Select the **Clear Data** button to clear the form and select **Cancel** to return to the previous page.

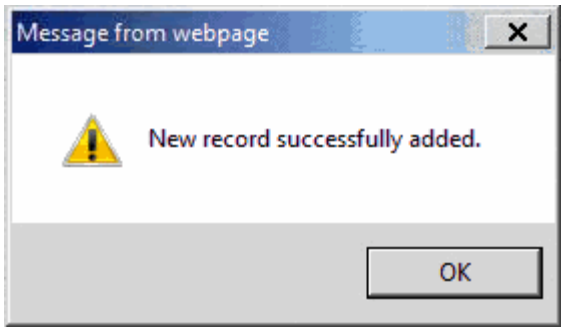


Figure 96: Transmission Online Entry Add Popup

16. Select the **OK** button to close the popup.

Viewing a 2809 Record

The **View** function allows users to view 2809 records.

To View a 2809 Record:

1. Select ***Forms*** tab on the CLER Main Menu.

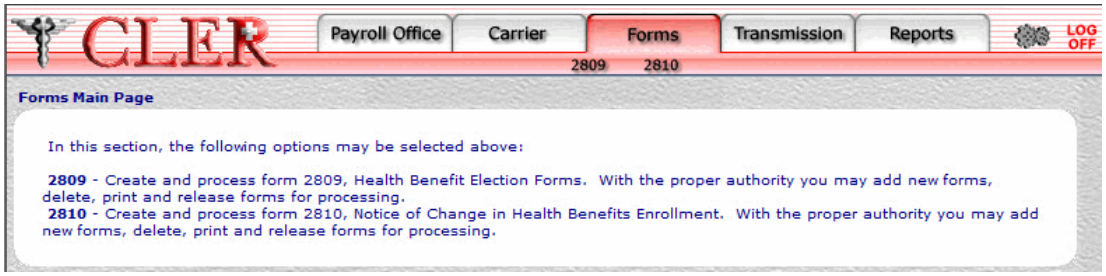


Figure 97: Forms Main Page

2. Select ***2809*** at the top on the Form Main page. The Form 2809 page is displayed.

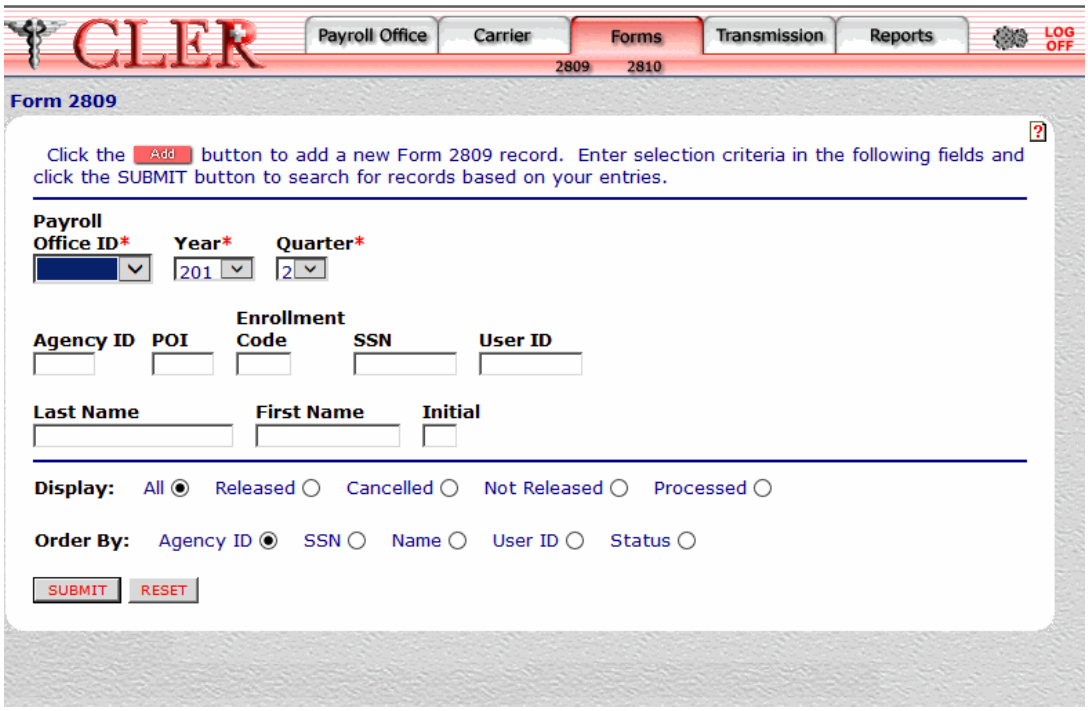


Figure 98: Form 2809 Page

3. Complete the following fields on the Form 2809 page:

Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

Year (see "***Year - (Required) Field Instruction***" on page 457)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

Agency ID (see "***Agency ID - Field Instruction***" on page 339)

POI (see "***POI - Field Description***" on page 424)

Enrollment Code (see "***Enrollment Code - Field Instruction***" on page 371)

SSN (see "***SSN - Field Instruction***" on page 440)

User ID (see "***User ID - (Form) Field Instruction***" on page 454)

Last Name (see "***Last Name - Enrollee Field Instruction***" on page 385)

First Name (see "***First Name - Enrollee Field Instruction***" on page 375)

Initial (see "***Initial - Field Instruction***" on page 380)

Display (see "***Display - (All) Field Instruction***" on page 363)

Order By (see "***Order By - (Agency ID) Field Instruction***" on page 395)

4. Select the **Submit** button to confirm all data entered. The Form 2809 search results page is displayed.

OR

Select the **Reset** button to clear all data entered.

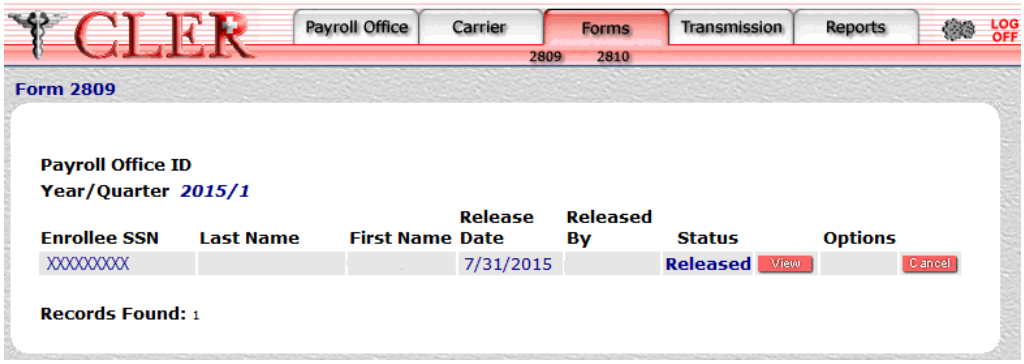


Figure 99: Form 2809 Search Results Page

The data on the Form 2809 search results page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year/Quarter (see "***Year/Quarter - Field Description***" on page 458)

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Release Date (see "***Release Date - (Form 2809 Search Results) Field Description***" on page 435)

Released By (see "***Released By - Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

Options (see "***Options - (View, Update, Cancel) Field Description***" on page 394)

5. Select the **View** button next to the applicable record. The Form 2809 View (Part A) page is displayed.

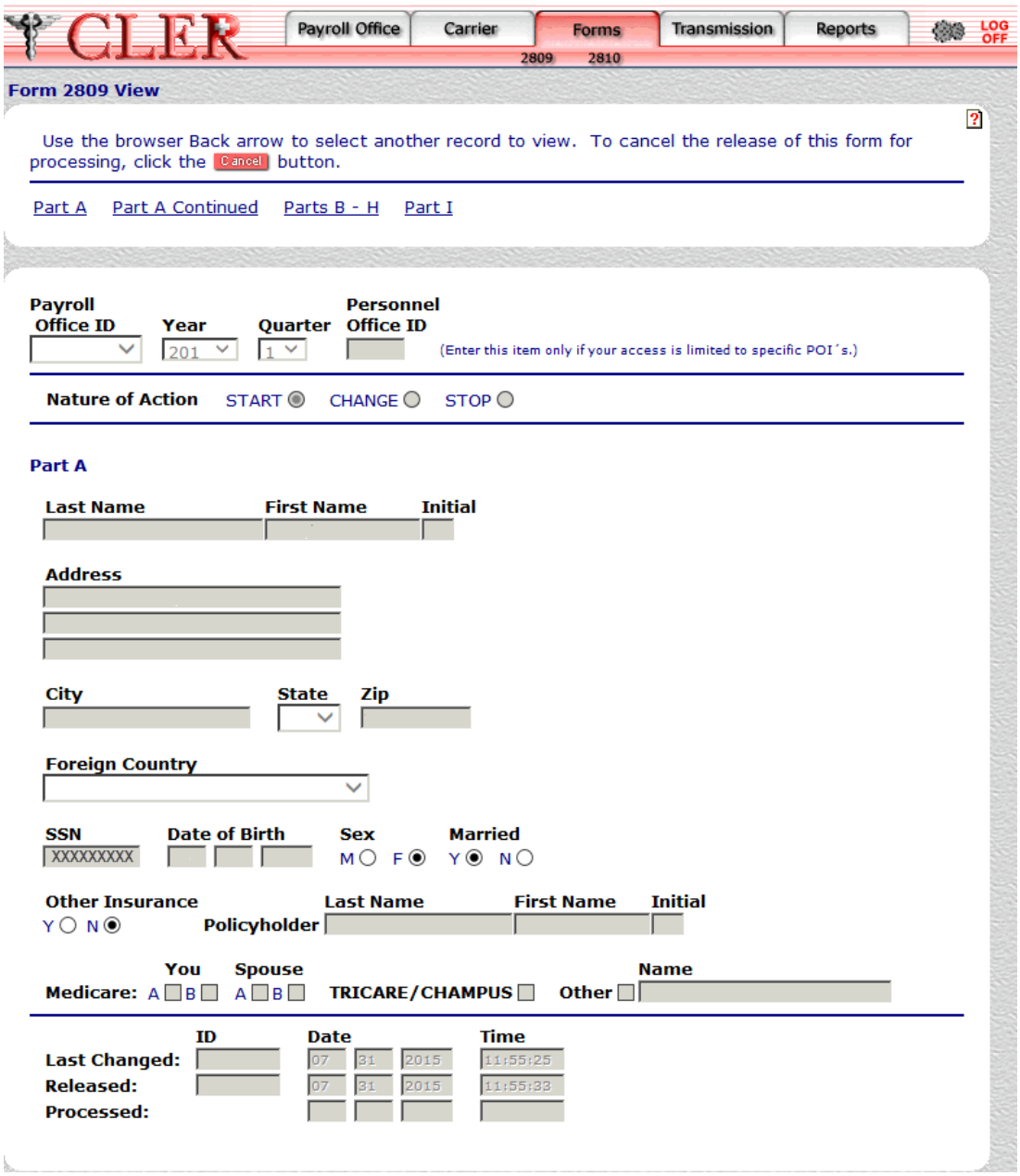


Figure 100: Form 2809 View Part A Page

The data on the Form 2809 View page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year (see "***Year - (Reconciliation Year) Field Description***" on page 456)

Quarter (see "***Quarter - (Reconciliation Quarter) Field Description***" on page 429)

Personnel Office ID (see "***Personnel Office ID - Field Description***" on page 422)

Nature of Action (see "***Nature of Action - Field Description***" on page 391)

The data on the Form 2809 View Part A is categorized into the following fields:

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Initial (see "***Initial - Field Description***" on page 380)

Address Line 1 (see "***Address Line 1 - Enrollee Field Description***" on page 331)

Address Line 2 (see "***Address Line 2 - Enrollee Field Description***" on page 334)

Address Line 3 (see "***Address Line 3 - Enrollee Field Description***" on page 336)

City (see "***City - Enrollee Field Description***" on page 349)

State (see "***State - (Enrollee) Field Description***" on page 442)

Zip (see "***ZIP - (Enrollee) Field Description***" on page 459)

Foreign Country (see "***Foreign Country - Form 2809 View (Part A) Field Description***" on page 378)

SSN (see "***SSN - (Enrollee) Field Description***" on page 439)

Date of Birth (see "***Date of Birth (Enrollee) - Field Description***" on page 359)

Sex (see "***Sex - (Enrollee) Field Description***" on page 438)

Married (see "***Married - (Enrollee) Field Description***" on page 387)

Other Insurance (see "***Other Insurance - Field Description***" on page 415)

Policyholder Last Name (see "***Policyholder Last Name - Field Description***" on page 426)

Policyholder First Name (see "***Policyholder First Name - Field Description***" on page 425)

Policyholder Initial (see "***Policyholder Initial - Field Description***" on page 425)

Medicare You (see "***Medicare You - Field Description***" on page 388)

Medicare Spouse (see "***Medicare Spouse - Field Description***" on page 388)

TRICARE/CHAMPUS (see "***TRICARE/CHAMPUS - Field Description***" on page 452)

Other (see "***Other - Field Description***" on page 414)

Name (see "***Other (Name) - Field Description***" on page 413)

Last Changed ID (see "***Last Changed ID - (Payroll Office) Field Description***" on page 381)

Last Changed Date (see "***Last Changed Date - (Payroll Office) Field Description***" on page 381)

Last Changed Time (see "***Last Changed Time - (Payroll Office) Field Description***" on page 381)

Released ID (see "***Released ID - Field Description***" on page 435)

Released Date (see "***Released Date - Field Description***" on page 435)

Released Time (see "***Released Time - Field Description***" on page 436)

Processed Date (see "***Processed Date - Field Description***" on page 427)

Processed Time (see "***Processed Time - Field Description***" on page 427)

6. Select ***Part A Continued***. The Form 2809 Part A Continued is displayed.

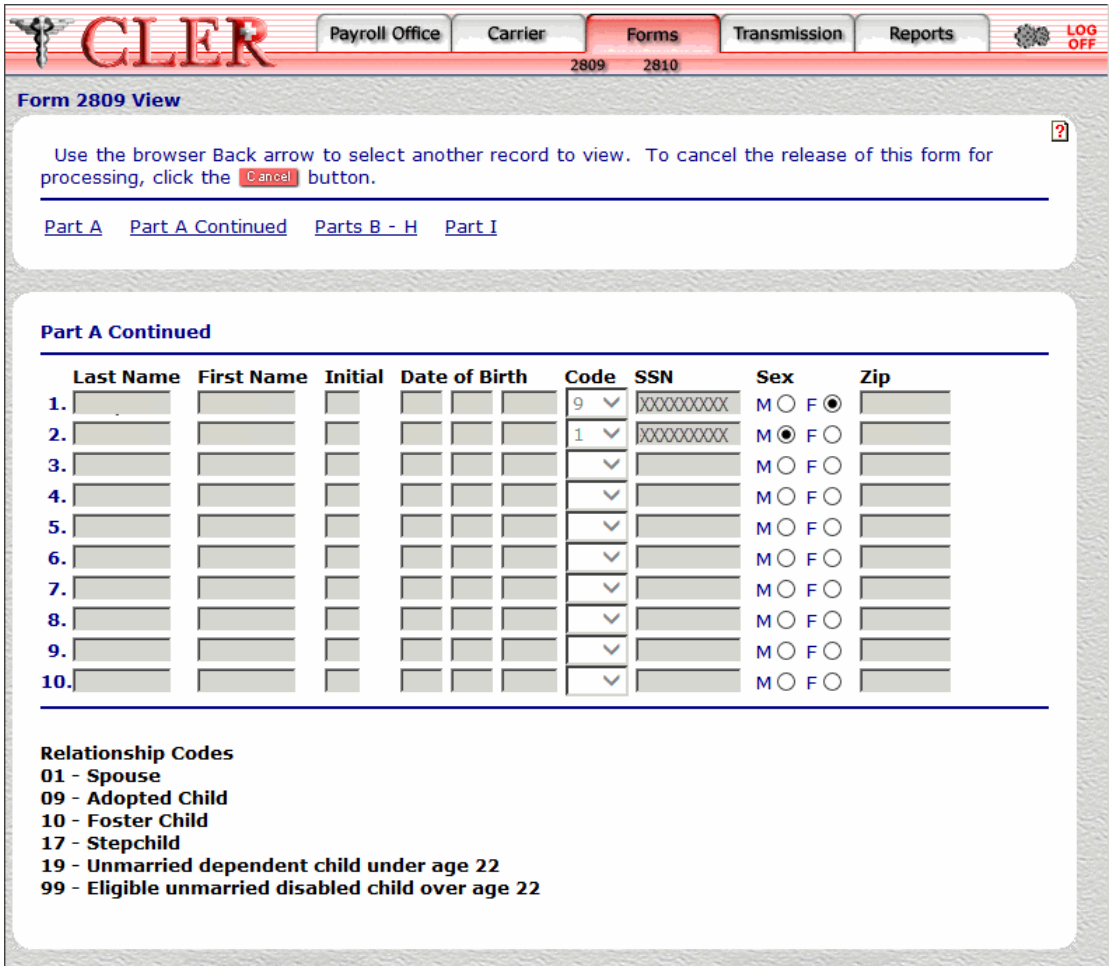


Figure 101: Form 2809 View Part A Continued Page

The data on the Form 2809 View Part A Continued is categorized into the following fields:

Last Name (see "***Last Name - Form 2809 View (Part A Continued) Field Description***" on page 386)

First Name (see "***First Name - Form 2809 View (Part A Continued) Field Description***" on page 375)

Initial (see "***Initial - Form 2809 View (Part A Continued) Field Description***" on page 380)

Date of Birth (see "***Date of Birth - Form 2809 View (Part A Continued) Field Description***" on page 359)

Code (see "***Code - Form 2809 View (Part A Continued) Field Description***" on page 352)

SSN (see "***SSN - Form 2809 View (Part A Continued) Field Description***" on page 440)

Sex (see "***Sex - Form 2809 View (Part A Continued) Field Description***" on page 438)

Zip (see "***ZIP - Form 2809 View (Part A Continued) Field Description***" on page 460)

7. Select ***Parts B through H*** to display the Form 2809 View (Parts B through H) page.

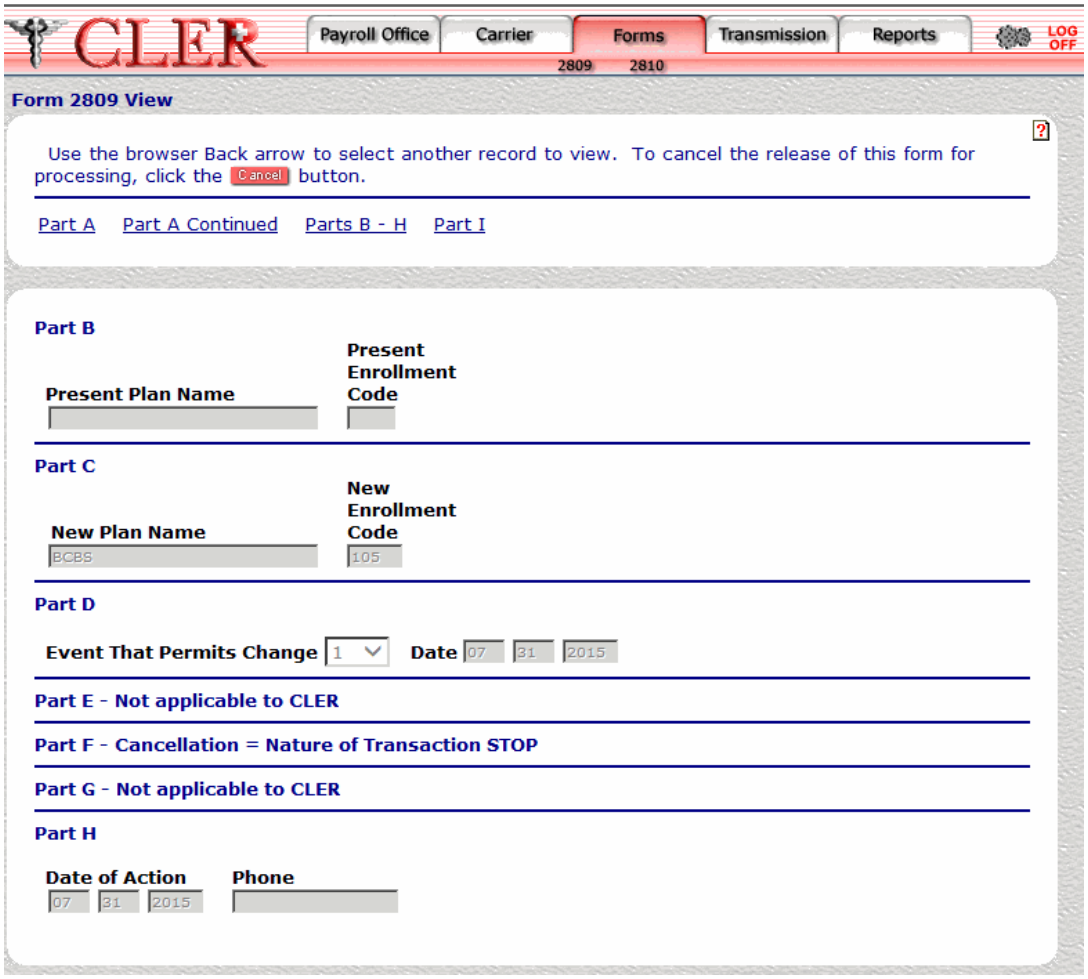


Figure 102: Form 2809 View Page Parts B - H

The data on the Form 2809 View Part B is categorized into the following fields:

Present Plan Name (see "***Present Plan Name - Field Description***" on page 427)

Present Enrollment Code (see "***Present Enrollment Code - (Enrollee) Field Description***" on page 426)

The data on the Form 2809 View Part C is categorized into the following fields:

New Plan Name (see "***New Plan Name - Field Description***" on page 392)

New Enrollment Code (see "***New Enrollment Code - Field Description***" on page 391)

The data on the Form 2809 View Part D is categorized into the following fields:

Event That Permits Change (see "***Event That Permits Change - Field Description***" on page 372)

Date (see "***Date - Form 2809 View (Parts C and D) Field Description***" on page 358)

The Form 2809 View Part E field is not applicable to CLER.

The Form 2809 View Part F field denotes Cancellation = Nature of Transaction STOP.

The Form 2809 View Part G field is not applicable to CLER.

The data on the Form 2809 View Part H is categorized into the following fields:

Date of Action (see "***Date of Action - Field Description***" on page 359)

Phone (see "***Phone - (Enrollee) Field Description***" on page 422)

8. Select ***Part I*** to display the Form 2809 View (Part I) page.

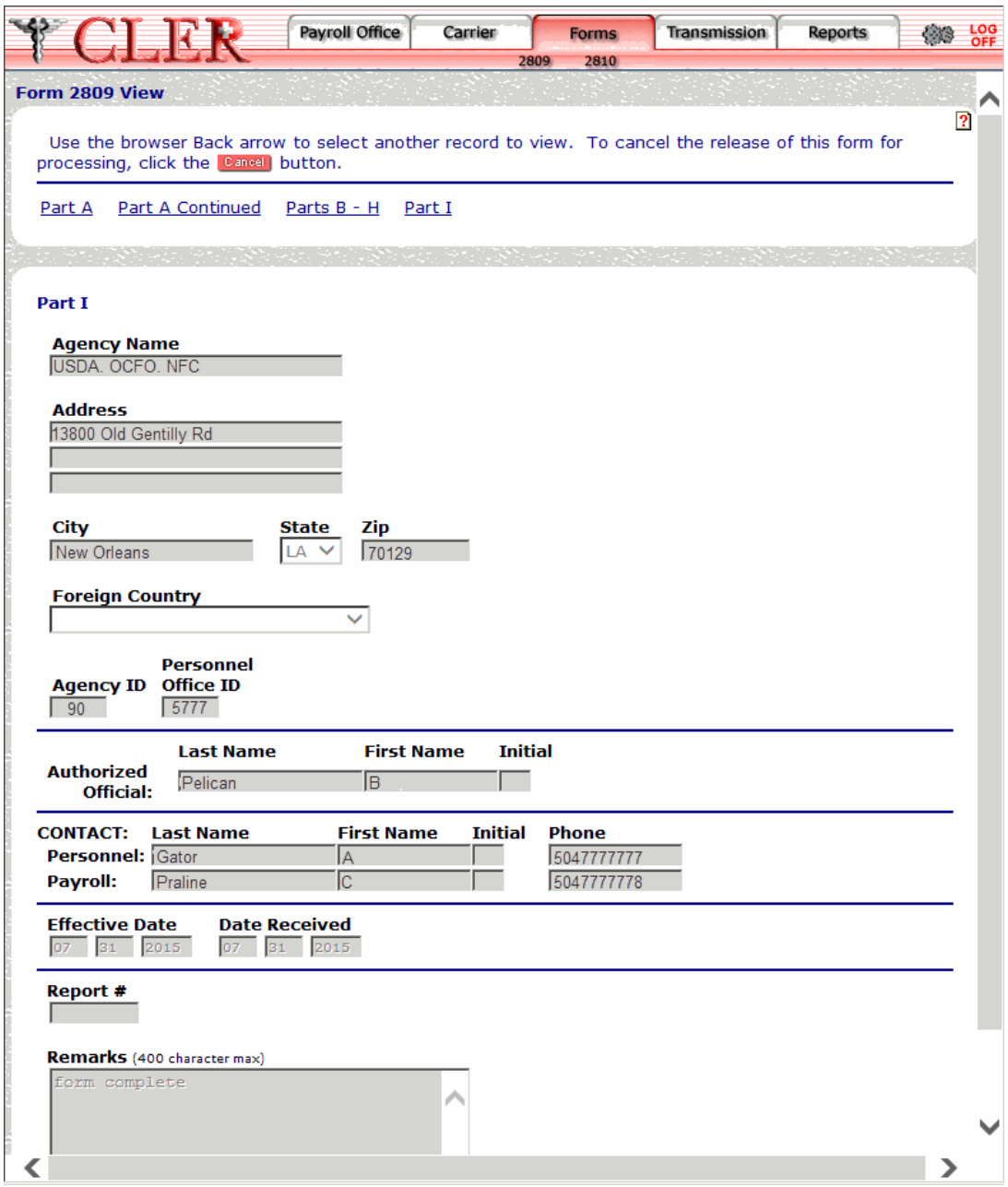


Figure 103: Form 2809 View Page Part I

The data on the Form 2809 View Part I is categorized into the following fields:

Agency Name (see "***Agency Name - Field Description***" on page 339)

Address Line 1 (see "***Address Line 1 - Coordinator Field Description***" on page 331)

Address Line 2 (see "***Address Line 2 - Coordinator Field Description***" on page 334)

Address Line 3 (see "***Address Line 3 - Coordinator Field Description***" on page 336)

City (see "***City - Coordinator Field Description***" on page 349)

State (see "***State - (Coordinator) Field Description***" on page 442)

Zip (see "***ZIP - (Coordinator) Field Description***" on page 459)

Foreign Country (see "***Foreign Country - (Enrollee Point of Contact) Field Description***" on page 376)

Agency ID (see "***Agency ID - Field Description***" on page 339)

Personnel Office ID (see "***Personnel Office ID - Enrollee Field Description***" on page 421)

Authorized Official Last Name (see "***Authorized Official - Last Name (SF 2809) Field Description***" on page 343)

Authorized Official First Name (see "***Authorized Official - First Name (SF 2809) Field Description***" on page 343)

Authorized Official Initial (see "***Authorized Official - Initial (SF 2809) Field Description***" on page 343)

Contact (Personnel) Last Name (see "***Contact (Personnel) Last Name - Field Description***" on page 355)

Contact (Personnel) First Name (see "***Contact (Personnel) First Name - Field Description***" on page 355)

Contact (Personnel) Initial (see "***Contact (Personnel) Initial - Field Description***" on page 355)

Contact (Personnel) Phone (see "***Contact (Personnel) Phone - Field Description***" on page 356)

Contact (Payroll) Last Name (see "***Contact (Payroll) Last Name - Field Description***" on page 354)

Contact (Payroll) First Name (see "***Contact (Payroll) First Name - Field Description***" on page 353)

Contact (Payroll) Initial (see "***Contact (Payroll) Initial - Field Description***" on page 354)

Contact (Payroll) Phone (see "***Contact (Payroll) Phone - Field Description***" on page 354)

Effective Date (see "***Effective Date - (Action) Field Description***" on page 366)

Date Received (see "***Date Received - Form 2809 View (Part I) Field Description***" on page 361)

Report # (see "***Report # - Field Description***" on page 436)

Remarks (see "***Remarks - Field Description***" on page 436)

Note: To view another record, select your browser's **Back** button to return to the Form 2809 search results page, then select the **View** button next to the applicable record.

Releasing a 2809 Record

The **Release** function allows users to release 2809 records for processing.

To Release a 2809 Record:

1. On the CLER Main Menu - ***Forms*** tab, select ***2809***. The Form 2809 page is displayed.

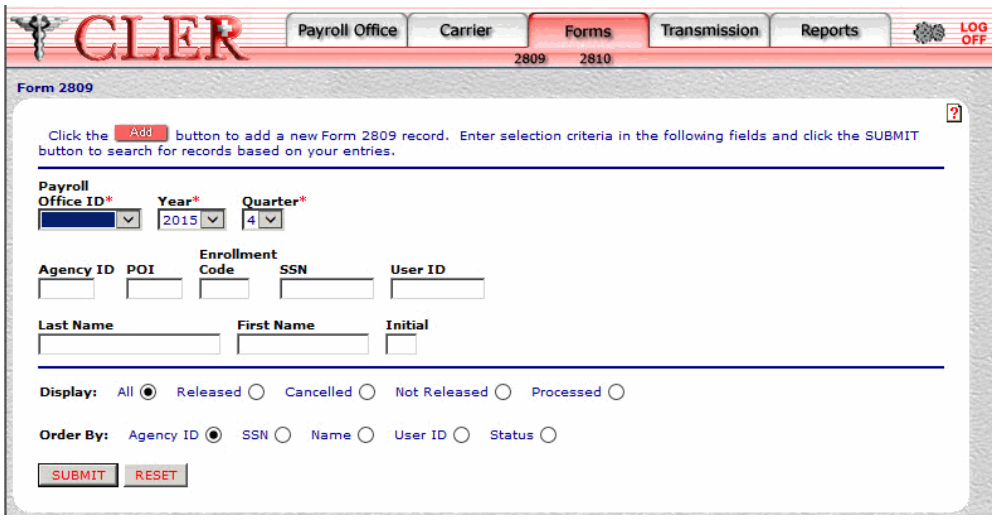


Figure 104: Form 2809 Page

2. Complete the following fields on the Form 2809 page:

Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

Year (see "***Year - (Required) Field Instruction***" on page 457)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

Agency ID (see "***Agency ID - Field Instruction***" on page 339)

POI (see "***POI - Field Description***" on page 424)

Enrollment Code (see "***Enrollment Code - Field Instruction***" on page 371)

SSN (see "***SSN - Field Instruction***" on page 440)

User ID (see "***User ID - (Form) Field Instruction***" on page 454)

Last Name (see "***Last Name - Enrollee Field Instruction***" on page 385)

First Name (see "***First Name - Enrollee Field Instruction***" on page 375)

Initial (see "***Initial - Field Instruction***" on page 380)

Display (see "***Display - (All) Field Instruction***" on page 363)

Order By (see "***Order By - (Agency ID) Field Instruction***" on page 395)

3. Select the **Submit** button. The Form 2809 page is displayed.

OR

Select the **Reset** button to clear the form.

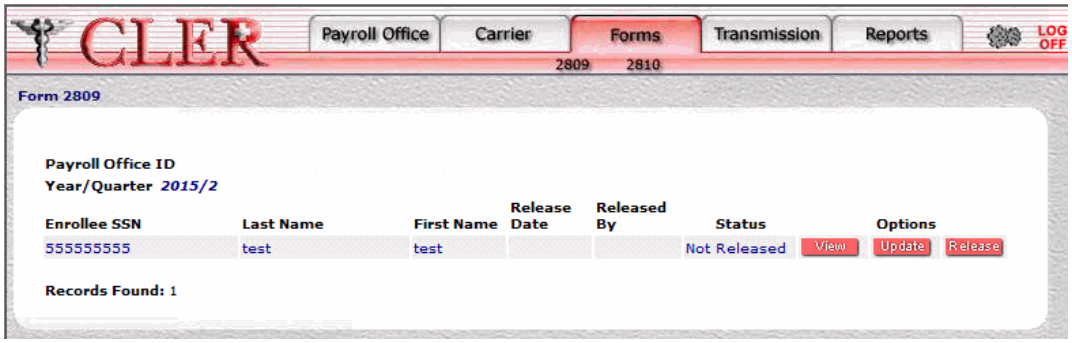


Figure 105: Form 2809 Search Results Page

The data on the Form 2809 search results page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year/Quarter (see "***Year/Quarter - Field Description***" on page 458)

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Release Date (see "***Release Date - (Form 2809 Search Results) Field Description***" on page 435)

Released By (see "***Released By - Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

Options (see "***Options - (View, Update, Release) Field Description***" on page 394)

4. Select the **Release** button next to the applicable record. A popup appears to confirm the record has been released.

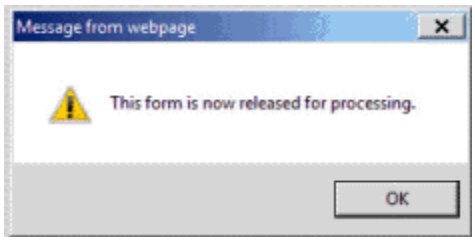


Figure 106: Form Release Popup

5. Select the **OK** button to close the popup.

Canceling a 2809 Record

The ***Cancel*** function allows users to cancel the release of 2809 records.

To Cancel the Release of a 2809 Record:

1. On the CLER Main Menu - ***Forms*** tab, select ***2809***. The Form 2809 page is displayed.

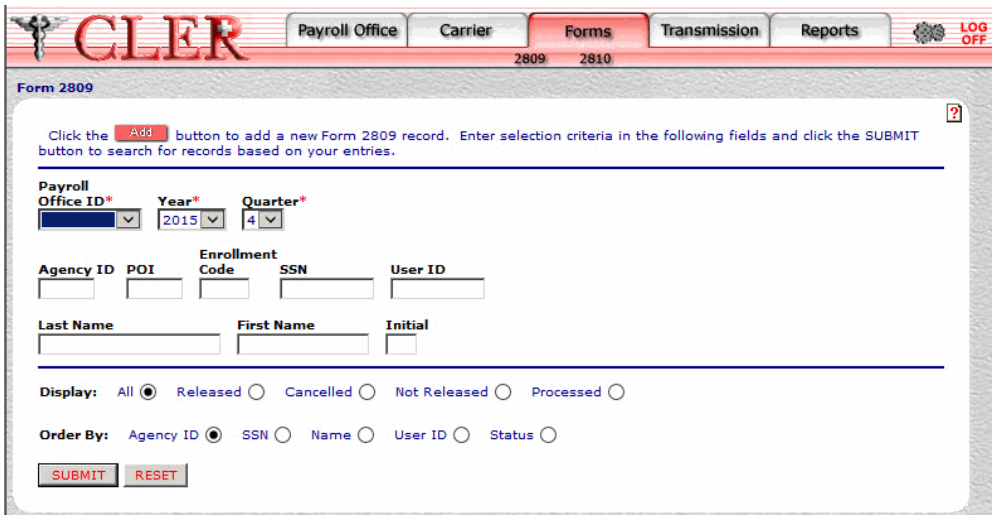


Figure 107: Form 2809 Page

2. Complete the following fields on the Form 2809 page:

   Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

   Year (see "***Year - (Required) Field Instruction***" on page 457)

   Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

   Agency ID (see "***Agency ID - Field Instruction***" on page 339)

   POI (see "***POI - Field Description***" on page 424)

   Enrollment Code (see "***Enrollment Code - Field Instruction***" on page 371)

   SSN (see "***SSN - Field Instruction***" on page 440)

   User ID (see "***User ID - (Form) Field Instruction***" on page 454)

   Last Name (see "***Last Name - Enrollee Field Instruction***" on page 385)

   First Name (see "***First Name - Enrollee Field Instruction***" on page 375)

   Initial (see "***Initial - Field Instruction***" on page 380)

   Display (see "***Display - (All) Field Instruction***" on page 363)

Order By (see "***Order By - (Agency ID) Field Instruction***" on page 395)

3. Select the **Submit** button. The Form 2809 page is displayed.

OR

Select the **Reset** button to clear the form.

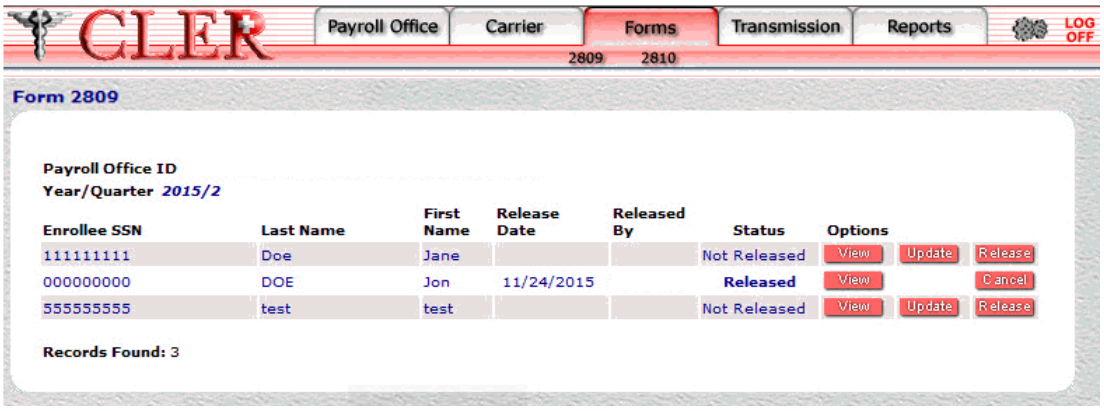


Figure 108: Form 2809 Cancel Search Results Page

The data on the Form 2809 search results page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year/Quarter (see "***Year/Quarter - Field Description***" on page 458)

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Release Date (see "***Release Date - (Form 2809 Search Results) Field Description***" on page 435)

Released By (see "***Released By - Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

Options (see "***Options - (View, Update, Release) Field Description***" on page 394)

4. Select the **Cancel** button next to the applicable record. A popup appears to confirm the cancelation of the record's release.

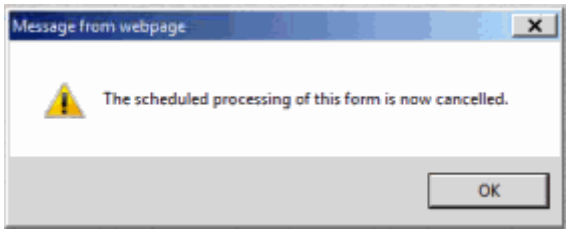


Figure 109: Form 2809 Cancel Popup

5. Select the **OK** button to close the popup.

Updating a 2809 Record

The **Update** function allows users to update 2809 records.

To Update a 2809 Record:

1. On the CLER Main Menu - ***Forms*** tab, select ***2809***. The Form 2809 page is displayed.

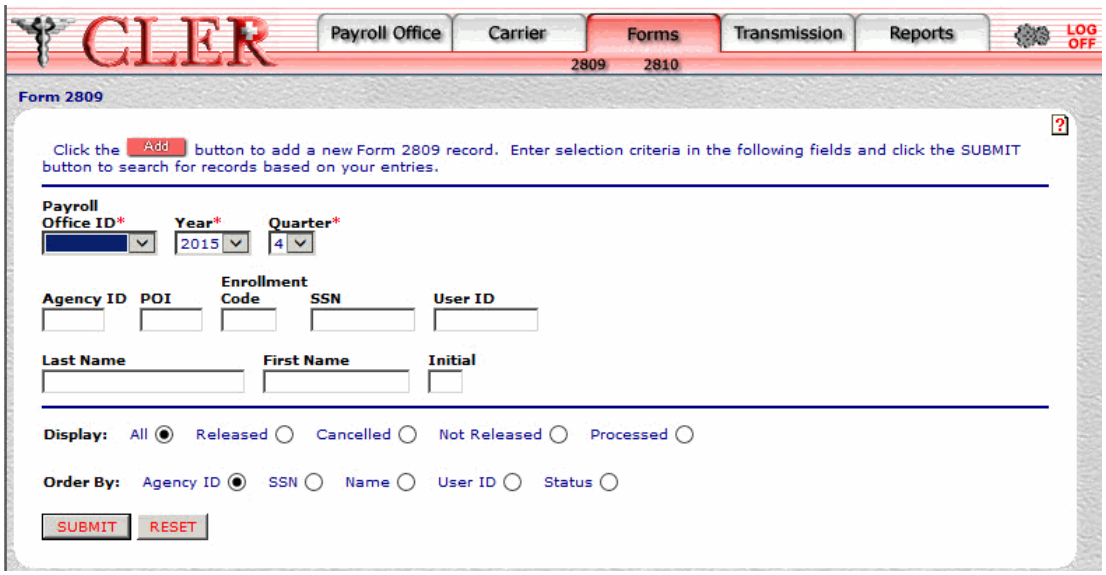


Figure 110: Form 2809 Page

2. Complete the following fields on the Form 2809 page:

   Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

   Year (see "***Year - (Required) Field Instruction***" on page 457)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

Agency ID (see "***Agency ID - Field Instruction***" on page 339)

POI (see "***POI - Field Description***" on page 424)

Enrollment Code (see "***Enrollment Code - Field Instruction***" on page 371)

SSN (see "***SSN - Field Instruction***" on page 440)

User ID (see "***User ID - (Form) Field Instruction***" on page 454)

Last Name (see "***Last Name - Enrollee Field Instruction***" on page 385)

First Name (see "***First Name - Enrollee Field Instruction***" on page 375)

Initial (see "***Initial - Field Instruction***" on page 380)

Display (see "***Display - (All) Field Instruction***" on page 363)

Order By (see "***Order By - (Agency ID) Field Instruction***" on page 395)

3. Select the **Submit** button to confirm all data entered. The Form 2809 search results page is displayed.

OR

Select the **Reset** button to clear all data entered.

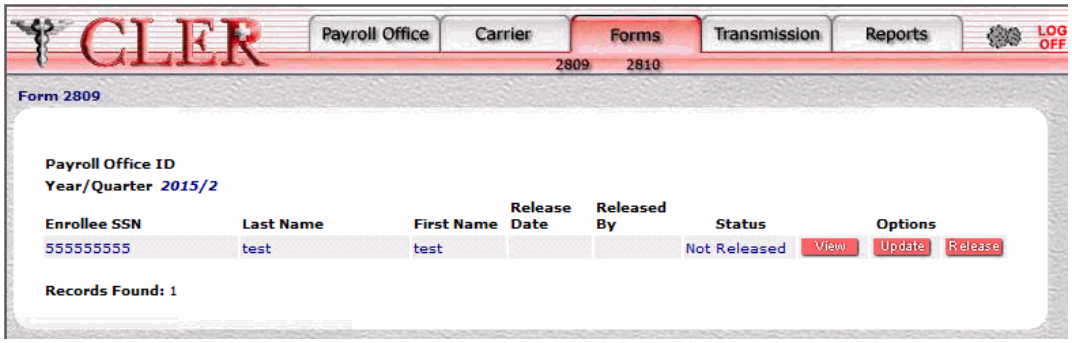


Figure 111: Form 2809 Search Results Page

The data on the Form 2809 search results page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year/Quarter (see "***Year/Quarter - Field Description***" on page 458)

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Release Date (see "***Release Date - (Form 2809 Search Results) Field Description***" on page 435)

Released By (see "***Released By - Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

Options (see "***Options - (View, Update, Cancel) Field Description***" on page 394)

4. Select the **Update** button next to the applicable record. The Form 2809 Update Part A section is displayed.

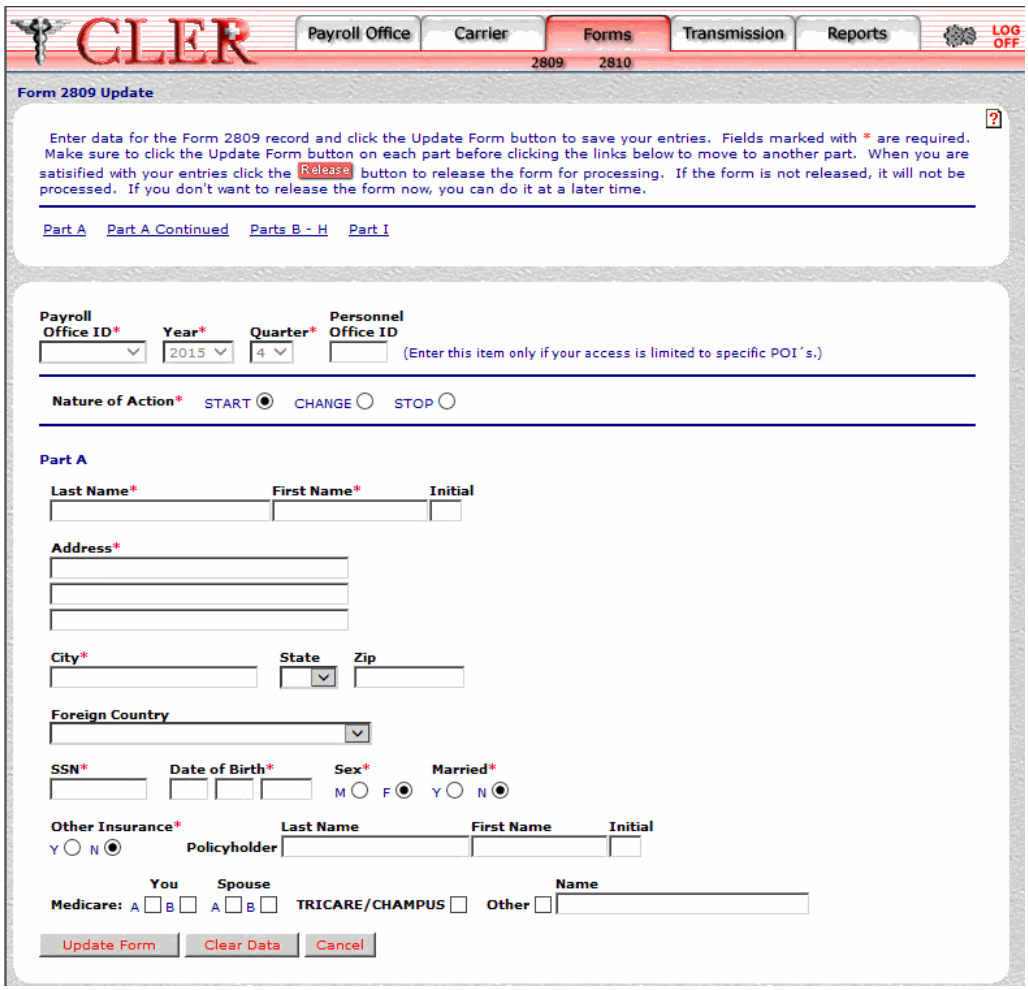


Figure 112: Form 2809 Update (Part A)

5. To update data on the Form 2809 Update Part A section, complete the following applicable fields:

   Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

   Year (see "***Year - (Required) Field Instruction***" on page 457)

   Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

   Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

   Nature of Action (see "***Nature of Action - Field Instruction***" on page 391)

   Last Name (see "***Last Name - (Required) Field Instruction***" on page 385)

   First Name (see "***First Name - (Required) Enrollee Field Instruction***" on page 375)

   Initial (see "***Initial - Field Instruction***" on page 380)

   Address Line 1 (see "***Address Line 1 - Form 2809 Add (Part A) Field Instruction***" on page 332)

   Address Line 2 (see "***Address Line 2 - Form 2809 Add (Part A) Field Instruction***" on page 334)

   Address Line 3 (see "***Address Line 3 - Form 2809 Add (Part A) Field Instruction***" on page 337)

   City (see "***City - Form 2809/2810 Add (Part A) Field Instruction***" on page 350)

   State (see "***State - (Enrollee) Field Description***" on page 442)

   Zip (see "***ZIP - (Enrollee) Field Description***" on page 459)

   Foreign Country (see "***Foreign Country - Form 2809/2810 Add (Part A) Field Instruction***" on page 378)

   SSN (see "***SSN - (Required) Field Instruction***" on page 439)

   Date of Birth (see "***Date of Birth - Form 2809/2810 Add (Part A) Field Instruction***" on page 360)

   Sex (see "***Sex - (Enrollee - Required) Field Instruction***" on page 438)

   Married (see "***Married - (Enrollee - Required) Field Instruction***" on page 387)

Other Insurance (see "***Other Insurance - (Enrollee - Required) Field Instruction***" on page 415)

Policyholder Last Name (see "***Policyholder Last Name - (Enrollee) Field Instruction***" on page 426)

Policyholder First Name (see "***Policyholder First Name - (Enrollee) Field Instruction***" on page 425)

Policyholder Initial (see "***Policyholder Initial - (Enrollee) Field Instruction***" on page 425)

Medicare You (see "***Medicare You - (Enrollee) Field Instruction***" on page 388)

Medicare Spouse (see "***Medicare Spouse - (Enrollee) Field Instruction***" on page 388)

TRICARE/CHAMPUS (see "***TRICARE/CHAMPUS - (Enrollee) Field Instruction***" on page 452)

Other (see "***Other - (Enrollee) Field Instruction***" on page 413)

6. Select the **Update Form** button. If no errors occur, a popup appears to confirm the record has been updated.

   OR

   Select the **Clear Data** button to clear form. Select the **Cancel** button to return the previous page.

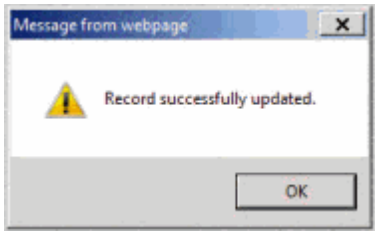


Figure 113: Transmission Online Entry Update Popup

7. Select the **OK** button to close the popup.

8. If applicable, select ***Part A Continued*** on the Form 2809 Update page. The Part A Continued page is displayed.

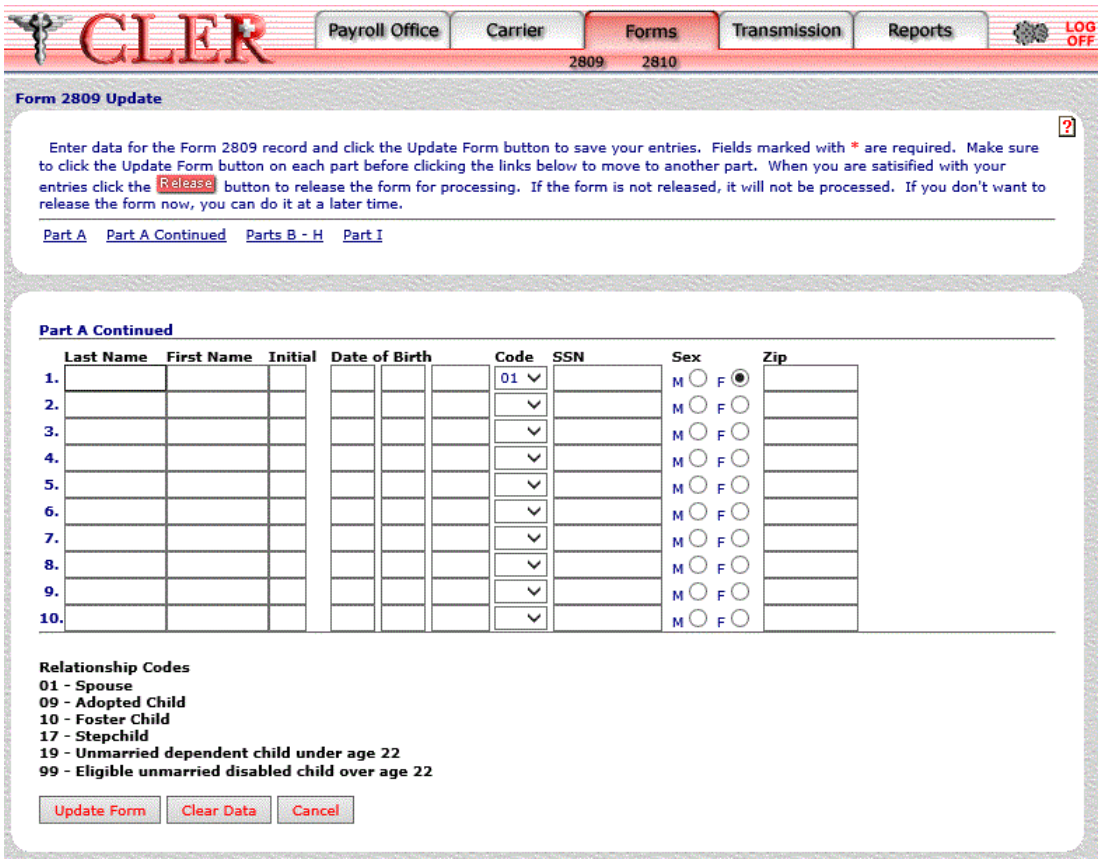


Figure 114: Form 2809 Update (Part A Continued)

9. Complete the following applicable fields on the 2809 Update Part A Continued page:

   Last Name (see "***Last Name - (Form 2809 Part A Continued) Field Instruction***" on page 385)

   First Name (see "***First Name - (Form 2809 Part A Continued) Field Instruction***" on page 375)

   Initial (see "***Initial - (Form 2809 Part A Continued) Field Instruction***" on page 379)

   Date of Birth (see "***Date of Birth - (Form 2809 Part A Continued) Field Instruction***" on page 359)

   Code (see "***Code - (Form 2809 Part A Continued) Field Instruction***" on page 351)

   SSN (see "***SSN - (Form 2809 Part A Continued) Field Instruction***" on page 439)

   Sex (see "***Sex - (Form 2809 Part A Continued) Field Instruction***" on page 438)

Zip (see "***Zip - (Form 2809 Part A Continued) Field Instruction***" on page 459)

Note: The process can be repeated on Lines 1-10 for additional family members of the enrolling employee.

10. If applicable, select ***Parts B - H*** on the Form 2809 Update page. The Parts B - H page is displayed.

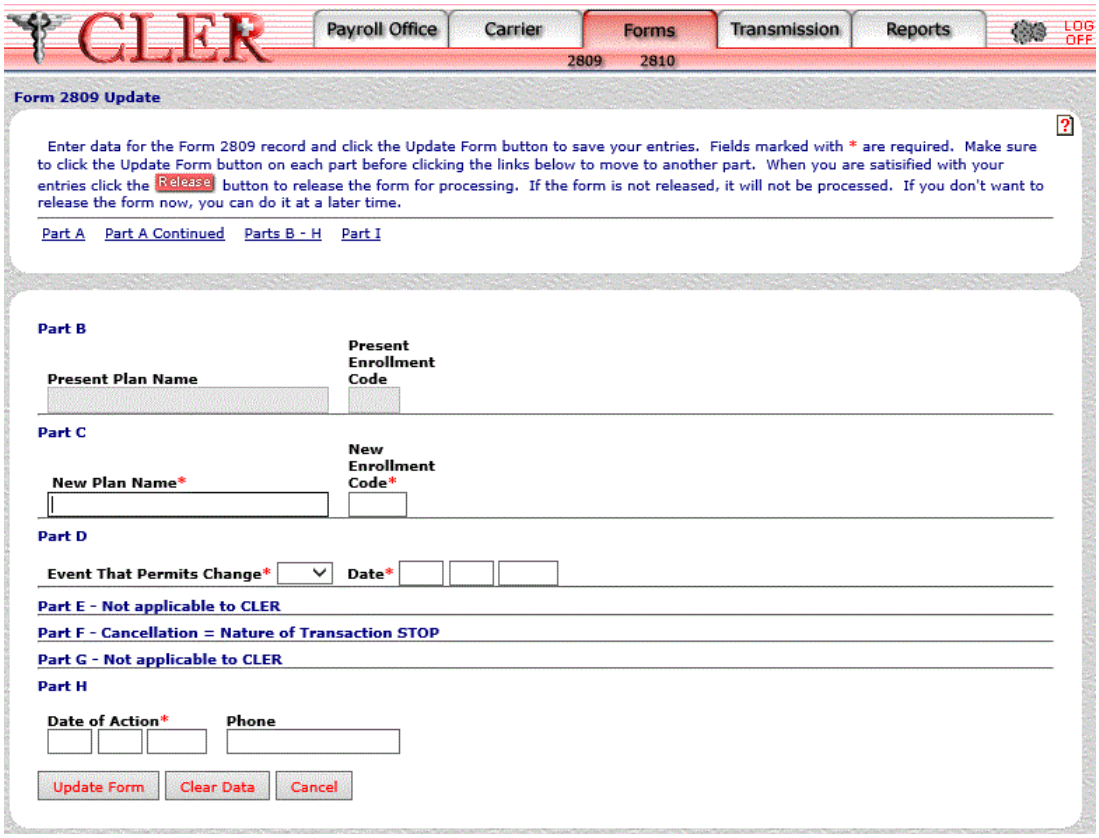


Figure 115: Form 2809 Update (Part B-H)

11. Complete the following applicable fields on the Form 2809 Update Parts B - H page:

Part B - Present Plan Name (see "***Present Plan Name - Form 2809 Update (Part B) Field Instruction***" on page 427)

Part B - Present Enrollment Code (see "***Present Enrollment Code - Form 2809 Update (Part B) Field Instruction***" on page 426)

Part C - New Plan Name (see "***New Plan Name - Form 2809 Update (Part C) Field Instruction***" on page 392)

Part C - New Enrollment Code (see "***New Enrollment Code - Form 2809 Update (Part C) Field Instruction***" on page 391)

Part D - Event That Permits Change (see "***Event That Permits Change - Form 2809 Update (Part D) Field Instruction***" on page 373)

Part D - Date (see "***Date - Form 2809 Update (Part D) Field Instruction***" on page 358)

Part H - Date of Action (see "***Date of Action - Form 2809 Add (Part H) Field Instruction***" on page 359)

Part H - Phone (see "***Phone - Form 2809 (Part H) Field Instruction***" on page 422)

12. Select the **Update Form** button. If no errors occur, a popup appears to confirm the record has been updated.

    OR

    Select the **Clear Data** button to clear form. Select the **Cancel** to return to the previous page.

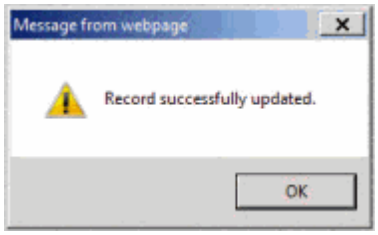


Figure 116: Transmission Online Entry Update Popup

13. Select the **OK** button to close the popup.

14. Select ***Part I*** on the Form 2809 Update page. The Part I page is displayed.

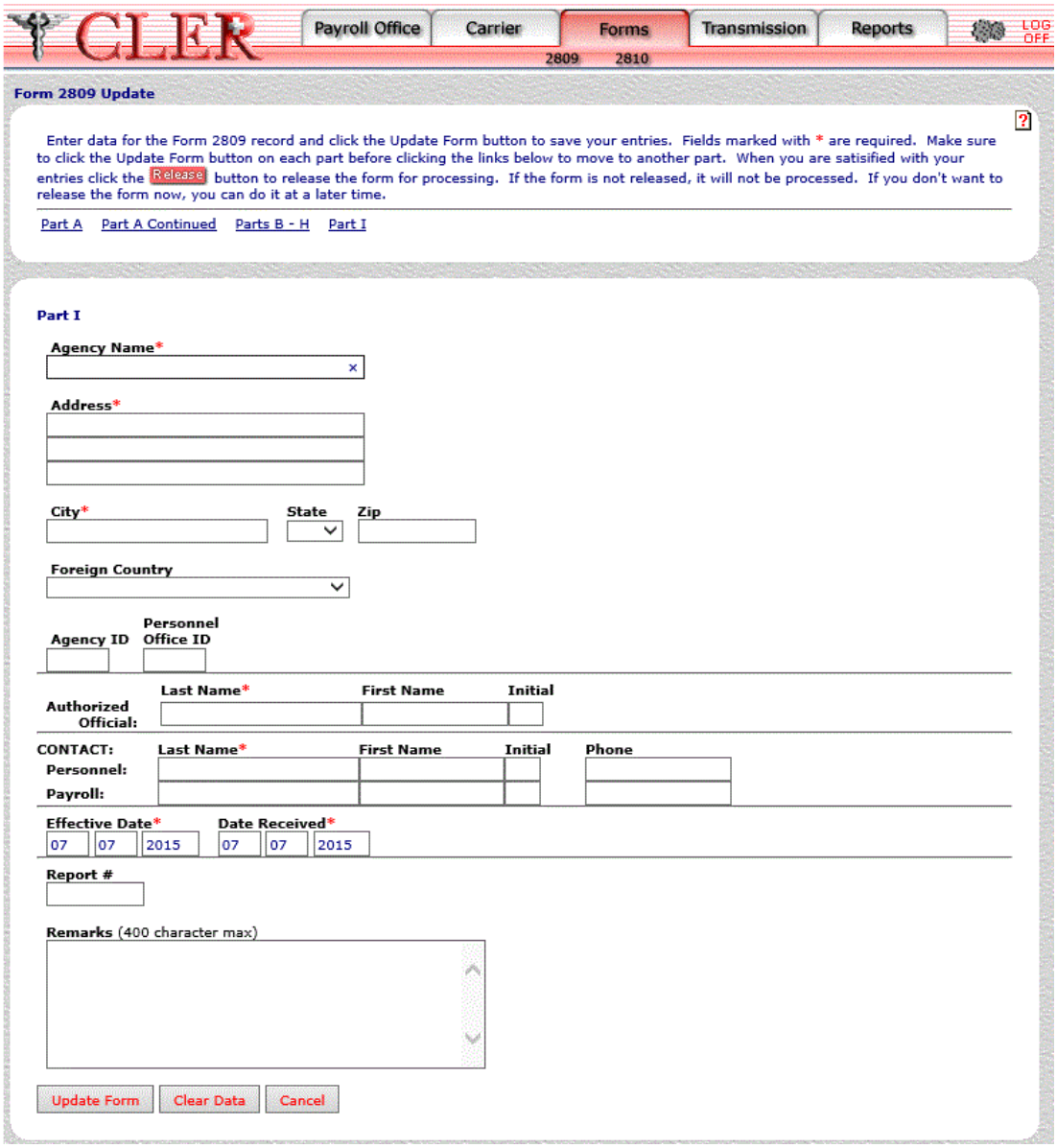


Figure 117: Form 2809 Update (Part I)

15. Complete the following applicable fields on the Form 2809 Update Parts I page:

Agency Name (see "***Agency Name - Form 2809 Add (Part I) Field Instruction***" on page 340)

Address Line 1 (see "***Address Line 1 - Form 2809 Add (Part I) Field Instruction***" on page 332)

Address Line 2 (see "***Address Line 2 - Form 2809 Add (Part I) Field Instruction***" on page 334)

Address Line 3 (see "***Address Line 3 - Form 2809 Add (Part I) Field Instruction***" on page 337)

City (see "***City - Form 2809 Add (Part I) Field Instruction***" on page 350)

State (on page 443)

Zip (see "***ZIP - (Coordinator) Field Instruction***" on page 459)

Foreign Country (see "***Foreign Country - Form 2809 Add (Part I) Field Instruction***" on page 377)

Agency ID (see "***Agency ID - Field Instruction***" on page 339)

Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

Authorized Official Last Name (see "***Authorized Official Last Name - Form 2809 Add (Part I) Field Instruction***" on page 344)

Authorized Official First Name (see "***Authorized Official First Name - Form 2809 Add (Part I) Field Instruction***" on page 344)

Authorized Official Initial (see "***Authorized Official Initial - Form 2809 Add (Part I) Field Instruction***" on page 344)

Contact (Personnel) Last Name (see "***Contact (Personnel) Last Name - Form 2809 Add (Part I) Field Instruction***" on page 356)

Contact (Personnel) First Name (see "***Contact (Personnel) First Name - Form 2809 Add (Part I) Field Instruction***" on page 355)

Contact (Personnel) Initial (see "***Contact (Personnel) Initial - Form 2809 Add (Part I) Field Instruction***" on page 355)

Contact (Personnel) Phone (see "***Contact (Personnel) Phone - Form 2809 Add (Part I) Field Instruction***" on page 356)

Contact (Payroll) Last Name (see "***Contact (Payroll) Last Name - Form 2809 Add (Part I) Field Instruction***" on page 354)

Contact (Payroll) First Name (see "***Contact (Payroll) First Name - Form 2809 Add (Part I) Field Instruction***" on page 353)

Contact (Payroll) Initial (see "***Contact (Payroll) Initial - Form 2809 Add (Part I) Field Instruction***" on page 354)

Contact (Payroll) Phone (see "***Contact (Payroll) Phone - Form 2809 Add (Part I) Field Instruction***" on page 355)

Effective Date (see "***Effective Date - Form 2809 View (Part I) Field Instruction***" on page 366)

Date Received (see "***Date Received - Form 2809 Add (Part I) Field Instruction***" on page 361)

Report # (see "***Report # - Field Instruction***" on page 436)

Remarks (see "***Remarks - (400 Max) Field Instruction***" on page 436)

16. Select the **Update Form** button. If no errors occur, a popup appears to confirm the record has been updated.

    OR

    Select the **Clear Data** button to clear form. Select the **Cancel** to return to the previous page.

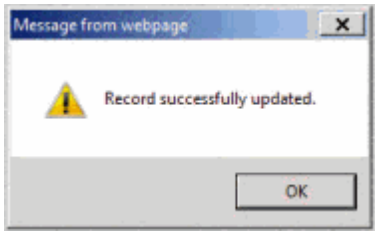


Figure 118: Transmission Online Entry Update Popup

17. Select the **OK** button to close the popup.

Maintaining 2810 Records

The ***2810*** option on the Forms Main page allows Agency users to create a 2810 record in CLER. The CLER 2810 provides carriers with the information they need to update their enrollee records. With the proper access authority, forms may be created, deleted, printed, and released for processing. From the input that creates the 2810, CLER will generate a corrective action file to the carrier through the OPM Data Hub located in Macon, Georgia. It should be noted that this is an option. Agencies may also use other procedures such as fax, hardcopy, etc., to coordinate corrective actions with the carriers.

For more information see:

Adding a 2810 Record **153**
Viewing a 2810 Record **161**

Releasing a 2810 Record 170
Canceling a 2810 Record 172
Updating a 2810 Record 175

Adding a 2810 Record

The **Add** function allows users to add 2810 records.

To Add a 2810 Record:

1. On the CLER Main Menu, select the ***Forms*** tab. The Forms Main page is displayed.

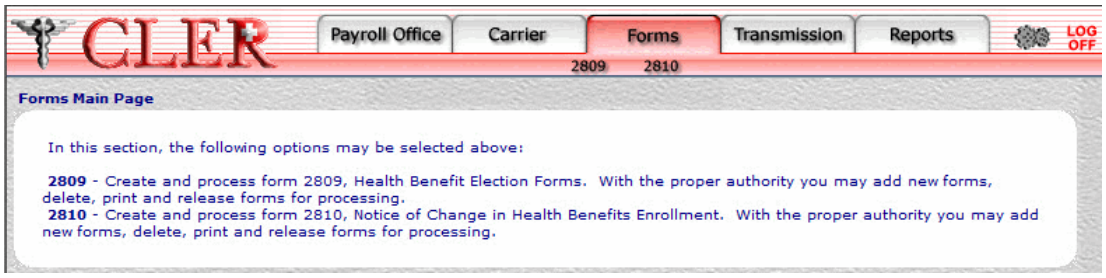


Figure 119: Forms Main Page

2. Select ***2810*** on the Forms tab. The Form 2810 page is displayed.

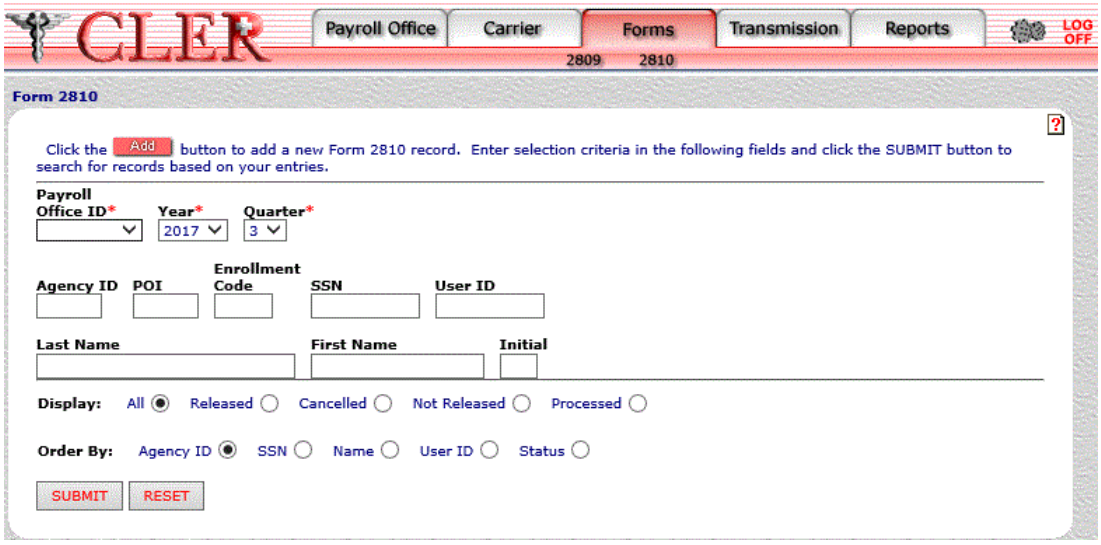


Figure 120: Form 2810 Search Page

3. Select the **Add** button on the Form 2810 page to display the Form 2810 Add Part A page.

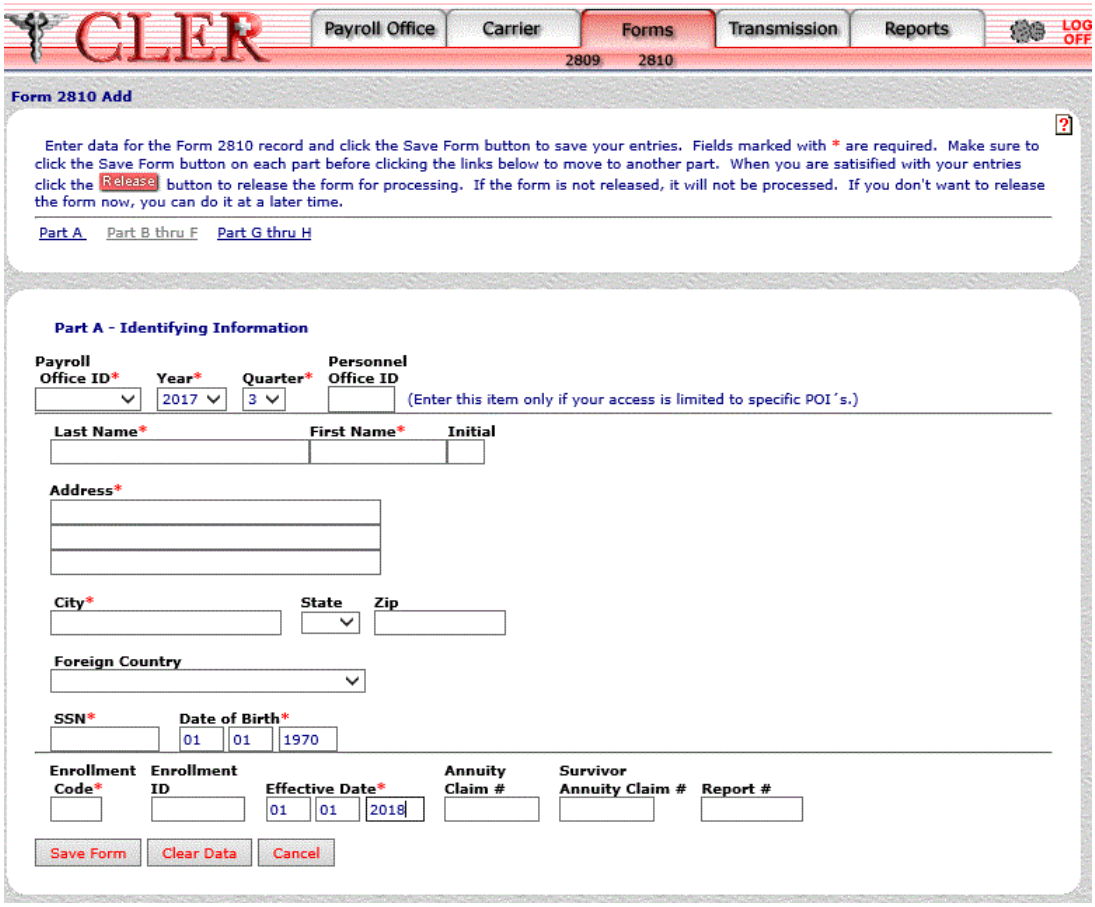


Figure 121: Form 2810 Add (Part A)

4. Complete the following fields on the Form 2810 Add Part A page:

   Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

   Year (see "***Year - (Required) Field Instruction***" on page 457)

   Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

   Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

   Last Name (see "***Last Name - (Required) Field Instruction***" on page 385)

   First Name (see "***First Name - (Required) Enrollee Field Instruction***" on page 375)

   Initial (see "***Initial - Field Instruction***" on page 380)

Address Line 1 (see "***Address Line 1 - Form 2810 Add (Part A) Field Instruction***" on page 332)

Address Line 2 (see "***Address Line 2 - Form 2810 Add (Part A) Field Instruction***" on page 334)

Address Line 3 (see "***Address Line 3 - Form 2810 Add (Part A) Field Instruction***" on page 337)

City (see "***City - Form 2809/2810 Add (Part A) Field Instruction***" on page 350)

State (see "***State - (Enrollee) Field Description***" on page 442)

Zip (see "***ZIP - (Enrollee) Field Description***" on page 459)

Foreign Country (see "***Foreign Country - Form 2809/2810 Add (Part A) Field Instruction***" on page 378)

SSN (see "***SSN - (Required) Field Instruction***" on page 439)

Date of Birth (see "***Date of Birth - Form 2809/2810 Add (Part A) Field Instruction***" on page 360)

Enrollment Code (see "***Enrollment Code - (Required) Field Instruction***" on page 371)

Enrollment ID

Effective Date (see "***Effective Date - Form 2810 Add Field Instruction***" on page 366)

Annuity Claim # (see "***Annuity Claim # - Form 2810 Add (Part A) Field Instruction***" on page 341)

Survivor Annuity Claim # (see "***Survivor Annuity Claim # - Field Instruction***" on page 447)

Report # (see "***Report # - Field Instruction***" on page 436)

5. Select the **Save Form** button. If no errors occur, a popup appears to confirm the record has been added.

OR

Select the **Clear Data** button to clear the form and select the **Cancel** button to return to the previous page.

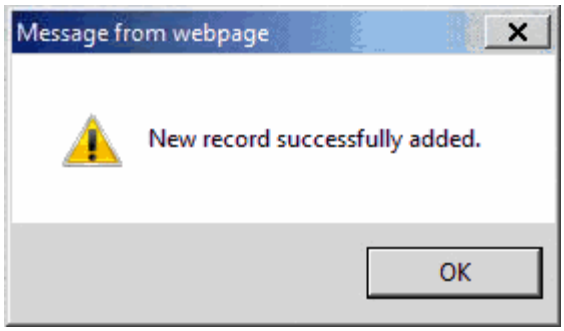


Figure 122: Transmission Online Entry Add Popup

6. Select the **OK** button to close the popup.

7. Select ***Part B thru F*** on the Form 2810 Add page. The Part B thru F page is displayed.

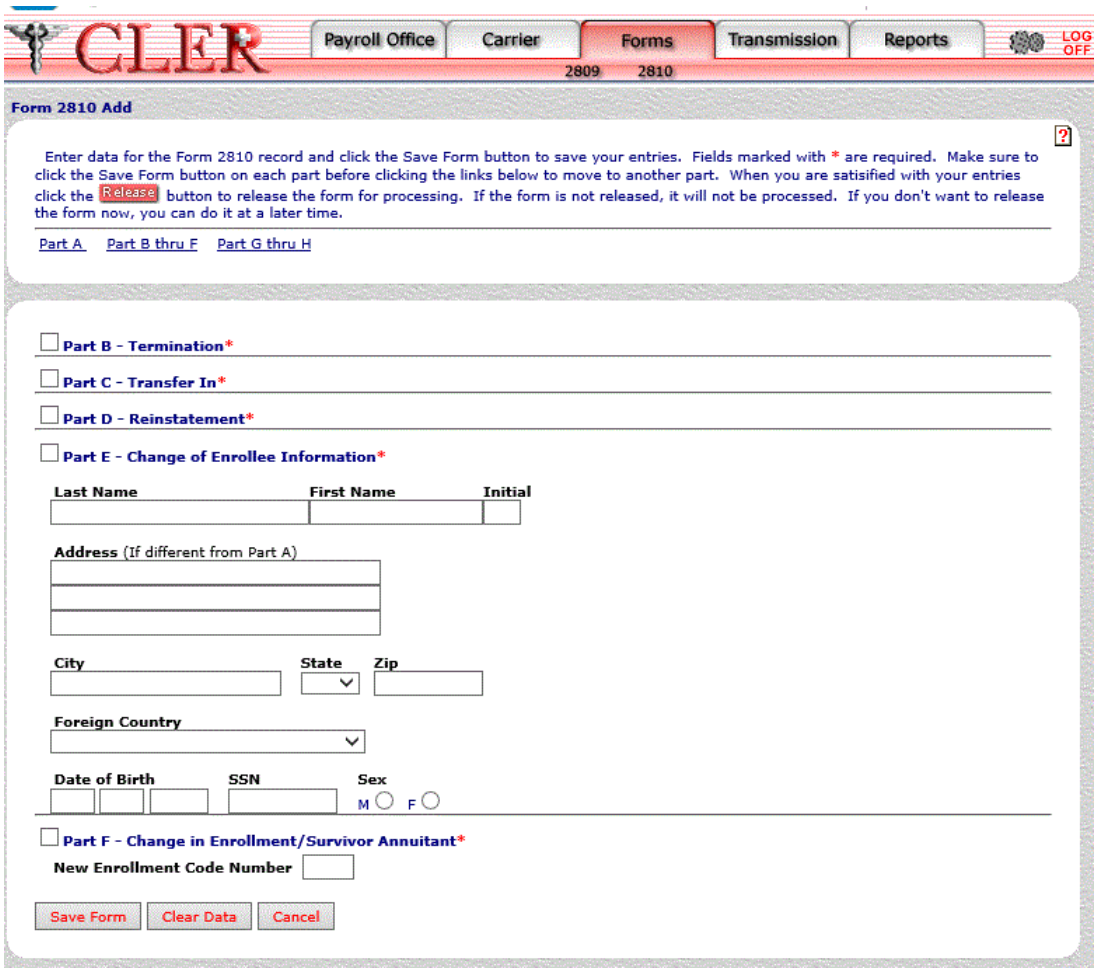


Figure 123: Form 2810 Add (Part B thru F)

8. Complete the following applicable fields on the Form 2810 Add Part B thru F page:

Part B - Termination (see "***Part B - Termination - Field Instruction***" on page 416)

Part C - Transfer In (see "***Part C - Transfer In - Field Instruction***" on page 416)

Part D - Reinstatement (see "***Part D - Reinstatement - Field Instruction***" on page 416)

Part E - Change of Enrollee Information (see "***Part E - Change of Enrollee Information - Field Instruction***" on page 417)

Last Name (see "***Last Name - Form 2810 Add (Part E) Field Instruction***" on page 386)

First Name (see "***First Name - Form 2810 Add (Part E) Field Instruction***" on page 376)

Initial (see "***Initial - Form 2810 Add (Part E) Field Instruction***" on page 380)

Address Line 1 (see "***Address Line 1 - Form 2810 Add (Parts B through F) Field Instruction***" on page 332)

Address Line 2 (see "***Address Line 2 - Form 2810 Add (Parts B through F) Field Instruction***" on page 335)

Address Line 3 (see "***Address Line 3 - Form 2810 Add (Parts B through F) Field Instruction***" on page 337)

City (see "***City - Form 2810 Add (Parts B thru F) Field Instruction***" on page 350)

State (see "***State - (Enrollee) Field Description***" on page 442)

Zip (see "***ZIP - (Enrollee) Field Description***" on page 459)

Foreign Country (see "***Foreign Country - Form 2810 Add (Parts B thru F) Field Instruction***" on page 378)

Date of Birth (see "***Date of Birth - Form 2810 Add (Parts B thru F) Field Instruction***" on page 360)

SSN (see "***SSN - Form 2810 Add (Part E) Field Instruction***" on page 440)

Sex (see "***Sex - Form 2810 Add (Part E) Field Instruction***" on page 439)

Part F - Change in Enrollment/Survivor Annuitant (see "***Part F - Change in Enrollment/Survivor Annuitant - Field Instruction***" on page 417)

New Enrollment Code Number (see "***New Enrollment Code Number - Form 2810 Add (Part F) Field Instruction***" on page 392)

9. Select the **Save Form** button to save changes.

OR

Select the **Clear Data** button to clear the form

OR

Select the **Cancel** button to return to the previous page.

Note: An asterisk (*) indicates a required field. The Plan Name and Enrollment Code fields in Part B are marked with * when ***Start*** or ***Change*** is selected in the Nature of Action field in Part A. The Last Name, First Name, Date of Birth, Code, SSN, and Sex fields in Part B are marked with * when the third position of the enrollment code entered in the Enrollment Code field in Part B is 2 or 5, indicating family coverage.

10. Select ***Part G thru H*** on the Form 2810 Add page. The Part G thru H page is displayed.

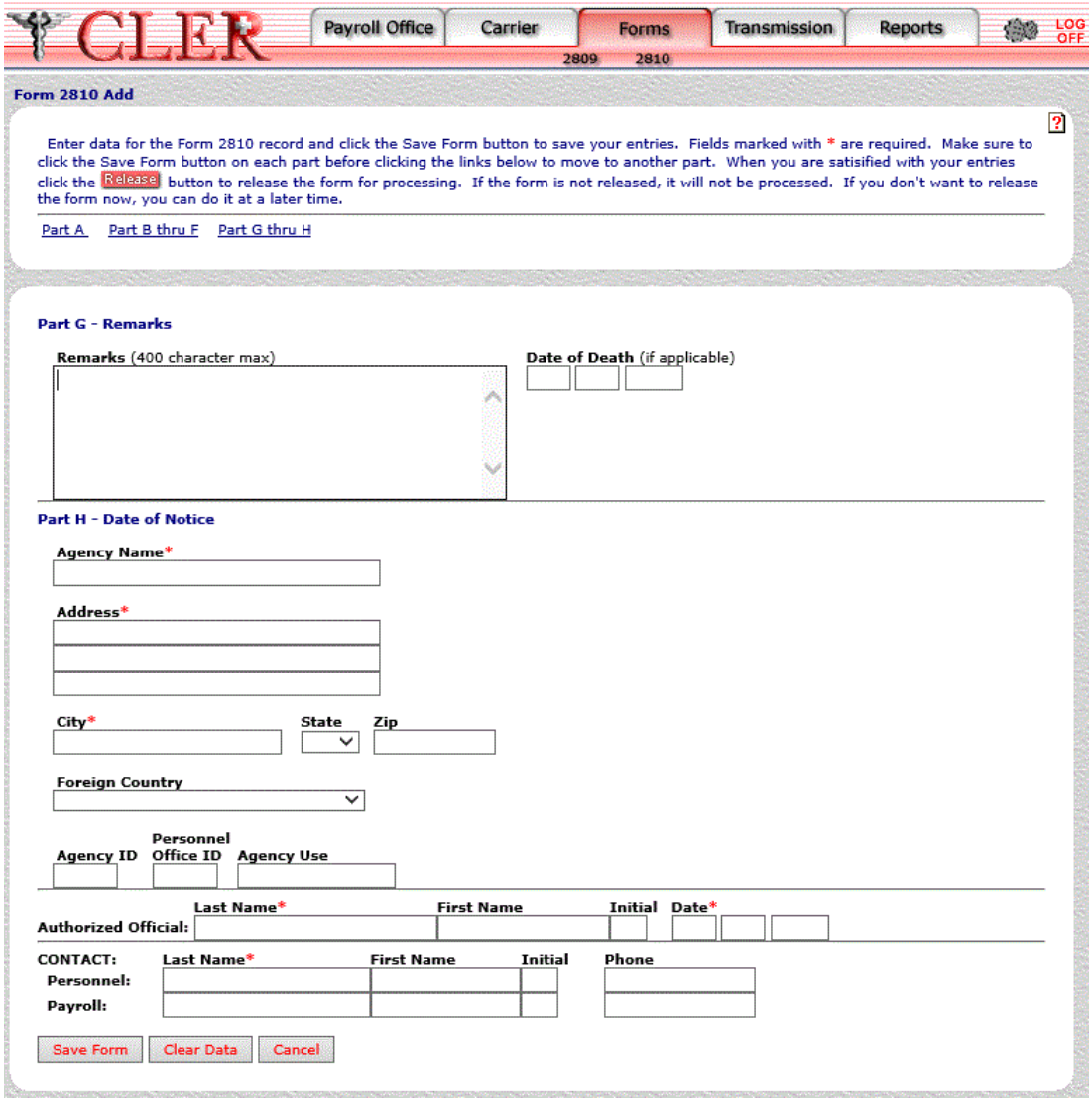


Figure 124: Form 2810 Add (Part G thru H)

11. Complete the following applicable fields on the Form 2810 Add Part G thru H page:

Remarks (see "***Remarks - (400 Max) Field Instruction***" on page 436)

Date of Death (see "***Date of Death - Form 2810 Add (Parts G and H) Field Instruction***" on page 360)

Agency Name (see "***Agency Name - Form 2809 Add (Part I) Field Instruction***" on page 340)

Address Line 1 (see "***Address Line 1 - Form 2809 Add (Part I) Field Instruction***" on page 332)

Address Line 2 (see "***Address Line 2 - Form 2809 Add (Part I) Field Instruction***" on page 334)

Address Line 3 (see "***Address Line 3 - Form 2809 Add (Part I) Field Instruction***" on page 337)

City (see "***City - Form 2809 Add (Part I) Field Instruction***" on page 350)

State (on page 443)

Zip (see "***ZIP - (Coordinator) Field Instruction***" on page 459)

Foreign Country (see "***Foreign Country - Form 2809 Add (Part I) Field Instruction***" on page 377)

Agency ID (see "***Agency ID - Field Instruction***" on page 339)

Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

Agency Use (see "***Agency Use - Field Instruction***" on page 340)

Authorized Official Last Name (see "***Authorized Official Last Name - Form 2809 Add (Part I) Field Instruction***" on page 344)

Authorized Official First Name (see "***Authorized Official First Name - Form 2809 Add (Part I) Field Instruction***" on page 344)

Authorized Official Initial (see "***Authorized Official Initial - Form 2809 Add (Part I) Field Instruction***" on page 344)

Authorized Official Date (see "***Authorized Official Date Signed - Form 2810 Add (Part H) Field Instruction***" on page 344)

Contact (Personnel) Last Name (see "***Contact (Personnel) Last Name - Form 2809 Add (Part I) Field Instruction***" on page 356)

Contact (Personnel) First Name (see "***Contact (Personnel) First Name - Form 2809 Add (Part I) Field Instruction***" on page 355)

Contact (Personnel) Initial (see "***Contact (Personnel) Initial - Form 2809 Add (Part I) Field Instruction***" on page 355)

Contact (Personnel) Phone (see "***Contact (Personnel) Phone - Form 2809 Add (Part I) Field Instruction***" on page 356)

Contact (Payroll) Last Name (see "***Contact (Payroll) Last Name - Form 2809 Add (Part I) Field Instruction***" on page 354)

Contact (Payroll) First Name (see "***Contact (Payroll) First Name - Form 2809 Add (Part I) Field Instruction***" on page 353)

Contact (Payroll) Initial (see "***Contact (Payroll) Initial - Form 2809 Add (Part I) Field Instruction***" on page 354)

Contact (Payroll) Phone (see "***Contact (Payroll) Phone - Form 2809 Add (Part I) Field Instruction***" on page 355)

12. Select the **Save Form** button. If no errors occur, a popup appears to confirm the record has been added.

    OR

    Select the **Clear Data** button to clear form. Select the **Cancel** button to return to previous form.

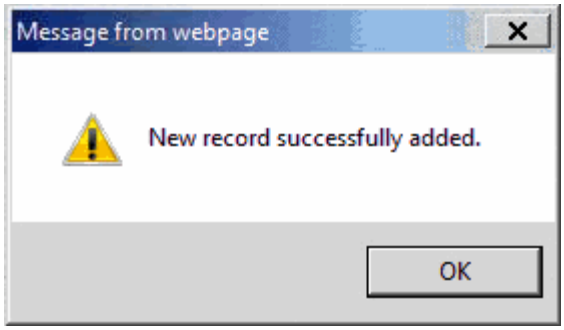


Figure 125: Transmission Online Entry Add Popup

13. Select the **OK** button to close the popup.

Viewing a 2810 Record

The **View** function allows users to view 2810 records.

To View a 2810 Record:

1. Select ***Forms*** tab on the CLER Main Menu. Select ***2810*** on the Forms Main page. The Form 2810 page is displayed.

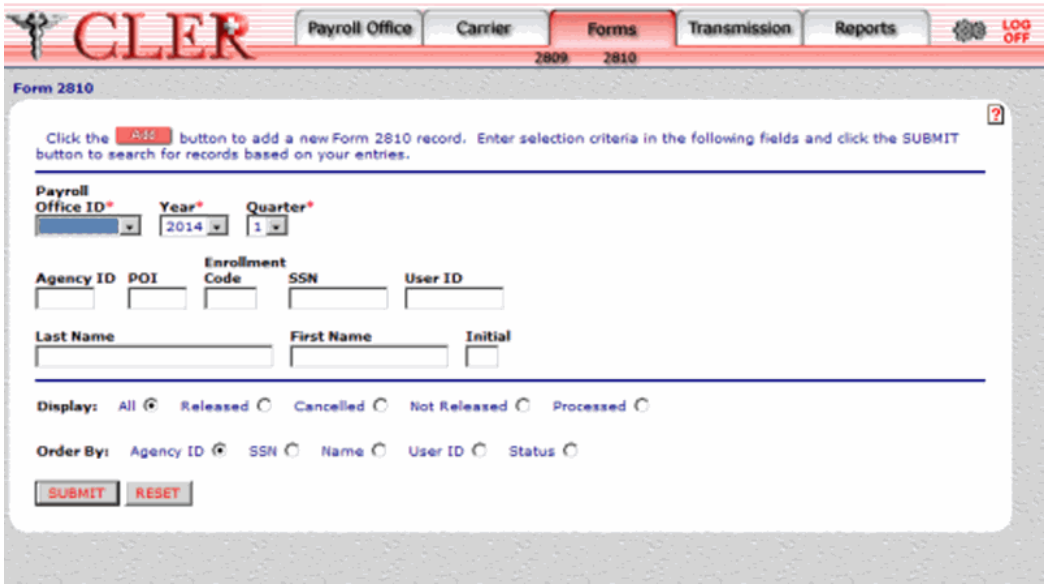


Figure 126: Form 2810 Search Page

2. Complete the following fields on the Form 2810 page:

   Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

   Year (see "***Year - (Required) Field Instruction***" on page 457)

   Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

   Agency ID (see "***Agency ID - Field Instruction***" on page 339)

   POI (see "***POI - Field Description***" on page 424)

   Enrollment Code (see "***Enrollment Code - Field Instruction***" on page 371)

   SSN (see "***SSN - Field Instruction***" on page 440)

   User ID (see "***User ID - (Form) Field Instruction***" on page 454)

   Last Name (see "***Last Name - Enrollee Field Instruction***" on page 385)

   First Name (see "***First Name - Enrollee Field Instruction***" on page 375)

   Initial (see "***Initial - Field Instruction***" on page 380)

Display (see "***Display - (All) Field Instruction***" on page 363)

Order By (see "***Order By - (Agency ID) Field Instruction***" on page 395)

3. Select the **Submit** button to confirm the data entered. The Form 2810 Search Results page is displayed.

OR

Select the **Reset** button to clear all data entered.

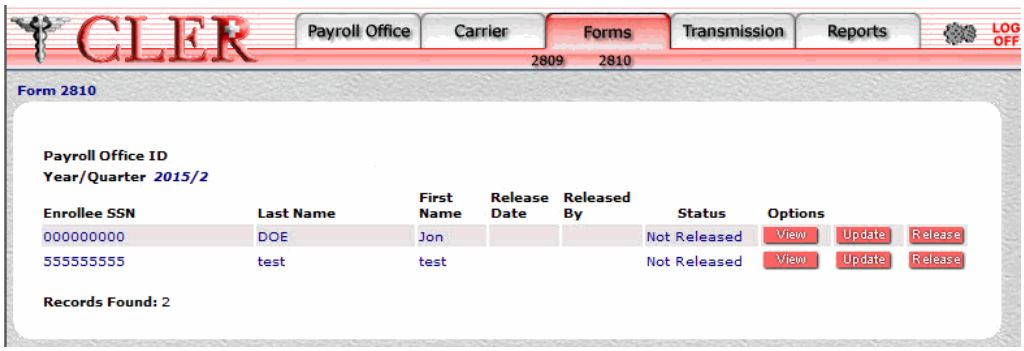


Figure 127: Form 2810 Search Results Page

The data on the Payroll Office Contacts search results page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year/Quarter (see "***Year/Quarter - Field Description***" on page 458)

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Release Date (see "***Release Date - (Form 2809 Search Results) Field Description***" on page 435)

Released By (see "***Released By - Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

Options (see "***Options - (View, Update, Cancel) Field Description***" on page 394)

4. Select the **View** button next to the applicable record. The Form 2810 View (Part A) page is displayed.

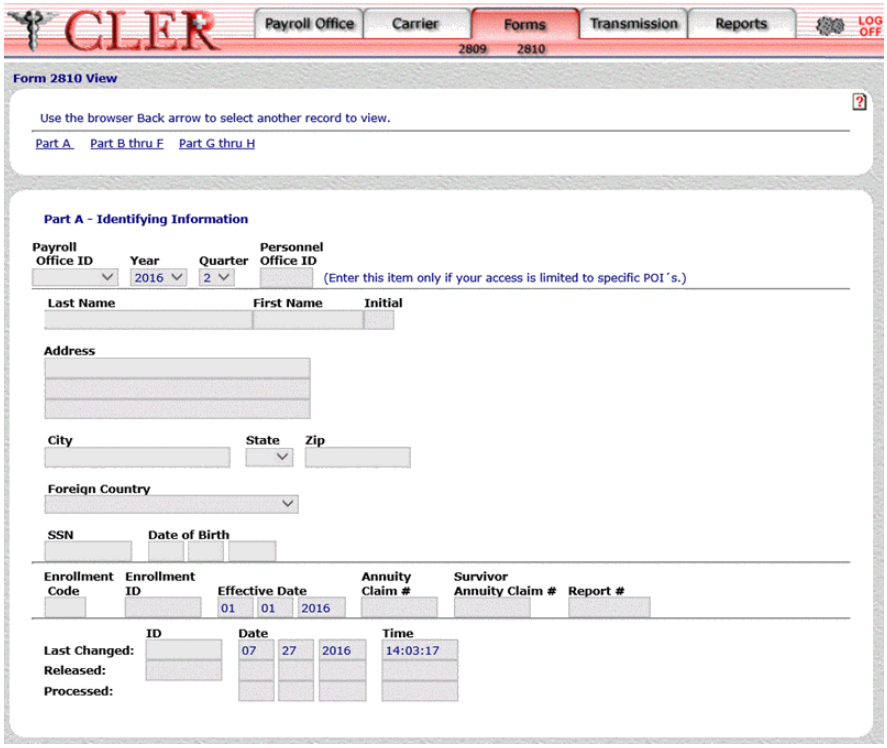


Figure 128: Form 2810 View Page Part A

The data on the Form 2810 View Part A page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year (see "***Year - (Reconciliation) 2810 Form Field Description***" on page 457)

Quarter (see "***Quarter - (Reconciliation 2810 Form) Field Description***" on page 429)

Personnel Office ID (see "***Personnel Office ID - Field Description***" on page 422)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Initial (see "***Initial - Field Description***" on page 380)

Address Line 1 (see "***Address Line 1 - Enrollee Field Description***" on page 331)

Address Line 2 (see "***Address Line 2 - Enrollee Field Description***" on page 334)

Address Line 3 (see "***Address Line 3 - Enrollee Field Description***" on page 336)

City (see "***City - Enrollee Field Description***" on page 349)

State (see "***State - (Enrollee) Field Description***" on page 442)

Zip (see "***ZIP - (Enrollee) Field Description***" on page 459)

Foreign Country (see "***Foreign Country - (Enrollee) Field Description***" on page 377)

SSN (see "***SSN - (Enrollee) Field Description***" on page 439)

Date of Birth (see "***Date of Birth (Enrollee) - Field Description***" on page 359)

Enrollment Code (see "***Enrollment Code - Field Description***" on page 371)

Enrollment ID (see "***Enrollment ID - Field Description***" on page 371)

Effective Date (see "***Effective Date - Field Description***" on page 366)

Annuity Claim # (see "***Annuity Claim # - Form 2810 View (Part A) Field Description***" on page 341)

Survivor Annuity Claim # (see "***Survivor Annuity Claim # - Field Description***" on page 447)

Report # (see "***Report # - Field Description***" on page 436)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 381)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 381)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 381)

Released ID (see "***Released ID - Field Description***" on page 435)

Released Date (see "***Released Date - Field Description***" on page 435)

Released Time (see "***Released Time - Field Description***" on page 436)

Processed Date (see "***Processed Date - Field Description***" on page 427)

Processed Time (see "***Processed Time - Field Description***" on page 427)

5. Select ***Part B through F*** to display the Form 2810 View Part B through F page.

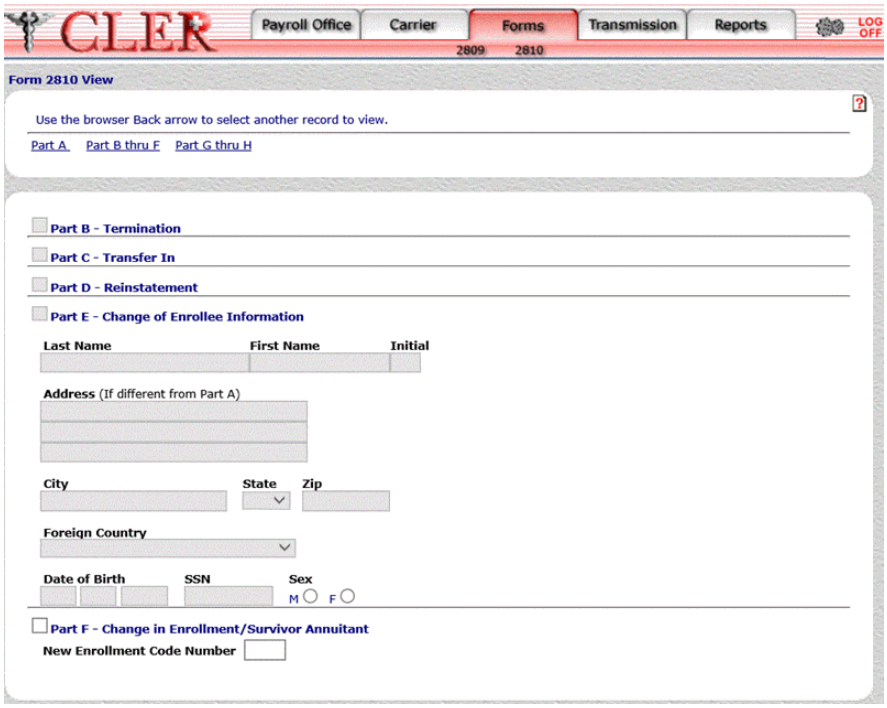


Figure 129: Form 2810 View Page Part B thru F

The data on the Form 2810 View page Part B - Termination is shown as indicated below.

Part B - Termination (see "***Part B - Termination - Field Description***" on page 416)

The data on the Form 2810 View page Part C - Transfer In is shown as indicated below.

Part C - Transfer In (see "***Part C - Transfer In - Field Description***" on page 416)

The data on the Form 2810 View page Part D - Reinstatement is shown as indicated below.

Part D - Reinstatement (see "***Part D - Reinstatement - Field Description***" on page 416)

The data on the Form 2810 View page Part E - Change of Enrollee Information is categorized into the following fields:

Part E - Change of Enrollee Information (see "***Part E - Change of Enrollee Information - Field Description***" on page 417)

Last Name (see "***Last Name - (Enrollee/Survivor) Field Description***" on page 384)

First Name (see "***First Name - (Enrollee New/Survivor) Field Description***" on page 375)

Initial (see "***Initial - (Enrollee New/Survivor) Field Description***" on page 379)

Address Line 1 (see "***Address Line 1 - Enrollee/Survivor Field Description***" on page 332)

Address Line 2 (see "***Address Line 2 - Enrollee/Survivor Field Description***" on page 334)

Address Line 3 (see "***Address Line 3 - Enrollee/Survivor Field Description***" on page 336)

City (see "***City - Enrollee/Survivor Field Description***" on page 349)

State (see "***State - (Enrollee/Survivor) Field Description***" on page 443)

Zip (see "***ZIP - (Enrollee/Survivor) Field Description***" on page 459)

Foreign Country (see "***Foreign Country - (Enrollee/Survivor) Field Description***" on page 377)

Date of Birth (see "***Date of Birth (Enrollee/Survivor) - Field Description***" on page 359)

SSN (see "***SSN - (Enrollee/Survivor) Field Description***" on page 439)

Sex (see "***Sex - (Enrollee/Survivor) Field Description***" on page 438)

The data on the Form 2810 View page Part F - Change in Enrollment/Survivor Annuitant is shown as indicated below.

Part F - Change in Enrollment/Survivor Annuitant (see "***Part F - Change in Enrollment/Survivor Annuitant - Field Description***" on page 417)

New Enrollment Code Number (see "***New Enrollment Code Number - (Survivor Annuitant) Field Description***" on page 392)

6. Select ***Part G thru H*** to display the Form 2810 View Part G thru H page.

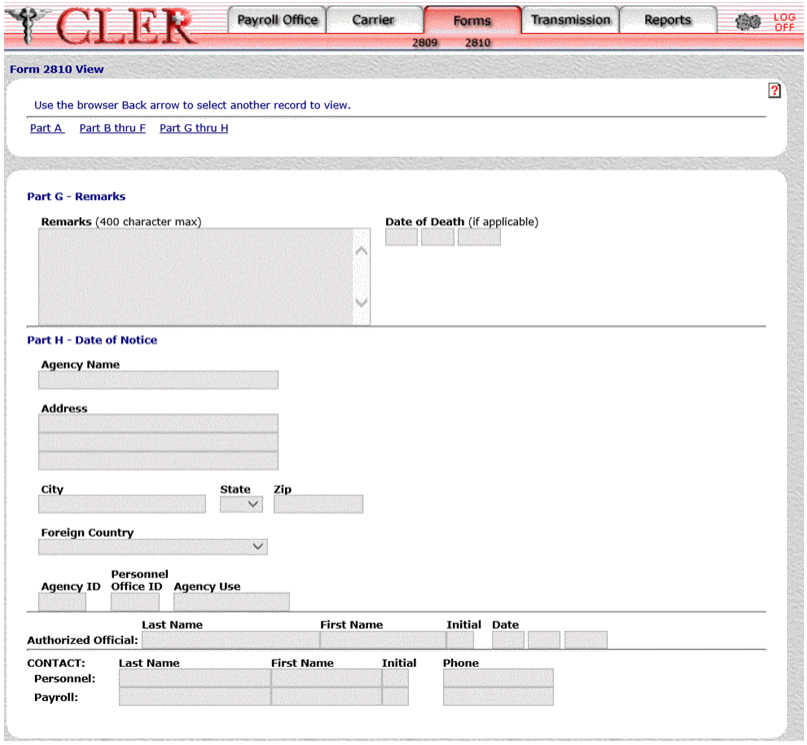


Figure 130: Form 2810 View Page Part G thru H

The data on the Form 2810 View page Part G - Remarks is categorized into the following fields:

Remarks (see "***Remarks - Field Description***" on page 436)

Date of Death (see "***Date of Death - Field Description***" on page 360)

The data on the Form 2810 View page Part H - Date of Notice is categorized into the following fields:

Agency Name (see "***Agency Name - Field Description***" on page 339)

Address Line 1 (see "***Address Line 1 - Coordinator Field Description***" on page 331)

Address Line 2 (see "***Address Line 2 - Coordinator Field Description***" on page 334)

Address Line 3 (see "***Address Line 3 - Coordinator Field Description***" on page 336)

City (see "***City - Coordinator Field Description***" on page 349)

State (see "***State - (Coordinator) Field Description***" on page 442)

Zip (see "***ZIP - (Coordinator) Field Description***" on page 459)

Foreign Country (see "***Foreign Country - (Enrollee Point of Contact) Field Description***" on page 376)

Agency ID (see "***Agency ID - Field Description***" on page 339)

Personnel Office ID (see "***Personnel Office ID - Enrollee Field Description***" on page 421)

Agency Use (see "***Agency Use - Field Description***" on page 340)

Authorized Official Last Name (see "***Authorized Official - Last Name (SF 2809) Field Description***" on page 343)

Authorized Official First Name (see "***Authorized Official - First Name (SF 2809) Field Description***" on page 343)

Authorized Official Initial (see "***Authorized Official - Initial (SF 2809) Field Description***" on page 343)

Authorized Official Date (see "***Authorized Official Date Signed - Form 2810 View (Part H) Field Description***" on page 344)

Contact (Personnel) Last Name (see "***Contact (Personnel) Last Name - Field Description***" on page 355)

Contact (Personnel) First Name (see "***Contact (Personnel) First Name - Field Description***" on page 355)

Contact (Personnel) Initial (see "***Contact (Personnel) Initial - Field Description***" on page 355)

Contact (Personnel) Phone (see "***Contact (Personnel) Phone - Field Description***" on page 356)

Contact (Payroll) Last Name (see "***Contact (Payroll) Last Name - Field Description***" on page 354)

Contact (Payroll) First Name (see "***Contact (Payroll) First Name - Field Description***" on page 353)

Contact (Payroll) Initial (see "***Contact (Payroll) Initial - Field Description***" on page 354)

Contact (Payroll) Phone (see "***Contact (Payroll) Phone - Field Description***" on page 354)

Note: To view another record, select your browser's **Back** button to return to the Form 2810 search results page then select the **View** button next to the applicable record.

Releasing a 2810 Record

The **Release** function allows users to release 2810 records for processing.

To Release a 2810 Record:

1. On the CLER Main Menu - ***Forms*** tab, select ***2810***. The Form 2810 page is displayed.

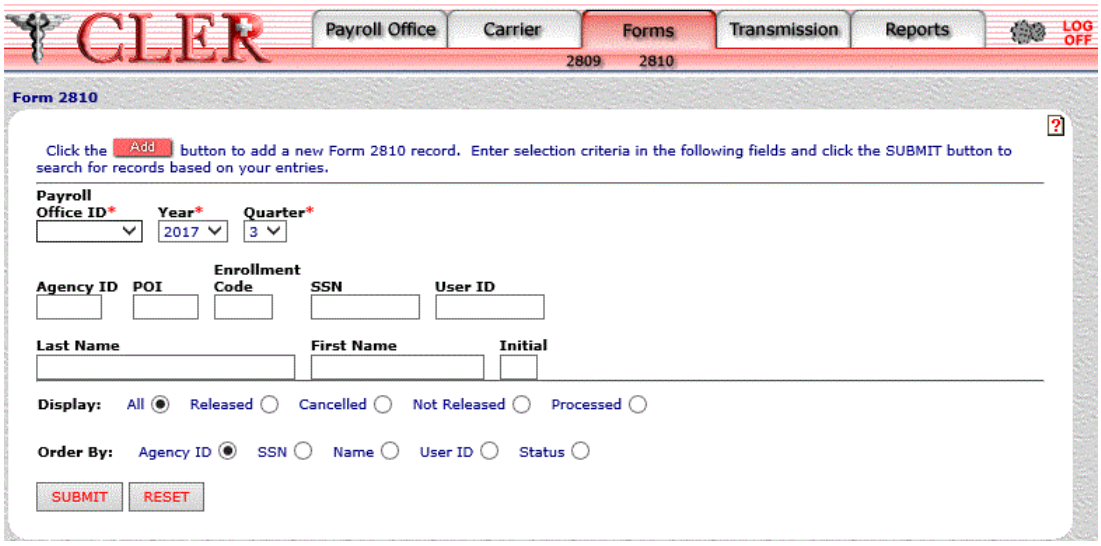


Figure 131: Form 2810 Search Page

2. Complete the following fields on the Form 2810 page:

   Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

   Year (see "***Year - (Required) Field Instruction***" on page 457)

   Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

   Agency ID (see "***Agency ID - Field Instruction***" on page 339)

   POI (see "***POI - Field Description***" on page 424)

   Enrollment Code (see "***Enrollment Code - Field Instruction***" on page 371)

   SSN (see "***SSN - Field Instruction***" on page 440)

   User ID (see "***User ID - (Form) Field Instruction***" on page 454)

Last Name (see "***Last Name - Enrollee Field Instruction***" on page 385)

First Name (see "***First Name - Enrollee Field Instruction***" on page 375)

Initial (see "***Initial - Field Instruction***" on page 380)

Display (see "***Display - (All) Field Instruction***" on page 363)

Order By (see "***Order By - (Agency ID) Field Instruction***" on page 395)

3. Select the **Submit** button. The Form 2810 search results page is displayed.

OR

Select the **Reset** button to clear the form

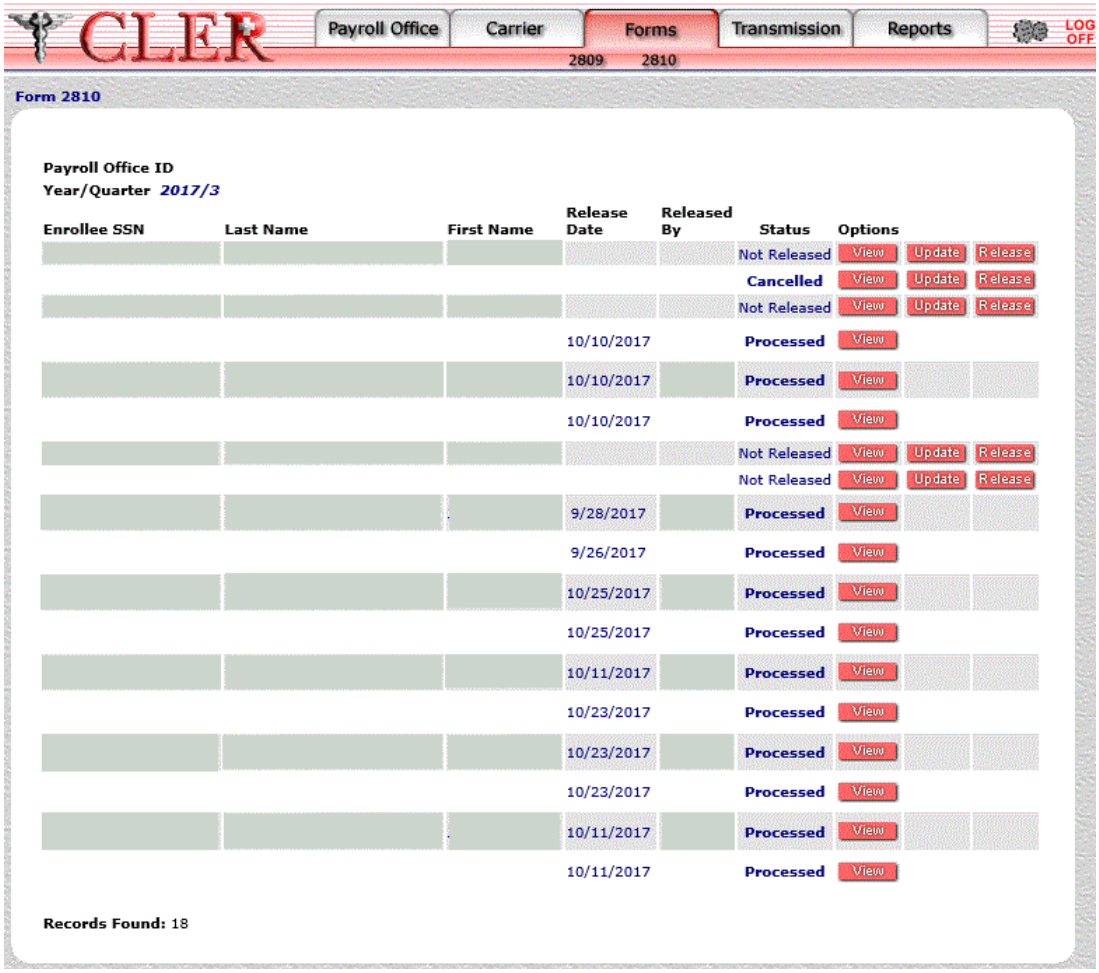


Figure 132: Form 2810 Search Results Page

The data on the Form 2810 search results page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year/Quarter (see "***Year/Quarter - Field Description***" on page 458)

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Release Date (see "***Release Date - (Form 2809 Search Results) Field Description***" on page 435)

Released By (see "***Released By - Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

Options (see "***Options - (View, Update, Cancel) Field Description***" on page 394)

4. Select the **Release** button next to the applicable record. A popup appears to confirm the record has been released.

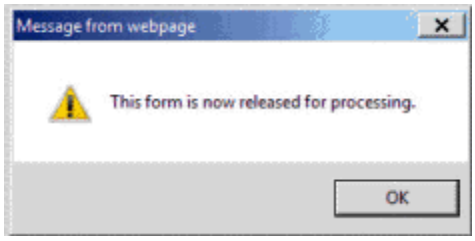


Figure 133: Form Release Popup

5. Select the **OK** button to close the popup.

Canceling a 2810 Record

The **Cancel** function allows users to cancel the release of 2810 records.

To Cancel the Release of a 2810 Record:

1. On the CLER Main Menu, select ***Forms - 2810***. The Form 2810 page is displayed.

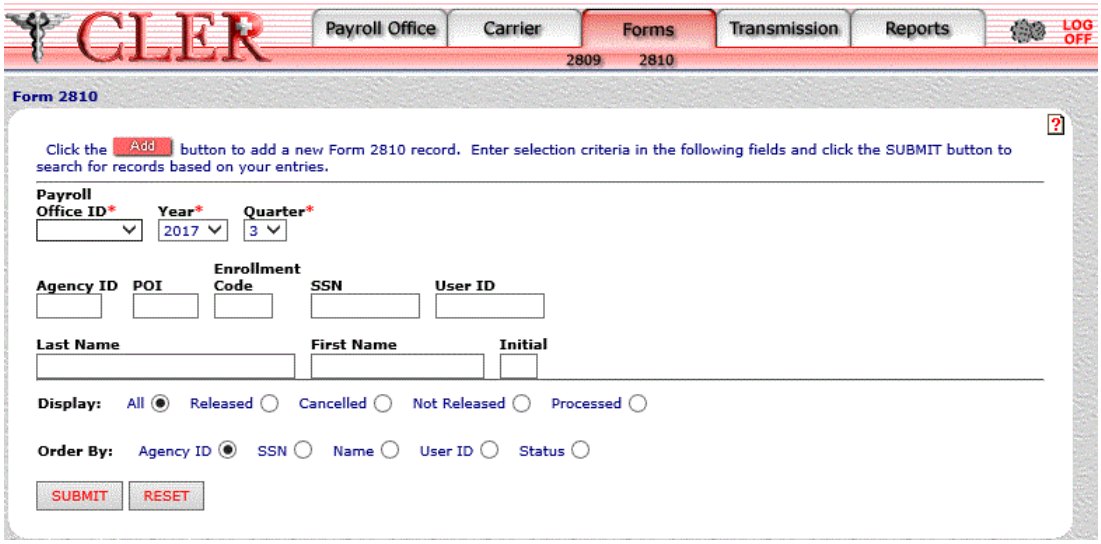


Figure 134: Form 2810 Search Page

2. Complete the following fields on the Form 2810 page:

Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

Year (see "***Year - (Required) Field Instruction***" on page 457)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

Agency ID (see "***Agency ID - Field Instruction***" on page 339)

POI (see "***POI - Field Description***" on page 424)

Enrollment Code (see "***Enrollment Code - Field Instruction***" on page 371)

SSN (see "***SSN - Field Instruction***" on page 440)

User ID (see "***User ID - (Form) Field Instruction***" on page 454)

Last Name (see "***Last Name - Enrollee Field Instruction***" on page 385)

First Name (see "***First Name - Enrollee Field Instruction***" on page 375)

Initial (see "***Initial - Field Instruction***" on page 380)

Display (see "***Display - (All) Field Instruction***" on page 363)

Order By (see "***Order By - (Agency ID) Field Instruction***" on page 395)

3. Select the **Submit** button. The Form 2810 Search Results page is displayed.

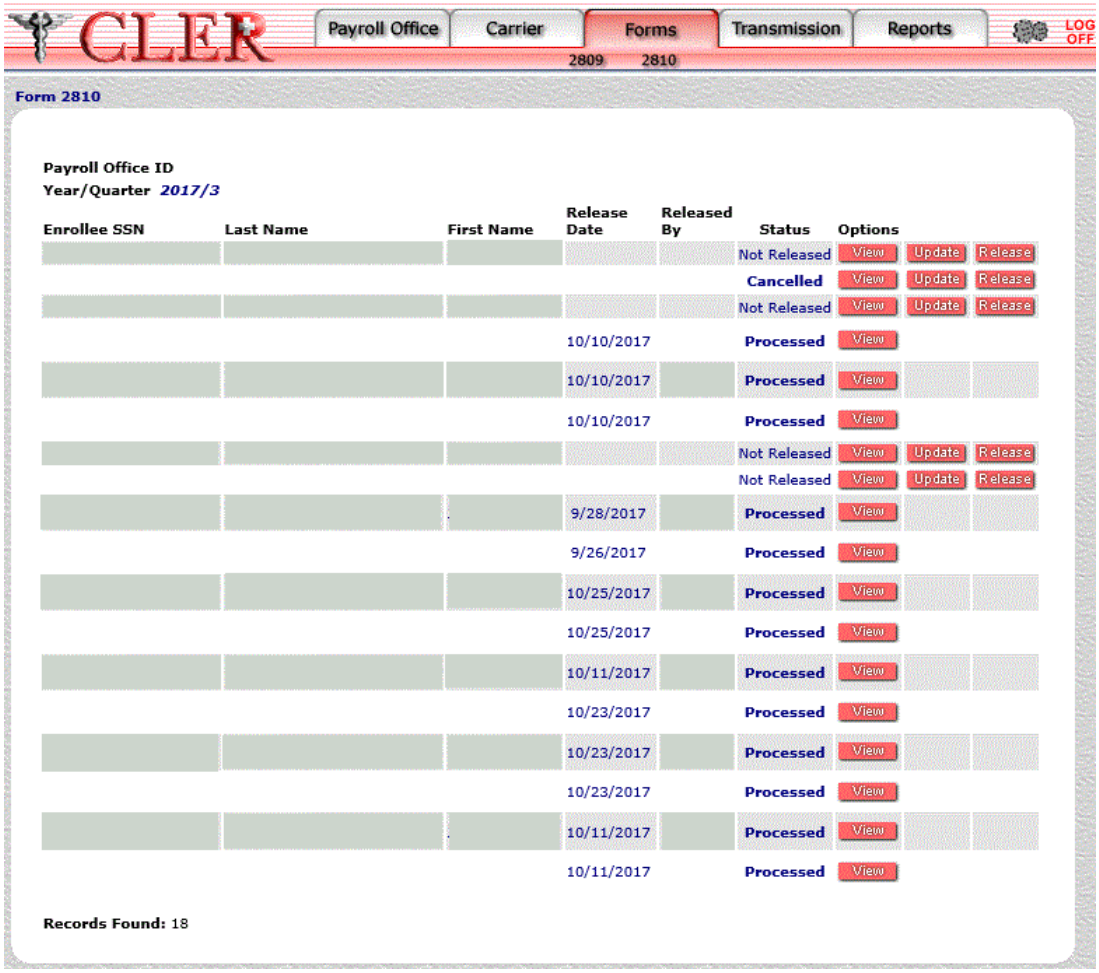


Figure 135: Form 2810 Search Results Page

The data on the Form 2810 search results page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year/Quarter (see "***Year/Quarter - Field Description***" on page 458)

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Release Date (see "***Release Date - (Form 2809 Search Results) Field Description***" on page 435)

Released By (see "***Released By - Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

Options (see "***Options - (View, Update, Cancel) Field Description***" on page 394)

4. Select the **Cancel** button next to the applicable record. A popup appears to confirm the cancellation of the record's release.

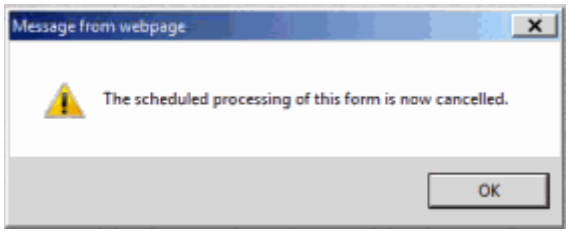


Figure 136: Form 2809 Cancel Popup

5. Select the **OK** button to close the popup.

Updating a 2810 Record

The **Update** function allows users to update 2810 records.

To Update Function on a 2810 Record:

1. On the CLER Main Menu - ***Forms*** tab, select ***2810***. The Form 2810 page is displayed.

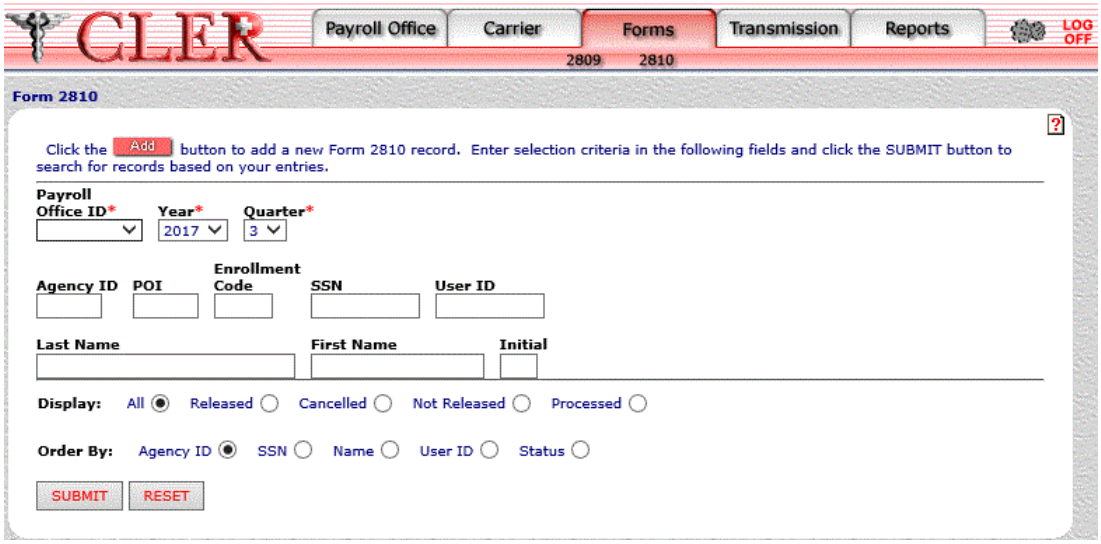


Figure 137: Form 2810 Search Page

2. Complete the following fields on the Form 2810 page:

Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

Year (see "***Year - (Required) Field Instruction***" on page 457)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

Agency ID (see "***Agency ID - Field Instruction***" on page 339)

POI (see "***POI - Field Description***" on page 424)

Enrollment Code (see "***Enrollment Code - Field Instruction***" on page 371)

SSN (see "***SSN - Field Instruction***" on page 440)

User ID (see "***User ID - (Form) Field Instruction***" on page 454)

Last Name (see "***Last Name - Enrollee Field Instruction***" on page 385)

First Name (see "***First Name - Enrollee Field Instruction***" on page 375)

Initial (see "***Initial - Field Instruction***" on page 380)

Display (see "***Display - (All) Field Instruction***" on page 363)

Order By (see "***Order By - (Agency ID) Field Instruction***" on page 395)

3. Select the **Submit** button. The Form 2810 Search Results page is displayed.

OR

Select the **Reset** button to clear fields.

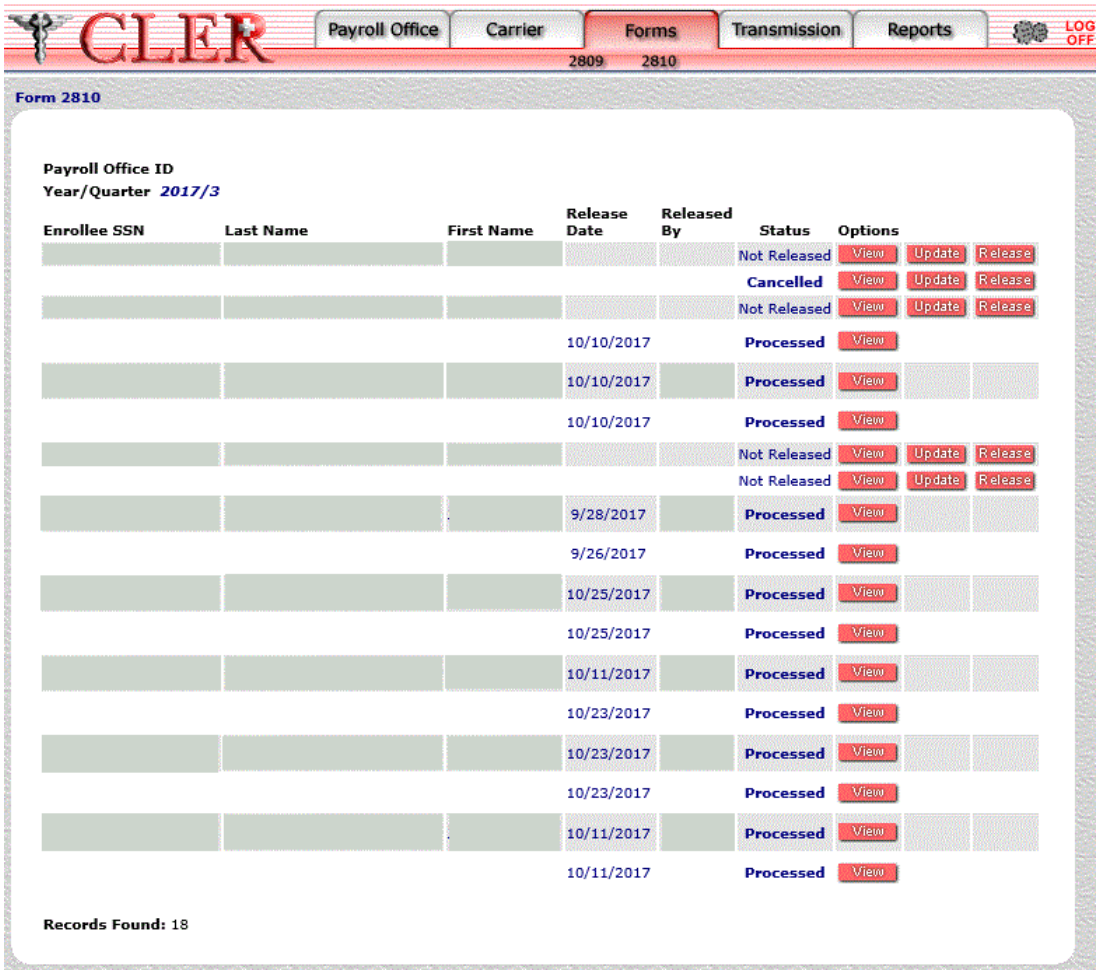


Figure 138: Form 2810 Search Results Page

The data on the Form 2810 search results page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year/Quarter (see "***Year/Quarter - Field Description***" on page 458)

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Release Date (see "***Release Date - (Form 2809 Search Results) Field Description***" on page 435)

Released By (see "***Released By - Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

Options (see "***Options - (View, Update, Cancel) Field Description***" on page 394)

4. Select the **Update** button next to the applicable record. The Form 2810 Update Part A page is displayed.

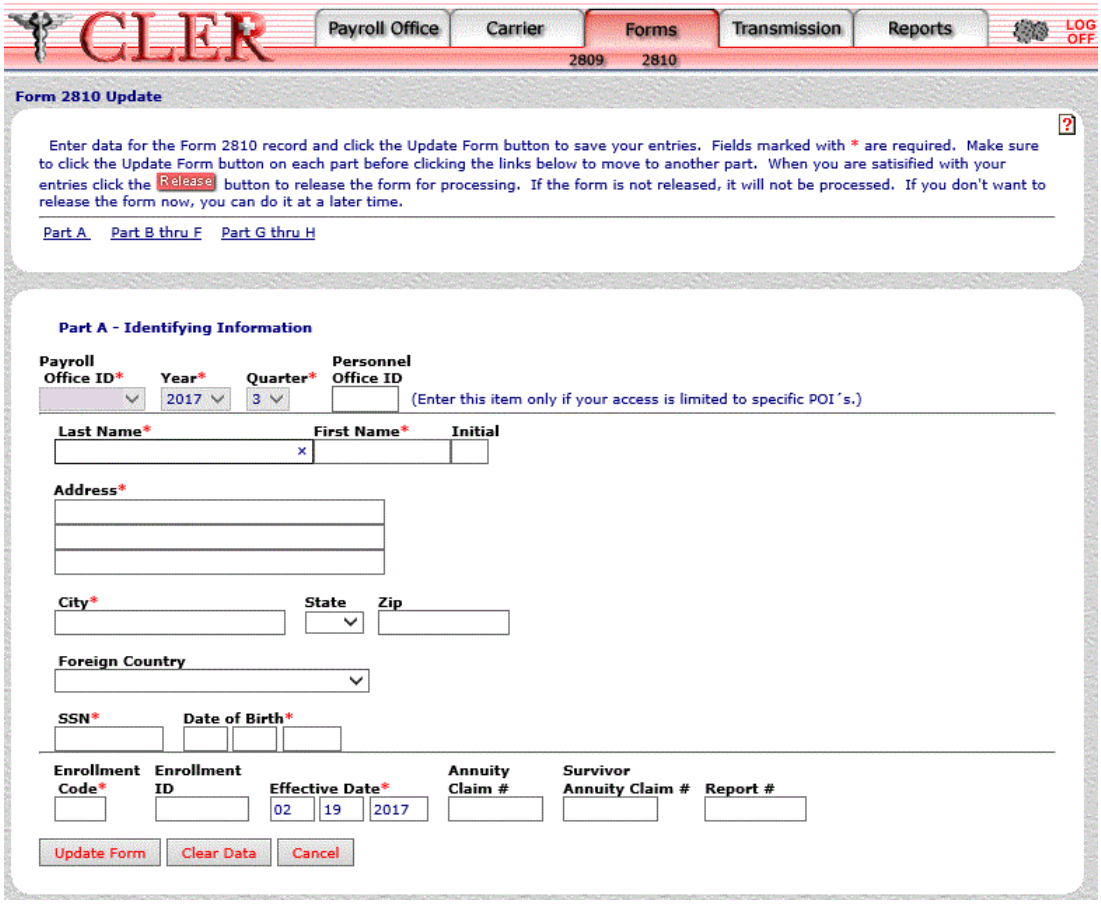


Figure 139: Form 2810 Update (Part A)

Complete the following applicable fields on the Form 2810 Update Part A page:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year (see "***Year - Field Description***" on page 457)

Quarter (see "***Quarter - Field Description***" on page 429)

Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

Last Name (see "***Last Name - (Required) Field Instruction***" on page 385)

First Name (see "***First Name - (Required) Enrollee Field Instruction***" on page 375)

Initial (see "***Initial - Field Instruction***" on page 380)

Address Line 1 (see "***Address Line 1 - Form 2810 Add (Part A) Field Instruction***" on page 332)

Address Line 2 (see "***Address Line 2 - Form 2810 Add (Part A) Field Instruction***" on page 334)

Address Line 3 (see "***Address Line 3 - Form 2810 Add (Part A) Field Instruction***" on page 337)

City (see "***City - Form 2809/2810 Add (Part A) Field Instruction***" on page 350)

State (see "***State - (Enrollee) Field Description***" on page 442)

Zip (see "***ZIP - (Enrollee) Field Description***" on page 459)

Foreign Country (see "***Foreign Country - Form 2809/2810 Add (Part A) Field Instruction***" on page 378)

SSN (see "***SSN - (Required) Field Instruction***" on page 439)

Date of Birth (see "***Date of Birth - Form 2809/2810 Add (Part A) Field Instruction***" on page 360)

Enrollment Code (see "***Enrollment Code - (Required) Field Instruction***" on page 371)

Enrollment ID

Effective Date (see "***Effective Date - Form 2810 Add Field Instruction***" on page 366)

Annuity Claim # (see "***Annuity Claim # - Form 2810 Add (Part A) Field Instruction***" on page 341)

Survivor Annuity Claim # (see "***Survivor Annuity Claim # - Field Instruction***" on page 447)

Report # (see "***Report # - Field Instruction***" on page 436)

5. Select the **Update Form** button. If no errors occur, a popup appears to confirm the record has been updated.

OR

Select the **Clear Data** button to reset form. Select the **Cancel** button to return to the previous page.

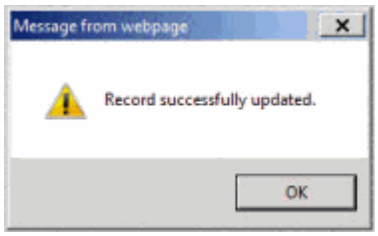


Figure 140: Transmission Online Entry Update Popup

6. Select the **OK** button to close the popup.

7. To update data on the Form 2810 Update Parts B thru F page, select ***Part B thru F***. The Form 2810 Update Part B thru F page is displayed.

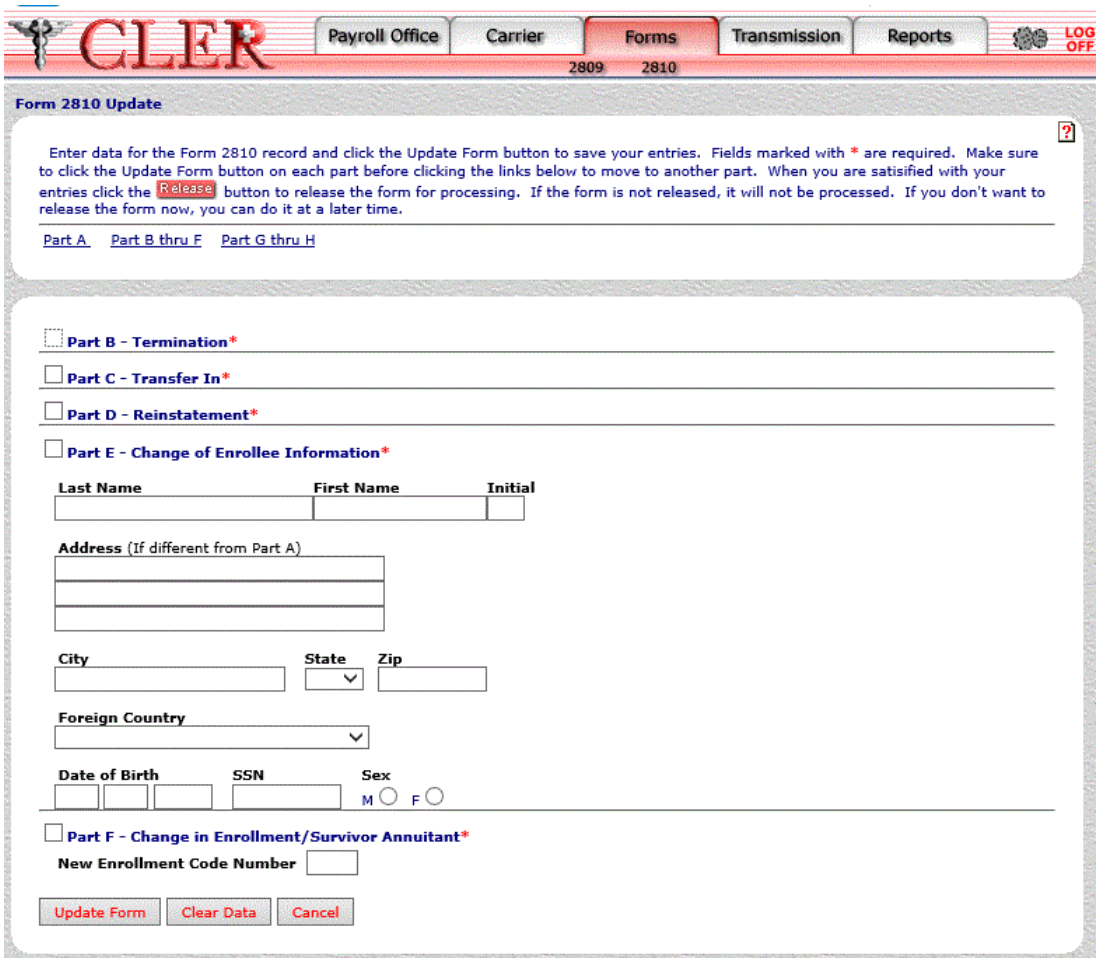


Figure 141: Form 2810 Update (Part B thru F)

8. Complete the following applicable fields on the Form 2810 Update Part B thru F page:

   Part B - Termination (see "***Part B - Termination - Field Instruction***" on page 416)

   Part C - Transfer In (see "***Part C - Transfer In - Field Instruction***" on page 416)

   Part D - Reinstatement (see "***Part D - Reinstatement - Field Instruction***" on page 416)

   Part E - Change of Enrollee Information (see "***Part E - Change of Enrollee Information - Field Instruction***" on page 417)

   Last Name (see "***Last Name - Form 2810 Add (Part E) Field Instruction***" on page 386)

   First Name (see "***First Name - Form 2810 Add (Part E) Field Instruction***" on page 376)

   Initial (see "***Initial - Form 2810 Add (Part E) Field Instruction***" on page 380)

   Address Line 1 (see "***Address Line 1 - Form 2810 Add (Parts B through F) Field Instruction***" on page 332)

   Address Line 2 (see "***Address Line 2 - Form 2810 Add (Parts B through F) Field Instruction***" on page 335)

   Address Line 3 (see "***Address Line 3 - Form 2810 Add (Parts B through F) Field Instruction***" on page 337)

   City (see "***City - Form 2810 Add (Parts B thru F) Field Instruction***" on page 350)

   State (see "***State - (Enrollee) Field Description***" on page 442)

   Zip (see "***ZIP - (Enrollee) Field Description***" on page 459)

   Foreign Country (see "***Foreign Country - Form 2810 Add (Parts B thru F) Field Instruction***" on page 378)

   Date of Birth (see "***Date of Birth - Form 2810 Add (Parts B thru F) Field Instruction***" on page 360)

   SSN (see "***SSN - Form 2810 Add (Part E) Field Instruction***" on page 440)

   Sex (see "***Sex - Form 2810 Add (Part E) Field Instruction***" on page 439)

   Part F - Change in Enrollment/Survivor Annuitant (see "***Part F - Change in Enrollment/Survivor Annuitant - Field Instruction***" on page 417)

   New Enrollment Code Number (see "***New Enrollment Code Number - Form 2810 Add (Part F) Field Instruction***" on page 392)

9. Select the **Update Form** button. If no errors occur, a popup appears to confirm the record has been updated.

   OR

   Select the **Clear Data** button to clear form. Select the **Cancel** button to return to the previous page.

Figure 142: Transmission Online Entry Update Popup

10. Select the **OK** button to close the popup.

11. To update data on the Form 2810 Update Parts G thru H page, select ***Part G thru H***. The Form 2810 Update Part G thru H page is displayed.

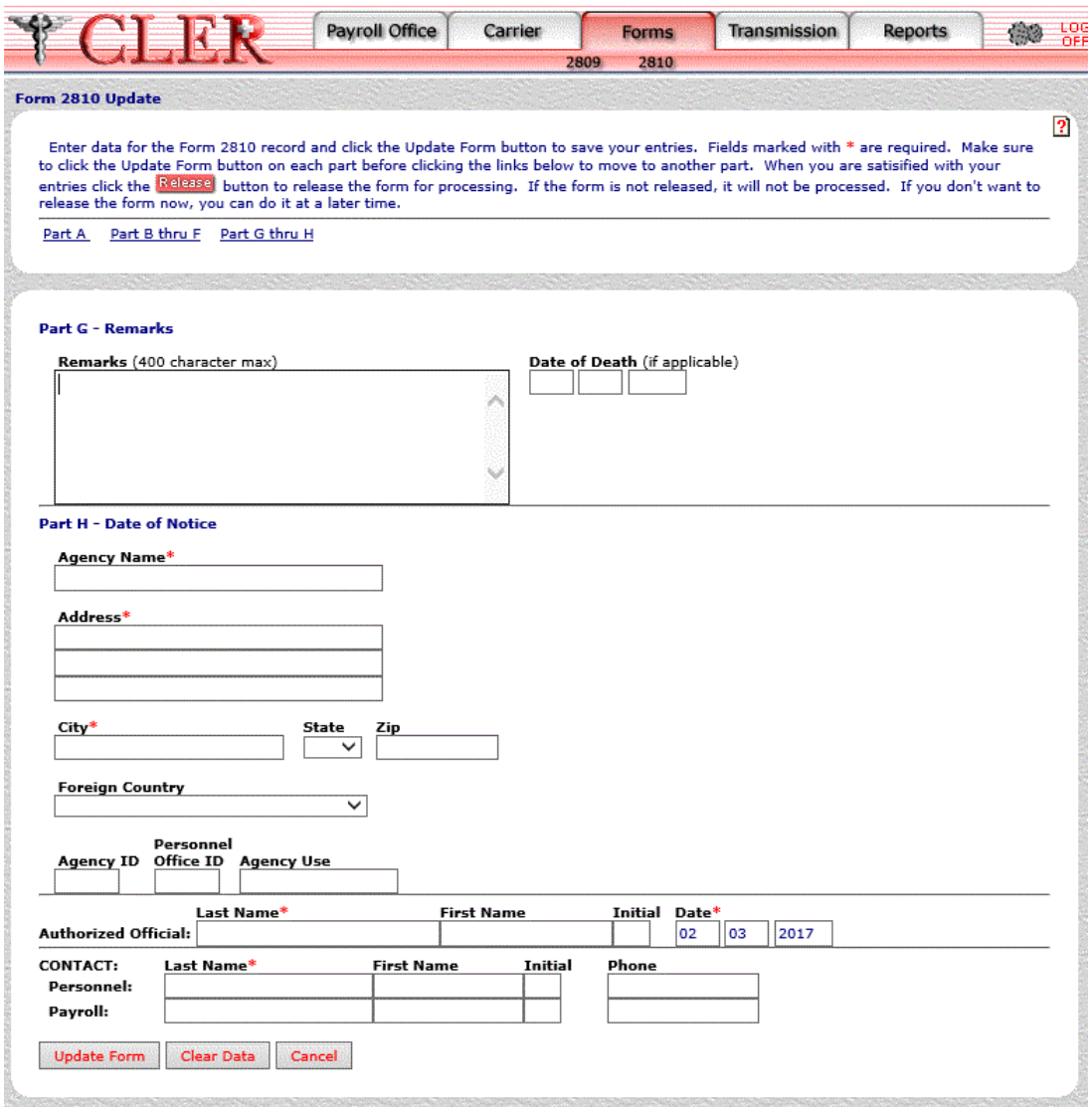


Figure 143: Form 2810 Update (Part G thru H)

12. Complete the following applicable fields on the Form 2810 Update Part G thru H page:

Remarks (see "***Remarks - (400 Max) Field Instruction***" on page 436)

Date of Death (see "***Date of Death - Form 2810 Add (Parts G and H) Field Instruction***" on page 360)

Agency Name (see "***Agency Name - Form 2809 Add (Part I) Field Instruction***" on page 340)

Address Line 1 (see "***Address Line 1 - Form 2809 Add (Part I) Field Instruction***" on page 332)

Address Line 2 (see "***Address Line 2 - Form 2809 Add (Part I) Field Instruction***" on page 334)

Address Line 3 (see "***Address Line 3 - Form 2809 Add (Part I) Field Instruction***" on page 337)

City (see "***City - Form 2809 Add (Part I) Field Instruction***" on page 350)

State (on page 443)

Zip (see "***ZIP - (Coordinator) Field Instruction***" on page 459)

Foreign Country (see "***Foreign Country - Form 2809 Add (Part I) Field Instruction***" on page 377)

Agency ID (see "***Agency ID - Field Instruction***" on page 339)

Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

Agency Use (see "***Agency Use - Field Instruction***" on page 340)

Authorized Official Last Name (see "***Authorized Official Last Name - Form 2809 Add (Part I) Field Instruction***" on page 344)

Authorized Official First Name (see "***Authorized Official First Name - Form 2809 Add (Part I) Field Instruction***" on page 344)

Authorized Official Initial (see "***Authorized Official Initial - Form 2809 Add (Part I) Field Instruction***" on page 344)

Authorized Official Date (see "***Authorized Official Date Signed - Form 2810 Add (Part H) Field Instruction***" on page 344)

Contact (Personnel) Last Name (see "***Contact (Personnel) Last Name - Form 2809 Add (Part I) Field Instruction***" on page 356)

Contact (Personnel) First Name (see "***Contact (Personnel) First Name - Form 2809 Add (Part I) Field Instruction***" on page 355)

Contact (Personnel) Initial (see "***Contact (Personnel) Initial - Form 2809 Add (Part I) Field Instruction***" on page 355)

Contact (Personnel) Phone (see "***Contact (Personnel) Phone - Form 2809 Add (Part I) Field Instruction***" on page 356)

Contact (Payroll) Last Name (see "***Contact (Payroll) Last Name - Form 2809 Add (Part I) Field Instruction***" on page 354)

Contact (Payroll) First Name (see "***Contact (Payroll) First Name - Form 2809 Add (Part I) Field Instruction***" on page 353)

Contact (Payroll) Initial (see "***Contact (Payroll) Initial - Form 2809 Add (Part I) Field Instruction***" on page 354)

Contact (Payroll) Phone (see "***Contact (Payroll) Phone - Form 2809 Add (Part I) Field Instruction***" on page 355)

13. Select the **Update Form** button. If no errors occur, a popup appears to confirm the record has been updated.

    OR

    Select the **Clear Data** button to clear form. Select the **Cancel** button to return to the previous page.

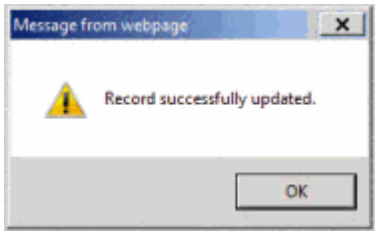


Figure 144: Transmission Online Entry Update Popup

14. Select the **OK** button to close the popup.

Viewing Payroll Office Error Records

The ***Errors*** option on the Payroll Office Main page allows users with the proper access to view error counts by type for each payroll office by processing year and quarter.

To View a Payroll Office Error Record:

1. Select the ***Payroll Office*** tab on the CLER Main Menu. Select ***Errors*** on the Payroll Office Main tab. The Payroll Office Errors page is displayed.

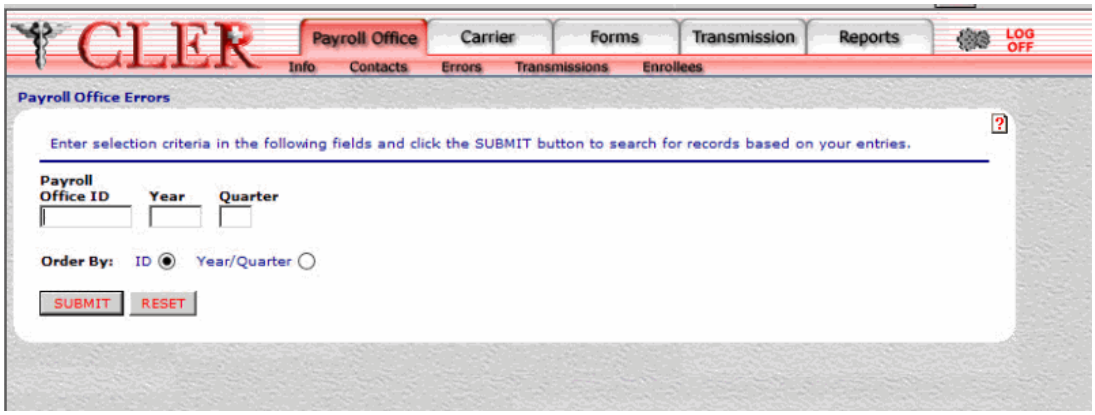


Figure 145: Payroll Office Errors Page

2. Complete the following fields on the Payroll Office Errors page:

   Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

   Year (see "***Year - Field Instruction***" on page 457)

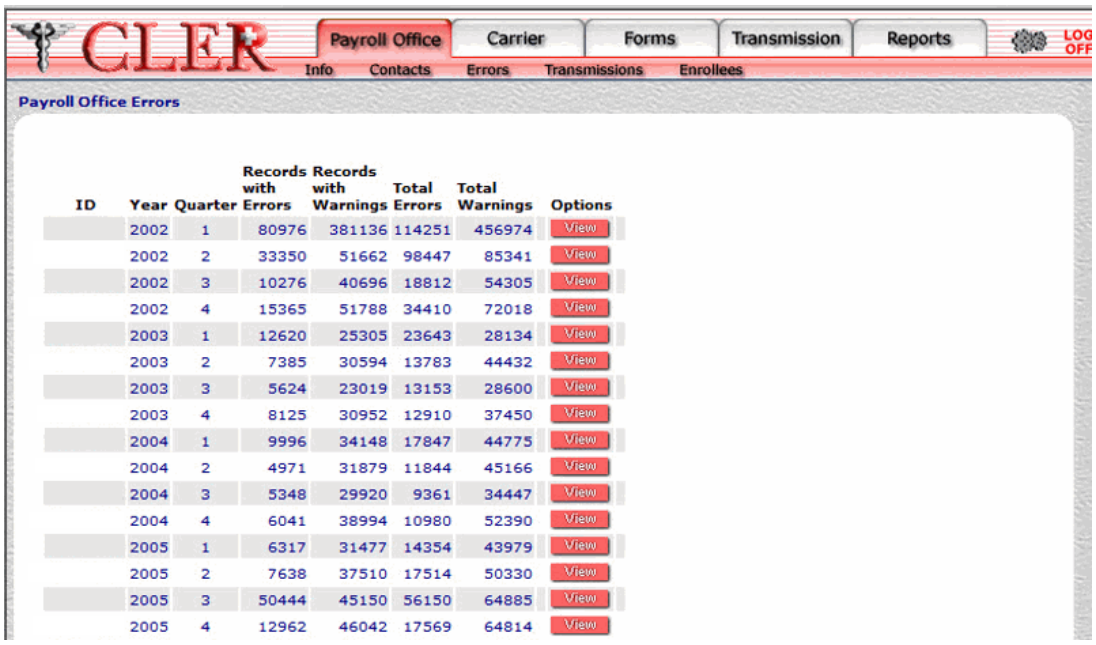
   Quarter (see "***Quarter - Field Instruction***" on page 429)

   Order By (see "***Order By - (Payroll Office Contact) Field Instruction***" on page 396)

3. Select the **Submit** button to confirm all data entered. The Payroll Office Errors search results page is displayed.

OR

Select the **Reset** button to clear all data entered.



ID	Year	Quarter	Records with Errors	Records with Warnings	Total Errors	Total Warnings	Options
	2002	1	80976	381136	114251	456974	View
	2002	2	33350	51662	98447	85341	View
	2002	3	10276	40696	18812	54305	View
	2002	4	15365	51788	34410	72018	View
	2003	1	12620	25305	23643	28134	View
	2003	2	7385	30594	13783	44432	View
	2003	3	5624	23019	13153	28600	View
	2003	4	8125	30952	12910	37450	View
	2004	1	9996	34148	17847	44775	View
	2004	2	4971	31879	11844	45166	View
	2004	3	5348	29920	9361	34447	View
	2004	4	6041	38994	10980	52390	View
	2005	1	6317	31477	14354	43979	View
	2005	2	7638	37510	17514	50330	View
	2005	3	50444	45150	56150	64885	View
	2005	4	12962	46042	17569	64814	View

Figure 146: Payroll Office Errors Search Results Page

The data on the Payroll Office Errors search results page is categorized into the following fields:

ID (see "***ID - Field Description***" on page 379)

Year (see "***Year - Field Description***" on page 457)

Quarter (see "***Quarter - (Error Statistics) Field Description***" on page 428)

Records with Errors (see "***Records With Errors - (Payroll Office) Field Description***" on page 434)

Records with Warnings (see "***Records With Warnings - (Payroll Office) Field Description***" on page 434)

Total Errors (see "***Total Errors - Field Description***" on page 450)

Total Warnings (see "***Total Warnings - Field Description***" on page 451)

Options (see "***Options - (View Only) Field Description***" on page 393)

4. Select the **View** button next to the applicable record. The Payroll Office Errors View page is displayed.

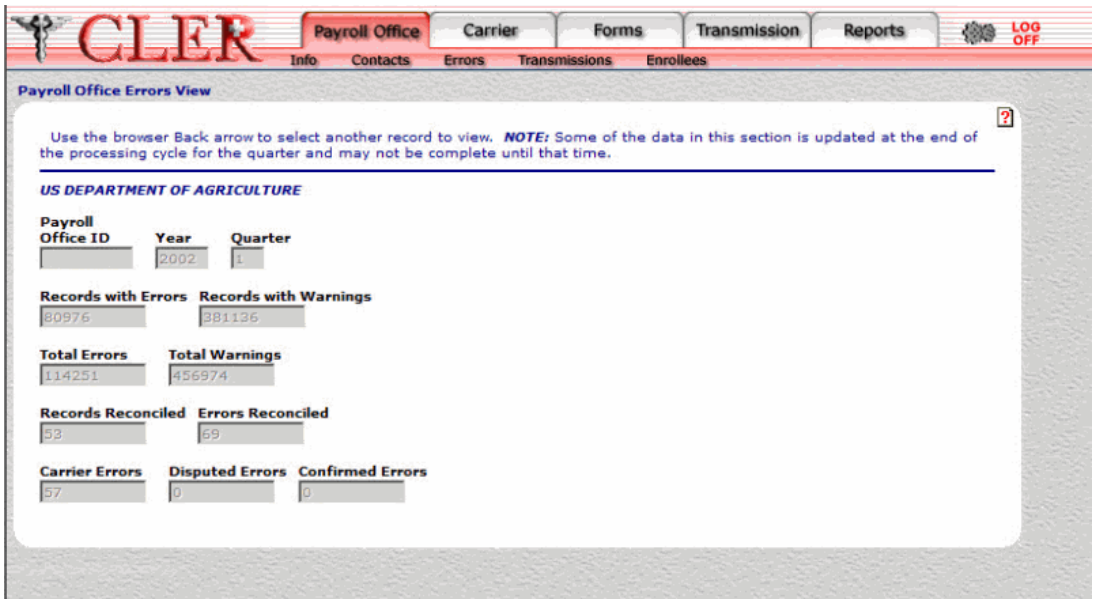


Figure 147: Payroll Office Errors View Page

The data on the Payroll Office Errors View page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year (see "***Year - (Error Statistics) Field Description***" on page 456)

Quarter (see "***Quarter - (Error Statistics) Field Description***" on page 428)

Records with Errors (see "***Records With Errors - (Payroll Office) Field Description***" on page 434)

Records with Warnings (see "***Records With Warnings - (Payroll Office) Field Description***" on page 434)

Total Errors (see "***Total Errors - Field Description***" on page 450)

Total Warnings (see "***Total Warnings - Field Description***" on page 451)

Records Reconciled (see "***Records Reconciled - Field Description***" on page 434)

Errors Reconciled (see "***Errors Reconciled - Field Description***" on page 372)

Carrier Errors (see "***Carrier Errors - Field Description***" on page 346)

Disputed Errors (see "***Disputed Errors - Field Description***" on page 365)

Confirmed Errors (see "***Confirmed Errors - Field Description***" on page 353)

Note: To view another record, select your browser's **Back** button to return to the Payroll Office Errors search results page and select **View** next to the applicable record.

Maintaining Transmission Records

The ***Transmission*** option allows users to view and maintain transmission files. With proper access authority, transmission files may be added, released, or canceled.

This section includes the following topics:

Viewing Payroll Office Transmissions Records.....191

Viewing Payroll Office Transmissions Records

The ***Transmissions*** option on the Payroll Office Main page allows users to view information about each transmission file submitted by a payroll office by the year and quarter the file was processed. This information includes file header information; date and time processed; and number of records sent, received, and processed.

To View a Payroll Office Transmissions Record:

1. Select the ***Payroll Office*** tab on the CLER Main Menu.
2. Select ***Transmissions*** on of the Payroll Office Main page. The Payroll Office Transmissions page is displayed.

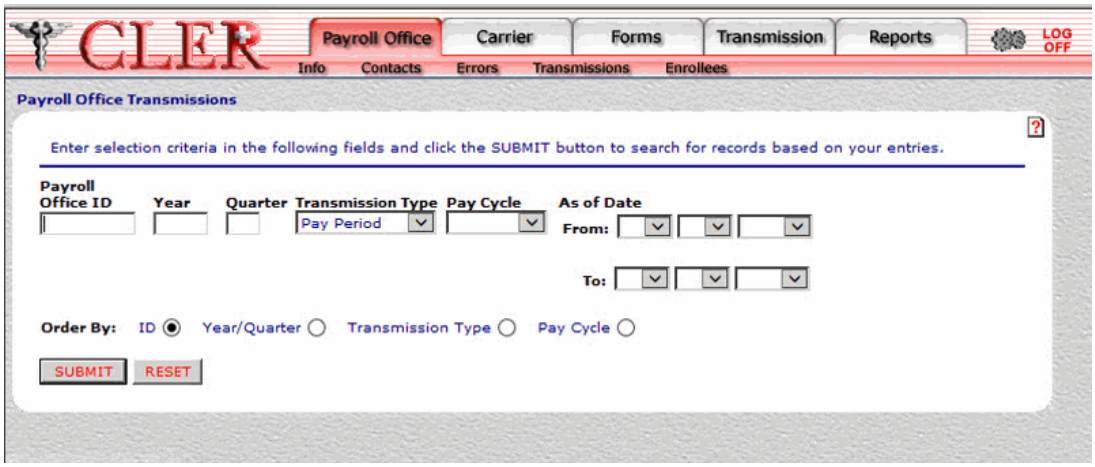


Figure 148: Payroll Office Transmissions Page

3. Complete the following fields on the Payroll Office Transmissions page:

   Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

   Year (see "***Year - Field Instruction***" on page 457)

Quarter (see "***Quarter - Field Instruction***" on page 429)

Transmission Type (see "***Transmission Type - (Optional) Field Instruction***" on page 451)

Pay Cycle (see "***Pay Cycle - (Optional) Field Instruction***" on page 418)

As of Date From (see "***As of Date From - Field Instruction***" on page 342)

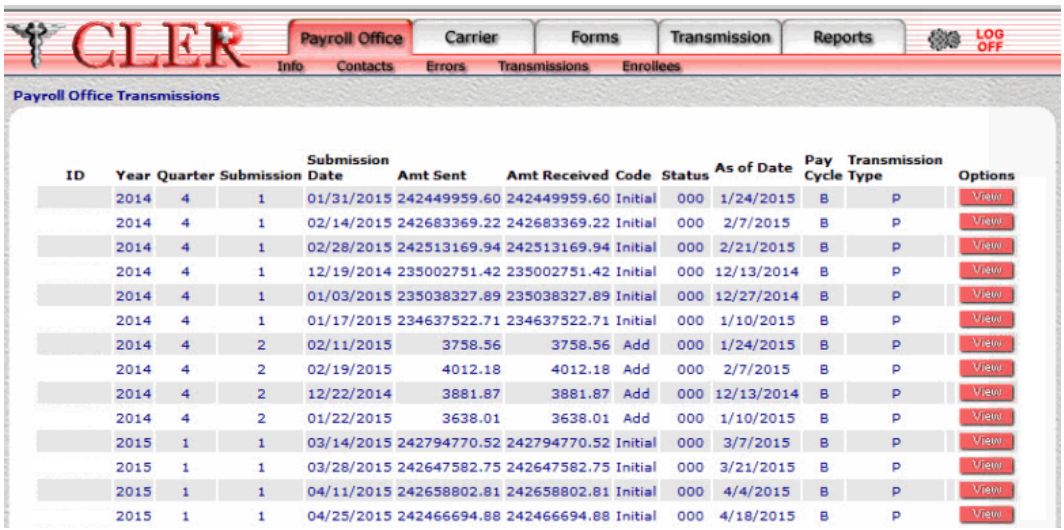
As of Date To (see "***As of Date To - Field Instruction***" on page 343)

Order By (see "***Order By - (Transmission) Field Instruction***" on page 397)

4. Select the **Submit** button to confirm all data entered. The Payroll Office Transmissions search results page is displayed.

OR

Select the **Reset** button to clear all data entered.



ID	Year	Quarter	Submission	Submission Date	Amt Sent	Amt Received	Code	Status	As of Date	Pay Cycle	Transmission Type	Options
	2014	4	1	01/31/2015	242449959.60	242449959.60	Initial	000	1/24/2015	B	P	View
	2014	4	1	02/14/2015	242683369.22	242683369.22	Initial	000	2/7/2015	B	P	View
	2014	4	1	02/28/2015	242513169.94	242513169.94	Initial	000	2/21/2015	B	P	View
	2014	4	1	12/19/2014	235002751.42	235002751.42	Initial	000	12/13/2014	B	P	View
	2014	4	1	01/03/2015	235038327.89	235038327.89	Initial	000	12/27/2014	B	P	View
	2014	4	1	01/17/2015	234637522.71	234637522.71	Initial	000	1/10/2015	B	P	View
	2014	4	2	02/11/2015	3758.56	3758.56	Add	000	1/24/2015	B	P	View
	2014	4	2	02/19/2015	4012.18	4012.18	Add	000	2/7/2015	B	P	View
	2014	4	2	12/22/2014	3881.87	3881.87	Add	000	12/13/2014	B	P	View
	2014	4	2	01/22/2015	3638.01	3638.01	Add	000	1/10/2015	B	P	View
	2015	1	1	03/14/2015	242794770.52	242794770.52	Initial	000	3/7/2015	B	P	View
	2015	1	1	03/28/2015	242647582.75	242647582.75	Initial	000	3/21/2015	B	P	View
	2015	1	1	04/11/2015	242658802.81	242658802.81	Initial	000	4/4/2015	B	P	View
	2015	1	1	04/25/2015	242466694.88	242466694.88	Initial	000	4/18/2015	B	P	View

Figure 149: Payroll Office Transmissions Page

The data on the Payroll Office Transmissions search results page is categorized into the following fields:

ID (see "***ID - Field Description***" on page 379)

Year (see "***Year - (Payroll Office Enrollees) Search Results Field Description***" on page 456)

Quarter (see "***Quarter - Payroll Office Transmissions Search Results Field Description***" on page 430)

Submission (see "***Submission - Field Description***" on page 445)

Submission Date (see "***Submission Date - Field Description***" on page 446)

Amt Sent (see "***Amount Sent - Field Description***" on page 341)

Amt Received (see "***Amount Received - Field Description***" on page 341)

Code (see "***Code - Payroll Office Transmission Search Results Field Description***" on page 353)

Status (see "***Status - (Payroll Office Errors) View Field Description***" on page 444)

As of Date (see "***As of Date - Field Description***" on page 342)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

Transmission Type (see "***Transmission Type - Field Description***" on page 451)

Options (see "***Options - (View, Update, Delete) Field Description***" on page 394)

5. Select the **View** button next to the applicable record. The Payroll Office Transmissions View page is displayed.

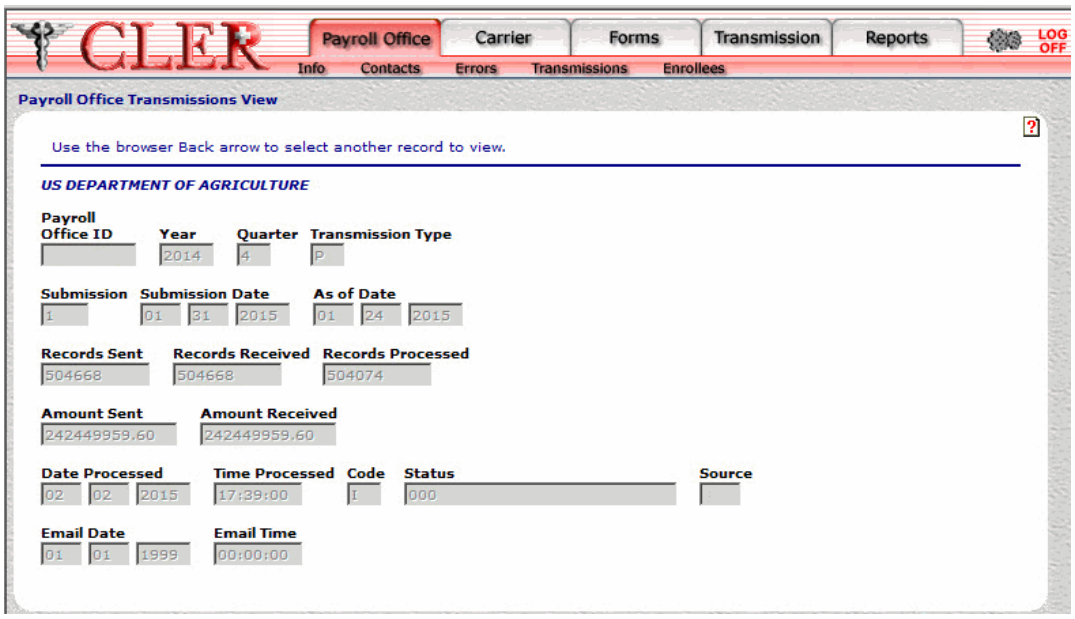


Figure 150: Payroll Office Transmissions View Page

The data on the Payroll Office Transmissions View page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year (see "***Year - (Payroll Office Enrollees) Search Results Field Description***" on page 456)

Quarter (see "***Quarter - Payroll Office Transmissions Search Results Field Description***" on page 430)

Transmission Type (see "***Transmission Type - Field Description***" on page 451)

Submission (see "***Submission - Field Description***" on page 445)

Submission Date (see "***Submission Date - Field Description***" on page 446)

As of Date (see "***As of Date - Field Description***" on page 342)

Records Sent (see "***Records Sent - Field Description***" on page 434)

Records Received (see "***Records Received - Field Description***" on page 434)

Records Processed (see "***Records Processed - Field Description***" on page 433)

Amount Sent (see "***Amount Sent - Field Description***" on page 341)

Amount Received (see "***Amount Received - Field Description***" on page 341)

Date Processed (see "***Date Processed - Field Description***" on page 360)

Time Processed (see "***Time Processed - Field Description***" on page 448)

Code (see "***Code - Payroll Office Transmission Search Results Field Description***" on page 353)

Status (see "***Status - (Payroll Office Errors) View Field Description***" on page 444)

Source (see "***Source - Field Description***" on page 439)

Email Date (see "***Email Date - Field Description***" on page 368)

Email Time (see "***Email Time - Field Description***" on page 368)

Note: To view another record, select your browser's **Back** button to return to the Payroll Office Transmissions search results page, then select the **View** button next to the applicable record.

Maintaining Online Entry Records

The ***Online Entry*** option on the Transmission Main page allows users (payroll offices only) to enter enrollment data online to submit the data to the CLER reconciliation process as a transmission file. This option is useful for Agencies with few enrollment records.

For more information see:

Adding an Online Entry Record.....195
Viewing an Online Entry Record 197
Updating an Online Entry Record 201
Releasing an Online Entry Record 204
Canceling an Online Entry Record.....207
Adding an Online Entry Enrollee Record 209
Viewing an Online Entry Enrollee Record 214
Updating an Online Entry Enrollee Record 220
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Adding an Online Entry Record

The **Add** function allows users to add transmission online entry records.

To Add an Online Entry Record:

1. On the ***Transmission*** tab, select ***Online Entry***. The Transmission Online Entry page is displayed.

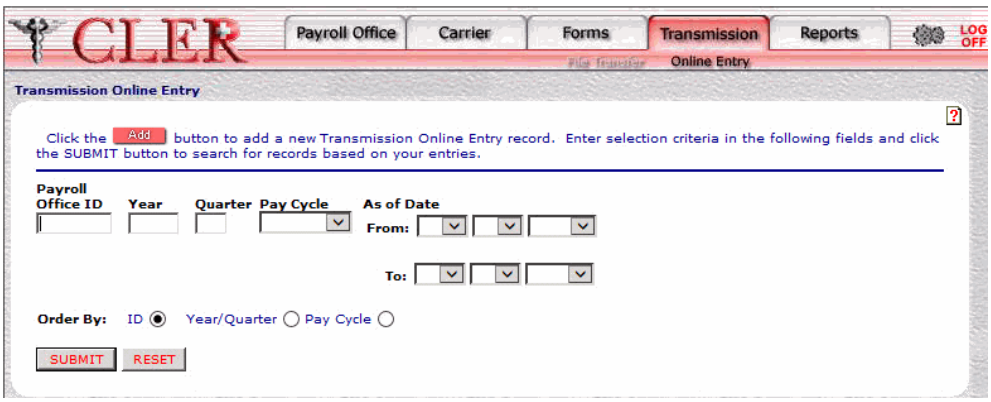


Figure 151: Transmission Online Entry Search Page

2. Select the **Add** button on the Transmission Online Entry page. The Transmission Online Entry Add page is displayed.

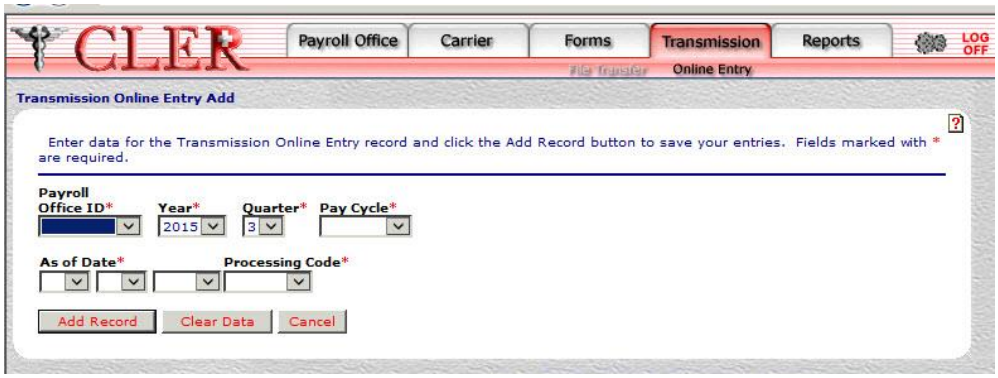


Figure 152: Transmissions Online Entry Add Page

3. Complete the following fields on the Transmission Online Entry Add page:

   Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

   Year (see "***Year - (Required) Field Instruction***" on page 457)

   Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

   Pay Cycle (see "***Pay Cycle - (Required) Field Instruction***" on page 418)

   As of Date (see "***As of Date - (Required) Field Instruction***" on page 341)

   Processing Code (see "***Processing Code - Field Instruction***" on page 428)

4. Select the **Add Record** button. If no errors occur, a popup appears to confirm the record has been added.

OR

Select the **Clear Data** button to reset form. Select **Cancel** to return the previous page.

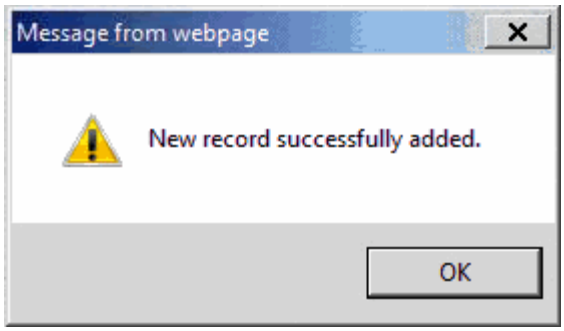


Figure 153: Transmission Online Entry Add Popup

5. Select the **OK** button to close the popup.

Note: To add another record, select the **Clear Data** button to refresh the Transmission Online Entry Add page and complete the fields for the new record.

Viewing an Online Entry Record

The **View** function allows users to view transmission online entry records.

To View an Online Entry Record:

1. On the ***Transmission*** tab, select ***Online Entry***. The Transmission Online Entry page is displayed.

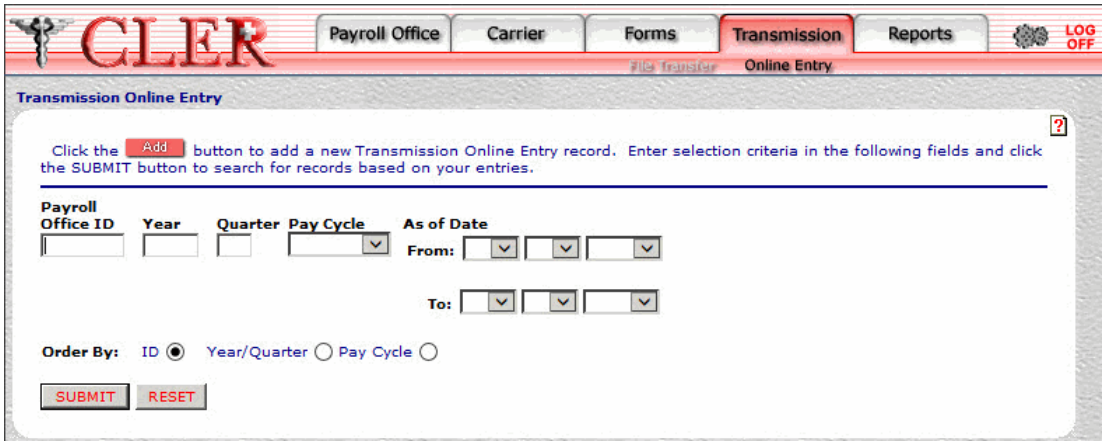


Figure 154: Transmission Online Entry Add Page

2. Complete the following fields on the Transmission Online Entry page:

   Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

Year (see "***Year - Field Instruction***" on page 457)

Quarter (see "***Quarter - Field Instruction***" on page 429)

Pay Cycle (see "***Pay Cycle - (Optional) Field Instruction***" on page 418)

As of Date From (see "***As of Date From - Field Instruction***" on page 342)

As of Date To (see "***As of Date To - Field Instruction***" on page 343)

Order By (see "***Order By - (ID - Year/Quarter - Pay Cycle) Field Instruction***" on page 396)

3. Select the **Submit** button. The Transmission Online Entries search results page is displayed.

OR

Select the **Reset** button to clear form.

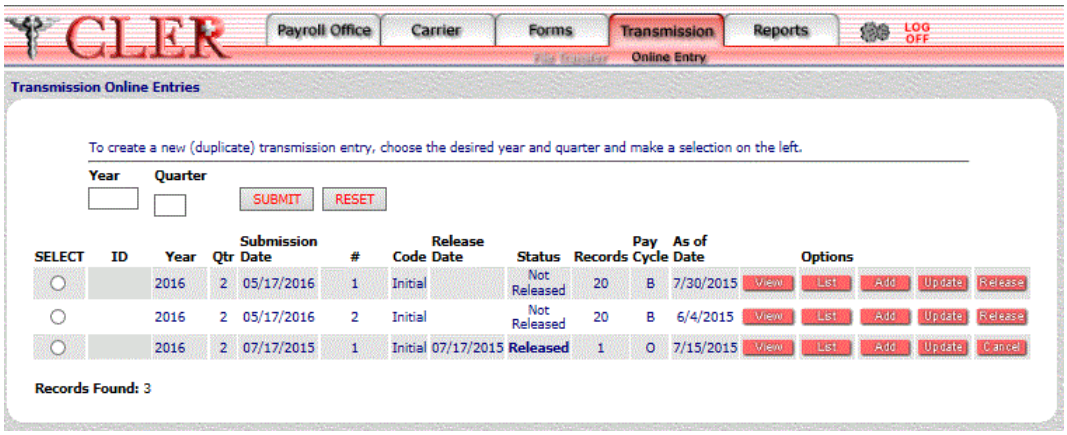


Figure 155: Transmissions Online Entries Search Results Page

Note: The Transmission Online Entries Search results page allows Agencies to reuse the enrollment data from a previous quarter for the online transmission of enrollment data in the current quarter. To reuse a previous quarter's enrollment data, complete the Year and Quarter fields as indicated under Transmission Online Entries search results page Field Instructions in Part 3 and select the radio button in the Select field located next to the applicable quarter's enrollment data record.

4. Complete the following fields to select different search criteria:

Year (see "***Year - Field Instruction***" on page 457)

Quarter (see "***Quarter - Field Instruction***" on page 429)

5. Select the **Submit** button. The Online Entry Record list is displayed.

OR

Select the **Reset** button to clear the fields.

The data on the Transmission Online Entries search results page is categorized into the following fields:

ID (see "***ID - Field Description***" on page 379)

Year (see "***Year - Field Description***" on page 457)

Qtr (see "***Qtr - Field Description***" on page 428)

Submission Date (see "***Submission Date - Field Description***" on page 446)

#

Code (see "***Code - Payroll Office Transmission Search Results Field Description***" on page 353)

Release Date (see "***Release Date - (Online Entries) Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

Records (see "***Records - Field Description***" on page 433)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

As of Date (see "***As of Date - Field Description***" on page 342)

Options (see "***Options - (View, List, Add) Field Description***" on page 393)

6. Select the **View** button next to the applicable record. The Transmission Online Entry View page is displayed.

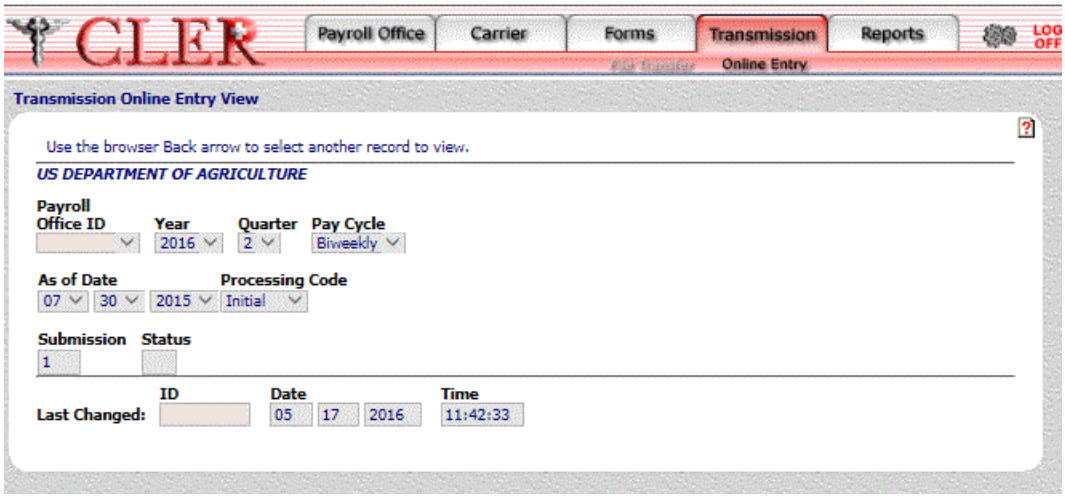


Figure 156: Transmission Online Entry View Page

The data on the Transmission Online Entry View page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year (see "***Year - Field Description***" on page 457)

Quarter (see "***Quarter - Field Description***" on page 429)

Pay Cycle (see "***Pay Cycle - (Biweekly, Monthly, Other) Field Description***" on page 417)

As of Date (see "***As of Date - Field Description***" on page 342)

Processing Code (see "***Processing Code - Field Description***" on page 427)

Submission (see "***Submission - Field Description***" on page 445)

Status (see "***Status - (Transmission Payroll Office) Field Description***" on page 445)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 381)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 381)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 381)

Note: To view another record, select your browser's **Back** button to return to the Transmission Online Entries search results page, then select **the View** button next to the applicable record.

Updating an Online Entry Record

The **Update** function allows users to update online entry records.

To Update an Online Entry Record:

1. On the ***Transmission*** tab, select ***Online Entry***. The Transmission Online Entry page is displayed.

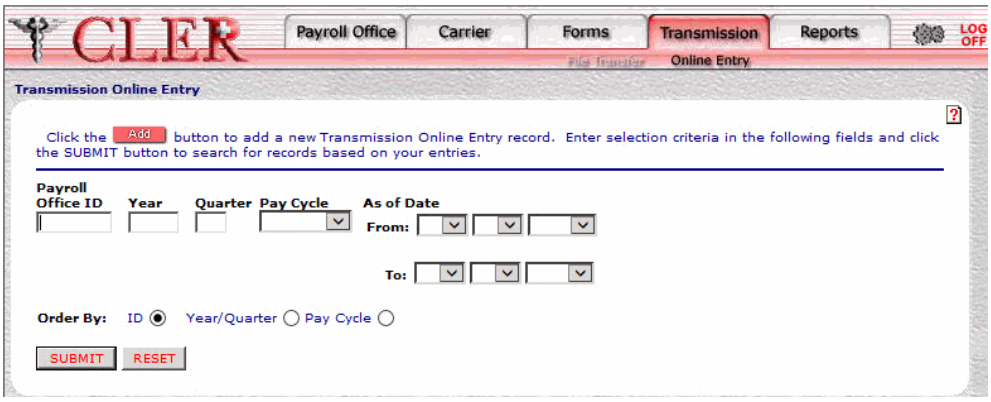


Figure 157: Transmission Online Entry Search Page

2. Complete the following fields on the Transmission Online Entry page:

   Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

   Year (see "***Year - Field Instruction***" on page 457)

   Quarter (see "***Quarter - Field Instruction***" on page 429)

   Pay Cycle (see "***Pay Cycle - (Optional) Field Instruction***" on page 418)

   As of Date From (see "***As of Date From - Field Instruction***" on page 342)

   As of Date To (see "***As of Date To - Field Instruction***" on page 343)

   Order By (see "***Order By - (ID - Year/Quarter - Pay Cycle) Field Instruction***" on page 396)

3. Select the **Submit** button. The Transmission Online Entries search results page is displayed.

OR

Select the **Reset** button to clear form.

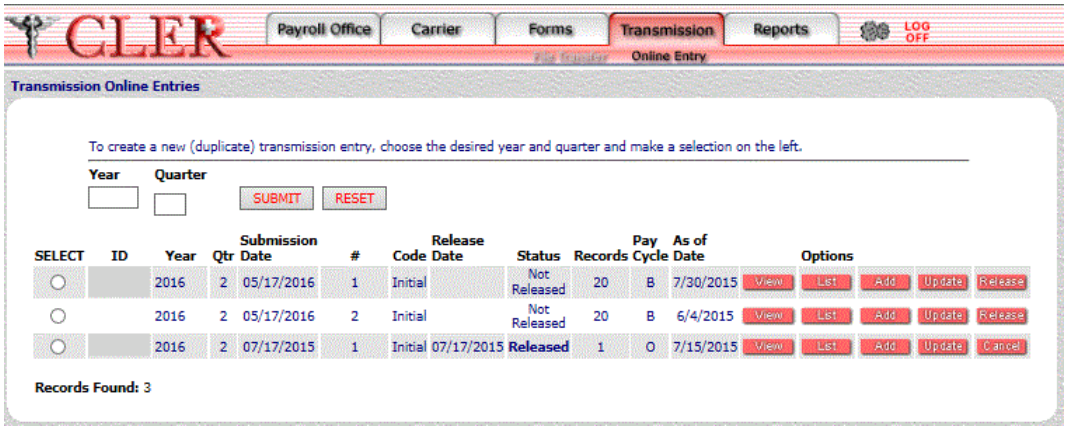


Figure 158: Transmission Online Entries Search Results Page

Note: The Transmission Online Entries Search results page allows Agencies to reuse the enrollment data from a previous quarter for the online transmission of enrollment data in the current quarter. To reuse a previous quarter's enrollment data, complete the Year and Quarter fields as indicated under Transmission Online Entries search results page Field Instructions in Part 3 and select the radio button in the Select field located next to the applicable quarter's enrollment data record.

4. Complete the following fields to select different search criteria:

   Year (see "***Year - Field Instruction***" on page 457)

   Quarter (see "***Quarter - Field Instruction***" on page 429)

5. Select the **Submit** button. The Online Entry Record list is displayed.

   OR

   Select the **Reset** button to clear the fields.

   The data on the Transmission Online Entries search results page is categorized into the following fields:

   ID (see "***ID - Field Description***" on page 379)

   Year (see "***Year - Field Description***" on page 457)

   Qtr (see "***Qtr - Field Description***" on page 428)

   Submission Date (see "***Submission Date - Field Description***" on page 446)

   #

Code (see "***Code - Payroll Office Transmission Search Results Field Description***" on page 353)

Release Date (see "***Release Date - (Online Entries) Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

Records (see "***Records - Field Description***" on page 433)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

As of Date (see "***As of Date - Field Description***" on page 342)

Options (see "***Options - (View, List, Add) Field Description***" on page 393)

6. Select the **Update** button next to the applicable record on the Transmission Online Entries search results page.

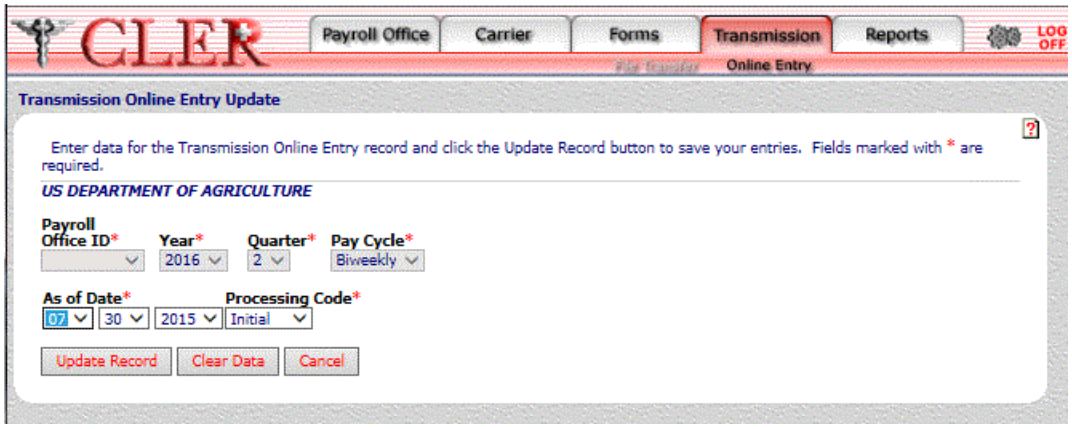


Figure 159: Transmission Online Entry Update Page

7. Complete the following applicable fields on the Transmission Online Entry Update page:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year (see "***Year - Field Description***" on page 457)

Quarter (see "***Quarter - Field Description***" on page 429)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

As of Date (see "***As of Date - (Required) Field Instruction***" on page 341)

Processing Code (see "***Processing Code - Field Instruction***" on page 428)

8. Select the **Update Record** button. If no errors occur, a popup appears to confirm the record has been updated.

OR

Select the **Clear Data** button to clear form. Select the **Cancel** button to return to the previous page.

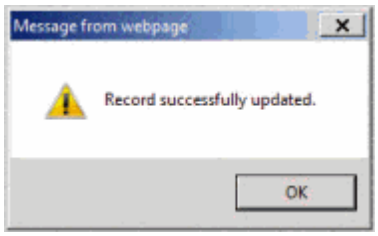


Figure 160: Transmission Online Entry Update Popup

9. Select the **OK** button to close the popup.

Note: To update another record, select the **Cancel** button to return to the Transmission Online Entries search results page, then select the **Update** button next to the applicable record.

Releasing an Online Entry Record

The **Release** function allows users to release online entry records for transmission to CLER.

To Release an Online Entry Record:

1. On the ***Transmission*** tab, select ***Online Entry***. The Transmission Online Entry page is displayed.

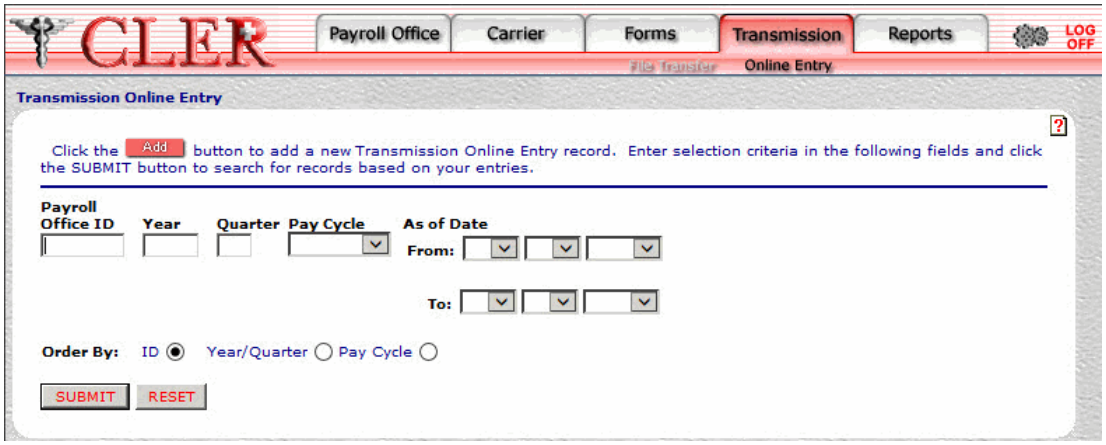


Figure 161: Transmission Online Entry Add Page

2. Complete the following fields on the Transmission Online Entry page:

   Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

Year (see "***Year - Field Instruction***" on page 457)

Quarter (see "***Quarter - Field Instruction***" on page 429)

Pay Cycle (see "***Pay Cycle - (Optional) Field Instruction***" on page 418)

As of Date From (see "***As of Date From - Field Instruction***" on page 342)

As of Date To (see "***As of Date To - Field Instruction***" on page 343)

Order By (see "***Order By - (ID - Year/Quarter - Pay Cycle) Field Instruction***" on page 396)

3. Select the **Submit** button. The Transmission Online Entries search results page is displayed.

OR

Select the **Reset** button to clear form.

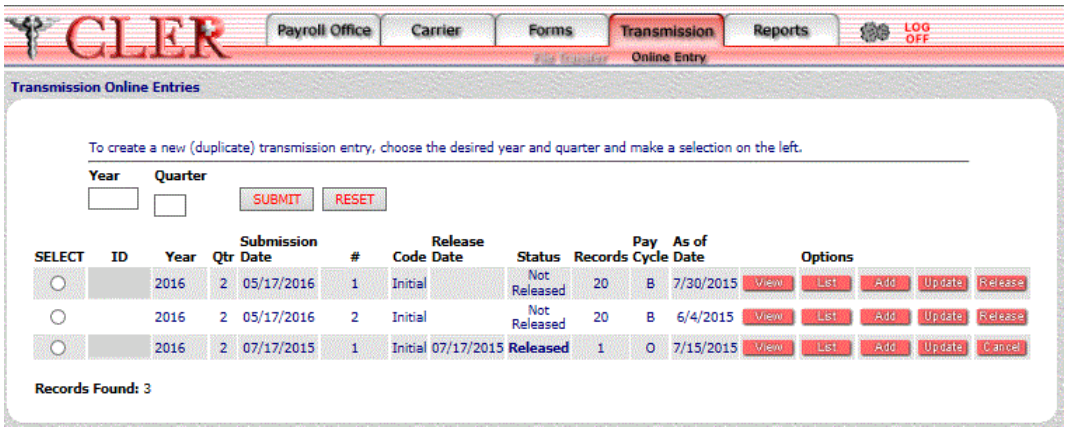


Figure 162: Transmission Online Entries Search Results Page

Note: The Transmission Online Entries Search results page allows Agencies to reuse the enrollment data from a previous quarter for the online transmission of enrollment data in the current quarter. To reuse a previous quarter's enrollment data, complete the Year and Quarter fields as indicated under Transmission Online Entries search results page Field Instructions in Part 3 and select the radio button in the Select field located next to the applicable quarter's enrollment data record.

4. Complete the following fields to select different search criteria:

Year (see "***Year - Field Instruction***" on page 457)

Quarter (see "***Quarter - Field Instruction***" on page 429)

5. Select the **Submit** button. The Online Entry Record list is displayed.

OR

Select the **Reset** button to clear the fields.

The data on the Transmission Online Entries search results page is categorized into the following fields:

ID (see "***ID - Field Description***" on page 379)

Year (see "***Year - Field Description***" on page 457)

Qtr (see "***Qtr - Field Description***" on page 428)

Submission Date (see "***Submission Date - Field Description***" on page 446)

#

Code (see "***Code - Payroll Office Transmission Search Results Field Description***" on page 353)

Release Date (see "***Release Date - (Online Entries) Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

Records (see "***Records - Field Description***" on page 433)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

As of Date (see "***As of Date - Field Description***" on page 342)

Options (see "***Options - (View, List, Add) Field Description***" on page 393)

Note: The Release button is only displayed next to online entry records that contain enrollee records.

6. Select the **Release** button next to the applicable entry record. A popup appears to confirm the record has been released.

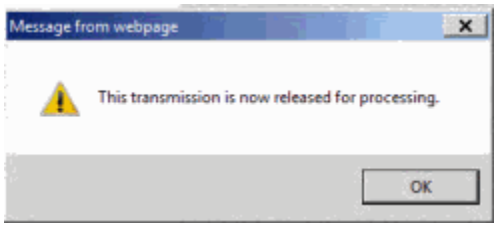


Figure 163: Transmission Online Entry Record Release Popup

7. Select the **OK** button to close the popup.

Canceling an Online Entry Record

The **Cancel** function allows users to cancel the transmission of online entry records. Canceled records will be held and may be viewed or released at a later time within that reconciliation year and quarter.

To Cancel the Transmission of an Online Entry Record:

1. On the ***Transmission*** tab select ***Online Entry***. The Transmission Online Entry page is displayed.

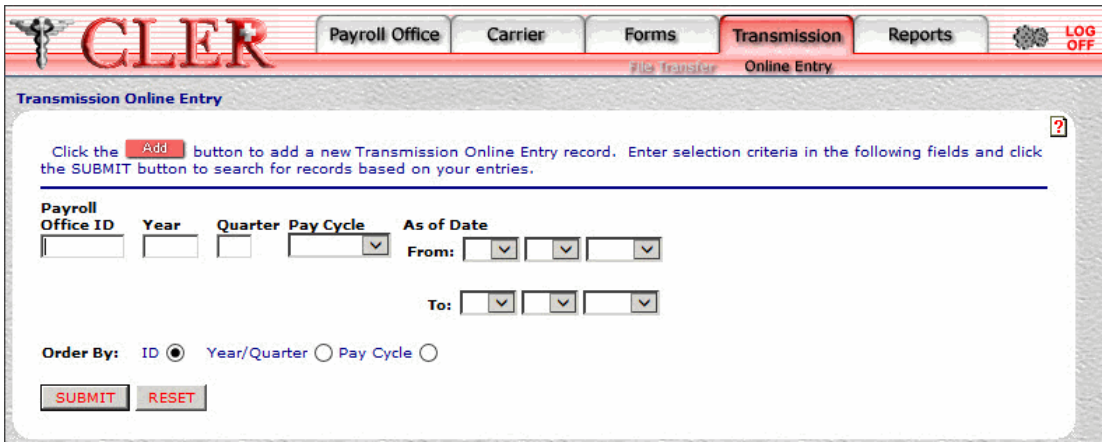


Figure 164: Transmission Online Entry Add Page

2. Complete the following fields on the Transmission Online Entry page:

   Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

   Year (see "***Year - Field Instruction***" on page 457)

   Quarter (see "***Quarter - Field Instruction***" on page 429)

   Pay Cycle (see "***Pay Cycle - (Optional) Field Instruction***" on page 418)

   As of Date From (see "***As of Date From - Field Instruction***" on page 342)

   As of Date To (see "***As of Date To - Field Instruction***" on page 343)

   Order By (see "***Order By - (ID - Year/Quarter - Pay Cycle) Field Instruction***" on page 396)

3. Select the **Submit** button. The Transmission Online Entries search results page is displayed.

OR

Select the **Reset** button to clear form.

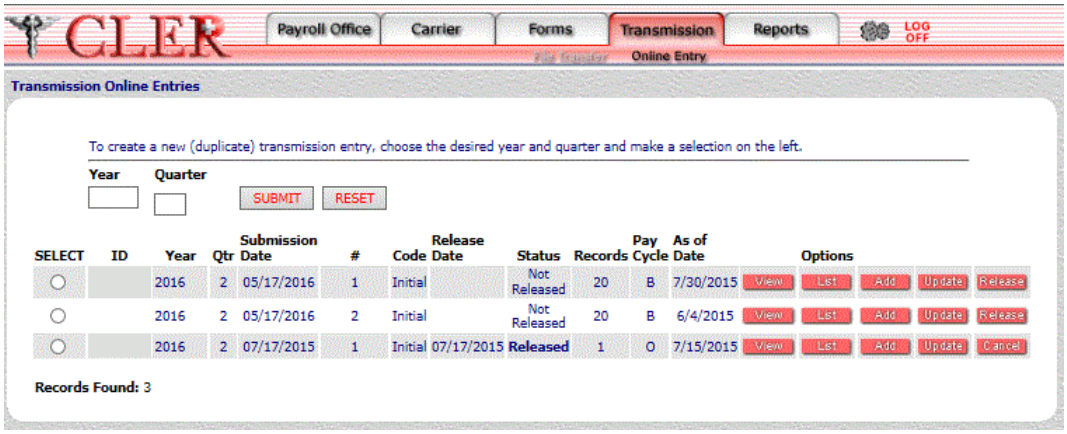


Figure 165: Transmissions Online Entries Search Results Page

Note: The Transmission Online Entries Search results page allows Agencies to reuse the enrollment data from a previous quarter for the online transmission of enrollment data in the current quarter. To reuse a previous quarter's enrollment data, complete the Year and Quarter fields as indicated under Transmission Online Entries search results page Field Instructions in Part 3 and select the radio button in the Select field located next to the applicable quarter's enrollment data record.

4. Complete the following fields to select different search criteria:

   Year (see "***Year - Field Instruction***" on page 457)

   Quarter (see "***Quarter - Field Instruction***" on page 429)

5. Select the **Submit** button. The Online Entry Record list is displayed.

   OR

   Select the **Reset** button to clear the fields.

   The data on the Transmission Online Entries search results page is categorized into the following fields:

   ID (see "***ID - Field Description***" on page 379)

   Year (see "***Year - Field Description***" on page 457)

   Qtr (see "***Qtr - Field Description***" on page 428)

   Submission Date (see "***Submission Date - Field Description***" on page 446)

#

Code (see "***Code - Payroll Office Transmission Search Results Field Description***" on page 353)

Release Date (see "***Release Date - (Online Entries) Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

Records (see "***Records - Field Description***" on page 433)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

As of Date (see "***As of Date - Field Description***" on page 342)

Options (see "***Options - (View, List, Add) Field Description***" on page 393)

Note: The **Cancel** button is only displayed next to online entry records that contain enrollee records that have been released for transmission to CLER.

6. Select the **Cancel** button next to the applicable online entry record. A popup appears to confirm the transmission of the record has been canceled.

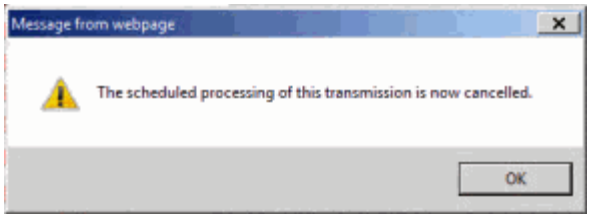


Figure 166: Transmission Online Entry Records Cancel Popup

7. Select the **OK** button to close the popup.

Adding an Online Entry Enrollee Record

The **Add** function allows users to add online entry enrollee records.

To Add an Online Entry Enrollee Record:

1. On the ***Transmission*** tab, select ***Online Entry***. The Transmission Online Entry page is displayed.

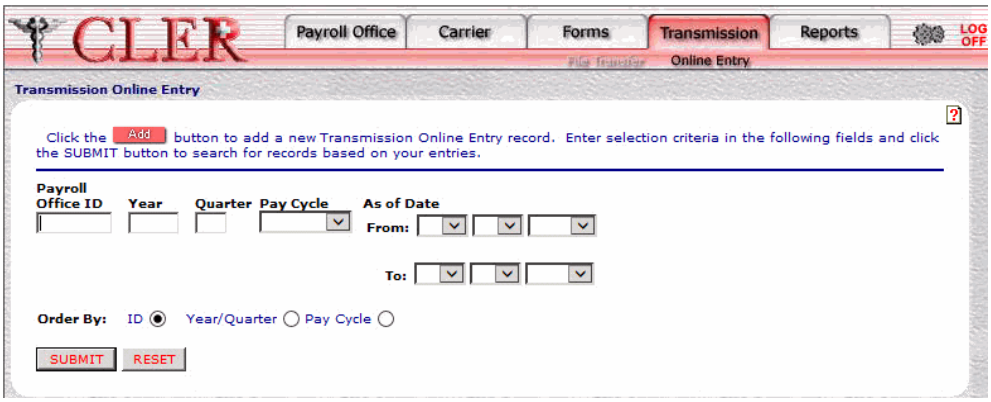


Figure 167: Transmission Online Entry Search Page

2. Complete the following fields on the Transmission Online Entry page:

   Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

   Year (see "***Year - Field Instruction***" on page 457)

   Quarter (see "***Quarter - Field Instruction***" on page 429)

   Pay Cycle (see "***Pay Cycle - (Optional) Field Instruction***" on page 418)

   As of Date From (see "***As of Date From - Field Instruction***" on page 342)

   As of Date To (see "***As of Date To - Field Instruction***" on page 343)

   Order By (see "***Order By - (ID - Year/Quarter - Pay Cycle) Field Instruction***" on page 396)

3. Select the **Submit** button. The Transmission Online Entries search results page is displayed.

OR

Select the **Reset** button to clear form.

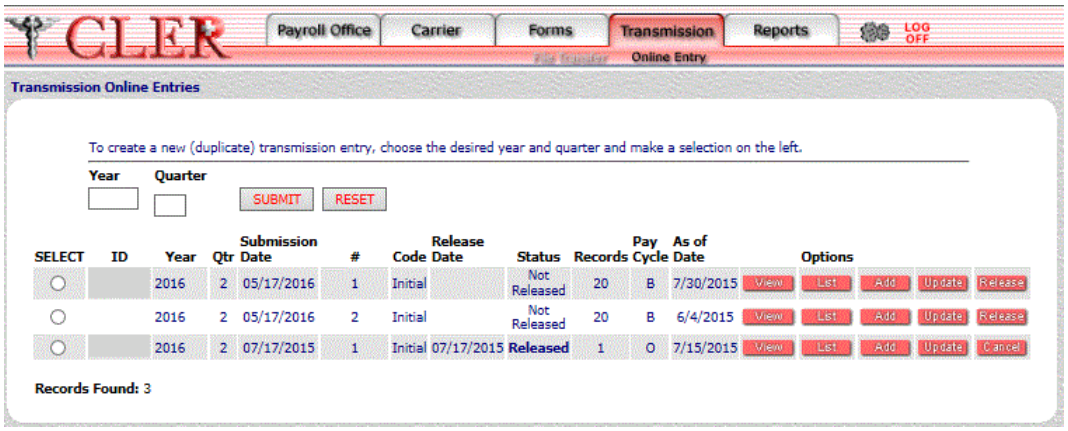


Figure 168: Transmission Online Entries Search Results Page

Note: The Transmission Online Entries Search results page allows Agencies to reuse the enrollment data from a previous quarter for the online transmission of enrollment data in the current quarter. To reuse a previous quarter's enrollment data, complete the Year and Quarter fields as indicated under Transmission Online Entries search results page Field Instructions in Part 3 and select the radio button in the Select field located next to the applicable quarter's enrollment data record.

4. Complete the following fields to select different search criteria:

   Year (see "***Year - Field Instruction***" on page 457)

   Quarter (see "***Quarter - Field Instruction***" on page 429)

5. Select the **Submit** button. The Online Entry Record list is displayed.

   OR

   Select the **Reset** button to clear the fields.

   The data on the Transmission Online Entries search results page is categorized into the following fields:

   ID (see "***ID - Field Description***" on page 379)

   Year (see "***Year - Field Description***" on page 457)

   Qtr (see "***Qtr - Field Description***" on page 428)

   Submission Date (see "***Submission Date - Field Description***" on page 446)

   #

Code (see "***Code - Payroll Office Transmission Search Results Field Description***" on page 353)

Release Date (see "***Release Date - (Online Entries) Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

Records (see "***Records - Field Description***" on page 433)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

As of Date (see "***As of Date - Field Description***" on page 342)

Options (see "***Options - (View, List, Add) Field Description***" on page 393)

6. Select the **Add** button next to the applicable record on the Transmission Online Entries search results page. The Transmission Online Entry Enrollees Add page is displayed.

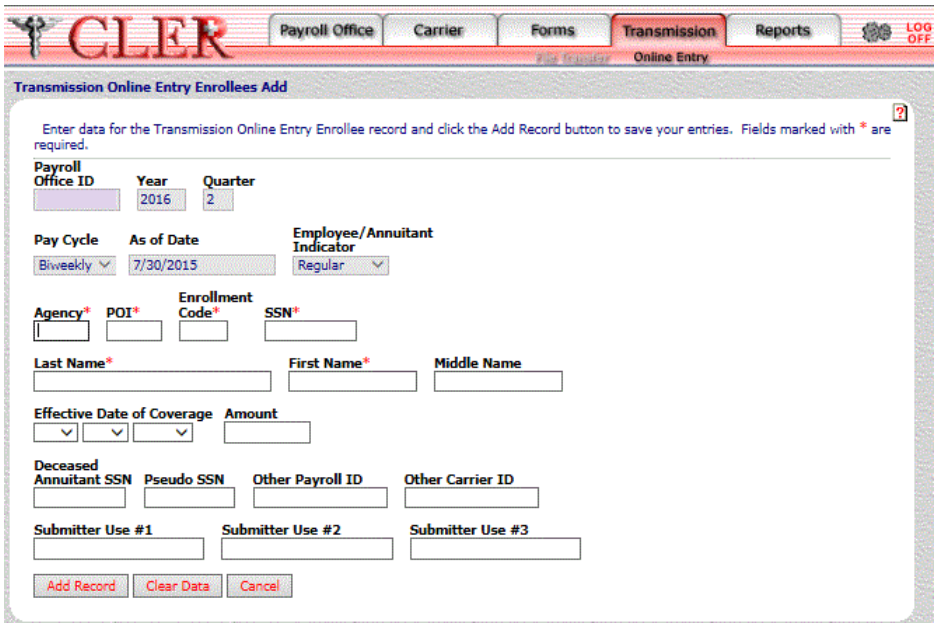


Figure 169: Transmission Online Entry Enrollees Add Page

7. Complete the following fields on the Transmission Online Entry Enrollees Add page:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year (see "***Year - Field Description***" on page 457)

Quarter (see "***Quarter - Field Description***" on page 429)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

As of Date (see "***As of Date - Field Description***" on page 342)

Employee/Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Description***" on page 368)

Agency (see "***Agency - Enrollee Field Instruction***" on page 339)

POI (see "***POI - (Required) Field Instruction***" on page 424)

Enrollment Code (see "***Enrollment Code - (Required) Field Instruction***" on page 371)

SSN (see "***SSN - (Required) Field Instruction***" on page 439)

Last Name (see "***Last Name - (Required) Field Instruction***" on page 385)

First Name (see "***First Name - (Required) Enrollee Field Instruction***" on page 375)

Middle Name (see "***Middle Name - Enrollee Field Instruction***" on page 389)

Effective Date of Coverage (see "***Effective Date of Coverage - Field Instruction***" on page 366)

Amount (see "***Amount - Field Description***" on page 340)

Deceased Annuitant SSN (see "***Deceased Annuitant SSN - Field Instruction***" on page 361)

Psuedo SSN (see "***Pseudo SSN - Field Description***" on page 428)

Other Payroll ID (see "***Other Payroll ID - Field Description***" on page 415)

Other Carrier ID (see "***Other Carrier ID - Field Description***" on page 414)

Submitter Use #1 (see "***Submitter Use #1 - Field Description***" on page 446)

Submitter Use#2 (see "***Submitter Use #2 - Field Instruction***" on page 447)

Submitter Use #3 (see "***Submitter Use #3 - Field Instruction***" on page 447)

8. Select the **Add Record** button. If no errors occur, a popup appears to confirm the record has been added.

OR

Select the **Clear Data** button to clear form. Select the **Cancel** button to return to the previous page.

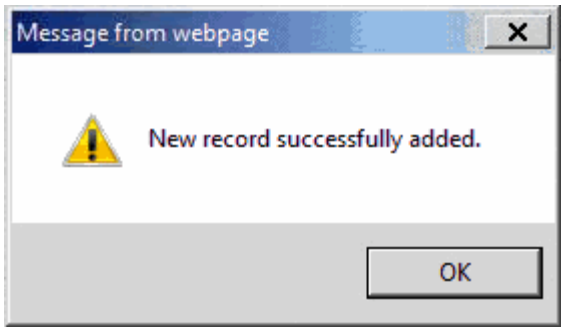


Figure 170: Transmission Online Entry Add Popup

9. Select **the OK** button to close the popup.

Note: To add another record, select the **Cancel** button to refresh the Transmission Online Entry Enrollees Add page and complete the fields for the new record.

Viewing an Online Entry Enrollee Record

The **View** function allows users to view online entry enrollee records.

To View an Online Entry Enrollee Record:

1. On the ***Transmission*** tab, select ***Online Entry***. The Transmission Online Entry page is displayed.

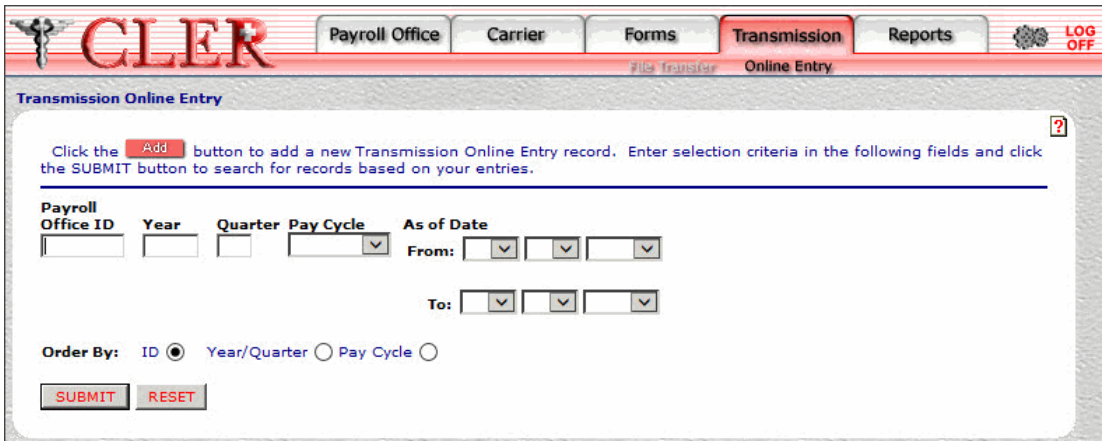


Figure 171: Transmission Online Entry Add Page

2. Complete the following fields on the Transmission Online Entry page:

   Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

   Year (see "***Year - Field Instruction***" on page 457)

   Quarter (see "***Quarter - Field Instruction***" on page 429)

   Pay Cycle (see "***Pay Cycle - (Optional) Field Instruction***" on page 418)

   As of Date From (see "***As of Date From - Field Instruction***" on page 342)

   As of Date To (see "***As of Date To - Field Instruction***" on page 343)

   Order By (see "***Order By - (ID - Year/Quarter - Pay Cycle) Field Instruction***" on page 396)

3. Select the **Submit** button. The Transmission Online Entries search results page is displayed.

   OR

   Select the **Reset** button to clear the form.

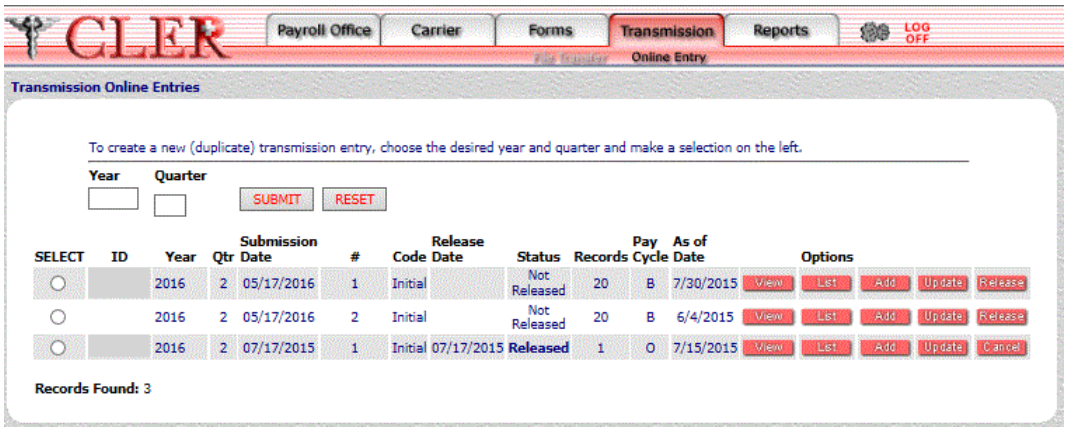


Figure 172: Transmission Online Entries Search Results Page

Note: The Transmission Online Entries Search results page allows Agencies to reuse the enrollment data from a previous quarter for the online transmission of enrollment data in the current quarter. To reuse a previous quarter's enrollment data, complete the Year and Quarter fields as indicated under Transmission Online Entries search results page Field Instructions in Part 3 and select the radio button in the Select field located next to the applicable quarter's enrollment data record.

4. Complete the following fields to select different search criteria:

   Year (see "***Year - Field Instruction***" on page 457)

   Quarter (see "***Quarter - Field Instruction***" on page 429)

5. Select the **Submit** button. The Online Entry Record list is displayed.

OR

Select the **Reset** button to clear the fields.

The data on the Transmission Online Entries search results page is categorized into the following fields:

ID (see "***ID - Field Description***" on page 379)

Year (see "***Year - Field Description***" on page 457)

Qtr (see "***Qtr - Field Description***" on page 428)

Submission Date (see "***Submission Date - Field Description***" on page 446)

#

Code (see "***Code - Payroll Office Transmission Search Results Field Description***" on page 353)

Release Date (see "***Release Date - (Online Entries) Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

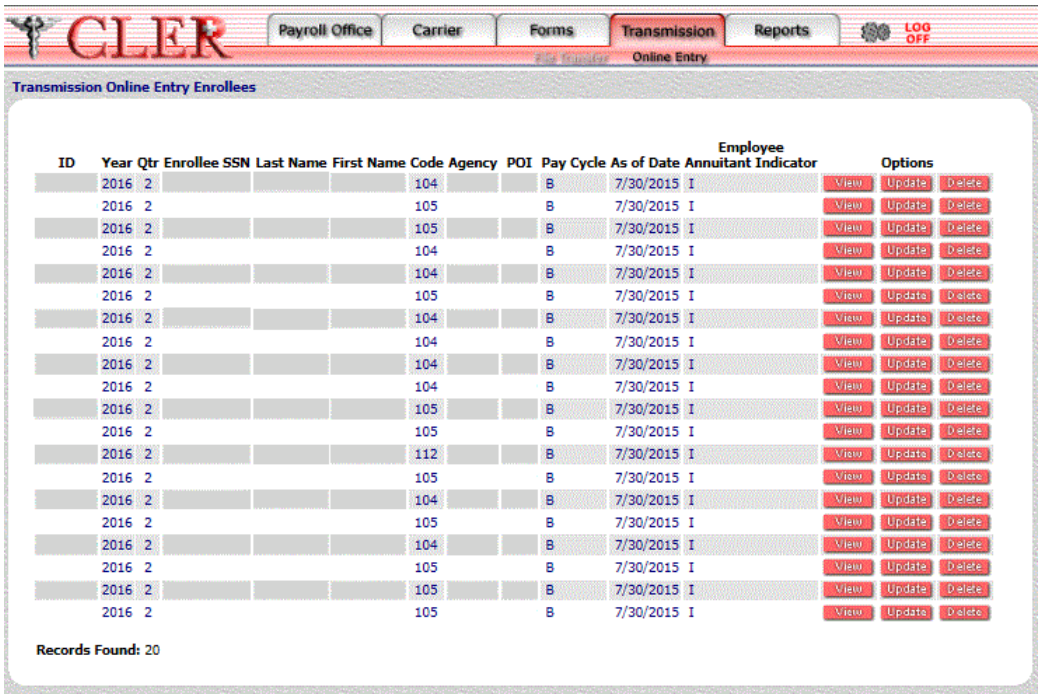
Records (see "***Records - Field Description***" on page 433)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

As of Date (see "***As of Date - Field Description***" on page 342)

Options (see "***Options - (View, List, Add) Field Description***" on page 393)

6. Select the **List** button next to the applicable record. The Transmission Online Entry Enrollees search results page is displayed.



ID	Year	Qtr	Enrollee SSN	Last Name	First Name	Code	Agency	POI	Pay Cycle	As of Date	Employee Annuitant Indicator	Options
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				112			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete

Figure 173: Transmission Online Entry Enrollees Search Results Page

The data on the Transmission Online Entry Enrollees search results page is categorized into the following fields:

ID (see "***ID - Field Description***" on page 379)

Year (see "***Year - Field Description***" on page 457)

Qtr (see "***Qtr - Field Description***" on page 428)

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Code (see "***Code - Field Description***" on page 352)

Agency (see "***Agency - Enrollee Field Description***" on page 338)

POI (see "***POI - Field Description***" on page 424)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

As of Date (see "***As of Date - Field Description***" on page 342)

Employee Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Description***" on page 368)

Options (see "***Options - (View, Update, Delete) Field Description***" on page 394)

7. Select the **View** button next to the applicable record on the Transmission Online Entry Enrollees search results page. The Transmission Online Entry Enrollees View page is displayed.

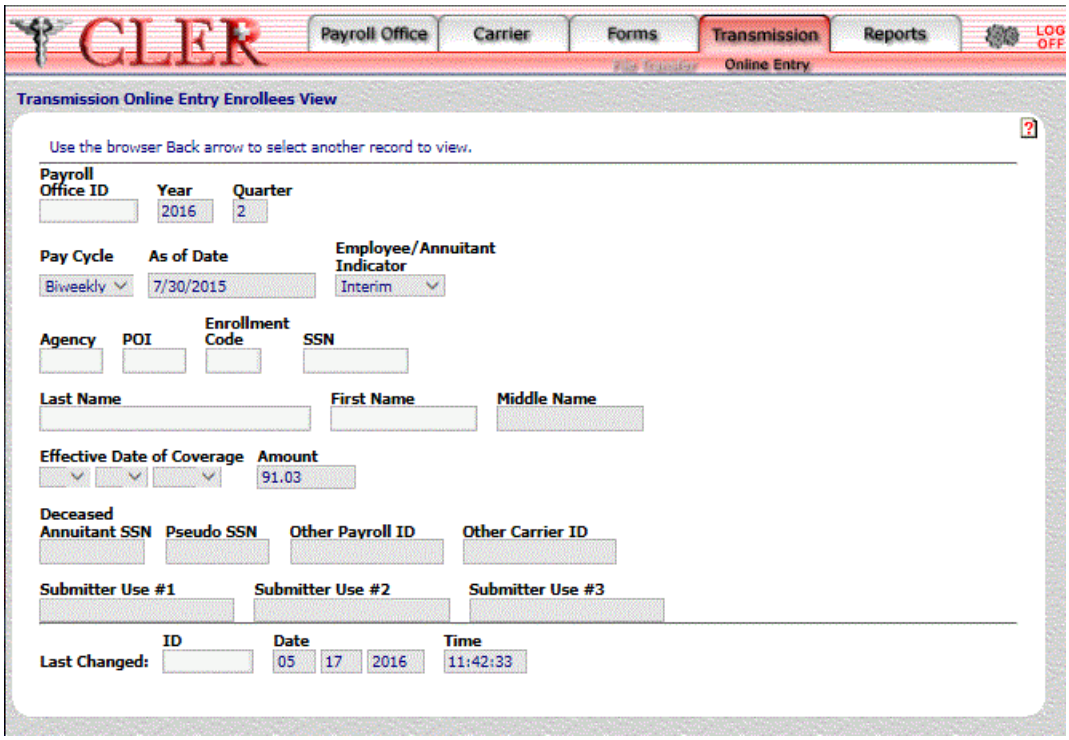


Figure 174: Transmission Online Entry Enrollees View Page

The data on the Transmission Online Entry Enrollees View page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

Year (see "***Year - Field Description***" on page 457)

Quarter (see "***Quarter - Field Description***" on page 429)

Pay Cycle (see "***Pay Cycle - (Biweekly, Monthly, Other) Field Description***" on page 417)

As of Date (see "***As of Date - Field Description***" on page 342)

Employee/Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Description***" on page 368)

Agency (see "***Agency - Enrollee Field Description***" on page 338)

POI (see "***POI - Field Description***" on page 424)

Enrollment Code (see "***Enrollment Code - Field Description***" on page 371)

SSN (see "***SSN - (Enrollee) Field Description***" on page 439)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Middle Name (see "***Middle Name - Enrollee Field Description***" on page 388)

Effective Date of Coverage (see "***Effective Date of Coverage - Field Description***" on page 366)

Amount (see "***Amount - Field Description***" on page 340)

Deceased Annuitant SSN (see "***Deceased Annuitant SSN - Field Description***" on page 361)

Pseudo SSN (see "***Pseudo SSN - Field Description***" on page 428)

Other Payroll ID (see "***Other Payroll ID - Field Description***" on page 415)

Other Carrier ID (see "***Other Carrier ID - Field Description***" on page 414)

Submitter Use #1 (see "***Submitter Use #1 - Field Description***" on page 446)

Submitter Use #2 (see "***Submitter Use #2 - Field Description***" on page 446)

Submitter Use #3 (see "***Submitter Use #3 - Field Description***" on page 447)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 381)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 381)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 381)

Note: To view another record, select your browser's **Back** button to return to the Transmission Online Entry Enrollees search results page, then select the **View** button next to the applicable record.

Updating an Online Entry Enrollee Record

The **Update** function allows users to update online entry enrollee records.

To Update an Online Entry Enrollee Record:

1. On the ***Transmission*** tab, select ***Online Entry***. The Transmission Online Entry page is displayed.

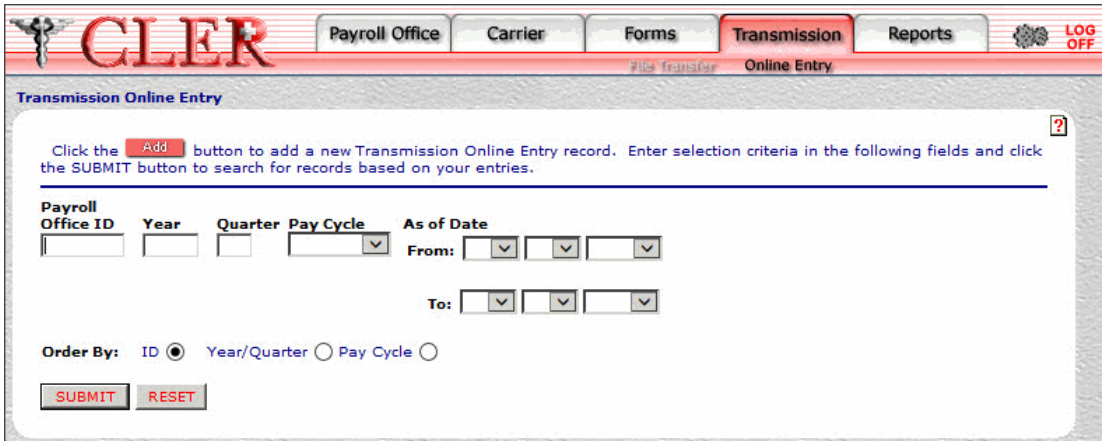


Figure 175: Transmission Online Entry Add Page

2. Complete the following fields on the Transmission Online Entry page:

   Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

   Year (see "***Year - Field Instruction***" on page 457)

   Quarter (see "***Quarter - Field Instruction***" on page 429)

   Pay Cycle (see "***Pay Cycle - (Optional) Field Instruction***" on page 418)

   As of Date From (see "***As of Date From - Field Instruction***" on page 342)

   As of Date To (see "***As of Date To - Field Instruction***" on page 343)

   Order By (see "***Order By - (ID - Year/Quarter - Pay Cycle) Field Instruction***" on page 396)

3. Select the **Submit** button. The Transmission Online Entries search results page is displayed.

OR

Select the **Reset** button to clear form.

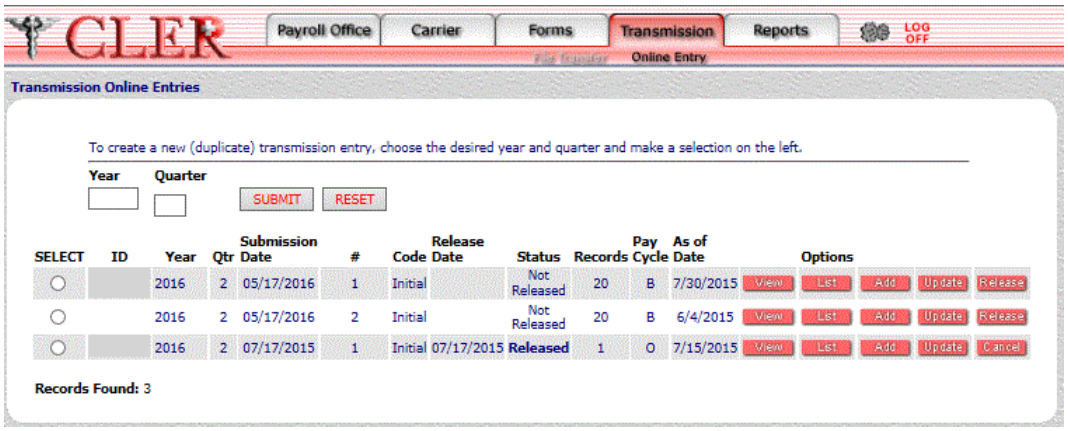


Figure 176: Transmission Online Entries Search Results Page

Note: The Transmission Online Entries Search results page allows Agencies to reuse the enrollment data from a previous quarter for the online transmission of enrollment data in the current quarter. To reuse a previous quarter's enrollment data, complete the Year and Quarter fields as indicated under Transmission Online Entries search results page Field Instructions in Part 3 and select the radio button in the Select field located next to the applicable quarter's enrollment data record.

4. Complete the following fields to select different search criteria:

   Year (see "***Year - Field Instruction***" on page 457)

   Quarter (see "***Quarter - Field Instruction***" on page 429)

5. Select the **Submit** button. The Online Entry Record list is displayed.

   OR

   Select the **Reset** button to clear the fields.

   The data on the Transmission Online Entries search results page is categorized into the following fields:

   ID (see "***ID - Field Description***" on page 379)

   Year (see "***Year - Field Description***" on page 457)

   Qtr (see "***Qtr - Field Description***" on page 428)

   Submission Date (see "***Submission Date - Field Description***" on page 446)

   #

Code (see "***Code - Payroll Office Transmission Search Results Field Description***" on page 353)

Release Date (see "***Release Date - (Online Entries) Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

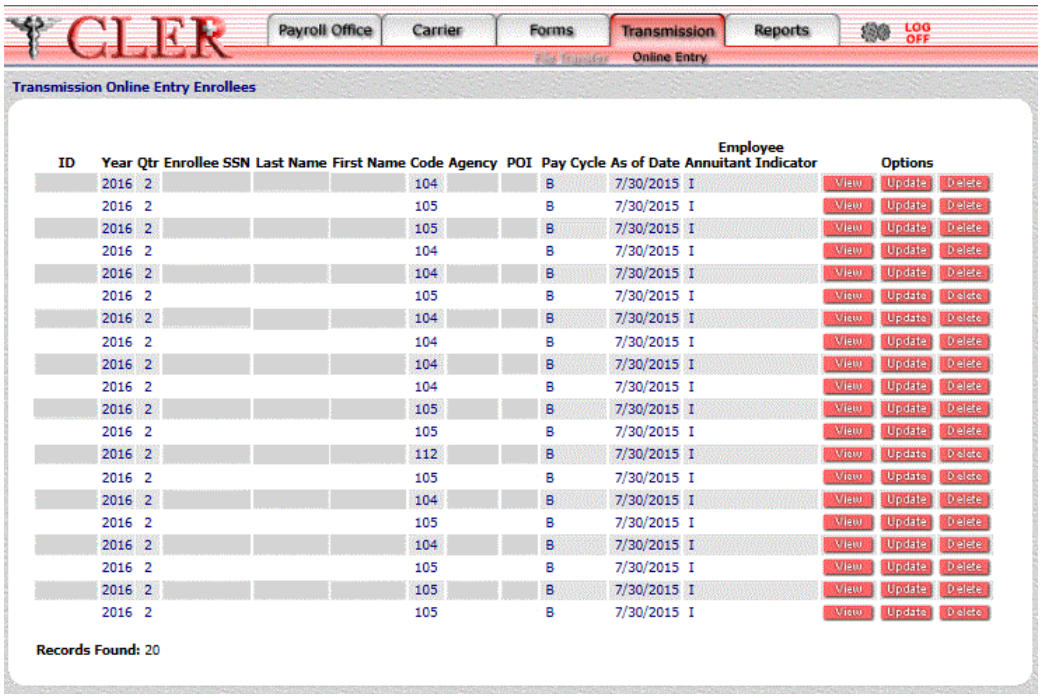
Records (see "***Records - Field Description***" on page 433)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

As of Date (see "***As of Date - Field Description***" on page 342)

Options (see "***Options - (View, List, Add) Field Description***" on page 393)

6. Select the **List** button next to the applicable record. The Transmission Online Entry Enrollees Search Results page is displayed.



ID	Year	Qtr	Enrollee SSN	Last Name	First Name	Code	Agency	POI	Pay Cycle	As of Date	Employee Annuitant Indicator	Options
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				112			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete

Figure 177: Transmission Online Entry Enrollees Search Results Page

The data on the Transmission Online Entry Enrollees search results page is categorized into the following fields:

ID (see "***ID - Field Description***" on page 379)

Year (see "***Year - Field Description***" on page 457)

Qtr (see "***Qtr - Field Description***" on page 428)

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Code (see "***Code - Field Description***" on page 352)

Agency (see "***Agency - Enrollee Field Description***" on page 338)

POI (see "***POI - Field Description***" on page 424)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

As of Date (see "***As of Date - Field Description***" on page 342)

Employee Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Description***" on page 368)

Options (see "***Options - (View, Update, Delete) Field Description***" on page 394)

7. Select the **Update** button next to the applicable record on the Transmission Online Entry Enrollees Search Results page. The Transmission Online Entry Update page is displayed.

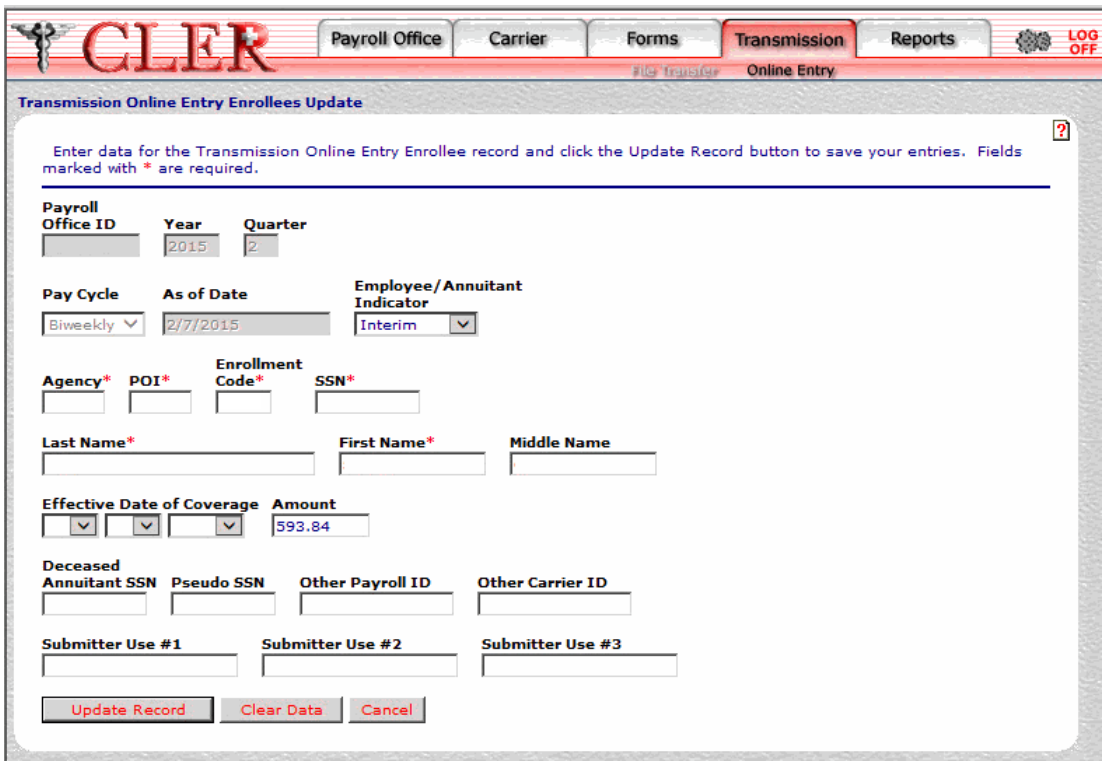


Figure 178: Transmission Online Entry Enrollees Update Page

8. Complete the following fields on the Transmission Online Entry Enrollees Update page:

   Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 420)

   Year (see "***Year - Field Description***" on page 457)

   Quarter (see "***Quarter - Field Description***" on page 429)

   Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

   As of Date (see "***As of Date - Field Description***" on page 342)

   Employee/Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Instruction***" on page 368)

   Agency (see "***Agency - Enrollee Field Instruction***" on page 339)

   POI (see "***POI - (Required) Field Instruction***" on page 424)

   Enrollment Code (see "***Enrollment Code - (Required) Field Instruction***" on page 371)

   SSN (see "***SSN - (Required) Field Instruction***" on page 439)

   Last Name (see "***Last Name - (Required) Field Instruction***" on page 385)

   First Name (see "***First Name - (Required) Enrollee Field Instruction***" on page 375)

   Middle Name (see "***Middle Name - Enrollee Field Instruction***" on page 389)

   Effective Date of Coverage (see "***Effective Date of Coverage - Field Instruction***" on page 366)

   Amount (see "***Maintaining 2809 Records***" on page 115)

   Deceased Annuitant SSN (see "***Deceased Annuitant SSN - Field Instruction***" on page 361)

   Psuedo SSN (see "***Pseudo SSN - Field Description***" on page 428)

   Other Payroll ID (see "***Other Payroll ID - Field Description***" on page 415)

   Other Carrier ID (see "***Other Carrier ID - Field Description***" on page 414)

   Submitter Use #1 (see "***Submitter Use #1 - Field Description***" on page 446)

   Submitter Use#2 (see "***Submitter Use #2 - Field Instruction***" on page 447)

   Submitter Use #3 (see "***Submitter Use #3 - Field Instruction***" on page 447)

9. Select the **Update Record** button. If no errors occur, a popup appears to confirm the record has been updated.

   OR

   Select the **Clear Data** button to clear data on the form.

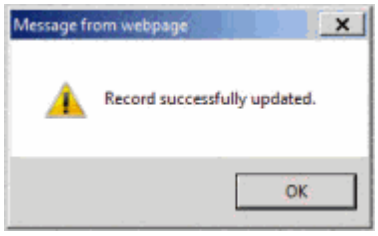


Figure 179: Transmission Online Entry Update Popup

10. Select the **OK** button to close the popup.

Note: To update another record, select the **Cancel** button to return to the Transmission Online Entry Enrollees search results page, then select the **Update** button next to the applicable record.

Deleting an Online Entry Enrollee Record

The **Delete** function allows users to delete online entry enrollee records.

To Delete an Online Entry Enrollee Record:

1. On the ***Transmission*** tab, select ***Online Entry***. The Transmission Online Entry page is displayed

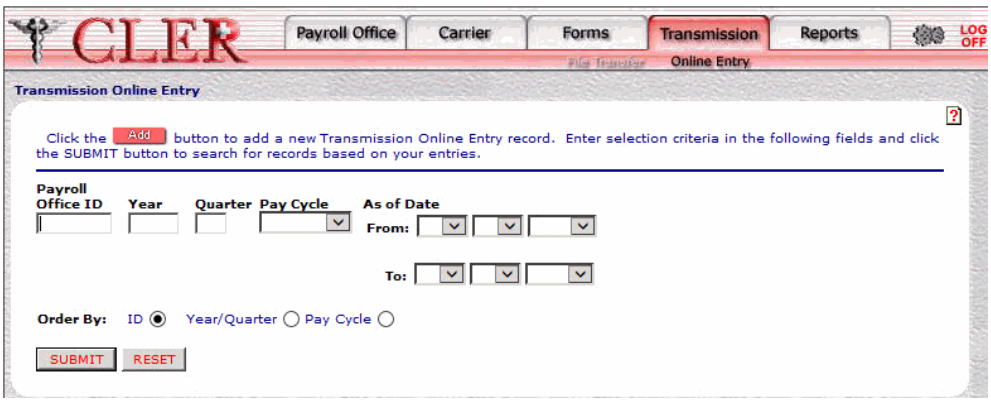


Figure 180: Transmission Online Entry Search Page

2. Complete the following fields on the Transmission Online Entry page:

   Payroll Office ID (see "***Payroll Office ID - (Optional) Field Instruction***" on page 420)

Year (see "***Year - Field Instruction***" on page 457)

Quarter (see "***Quarter - Field Instruction***" on page 429)

Pay Cycle (see "***Pay Cycle - (Optional) Field Instruction***" on page 418)

As of Date From (see "***As of Date From - Field Instruction***" on page 342)

As of Date To (see "***As of Date To - Field Instruction***" on page 343)

Order By (see "***Order By - (ID - Year/Quarter - Pay Cycle) Field Instruction***" on page 396)

3. Select the **Submit** button. The Transmission Online Entries search results page is displayed.

OR

Select the **Reset** button to clear form.

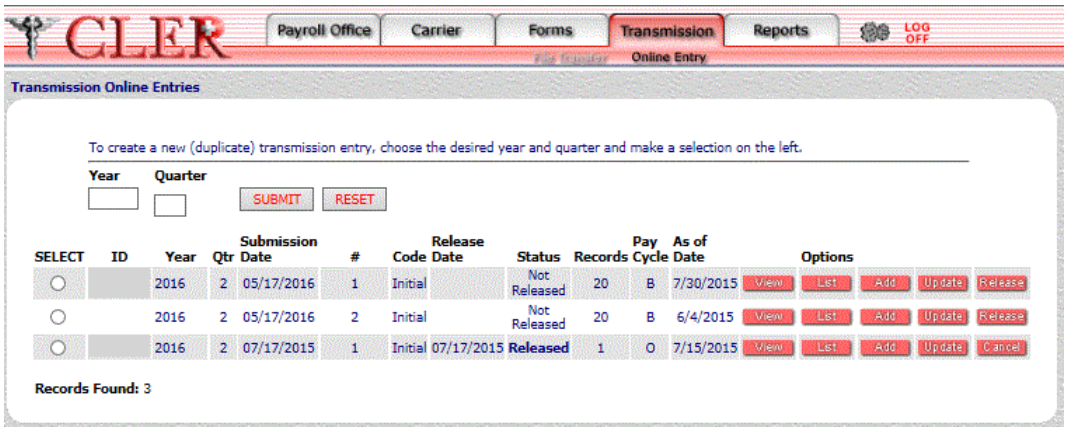


Figure 181: Transmission Online Entries Search Results Page

Note: The Transmission Online Entries Search results page allows Agencies to reuse the enrollment data from a previous quarter for the online transmission of enrollment data in the current quarter. To reuse a previous quarter's enrollment data, complete the Year and Quarter fields as indicated under Transmission Online Entries search results page Field Instructions in Part 3 and select the radio button in the Select field located next to the applicable quarter's enrollment data record.

4. Complete the following fields to select different search criteria:

Year (see "***Year - Field Instruction***" on page 457)

Quarter (see "***Quarter - Field Instruction***" on page 429)

5. Select the **Submit** button. The Online Entry Record list is displayed.

OR

Select the **Reset** button to clear the fields.

The data on the Transmission Online Entries search results page is categorized into the following fields:

ID (see "***ID - Field Description***" on page 379)

Year (see "***Year - Field Description***" on page 457)

Qtr (see "***Qtr - Field Description***" on page 428)

Submission Date (see "***Submission Date - Field Description***" on page 446)

#

Code (see "***Code - Payroll Office Transmission Search Results Field Description***" on page 353)

Release Date (see "***Release Date - (Online Entries) Field Description***" on page 435)

Status (see "***Status - (Processed, Canceled, Released, Not Released) Field Description***" on page 444)

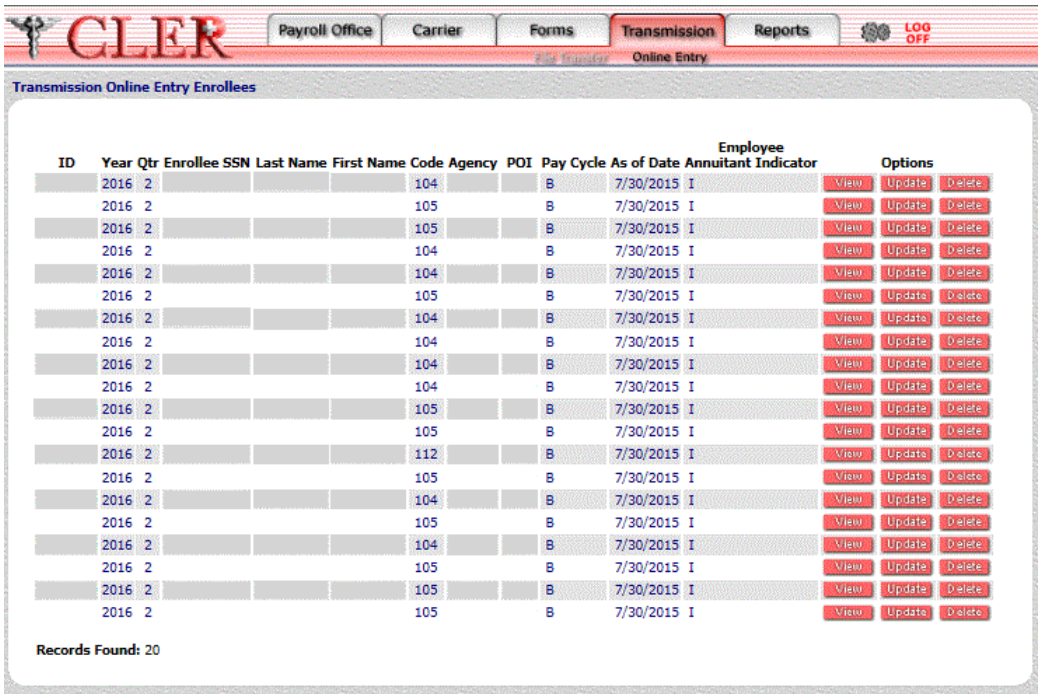
Records (see "***Records - Field Description***" on page 433)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

As of Date (see "***As of Date - Field Description***" on page 342)

Options (see "***Options - (View, List, Add) Field Description***" on page 393)

6. Select the **List** button next to the applicable record. The Transmission Online Entry Enrollees search results page is displayed.



ID	Year	Qtr	Enrollee SSN	Last Name	First Name	Code	Agency	POI	Pay Cycle	As of Date	Employee Annuitant Indicator	Options
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				112			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				104			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete
	2016	2				105			B	7/30/2015	I	View Update Delete

Figure 182: Transmission Online Entry Enrollees Search Results Page

The data on the Transmission Online Entry Enrollees search results page is categorized into the following fields:

ID (see "***ID - Field Description***" on page 379)

Year (see "***Year - Field Description***" on page 457)

Qtr (see "***Qtr - Field Description***" on page 428)

Enrollee SSN (see "***Enrollee SSN - Field Description***" on page 369)

Last Name (see "***Last Name - Enrollee Field Description***" on page 385)

First Name (see "***First Name - Enrollee Field Description***" on page 375)

Code (see "***Code - Field Description***" on page 352)

Agency (see "***Agency - Enrollee Field Description***" on page 338)

POI (see "***POI - Field Description***" on page 424)

Pay Cycle (see "***Pay Cycle - Field Description***" on page 418)

As of Date (see "***As of Date - Field Description***" on page 342)

Employee Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Description***" on page 368)

Options (see "***Options - (View, Update, Delete) Field Description***" on page 394)

7. Select the **Delete** button next to the applicable record on the Transmission Online Entry Enrollees search results page. A popup appears asking the user to approve the deletion.

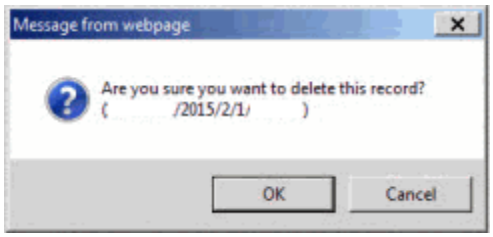


Figure 183: Transmission Online Entry Enrollees Delete Popup

8. Select the **OK** button to delete the record and close the popup.

OR

Select the **Cancel** button to return to the previous record.

Reports

The ***Reports*** option allows users to view reports information.

In this section the following options may be selected:

1. Payroll Discrepancy Listing - Provides a listing by Payroll enrollee of each discrepancy.
2. Discrepancy Summary - Allows comparison of discrepancies occurring in 1 quarter with those that occurred in any other quarter.
3. Payroll Office Reconciliation - Displays each enrollee that has a discrepancy and whether that discrepancy has been reconciled.
4. Carrier Validation - Displays each enrollee that has a discrepancy and if that discrepancy has been validated.
5. Payroll Office Enrollment Transmission - Displays the timeliness of the transmission of quarterly Payroll Office enrollment data.
6. Carrier Enrollment Transmission - Displays the timeliness of the transmission of quarterly Carrier data.
7. Enrollment Change Summary - Displays how enrollment changes occur between 1 quarter and any prior quarter.
8. Carrier Gain/Loss Summary - Displays how enrollment changes occur between one quarter and any prior quarter.
9. Reconciliation Reason Summary - Displays what caused the discrepancies that were uncovered during the reconciliation process for a single quarter.
10. Reconciliation Action Summary - Displays what had to be corrected during the reconciliation process for a single quarter.
11. Reconciliation Summary - Displays the progress that has been made to reconcile the discrepancies found in a single quarter.
12. Carrier Discrepancy Listing - Provides a listing by Carrier ID enrollee of each discrepancy.
13. Pay Period Transmissions Payment Amounts - Provides information from Payroll Offices relative to the amount of premiums collected for each completed pay period.

This section includes the following topics:

Viewing Payroll Discrepancy Listing (Report 1) 232
Viewing Discrepancy Summary (Report 2) 237
Viewing Payroll Office Reconciliation (Report 3) 240
Viewing Carrier Validation Reconciliation (Report 4) 245
Viewing Payroll Office Enrollment Transmission (Report 5) 249
Viewing Carrier Enrollment Transmission (Report 6) 252
Viewing Enrollment Change Summary (Report 7) 255
Viewing Carrier Gain/Loss Summary (Report 8) 257
Viewing Reconciliation Reason Summary (Report 9) 260
Viewing Reconciliation Action Summary (Report 10) 263
Viewing Reconciliation Summary (Report 11) 267
Viewing Carrier Discrepancy Listing (Report 12) 270
Viewing Pay Period Transmissions Payment Amounts (Report 13) 274

Viewing Payroll Discrepancy Listing (Report 1)

The ***1. Payroll Discrepancy Listing*** option on the Reports Selection page allows users to view the Payroll Discrepancy Listing report. This report provides a listing by payroll office identification number of payroll office and carrier enrollee records that match, as well as records marked with payroll office warning and discrepancy codes.

To View a Payroll Discrepancy Listing Report:

1. Select the **Reports** tab on the CLER Main Menu. The Reports Selection page is displayed.

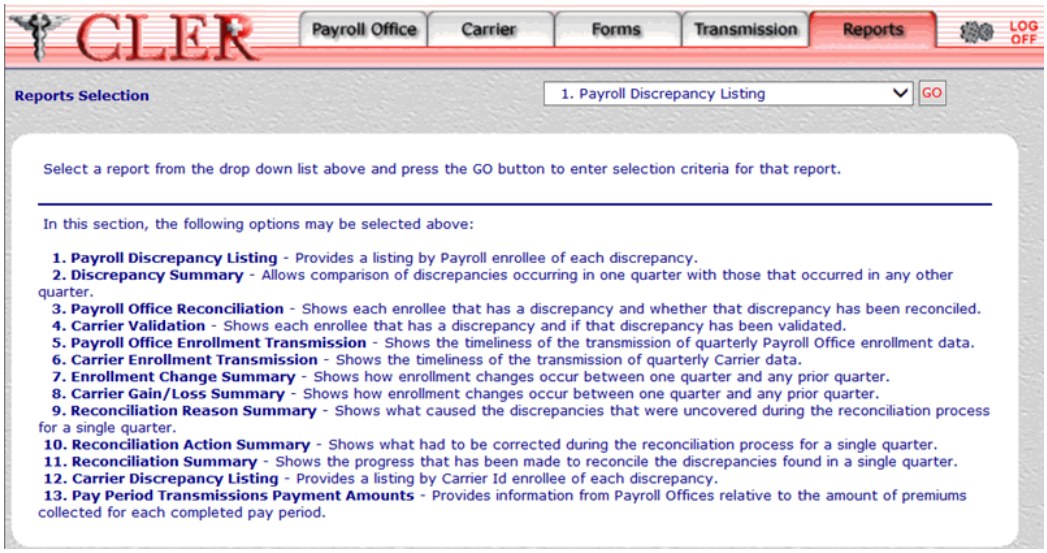


Figure 184: Reports Selection Page

2. On the drop-down menu on the Reports Selection page select ***1. Payroll Discrepancy Listing.***

3. Select the **GO** button to display the 1. Payroll Discrepancy Listing page.

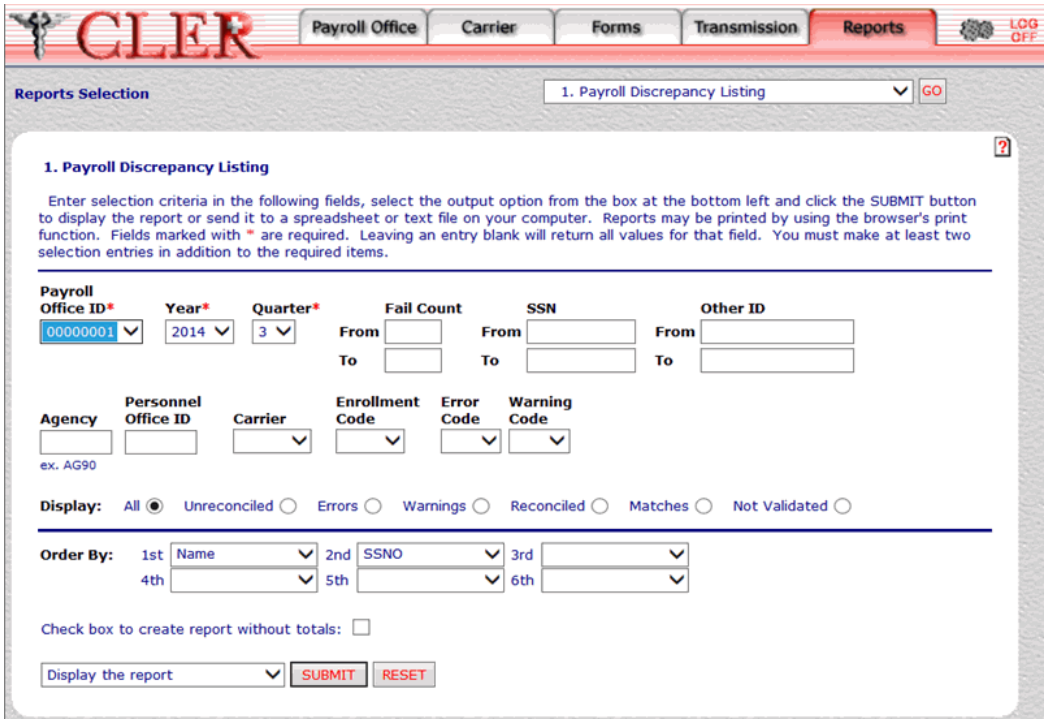


Figure 185: 1. Payroll Discrepancy Listing Report Search Page

4. Complete the following fields on the 1. Payroll Discrepancy Listing page:

Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

Year (see "***Year - (Required) Field Instruction***" on page 457)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

Fail Count From (see "***Fail Count From - Field Instruction***" on page 373)

Fail Count To (see "***Fail Count To - Field Instruction***" on page 373)

SSN From (see "***SSN From - Field Instruction***" on page 440)

SSN To (see "***SSN To - Field Instruction***" on page 440)

Other ID From (see "***Other ID From - Field Instruction***" on page 414)

Other ID To (see "***Other ID To - Field Instruction***" on page 415)

Agency (see "***Agency - Field Instruction***" on page 339)

Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

Carrier (see "***Carrier - (Drop-down) Field Instruction***" on page 345)

Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 371)

Error Code (see "***Error Code - (Select) Field Instruction***" on page 371)

Warning Code (see "***Warning Code - (Select) Field Instruction***" on page 455)

Display (see "***Display - Field Instruction***" on page 364)

Order By 1st (see "***Order By 1st - (Report - Name Enrollment Code) Field Instruction***" on page 399)

Order By 2nd (see "***Order By 2nd - (Report - SSNO Enrollment Code) Field Instruction***" on page 402)

Order By 3rd (see "***Order By 3rd - (Report - Enrollment Code) Field Instruction***" on page 405)

Order By 4th (see "***Order By 4th - (Report - Enrollment Code) Field Instruction***" on page 407)

Order By 5th (see "***Order By 5th - (Report - Enrollment Code) Field Instruction***" on page 409)

Order By 6th (see "***Order By 6th - (Report - Enrollment Code) Field Instruction***" on page 411)

Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 348)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report
   - Save report as a spreadsheet
   - Save report as a text file

6. Select the **Submit** button to display the Payroll Discrepancy Listing report in the selected format.

OR

Select the **Reset** button to clear all data entered.

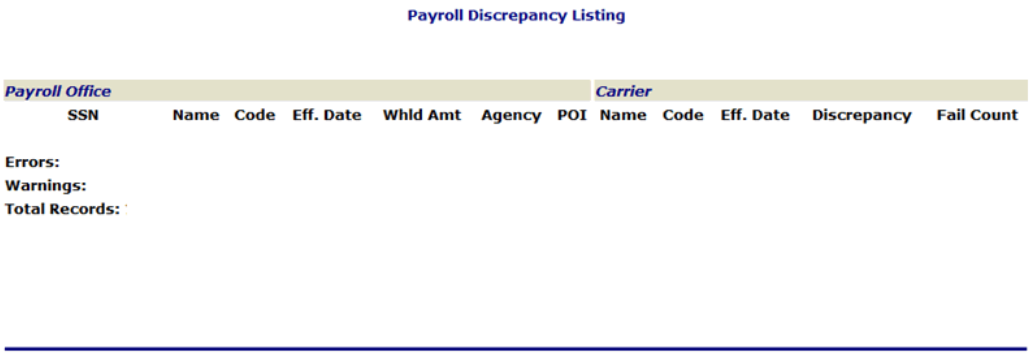


Figure 186: Payroll Discrepancy Listing Report Page

The following fields are displayed on the Payroll Office section of the Payroll Discrepancy Listing report:

SSN (see "***SSN - (Enrollee) Field Description***" on page 439)

Name (see "***Name - Enrollee Payroll Field Description***" on page 390)

Code (see "***Code - Enrollment Payroll Field Description***" on page 352)

Eff. Date (see "***Eff. Date - (Payroll) Field Description***" on page 365)

Whld Amt (see "***Whld Amt - Field Description***" on page 456)

Agency (see "***Agency - with Note (No Example) Field Description***" on page 339)

POI (see "***POI - With Note Field Description***" on page 424)

The following fields are displayed on the Carrier section of the Payroll Discrepancy Listing report:

Name (see "***Name - Enrollee Carrier Field Description***" on page 390)

Code (see "***Code - Carrier Enrollment Code Field Description***" on page 352)

Eff. Date (see "***Eff. Date - (Carrier) Field Description***" on page 365)

Discrepancy (see "***Discrepancy - (No Note) Field Description***" on page 362)

Fail Count (see "***Fail Count - Field Description***" on page 373)

Errors (see "***Errors - Field Description***" on page 372)

Warnings (see "***Warnings - Field Description***" on page 456)

Total Records (see "***Total Records - (Enrollee) Field Description***" on page 450)

Note: To return to the 1. Payroll Discrepancy Listing page, close the report.

If **24900002, 24900003**, or **160099XX** was entered in the Payroll Office ID field on the Payroll Discrepancy Listing (Report 1) page, the Payroll Discrepancy Listing (Other ID) report is displayed.

Payroll Office						Carrier				
OTHER ID	SSN	Name	Code	Eff. Date	Whld Amt	Name	Code	Eff. Date	Discrepancy	Fail Count

Errors: 0
Warnings: 0
Total Records: 0

Figure 187: Payroll Discrepancy Listing (Other ID) Report Page

The following fields are displayed on the Payroll Office section of the Payroll Discrepancy Listing (Other ID) report:

Other ID (see "***Other ID - Field Description***" on page 414)

SSN (see "***SSN - (Enrollee) Field Description***" on page 439)

Name (see "***Name - Enrollee Payroll Field Description***" on page 390)

Code (see "***Code - Enrollment Payroll Field Description***" on page 352)

Eff. Date (see "***Eff. Date - (Payroll) Field Description***" on page 365)

Whld Amt (see "***Whld Amt - Field Description***" on page 456)

The following fields are displayed on the Carrier section of the Payroll Discrepancy Listing (Other ID) report:

Name (see "***Name - Enrollee Carrier Field Description***" on page 390)

Code (see "***Code - Carrier Enrollment Code Field Description***" on page 352)

Eff. Date (see "***Eff. Date - (Carrier) Field Description***" on page 365)

Discrepancy (see "***Discrepancy - (No Note) Field Description***" on page 362)

Fail Count (see "***Fail Count - Field Description***" on page 373)

Errors (see "***Errors - Field Description***" on page 372)

Warnings (see "***Viewing Enrollment Change Summary (Report 7)***" on page 255)

Total Records (see "***Total Records - (Enrollee) Field Description***" on page 450)

7. Close the report to return to the 1. Payroll Discrepancy Listing page.

Viewing Discrepancy Summary (Report 2)

The ***2. Discrepancy Summary*** option on the Reports Selection page allows users to view the Discrepancy Summary report. This report provides a comparison of the number of enrollee records with discrepancies occurring in 1 quarter with those that occurred in any other quarter.

To View a Discrepancy Summary Report:

1. Select the ***Reports*** tab on the CLER Main Menu. The Reports Selection page is displayed.

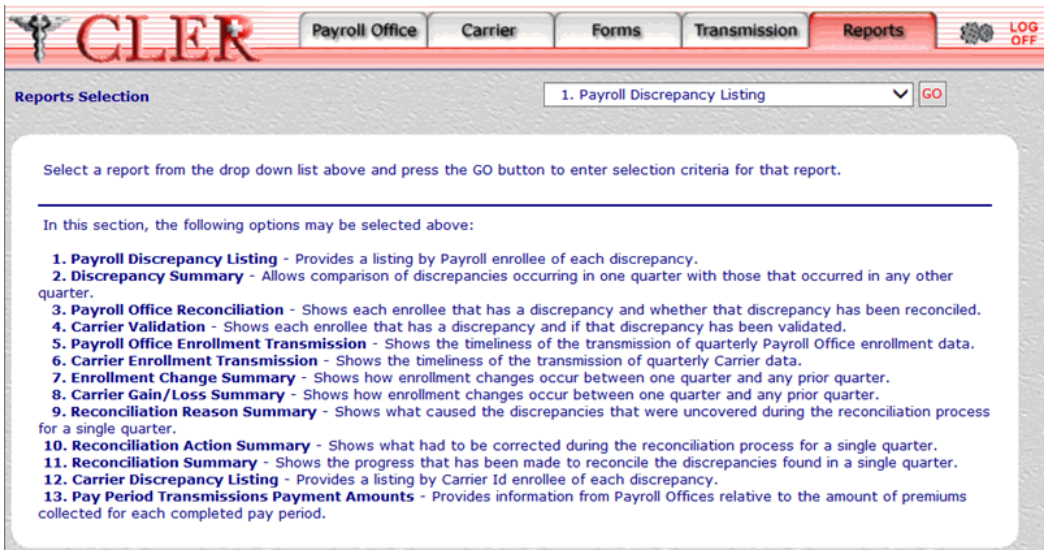


Figure 188: Reports Selection Page

2. On the drop-down menu on the Reports Selection page, select ***2. Discrepancy Summary.***

3. Select the **GO** button to display the 2. Discrepancy Summary page.

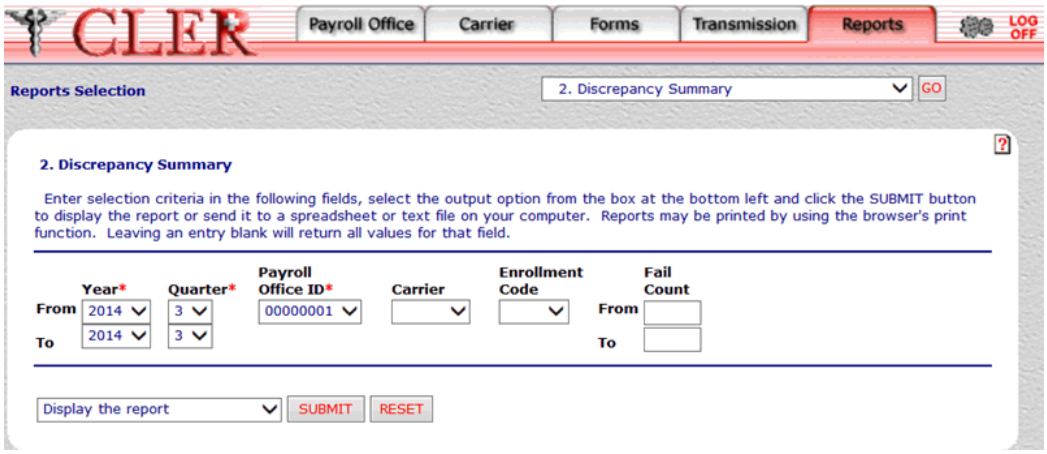


Figure 189: 2. Discrepancy Summary Report Search Page

4. Complete the following fields on the 2. Discrepancy Summary page:

   Year From (see "***Year From - (Range - Required) Field Instruction***" on page 457)

   Year To (see "***Year To - (Range - Required) Field Instruction***" on page 458)

   Quarter From (see "***Quarter From - Field Instruction***" on page 430)

   Quarter To (see "***Quarter To - Field Instruction***" on page 430)

   Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

   Carrier (see "***Carrier - (Drop-down) Field Instruction***" on page 345)

   Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 371)

   Fail Count From (see "***Fail Count From - Field Instruction***" on page 373)

   Fail Count To (see "***Fail Count To - Field Instruction***" on page 373)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report.
   - Save report as a spreadsheet.
   - Save report as a text file.

6. Select the **Submit** button to display the Discrepancy Summary report in the selected format.

   OR

   Select the **Reset** button to clear all data entered.

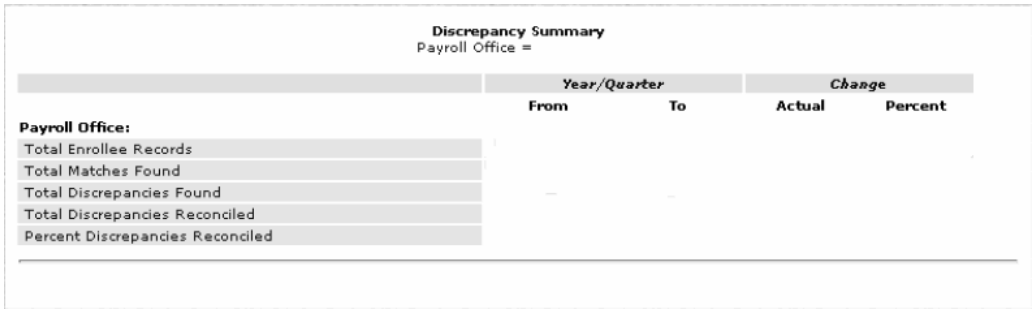


Figure 190: Discrepancy Summary Report Page

The data on the Discrepancy Summary report is categorized into the following fields:

Payroll Office (see "***Payroll Office ID - Field Description***" on page 420)

Year/Quarter From (see "***Year/Quarter From - Field Description***" on page 458)

Year/Quarter To (see "***Year/Quarter To - Field Description***" on page 458)

Change Actual (see "***Change Actual - Field Description***" on page 347)

Change Percent (see "***Change Percent - Field Description***" on page 348)

Total Enrollee Records (see "***Total Enrollee Records - Field Description***" on page 449)

Total Matches Found (see "***Total Matches Found - Field Description***" on page 450)

Total Discrepancies Found (see "***Total Discrepancies Found - Field Description***" on page 449)

Total Discrepancies Reconciled (see "***Total Discrepancies Reconciled - Field Description***" on page 449)

Percent Discrepancies Reconciled (see "***Percent Discrepancies Reconciled - Field Description***" on page 421)

7. Close the report to return to the 2. Discrepancy Summary page.

Viewing Payroll Office Reconciliation (Report 3)

The ***3. Payroll Office Reconciliation*** option on the Reports Selection page allows users to view the Payroll Office Reconciliation report. This report lists each enrollee record that has a discrepancy and indicates whether that discrepancy has been reconciled.

To View a Payroll Office Reconciliation Report:

1. Select the ***Reports*** tab on the CLER Main Menu. The Reports Selection page is displayed.

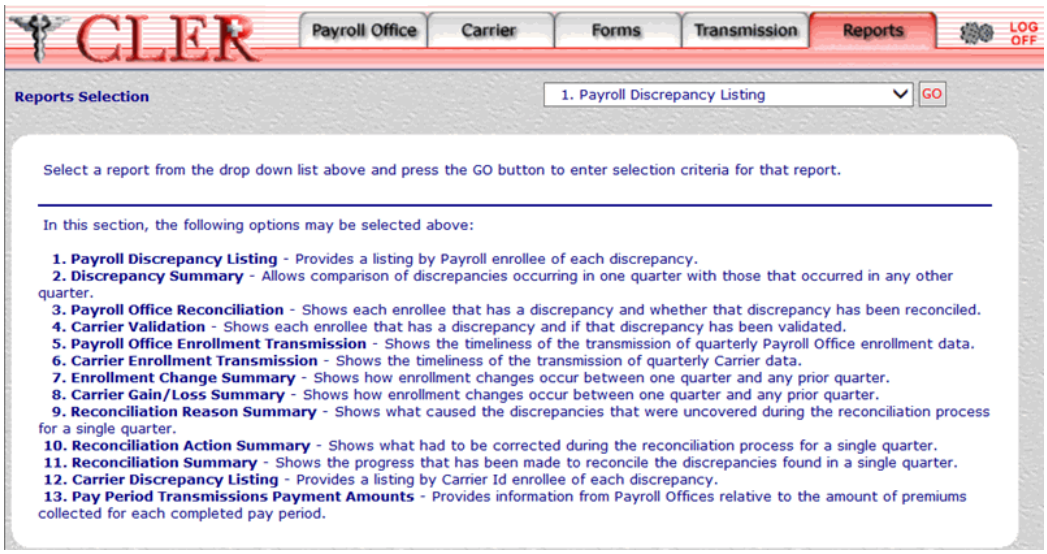


Figure 191: Reports Selection Page

2. On the drop-down menu on the Reports Selection page, select ***3. Payroll Office Reconciliation.***

3. Select the **GO** button to display the 3. Payroll Office Reconciliation page.

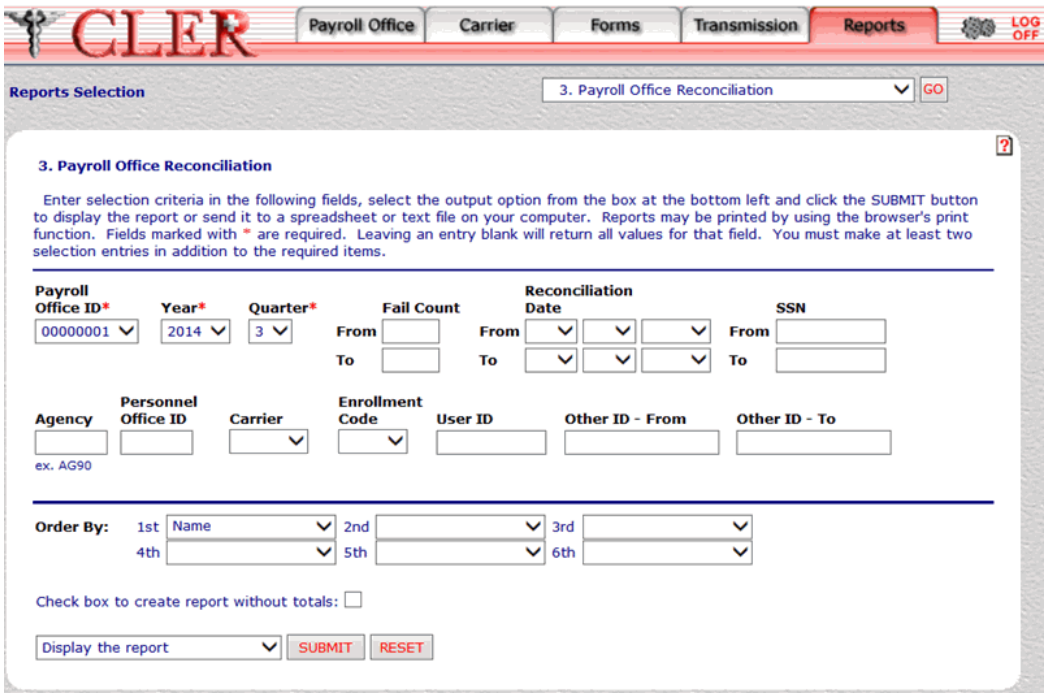


Figure 192: 3. Payroll Office Reconciliation Search Page

4. Complete the following fields on the 3. Payroll Office Reconciliation page:

Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

Year (see "***Year - (Required) Field Instruction***" on page 457)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

Fail Count From (see "***Fail Count From - Field Instruction***" on page 373)

Fail Count To (see "***Fail Count To - Field Instruction***" on page 373)

Reconciliation Date From (see "***Reconciliation Date From - Field Instruction***" on page 431)

Reconciliation Date To (see "***Reconciliation Date To - Field Instruction***" on page 432)

SSN From (see "***SSN From - Field Instruction***" on page 440)

SSN To (see "***SSN To - Field Instruction***" on page 440)

Agency (see "***Agency - Field Instruction***" on page 339)

Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

Carrier (see "***Carrier - (Drop-down) Field Instruction***" on page 345)

Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 371)

User ID (see "***User ID - (Report) Field Instruction***" on page 455)

Other ID From (see "***Other ID From - Field Instruction***" on page 414)

Other ID To (see "***Other ID To - Field Instruction***" on page 415)

Order By 1st (see "***Order By 1st - (Report - Name Enrollment Code) Field Instruction***" on page 399)

Order By 2nd (see "***Order By 2nd - (Report - SSNO Enrollment Code) Field Instruction***" on page 402)

Order By 3rd (see "***Order By 3rd - (Report - Enrollment Code) Field Instruction***" on page 405)

Order By 4th (see "***Order By 4th - (Report - Enrollment Code) Field Instruction***" on page 407)

Order By 5th (see "***Order By 5th - (Report - Enrollment Code) Field Instruction***" on page 409)

Order By 6th (see "***Order By 6th - (Report - Enrollment Code) Field Instruction***" on page 411)

Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 348)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report.
   - Save report as a spreadsheet.
   - Save report as a text file.

6. Select the **Submit** button to display the Payroll Office Reconciliation report in the selected format. The Payroll Office Reconciliation report is displayed.

OR

Select the **Reset** button to clear all data entered.

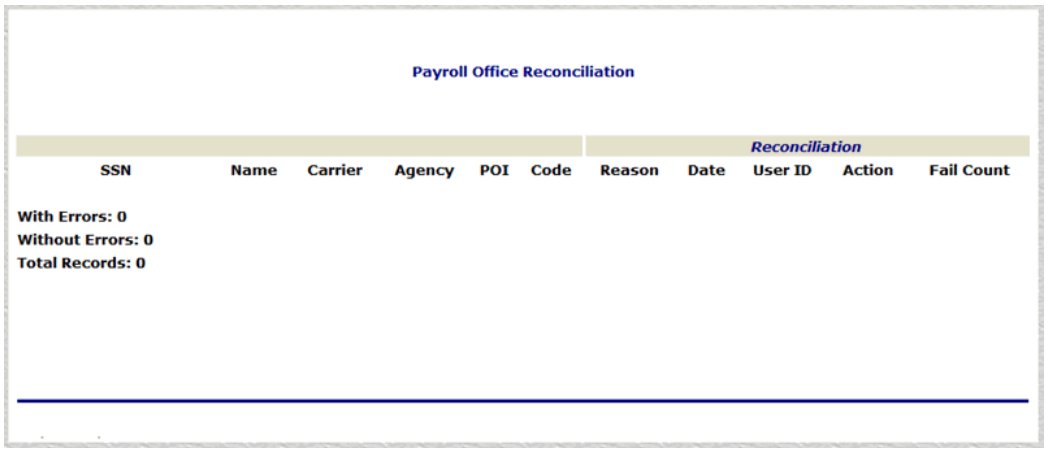


Figure 193: Payroll Office Reconciliation Report Page

The data in the Payroll Office Reconciliation report is categorized into the following fields:

SSN (see "***SSN - (Enrollee) Field Description***" on page 439)

Name (see "***Name - Enrollee Field Description***" on page 390)

Carrier (see "***Carrier - Field Description***" on page 345)

Agency (see "***Agency - with Note (No Example) Field Description***" on page 339)

POI (see "***POI - With Note Field Description***" on page 424)

Code (see "***Code - Carrier Enrollment Code Field Description***" on page 352)

The following fields are displayed on the Reconciliation section of the Payroll Office Reconciliation report:

Reason (see "***Reconciliation Reason - Field Description***" on page 432)

Date (see "***Reconciliation Date - Field Description***" on page 431)

User ID (see "***Reconciliation User ID - Field Description***" on page 433)

Action (see "***Reconciliation Action - Field Description***" on page 431)

Fail Count

Reconciliation Fail Count
System generated

Displays the number of times the initial discrepancy has been identified

With Errors (see "***Reconciliation With Errors - Field Description***" on page 433)

Without Errors (see "***Reconciliation Without Errors - Field Description***" on page 433)

Total Records (see "***Reconciliation Total Records - Field Description***" on page 432)

If **`24900002, 24900003`**, or **`160099XX`** was entered in the Payroll Office ID field on the Payroll Office Reconciliation (Report 3) page, the Payroll Office Reconciliation (Other ID) report is displayed.

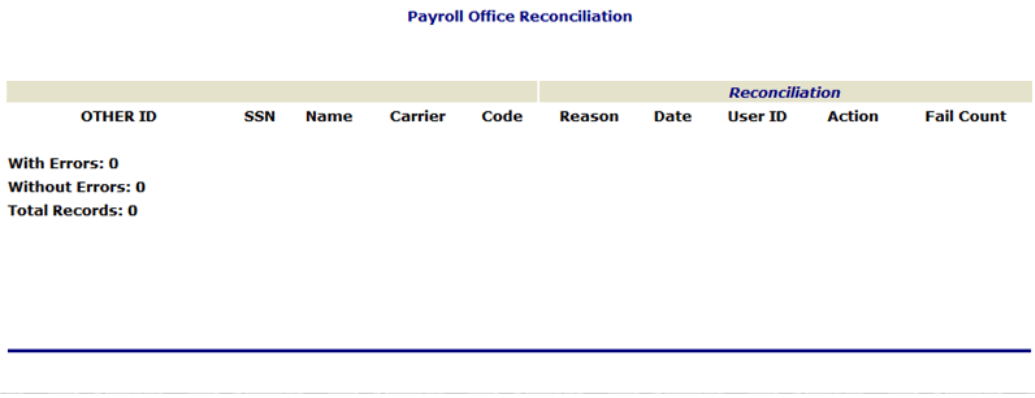


Figure 194: Payroll Office Reconciliation Other ID Report Page

The data in the Payroll Office Reconciliation (Other ID) report is categorized into the following fields:

Other ID (see "***Other ID - Field Description***" on page 414)

SSN (see "***SSN - (Enrollee) Field Description***" on page 439)

Name (see "***Name - Enrollee Field Description***" on page 390)

Carrier (see "***Carrier - Field Description***" on page 345)

Code (see "***Code - Field Description***" on page 352)

The following fields are displayed on the Reconciliation section of the Payroll Office Reconciliation (Other ID) report:

Reason (see "***Reconciliation Reason - Field Description***" on page 432)

Date (see "***Reconciliation Date - Field Description***" on page 431)

User ID (see "***Reconciliation User ID - Field Description***" on page 433)

Action (see "***Reconciliation Action - Field Description***" on page 431)

Fail Count

Reconciliation Fail Count
System generated
Displays the number of times the initial discrepancy has been identified

With Errors (see "***Reconciliation With Errors - Field Description***" on page 433)

Without Errors (see "***Reconciliation Without Errors - Field Description***" on page 433)

Total Records (see "***Reconciliation Total Records - Field Description***" on page 432)

1. Close the report to return to the 3. Payroll Office Reconciliation page.

Viewing Carrier Validation Reconciliation (Report 4)

The ***4. Carrier Validation*** option on the Reports Selection page allows users to view the Carrier Reconciliation report. This report lists each enrollee record that has a discrepancy that the payroll office has determined to be a problem with the carrier's records.

To View a Carrier Validation Report:

1. Select the ***Reports*** tab on the CLER Main Menu. The Reports Selection page is displayed.

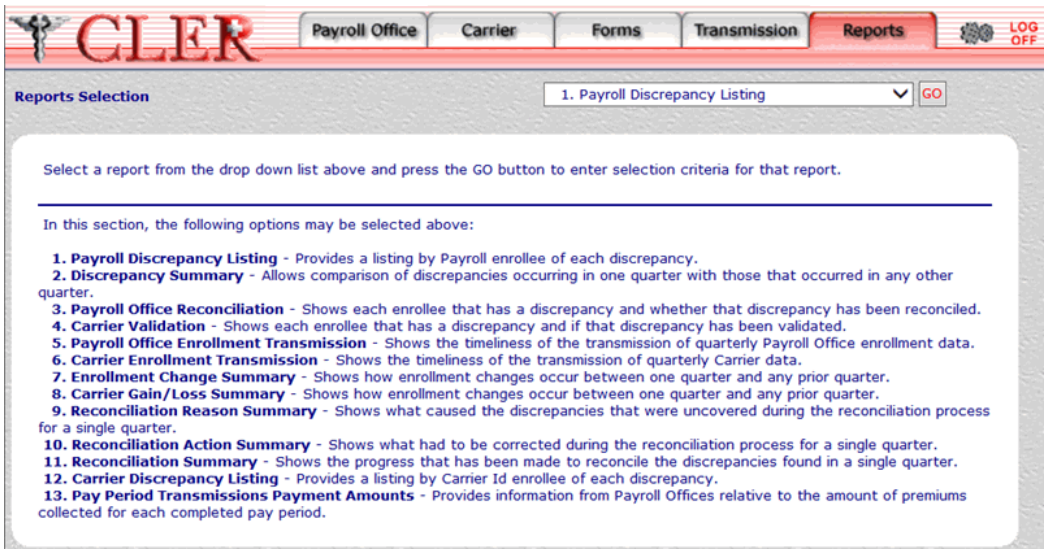


Figure 195: Reports Selection Page

2. On the drop-down menu on the Reports Selection page, select ***4. Carrier Validation***.

3. Select the **GO** button to display the Carrier Validation page.

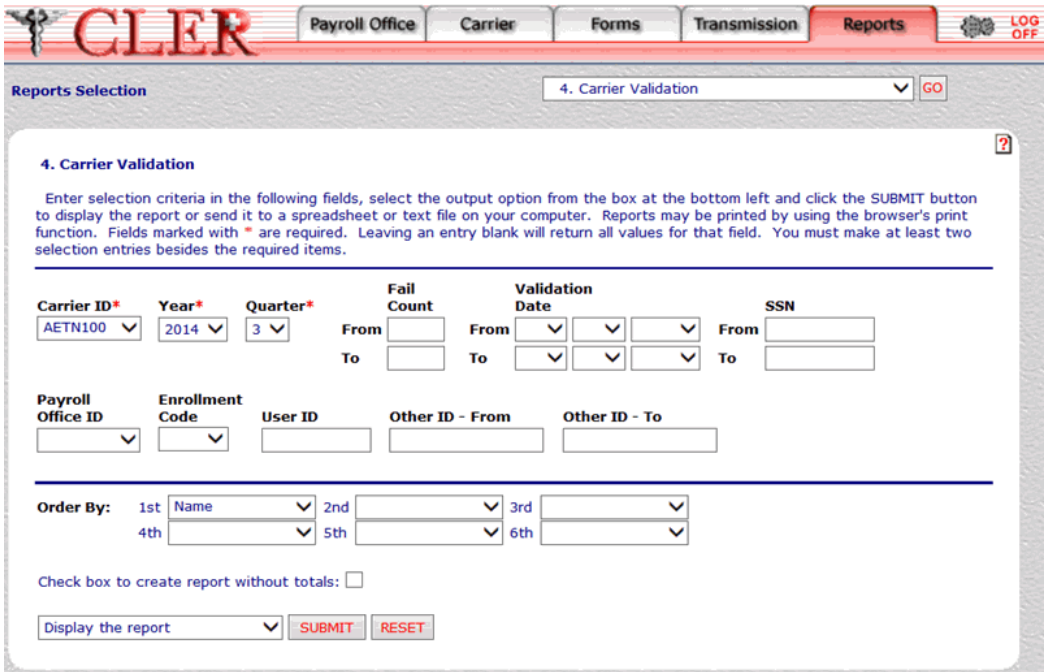


Figure 196: 4. Carrier Validation Report Search Page

4. Complete the following fields on the 4. Carrier Validation page:

Carrier ID (see "***Carrier ID - (Carrier Enrollees) Field Instruction***" on page 346)

Year (see "***Year - (Required) Field Instruction***" on page 457)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

Fail Count From (see "***Fail Count From - Field Instruction***" on page 373)

Fail Count To (see "***Fail Count To - Field Instruction***" on page 373)

Validation Date From (see "***Validation Date From - Field Instruction***" on page 455)

Validation Date To (see "***Validation Date To - Field Instructions***" on page 455)

SSN From (see "***SSN From - Field Instruction***" on page 440)

SSN To (see "***SSN To - Field Instruction***" on page 440)

Payroll Office ID (see "***Payroll Office ID - (Select - Optional) Field Instruction***" on page 420)

Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 371)

User ID (see "***User ID - (Report) Field Instruction***" on page 455)

Other ID From (see "***Other ID From - Field Instruction***" on page 414)

Other ID To (see "***Other ID To - Field Instruction***" on page 415)

Order By 1st (see "***Order By 1st - (Report - Name Enrollment Code) Field Instruction***" on page 399)

Order By 2nd (see "***Order By 2nd - (Report - SSNO Enrollment Code) Field Instruction***" on page 402)

Order By 3rd (see "***Order By 3rd - (Report - Enrollment Code) Field Instruction***" on page 405)

Order By 4th (see "***Order By 4th - (Report - Enrollment Code) Field Instruction***" on page 407)

Order By 5th (see "***Order By 5th - (Report - Enrollment Code) Field Instruction***" on page 409)

Order By 6th (see "***Order By 6th - (Report - Enrollment Code) Field Instruction***" on page 411)

Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 348)

5. On the drop-down menu at the bottom of the page , one of the following format options:
   - Display the report.
   - Save report as a spreadsheet.
   - Save report as a text file.
6. Select the **Submit** button to display the Carrier Reconciliation report in the selected format. The Carrier Validation report is displayed.

OR

Select the **Reset** button to clear all data entered.

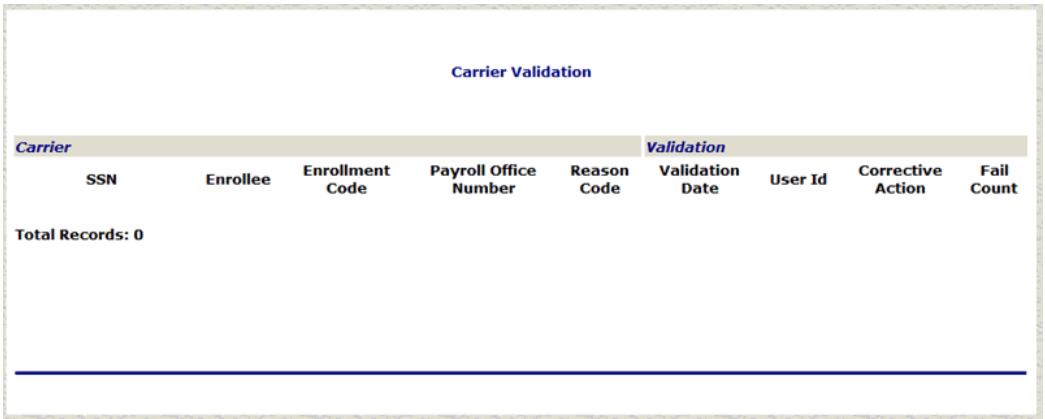


Figure 197: Carrier Validation Report Page

The following fields are displayed on the Carrier section of the Carrier Validation report:

SSN (see "***SSN - (Enrollee) Field Description***" on page 439)

Enrollee (see "***Enrollee - (Carrier) Field Description***" on page 369)

Enrollment Code (see "***Enrollment Code - Field Description***" on page 371)

Payroll Office Number (see "***Payroll Office Number - Field Description***" on page 421)

Reason Code (see "***Reason Code - Field Description***" on page 430)

The following fields are displayed on the Validation section of the Carrier Validation report:

Validation Date (see "***Validation Date - Field Description***" on page 455)

User ID (see "***User ID - (Reconciliation) Field Description***" on page 454)

Corrective Action (see "***Corrective Action - Field Description***" on page 356)

Fail Count (see "***Fail Count - Field Description***" on page 373)

Total Records (see "***Total Records - (Enrollee) Field Description***" on page 450)

7. Close the report to return to the 4. Payroll Office Validation page.

Viewing Payroll Office Enrollment Transmission (Report 5)

The ***5. Payroll Office Enrollment Transmission*** option on the Reports Selection page allows users to view the Payroll Office Enrollment Transmission report. This report provides information regarding the timeliness of the transmission of quarterly payroll office enrollment data.

To View a Payroll Office Enrollment Transmission Report:

1. Select ***Reports*** on the CLER Main Menu.The Reports Selection page is displayed.

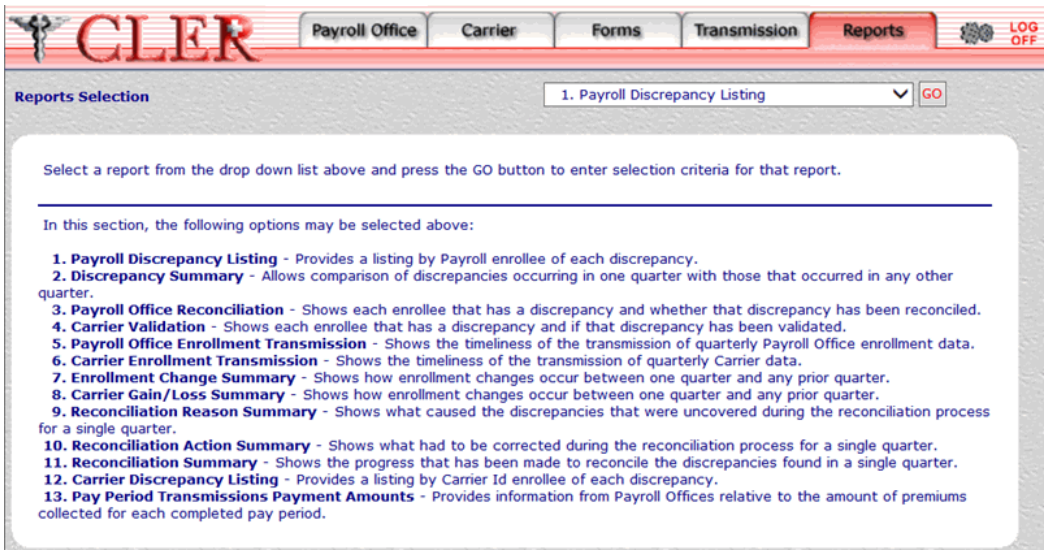


Figure 198: Reports Selection Page

2. Select the drop-down menu on the Reports Selection page and select ***5. Payroll Office Enrollment Transmission.***

3. Select **GO** to display the 5. Payroll Office Enrollment Transmission page.

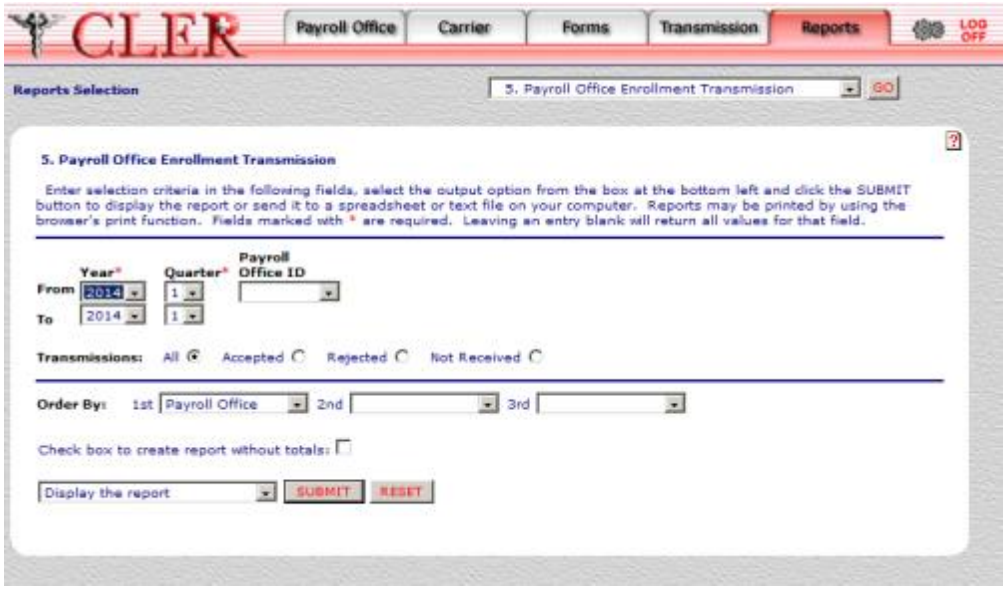


Figure 199: Payroll Office Enrollment Transmission Page

4. Complete the following fields on the 5. Payroll Office Enrollment Transmission page:

   Year From (see "***Year From - (Range - Required) Field Instruction***" on page 457)

   Year To (see "***Year To - (Range - Required) Field Instruction***" on page 458)

   Quarter From (see "***Quarter From - Field Instruction***" on page 430)

   Quarter To (see "***Quarter To - Field Instruction***" on page 430)

   Payroll Office ID (see "***Payroll Office ID - (Select - Optional) Field Instruction***" on page 420)

   Transmissions (see "***Transmissions - Field Instruction***" on page 451)

   Order By 1st (see "***Order By 1st - (Payroll Office) Field Instruction***" on page 399)

   Order By 2nd (see "***Order By 2nd - (Payroll Office) Field Instruction***" on page 402)

   Order By 3rd (see "***Order By 3rd - (Payroll Office) Field Instruction***" on page 405)

   Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 348)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:

- Display the report.
- Save report as a spreadsheet.
- Save report as a text file.

6. Select the **Submit** button to display the Payroll Office Enrollment Transmission report in the selected format. The Payroll Office Enrollment Transmission report is displayed.

OR

Select the **Reset** button to clear all data entered.

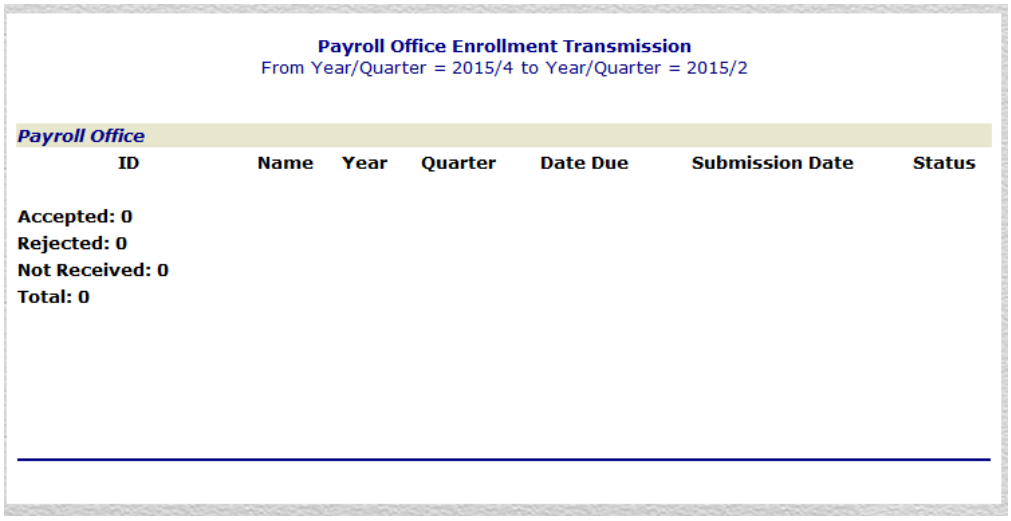


Figure 200: Payroll Office Enrollment Transmission Report

The data in the Payroll Office Enrollment Transmission report is categorized into the following fields:

ID (see "***ID - (Payroll Office) Field Description***" on page 379)

Name (see "***Name - (Payroll Office) Field Description***" on page 389)

Year (see "***Year - Field Description***" on page 457)

Quarter (see "***Quarter - Field Description***" on page 429)

Date Due (see "***Date Due - Field Description***" on page 359)

Submission Date (see "***Submission Date - (Payroll) Field Description***" on page 446)

Status (see "***Status - (Transmission Payroll Office) Field Description***" on page 445)

Accepted (see "***Accepted - Field Description***" on page 330)

Rejected (see "***Rejected - Field Description***" on page 435)

Not Received (see "***Not Received - Field Description***" on page 392)

Total (see "***Total - (Transmission Records) Field Description***" on page 449)

7. Close the report to return to the 5. Payroll Office Enrollment Transmission page.

Viewing Carrier Enrollment Transmission (Report 6)

The ***6. Carrier Enrollment Transmission*** option on the Reports Selection page allows users to view the Carrier Enrollment Transmission report. This report provides information regarding the timeliness of the transmission of quarterly carrier enrollment data.

To View a Carrier Enrollment Transmission Report:

1. Select the ***Reports*** tab on the CLER Main Menu. The Reports Selection page is displayed.

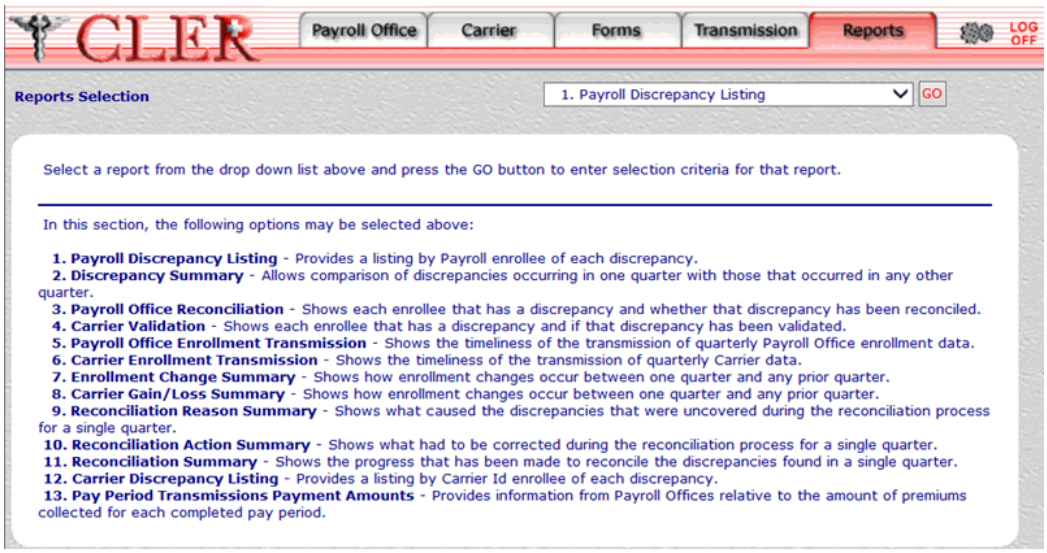


Figure 201: Reports Selection Page

2. Select the drop-down menu on the Reports Selection page and select ***6. Carrier Enrollment Transmission***.

3. Select the **GO** button to display the 6. Carrier Enrollment Transmission page.

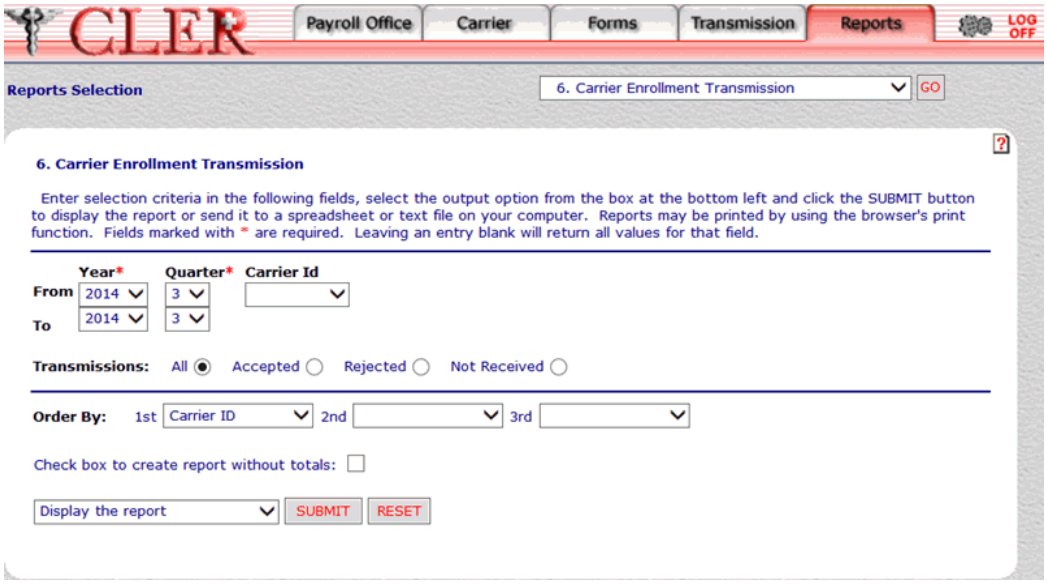


Figure 202: 6. Carrier Enrollment Transmission Report Search Page

4. Complete the following fields on the 6. Carrier Enrollment Transmission page:

   Year From (see "***Year From - (Range - Required) Field Instruction***" on page 457)

   Year To (see "***Year To - (Range - Required) Field Instruction***" on page 458)

   Quarter From (see "***Quarter From - Field Instruction***" on page 430)

   Quarter To (see "***Quarter To - Field Instruction***" on page 430)

   Carrier ID (see "***Carrier ID - (Carrier Enrollees) Field Instruction***" on page 346)

   Transmissions (see "***Transmissions - Field Instruction***" on page 451)

   Order By 1st (see "***Order By 1st - (Carrier ID) Field Instruction***" on page 398)

   Order By 2nd (see "***Order By 2nd - (Carrier ID) Field Instruction***" on page 401)

   Order By 3rd (see "***Order By 3rd - (Carrier ID) Field Instruction***" on page 404)

   Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 348)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report.
   - Save report as a spreadsheet.

- Save report as a text file.

6. Select the **Submit** button to display the Carrier Enrollment Transmission report in the selected format. The Carrier Enrollment Transmission report page is displayed.

OR

Select the **Reset** button to clear all data entered.

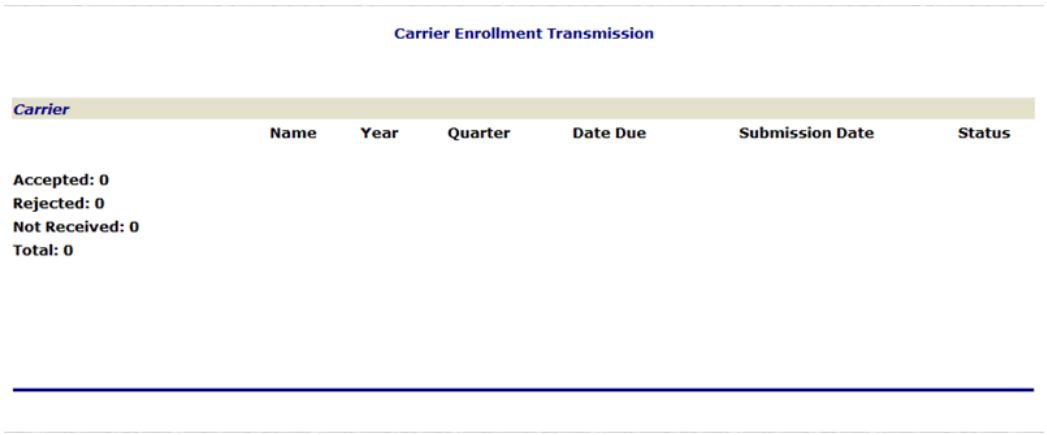


Figure 203: Carrier Enrollment Transmission Report Page

The data in the Carrier Enrollment Transmission report is categorized into the following fields:

Carrier (see "***Carrier - Field Description***" on page 345)

Name (see "***Name - Carrier Field Description***" on page 390)

Year (see "***Year - Field Description***" on page 457)

Quarter (see "***Quarter - Field Description***" on page 429)

Date Due (see "***Date Due - Field Description***" on page 359)

Submission Date (see "***Submission Date - (Carrier) Field Description***" on page 446)

Status (see "***Status - (Transmission Payroll Office) Field Description***" on page 445)

Accepted (see "***Accepted - Field Description***" on page 330)

Rejected (see "***Rejected - Field Description***" on page 435)

Not Received (see "***Not Received - Field Description***" on page 392)

Total (see "***Total - (Transmission Records) Field Description***" on page 449)

7. Close the report to return to the 6. Carrier Enrollment Transmission page.

Viewing Enrollment Change Summary (Report 7)

The ***7. Enrollment Change Summary*** option on the Reports Selection page allows users to view the Enrollment Change Summary report. This report lists additions and changes in enrollment between carriers and enrollment codes when comparing 1 quarter to any prior quarter.

To View an Enrollment Change Summary Report:

1. Select the ***Reports*** tab on the CLER Main Menu. The Reports Selection page is displayed.

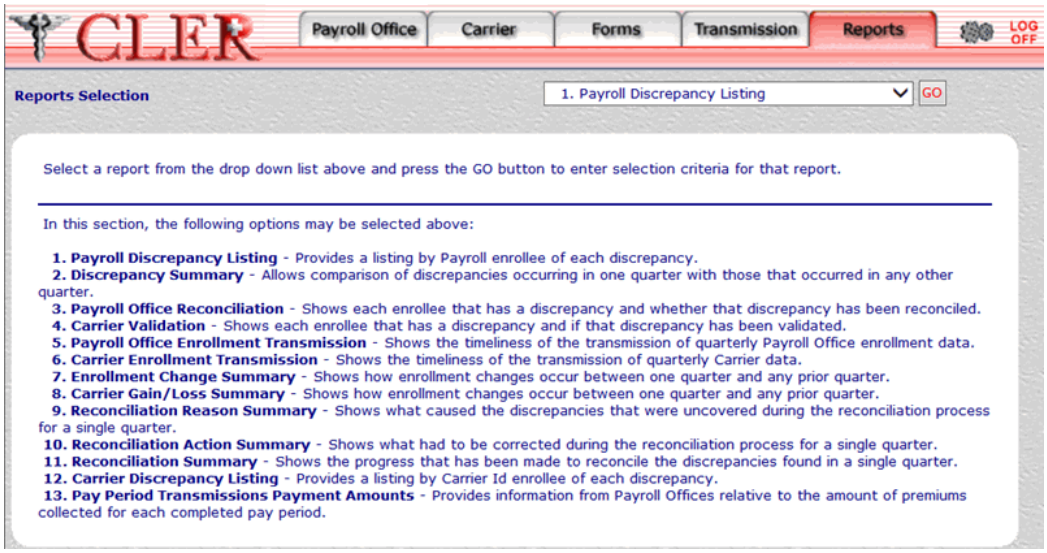


Figure 204: Reports Selection Page

2. Select the drop-down menu on the Reports Selection page and select ***7. Enrollment Change Summary***.

3. Select **the GO** button to display the 7. Enrollment Change Summary page.

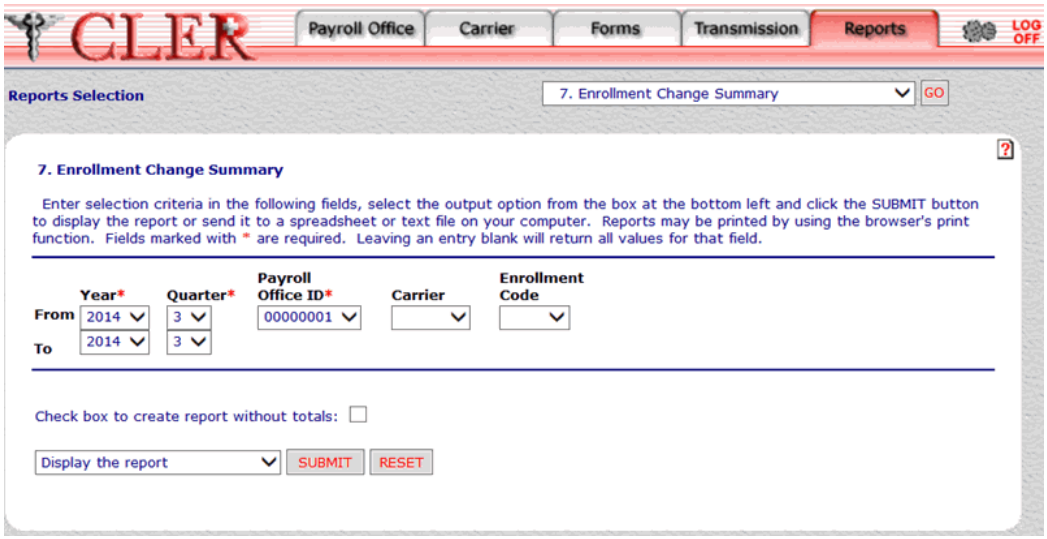


Figure 205: 7. Enrollment Change Summary Report Search Page

4. Complete the following fields on the 7. Enrollment Change Summary page:

   Year From (see "***Year From - (Range - Required) Field Instruction***" on page 457)

   Year To (see "***Year To - (Range - Required) Field Instruction***" on page 458)

   Quarter From (see "***Quarter From - Field Instruction***" on page 430)

   Quarter To (see "***Quarter To - Field Instruction***" on page 430)

   Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

   Carrier (see "***Carrier - (Drop-down) Field Instruction***" on page 345)

   Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 371)

   Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 348)

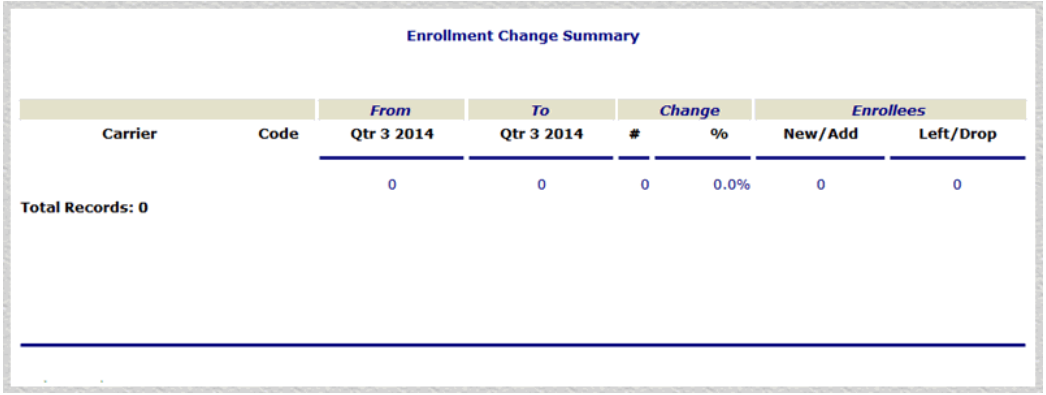
5. Select the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report.
   - Save report as a spreadsheet.
   - Save report as a text file.

6. Select the **Submit** button to display the Enrollment Change Summary report in the selected format. The Enrollment Change Summary report is displayed.

   OR

   Select the **Reset** button to clear all data entered.



Enrollment Change Summary

		From	To	Change		Enrollees	
Carrier	Code	Qtr 3 2014	Qtr 3 2014	#	%	New/Add	Left/Drop
		0	0	0	0.0%	0	0

Total Records: 0

Figure 206: Enrollment Change Summary Report Page

The data in the Enrollment Change Summary report is categorized into the following fields:

Carrier (see "***Carrier - Field Description***" on page 345)

Code (see "***Code - Field Description***" on page 352)

From (Quarter/Year) (see "***From (Quarter/Year) - Field Description***" on page 379)

To (Quarter/Year) (see "***To (Quarter/Year) - Field Description***" on page 448)

Change # (see "***Change (#) - Field Description***" on page 347)

Change % (see "***Change (%) - Field Description***" on page 347)

Enrollees (New/Add) (see "***Enrollees (New/Add) - Field Description***" on page 370)

Enrollees (Left/Drop) (see "***Enrollees (Left/Drop) - Field Description***" on page 369)

Total Records (see "***Total Records - (Enrollee) Field Description***" on page 450)

7. Close the report to return to the 7. Enrollment Change Summary page.

Viewing Carrier Gain/Loss Summary (Report 8)

The ***8. Carrier Gain/Loss Summary*** option on the Reports Selection page allows users to view the Carrier Gain/Loss Summary report. This report provides information regarding the movement of

enrollees between carriers and plans (enrollment codes) when comparing 1 quarter to any prior quarter.

To View a Carrier Gain/Loss Summary Report:

1. Select the ***Reports*** tab on the CLER Main Menu. The Reports Selection page is displayed.

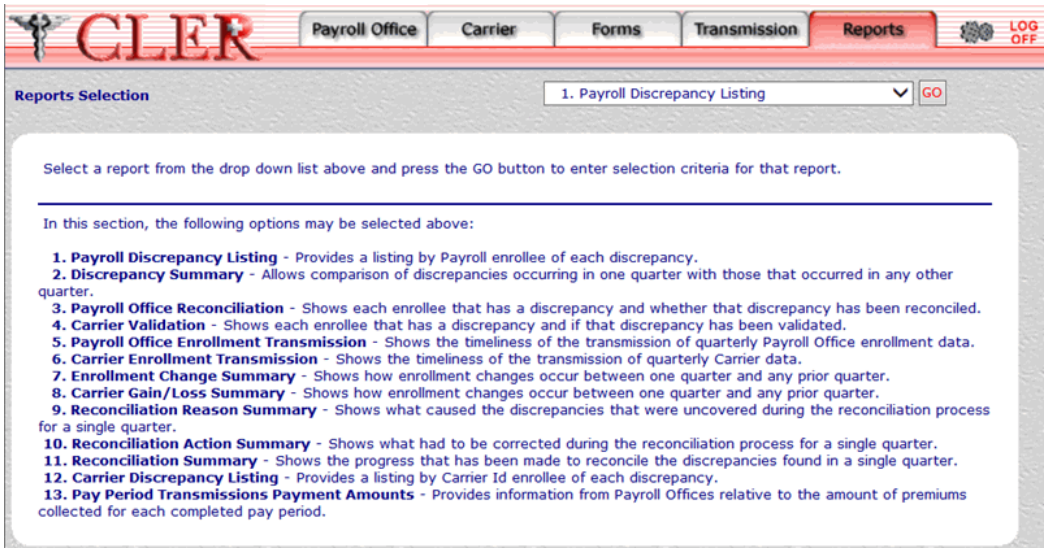


Figure 207: Reports Selection Page

2. Select the drop-down menu on the Reports Selection page and select ***8. Carrier Gain/Loss Summary.***

3. Select the **GO** button to display the 8. Carrier Gain/Loss Summary page.

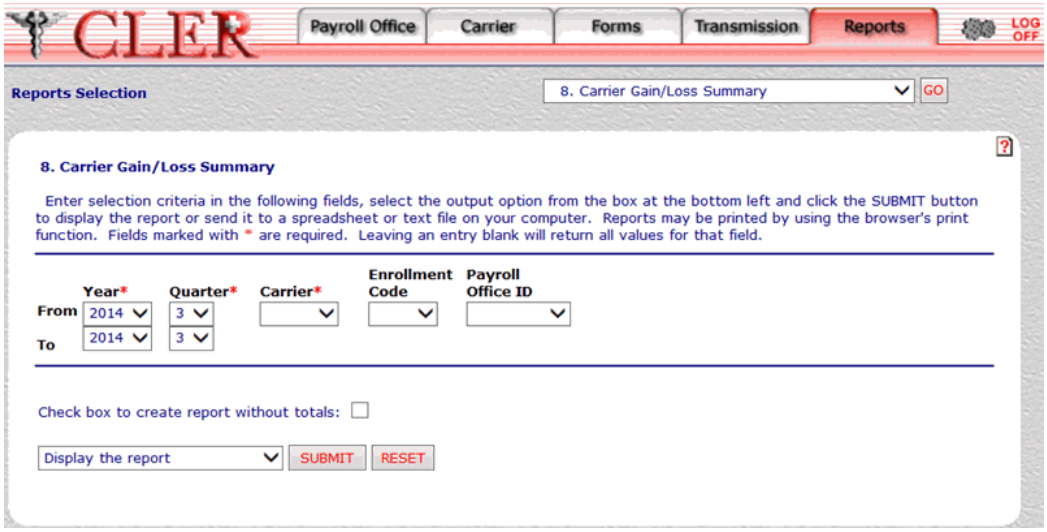


Figure 208: 8. Carrier Gain/Loss Summary Report Search Page

4. Complete the following fields on the 8. Carrier Gain/Loss Summary page:

Year From (see "***Year From - (Range - Required) Field Instruction***" on page 457)

Year To (see "***Year To - (Range - Required) Field Instruction***" on page 458)

Quarter From (see "***Quarter From - Field Instruction***" on page 430)

Quarter To (see "***Quarter To - Field Instruction***" on page 430)

Carrier (see "***Carrier - (Drop-down - Required) Field Instruction***" on page 345)

Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 371)

Payroll Office ID (see "***Payroll Office ID - (Select - Optional) Field Instruction***" on page 420)

Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 348)

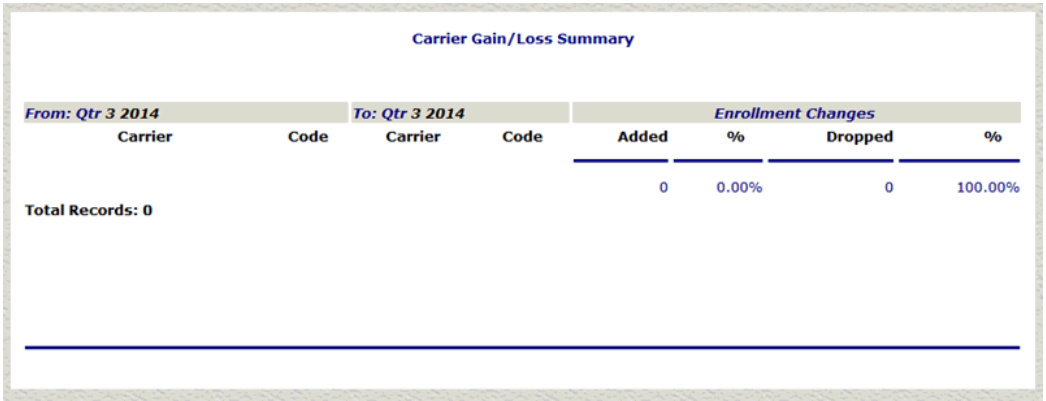
5. Select the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report.
   - Save report as a spreadsheet.
   - Save report as a text file.

6. Select the **Submit button** to display the Carrier Gain/Loss Summary report in the selected format. The Carrier Gain/Loss Summary report is displayed.

   OR

   Select the **Reset** button to clear all data entered.



Carrier Gain/Loss Summary

From: Qtr 3 2014		To: Qtr 3 2014		Enrollment Changes			
Carrier	Code	Carrier	Code	Added	%	Dropped	%
				0	0.00%	0	100.00%

Total Records: 0

Figure 209: Carrier Gain/Loss Summary Report Page

The data in the Carrier Gain/Loss Summary report is categorized into the following fields:

From (Quarter/Year) Carrier (see "***From (Quarter/Year - Carrier) - Field Description***" on page 378)

From (Quarter/Year) Code (see "***From (Quarter/Year - Code) - Field Description***" on page 378)

To (Quarter/Year) Carrier (see "***To (Quarter/Year - Carrier) - Field Description***" on page 448)

To (Quarter/Year) Code (see "***To (Quarter/Year - Code) - Field Description***" on page 448)

Enrollment Changes Added (see "***Enrollment Changes Added - Field Description***" on page 370)

Enrollment Changes Added % (see "***Enrollment Changes % - (Added) Field Description***" on page 370)

Enrollment Changes Dropped (see "***Enrollment Changes Dropped - Field Description***" on page 370)

Enrollment Changes Dropped % (see "***Enrollment Changes % - (Dropped) Field Description***" on page 370)

Total Records (see "***Total Records - (Records) Field Description***" on page 450)

7. Close the report to return to the 8. Carrier Gain/Loss Summary page.

Viewing Reconciliation Reason Summary (Report 9)

The ***9. Reconciliation Reason Summary*** option on the Reports Selection page allows users to view the Reconciliation Reason Summary report. This report provides information regarding the cause of the discrepancies that were identified during the reconciliation process for a single quarter.

To View a Reconciliation Reason Summary Report:

1. Select the ***Reports*** tab on the CLER Main Menu. The Reports Selection page is displayed.

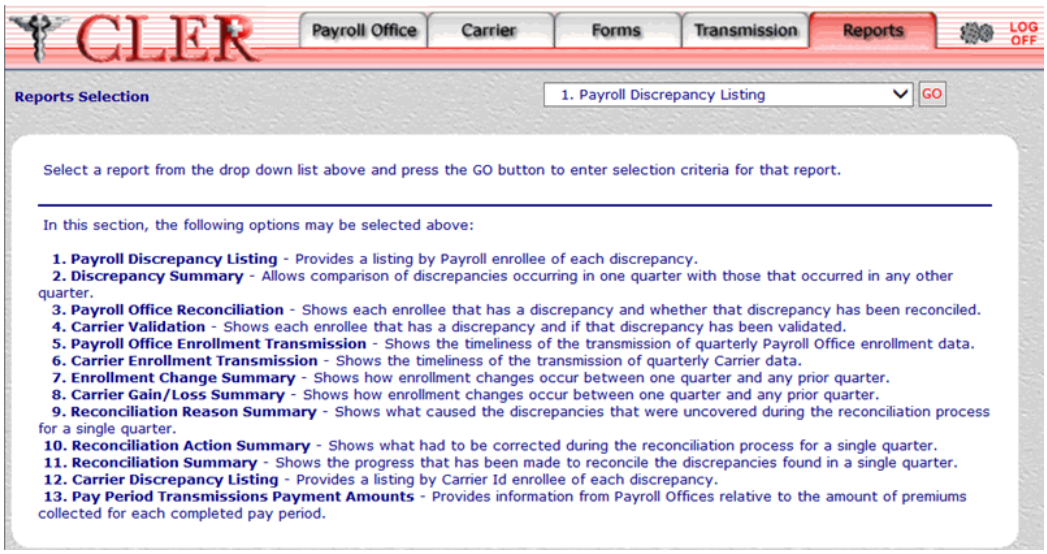


Figure 210: Reports Selection Page

2. Select the drop-down menu on the Reports Selection page and select ***9. Reconciliation Reason Summary***.

3. Select the **GO** button to display the 9. Reconciliation Reason Summary page.

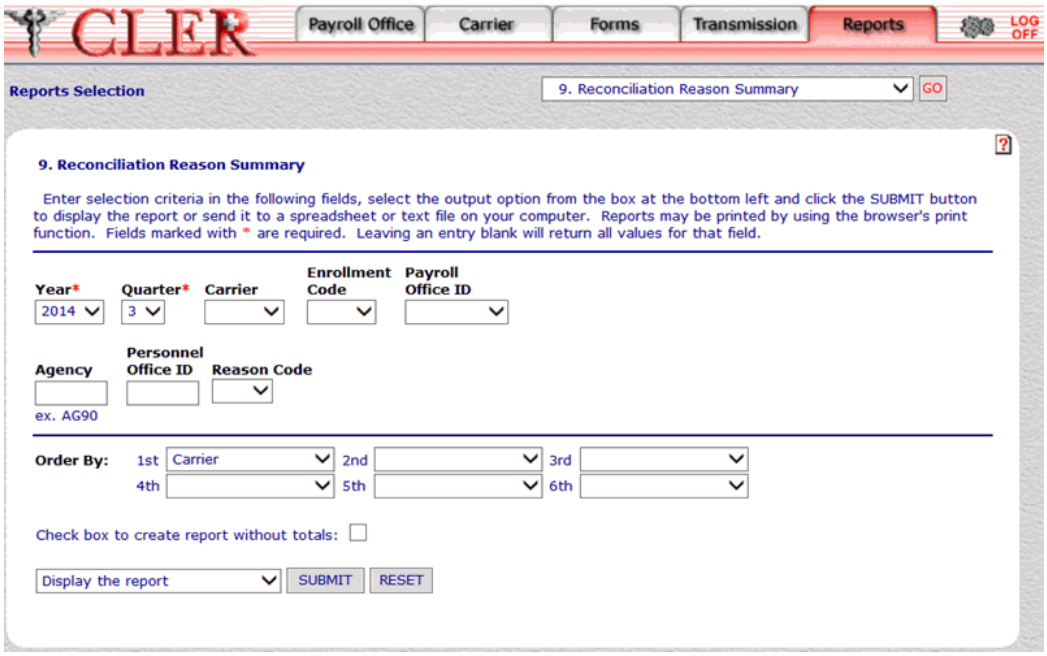


Figure 211: 9. Reconciliation Reason Summary Report Search Page

4. Complete the following fields on the 9. Reconciliation Reason Summary page:

Year (see "***Year - (Required) Field Instruction***" on page 457)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

Carrier (see "***Carrier - (Drop-down) Field Instruction***" on page 345)

Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 371)

Payroll Office ID (see "***Payroll Office ID - (Select - Optional) Field Instruction***" on page 420)

Agency (see "***Agency - Field Instruction***" on page 339)

Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

Reason Code (see "***Reason Code - Field Instruction***" on page 431)

Order By 1st (see "***Order By 1st - (Carrier - Reason Code) Field Instruction***" on page 398)

Order By 2nd (see "***Order By 2nd - (Carrier) Field Instruction***" on page 401)

Order By 3rd (see "***Order By 3rd - (Carrier) Field Instruction***" on page 404)

Order By 4th (see "***Order By 4th - (Carrier) Field Instruction***" on page 407)

Order By 5th (see "***Order By 5th - (Carrier) Field Instruction***" on page 408)

Order By 6th (see "***Order By 6th - (Carrier) Field Instruction***" on page 410)

Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 348)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report .
   - Save report as a spreadsheet.
   - Save report as a text file.

6. Select the **Submit** button to display the Reconciliation Reason Summary report in the selected format. The Reconciliation Reason Summary report is displayed.

OR

Select the **Reset** button to clear all data entered.

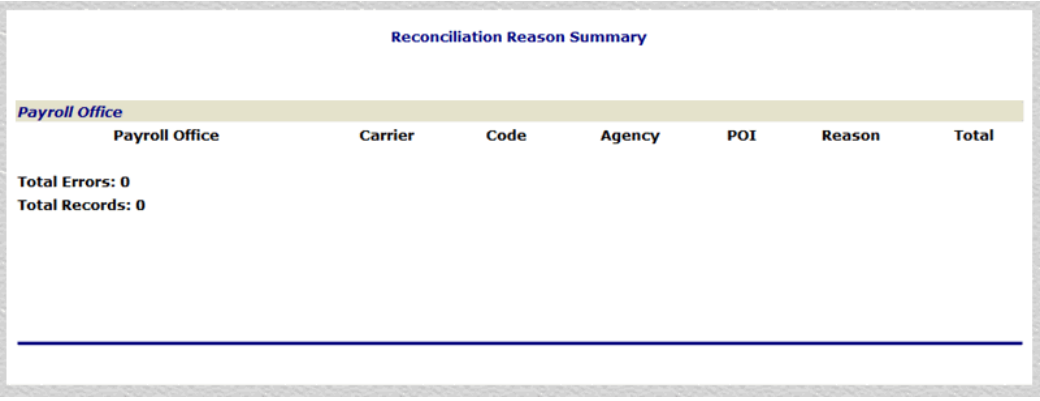


Figure 212: Reconciliation Reason Summary Report Page

The data in the Reconciliation Reason Summary report is categorized into the following fields:

Payroll Office (see "***Payroll Office - Field Description***" on page 419)

Carrier (see "***Carrier - Field Description***" on page 345)

Code (see "***Code - Field Description***" on page 352)

Agency (see "***Agency ID - Field Description***" on page 339)

POI (see "***POI - Field Description***" on page 424)

Reason (see "***Reason - Field Description***" on page 430)

Total (see "***Total - (Reconciliation Reason Codes) Field Description***" on page 449)

Total Errors (see "***Total Errors - (Total Field) Field Description***" on page 450)

Total Records (see "***Total Records - (Records) Field Description***" on page 450)

7. Close the report to return to the 9. Reconciliation Reason Summary page.

Viewing Reconciliation Action Summary (Report 10)

The ***10. Reconciliation Action Summary*** option on the Reports Selection page allows users to view the Reconciliation Action Summary report. This report provides information regarding the action to be taken to correct the discrepancies identified during the reconciliation process for a single quarter.

To View a Reconciliation Action Summary Report:

1. Select the ***Reports*** tab on the CLER Main Menu. The Reports Selection page is displayed.

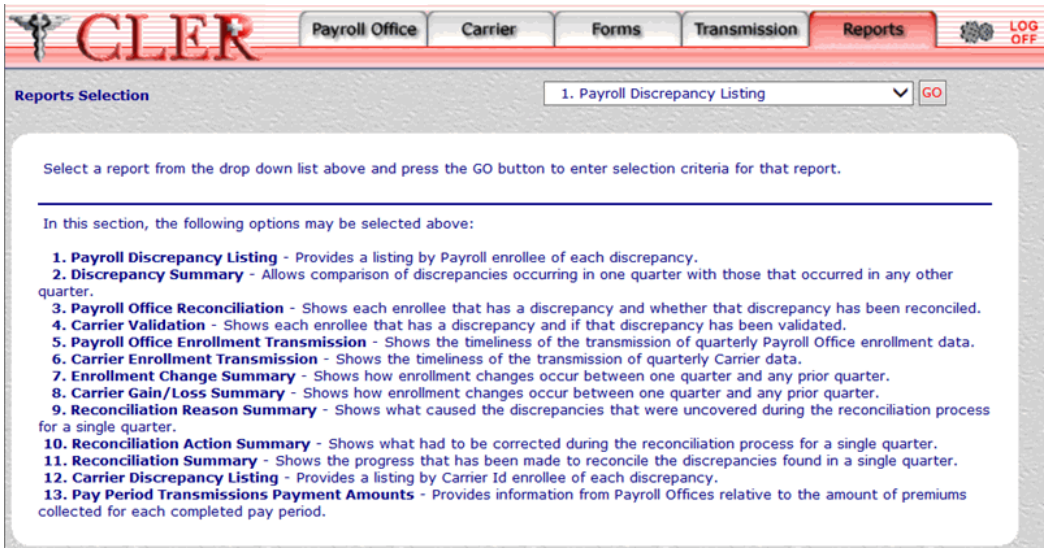


Figure 213: Reports Selection Page

2. Select the drop-down menu on the Reports Selection page and select ***10. Reconciliation Action Summary.***

3. Select the **GO** button to display the 10. Reconciliation Action Summary page.

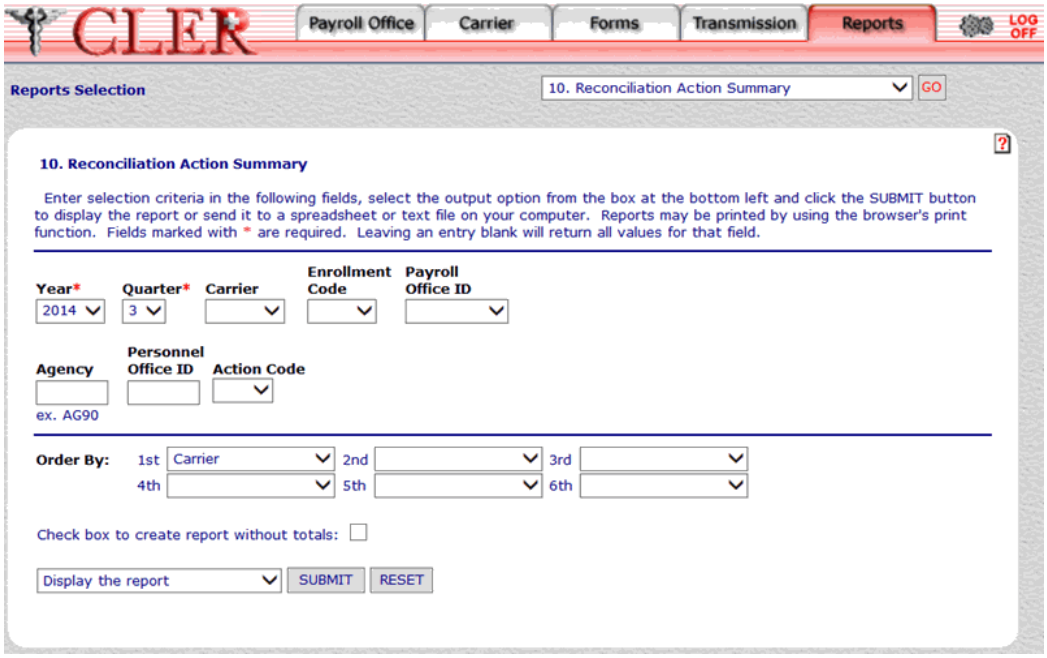


Figure 214: 10. Reconciliation Action Summary Report Search Page

4. Complete the following fields on the 10. Reconciliation Action Summary page:

   Year (see "***Year - (Required) Field Instruction***" on page 457)

   Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

   Carrier (see "***Carrier - (Drop-down) Field Instruction***" on page 345)

   Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 371)

   Payroll Office ID (see "***Payroll Office ID - (Select - Optional) Field Instruction***" on page 420)

   Agency (see "***Agency - Field Instruction***" on page 339)

   Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

   Action Code (see "***Action Code - Field Instruction***" on page 330)

   Order By 1st (see "***Order By 1st - (Carrier - Action Code) Field Instruction***" on page 397)

   Order By 2nd (see "***Order By 2nd - (Carrier - Action Code) Field Instruction***" on page 400)

   Order By 3rd (see "***Order By 3rd - (Carrier - Action Code) Field Instruction***" on page 403)

   Order By 4th (see "***Order By 4th - (Carrier - Action Code) Field Instruction***" on page 406)

   Order By 5th (see "***Order By 5th - (Carrier - Action Code) Field Instruction***" on page 408)

   Order By 6th (see "***Order By 6th - (Carrier - Action Code) Field Instruction***" on page 410)

   Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 348)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report.
   - Save report as a spreadsheet.

- Save report as a text file.

6. Select **the Submit** button to display the Reconciliation Action Summary report in the selected format. The Reconciliation Action Summary report is displayed.

OR

Select the **Reset** button to clear all data entered.

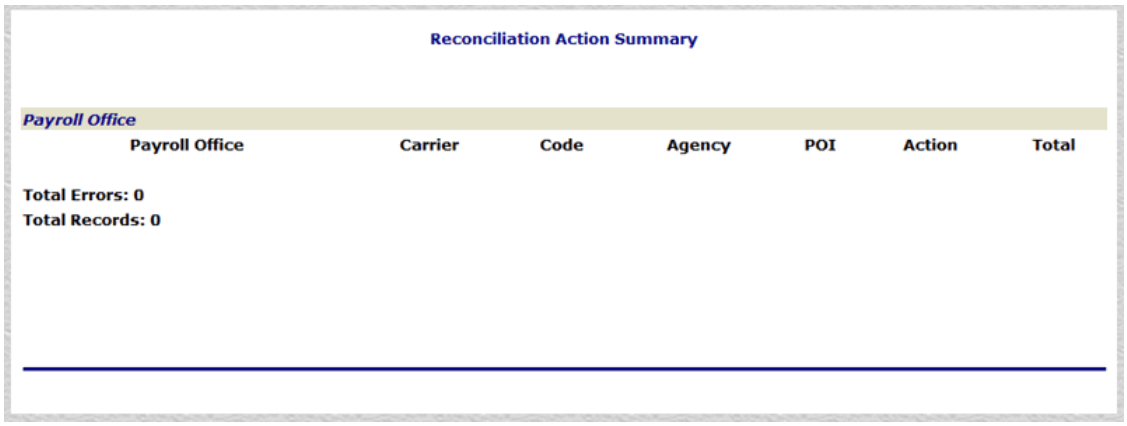


Figure 215: Reconciliation Action Summary Report Page

The data in the Reconciliation Action Summary report is categorized into the following fields:

Payroll Office (see "***Payroll Office - Field Description***" on page 419)

Carrier (see "***Carrier - Field Description***" on page 345)

Code (see "***Code - Field Description***" on page 352)

Agency (see "***Agency ID - Field Description***" on page 339)

POI (see "***POI - Field Description***" on page 424)

Action (see "***Action - Field Description***" on page 330)

Total (see "***Total - (Reconciliation Action Codes) Field Description***" on page 449)

Total Errors (see "***Total Errors - (Total Field) Field Description***" on page 450)

Total Records (see "***Total Records - (Records) Field Description***" on page 450)

7. Close the report to return to the 10. Reconciliation Action Summary page.

Viewing Reconciliation Summary (Report 11)

The ***11. Reconciliation Summary*** option on the Reports Selection page allows users to view the Reconciliation Summary report. This report provides information regarding the progress that has been made to reconcile the discrepancies found in a single quarter.

To View a Reconciliation Summary Report:

1. Select the ***Reports*** tab on the CLER Main Menu. The Reports Selection page is displayed.

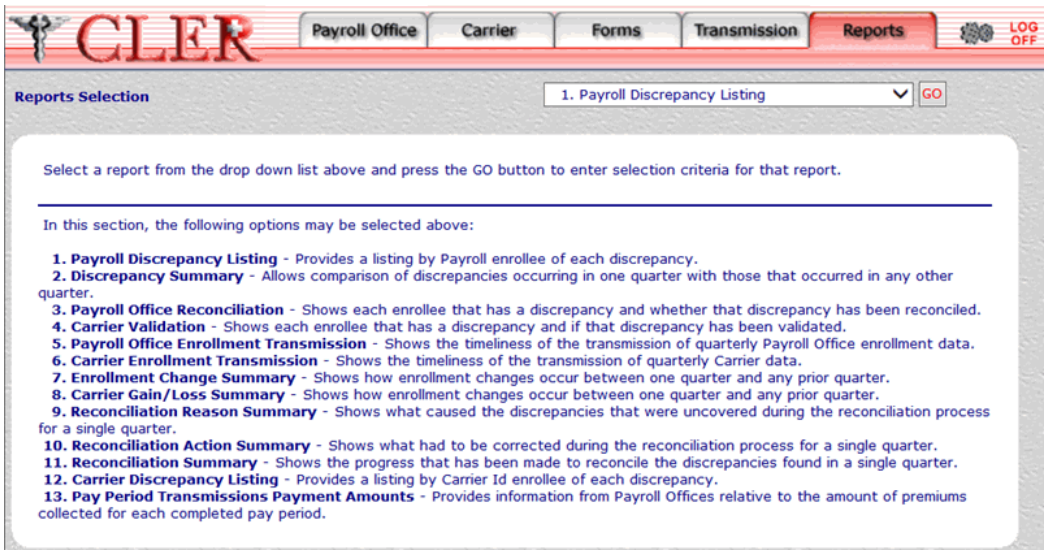


Figure 216: Reports Selection Page

2. On the drop-down menu on the Reports Selection page, select ***11. Reconciliation Summary.***

3. Select the **GO** button to display the 11. Reconciliation Summary page.

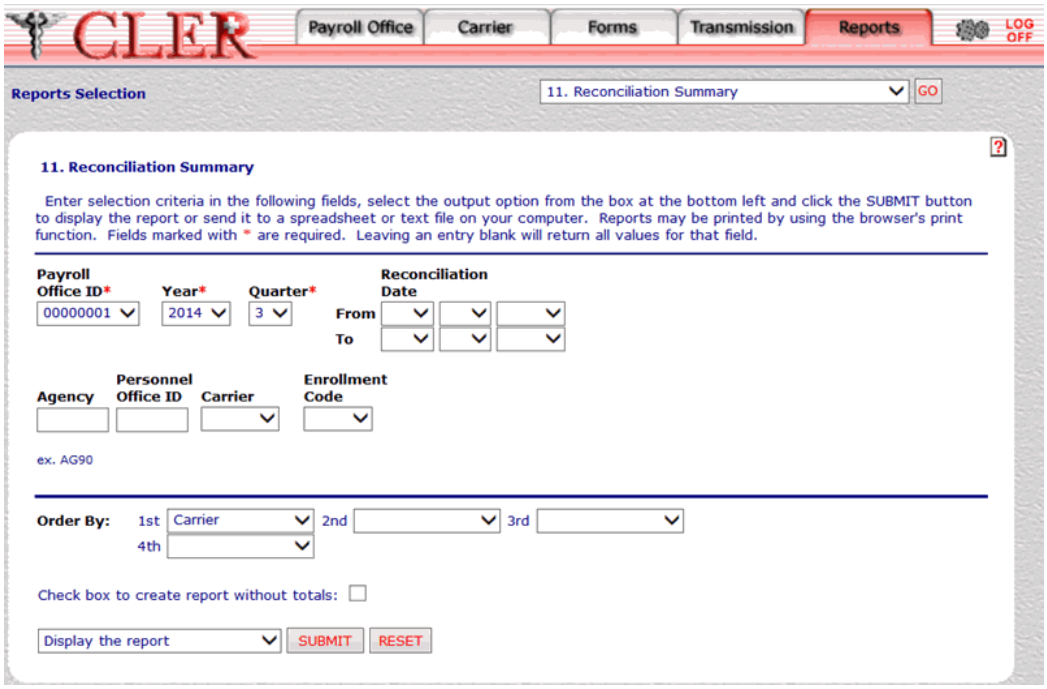


Figure 217: 11. Reconciliation Summary Report Search Page

4. Complete the following fields on the 11. Reconciliation Summary page:

Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

Year (see "***Year - (Required) Field Instruction***" on page 457)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

Reconciliation Date From (see "***Reconciliation Date From - Field Instruction***" on page 431)

Reconciliation Date To (see "***Reconciliation Date To - Field Instruction***" on page 432)

Agency (see "***Agency - Field Instruction***" on page 339)

Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 421)

Carrier (see "***Carrier - (Drop-down) Field Instruction***" on page 345)

Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 371)

Order By 1st (see "***Order By 1st - (Carrier - Agency) Field Instruction***" on page 398)

Order By 2nd (see "***Order By 2nd - (Carrier - Agency) Field Instruction***" on page 401)

Order By 3rd (see "***Order By 3rd - (Carrier - Agency) Field Instruction***" on page 404)

Order By 4th (see "***Order By 4th - (Carrier - Agency) Field Instruction***" on page 406)

Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 348)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report.
   - Save report as a spreadsheet.
   - Save report as a text file.

6. Select the **Submit** button to display the Reconciliation Summary report in the selected format. The Reconciliation Summary report is displayed.

   OR

   Select the **Reset** button to clear all data entered.

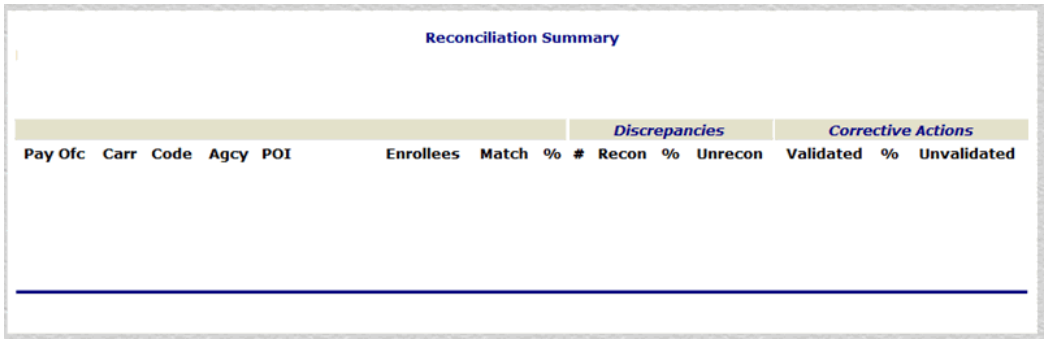


Figure 218: Reconciliation Summary Report Page

The data in the Reconciliation Summary report is categorized into the following fields:

Pay Ofc (see "***Pay Ofc - Field Description***" on page 418)

Carr (see "***Carr - Field Description***" on page 344)

Code (see "***Code - Field Description***" on page 352)

Agcy (see "***Agcy Field Description***" on page 338)

POI (see "***POI - Field Description***" on page 424)

Enrollees (see "***Enrollees - Field Description***" on page 370)

Match (see "***Match - Field Description***" on page 387)

% (see "***% (Matching Records) - Field Description***" on page 330)

Discrepancies # (see "***Discrepancies # - Field Description***" on page 361)

Discrepancies Recon (see "***Discrepancies Recon - Field Description***" on page 362)

Discrepancies % (see "***Discrepancies % - Field Description***" on page 362)

Discrepancies Unrecon (see "***Unrecon - Field Description***" on page 454)

Corrective Actions Validated (see "***Corrective Actions Validated - Field Description***" on page 357)

Corrective Actions % (see "***Corrective Actions % - Field Description***" on page 357)

Corrective Actions Unvalidated (see "***Corrective Actions Unvalidated - Field Description***" on page 357)

7. Close the report to return to the 11. Reconciliation Summary page.

Viewing Carrier Discrepancy Listing (Report 12)

The ***12. Carrier Discrepancy Listing*** option on the Reports Selection page allows users to view the Carrier Discrepancy Listing report. This report provides a listing by carrier identification code of carrier and payroll office enrollee records that match, as well as records marked with carrier warning and discrepancy codes.

To View a Carrier Discrepancy Listing Report:

1. Select the ***Reports*** tab on the CLER Main Menu. The Reports Selection page is displayed.

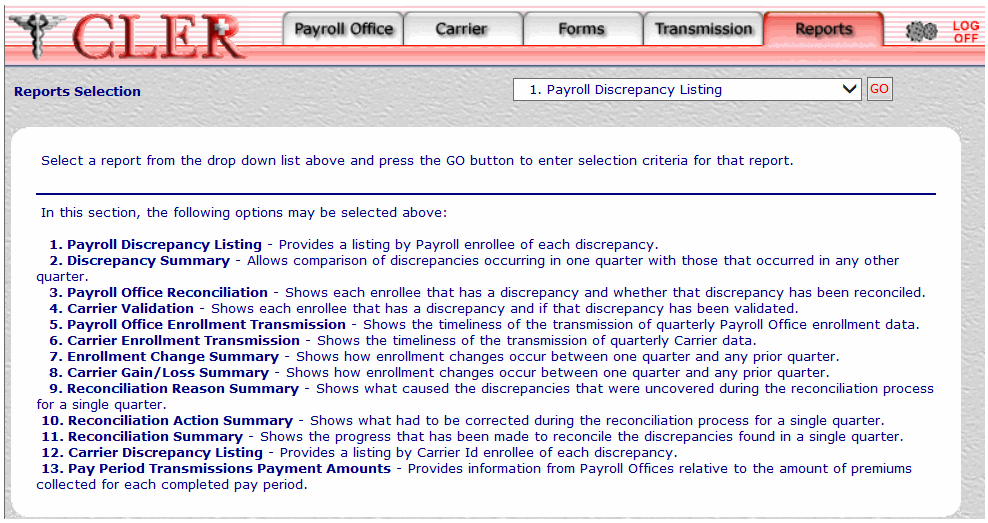


Figure 219: Reports Selection Page

2. On the drop-down menu on the Reports Selection page, select ***12. Carrier Discrepancy Listing.***

3. Select the **GO** button to display the 12. Carrier Discrepancy Listing page.

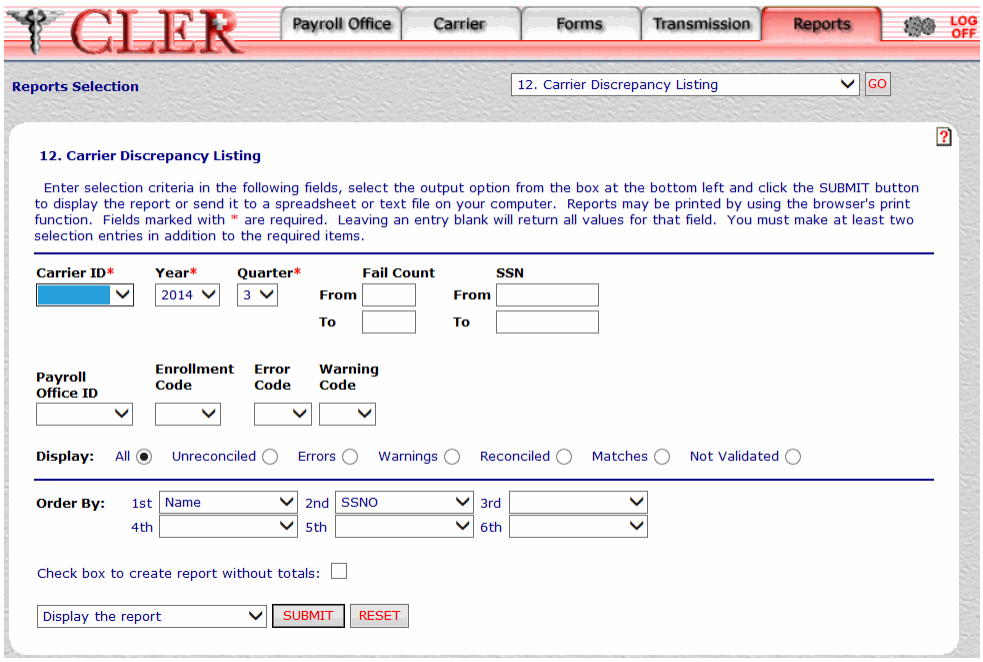


Figure 220: Carrier Discrepancy Listing Page

4. Complete the following fields on the 12. Carrier Discrepancy Listing page:

Carrier ID (see "***Carrier ID - (Carrier Enrollees) Field Instruction***" on page 346)

Year (see "***Year - (Required) Field Instruction***" on page 457)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 429)

Fail Count From (see "***Fail Count From - Field Instruction***" on page 373)

Fail Count To (see "***Fail Count To - Field Instruction***" on page 373)

SSN From (see "***SSN From - Field Instruction***" on page 440)

SSN To (see "***SSN To - Field Instruction***" on page 440)

Payroll Office ID (see "***Payroll Office ID - (Select - Optional) Field Instruction***" on page 420)

Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 371)

Error Code (see "***Error Code - (Select) Field Instruction***" on page 371)

Warning Code (see "***Warning Code - (Select) Field Instruction***" on page 455)

Display (see "***Display - Field Instruction***" on page 364)

Order By 1st (see "***Order By 1st - (Report 12) Field Instruction***" on page 400)

Order By 2nd (see "***Order By 2nd - (Enrollee) Field Instruction***" on page 401)

Order By 3rd (see "***Order By 3rd - (Enrollee) Field Instruction***" on page 404)

Order By 4th (see "***Order By 4th - (Enrollee) Field Instruction***" on page 407)

Order By 5th (see "***Order By 5th - (Enrollee) Field Instruction***" on page 409)

Order By 6th (see "***Order By 6th - (Enrollee) Field Instruction***" on page 411)

Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 348)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report.
   - Save report as a spreadsheet.

- Save report as a text file.

6. Select the **Submit** button to display the Carrier Discrepancy Listing report in the selected format. The Carrier Discrepancy Listing report is displayed.

OR

Select the **Reset** button to clear all data entered.

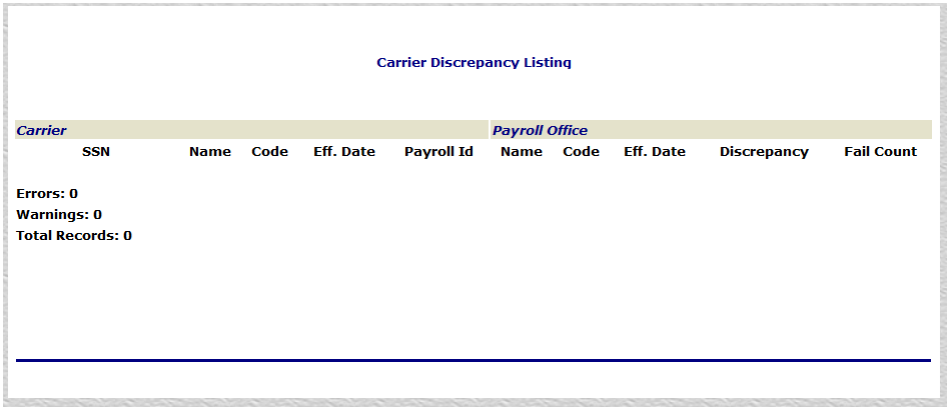


Figure 221: Carrier Discrepancy Listing Report Page

The following fields are displayed on the Carrier section of the Carrier Discrepancy Listing report:

SSN (see "***Carrier SSN - Field Description***" on page 347)

Name (see "***Carrier Name - Field Description***" on page 347)

Code (see "***Carrier Code - Field Description***" on page 345)

Eff. Date (see "***Carrier Eff. Date - Field Description***" on page 346)

Payroll ID (see "***Payroll Office Payroll ID - Field Description***" on page 421)

The following fields are displayed on the Payroll Office section of the Carrier Discrepancy Listing report:

Name (see "***Payroll Office Name - Field Description***" on page 420)

Code (see "***Payroll Office Code - Field Description***" on page 419)

Eff. Date (see "***Payroll Office Eff. Date - Field Description***" on page 419)

Discrepancy (see "***Payroll Office Discrepancy - Field Description***" on page 419)

Fail Count (see "***Payroll Office Fail Count - Field Description***" on page 420)

Errors (see "***Errors - Field Description***" on page 372)

Warnings (see "***Warnings - Field Description***" on page 456)

Total Records (see "***Total Records - (Records) Field Description***" on page 450)

7. Close the report to return to the 12. Carrier Discrepancy Listing page.

Viewing Pay Period Transmissions Payment Amounts (Report 13)

The ***13. Pay Period Transmissions Payment Amounts*** option on the Reports Selection page allows FEHB carriers to see a grand total of all premiums collected or payments amount for enrollees by the payroll office.

To View a Pay Period Transmissions Payment Amount Report:

1. Select the ***Reports*** tab on the CLER Main Menu. The Reports Selection page is displayed.

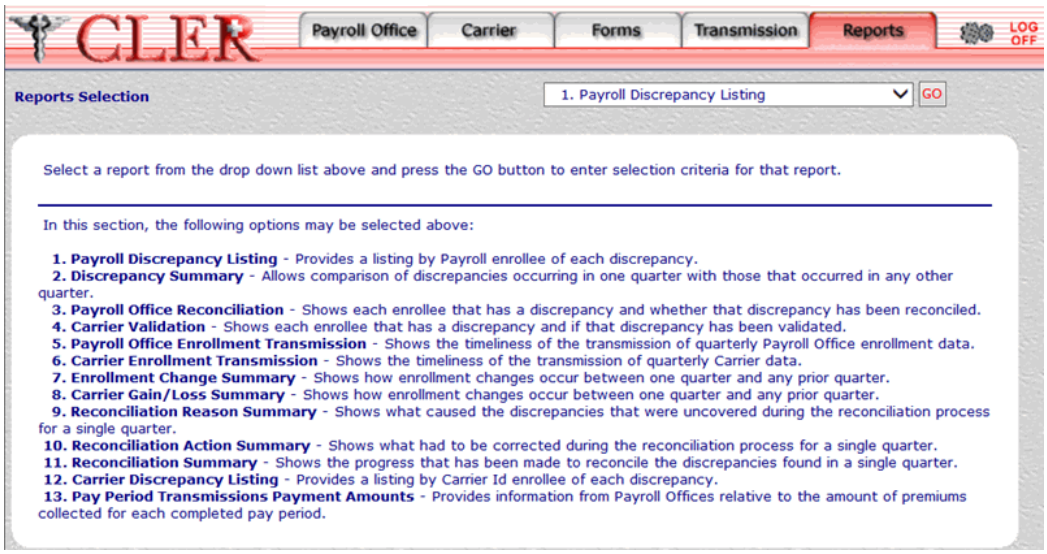


Figure 222: Reports Selection Page

2. On the drop-down menu on the Reports Selection page, select ***13. Pay Period Transmissions Payment Amounts.***

3. Select the **GO** button to display the 13. Pay Period Transmission Payment Amounts page.

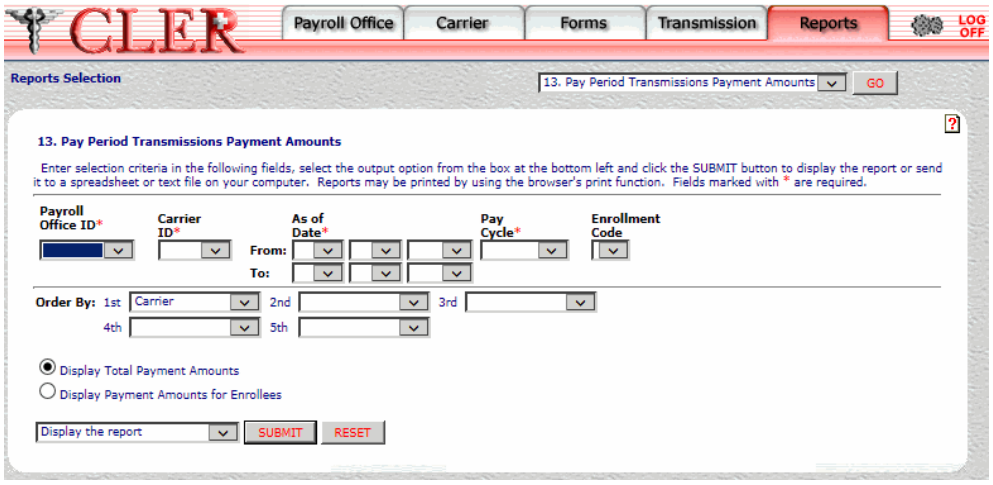


Figure 223: Pay Period Transmissions Payment Amounts Page

4. Complete the following fields on the 13. Pay Period Transmission Payment Amounts page:

   Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 420)

   Carrier ID (see "***Carrier ID - (Select - Required) Field Instruction***" on page 346)

   As of Date From (see "***As of Date From - (Required) Field Instruction***" on page 342)

   As of Date To (see "***As of Date To - (Required) Field Instruction***" on page 343)

   Pay Cycle (see "***Pay Cycle - (Optional) Field Instruction***" on page 418)

   Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 371)

   Order By 1st (see "***Order By 1st - (Report 13) Field Instruction***" on page 400)

   Order By 2nd (see "***Order By 2nd - (Report 13) Field Instruction***" on page 402)

   Order By 3rd (see "***Order By 3rd - (Report 13) Field Instruction***" on page 405)

   Order By 4th (see "***Order By 4th - (Report 13) Field Instruction***" on page 407)

   Order By 5th (see "***Order By 5th - (Report 13) Field Instruction***" on page 409)

   Display Total Payment Amounts

OR

Display Payment Amounts for Enrollees (see "***Display Total Payment Amounts - (Report 13) Field Instruction***" on page 365)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report.
   - Save report as a spreadsheet.
   - Save report as a text file.

6. Select the **Submit** button to display the Carrier Discrepancy Listing report in the selected format. The Carrier Discrepancy Listing report is displayed.

   OR

   Select the **Reset** button to clear all data entered.

Controlled Unclassified Information

Carrier Discrepancy Listing

Carrier Id = and Year = 2013 and Quarter = 1 and Payroll Office = and Enrollment Code =

Carrier					Payroll Office				
SSN	Name	Code	Eff. Date	Payroll Id	Name	Code	Eff. Date	Discrepancy	Fail Count
			08/29/2012						0
			09/13/2012						0
			01/01/2011						0
			01/02/2013						0
			02/15/2012						0
			09/07/2012						0
			01/01/2003						0
			04/04/2012						0
			01/15/2012						0
			08/13/2012						0
			01/16/2013						0
			10/26/2011						0
			01/01/2006						0
			01/01/2006						0
			08/01/2012						0
			02/03/2013						0
			10/26/2011						0

The data in the Carrier Discrepancy Listing report is categorized into the following fields:

Carrier

SSN (see "***Carrier SSN - Field Description***" on page 347)

Name (see "***Carrier Name - Field Description***" on page 347)

Code (see "***Carrier Code - Field Description***" on page 345)

Eff. Date (see "***Carrier Eff. Date - Field Description***" on page 346)

Payroll ID (see "***Payroll Office Payroll ID - Field Description***" on page 421)

Payroll Office

Name (see "***Payroll Office Name - Field Description***" on page 420)

Code (see "***Payroll Office Code - Field Description***" on page 419)

Eff. Date (see "***Payroll Office Eff. Date - Field Description***" on page 419)

Discrepancy (see "***Payroll Office Discrepancy - Field Description***" on page 419)

Fail Count (see "***Payroll Office Fail Count - Field Description***" on page 420)

7. Close the report to return to the 13. Pay Period Transmissions Payment Amounts page.

Viewing Maintenance Records

The ***Maintenance*** option allows users to view schedule and system code records.

This section includes the following topics:

Viewing Schedule Records **279**
Viewing System Code Records **282**

Viewing Schedule Records

The ***Schedules*** option on the Maintenance Main page allows users to view information about CLER processing dates.

To View a Schedule Record:

1. Select the **Gears** on the CLER Main Menu. The Maintenance Main Page is displayed.

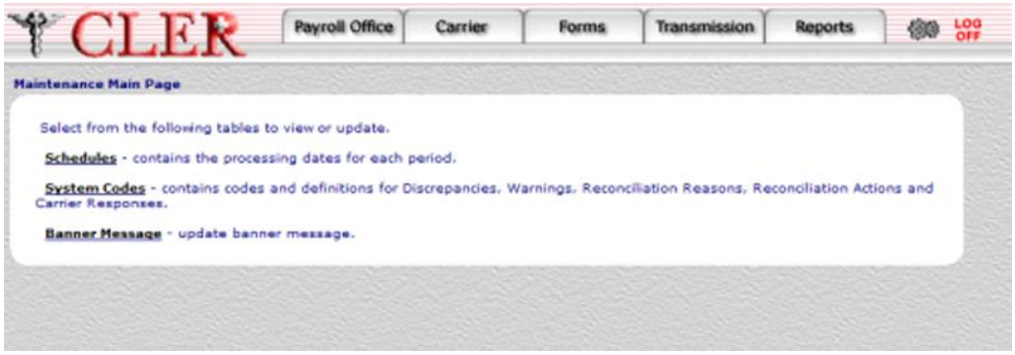


Figure 224: Maintenance Main Page

2. Select ***Schedules*** on the Maintenance Main Page to display the Schedules page.

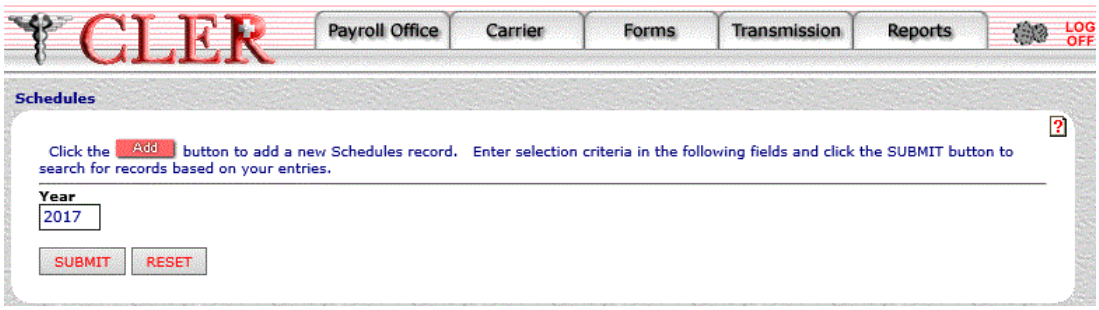


Figure 225: Schedules Page

3. Complete the following field on the Schedules page:

Year (see "***Year - Field Instruction***" on page 457)

4. Select the **Submit** button. The Schedules search results page is displayed.

OR

Select the **Reset** button to clear the form.

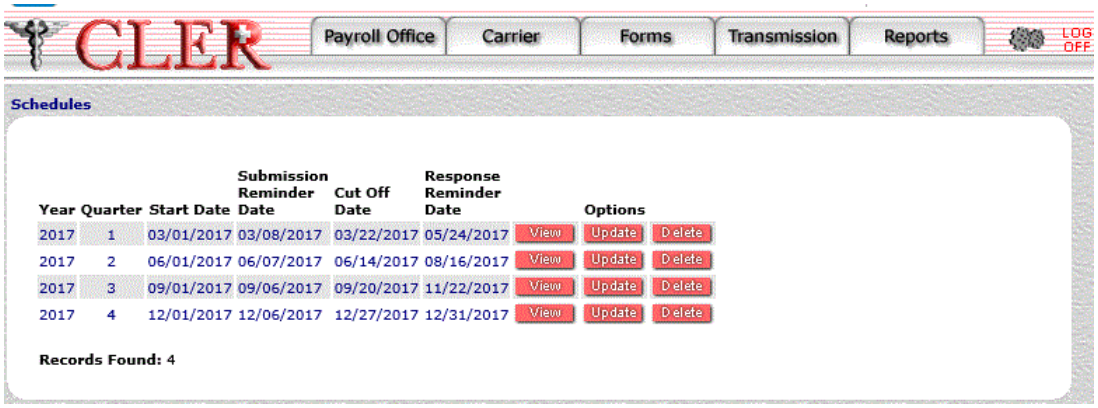


Figure 226: Schedules Search Result Page

The data on the Schedules search results page is categorized into the following fields:

Year (see "***Year - Field Description***" on page 457)

Quarter (see "***Quarter - Field Description***" on page 429)

Start Date (see "***Start Date - (Processed) Field Description***" on page 441)

Submission Reminder Date (see "***Submission Reminder Date - Field Description***" on page 446)

Cut Off Date (see "***Cut Off Date - Field Description***" on page 358)

Response Reminder Date (see "***Response Reminder Date - Field Description***" on page 436)

Options (see "***Options - (View, Update, Delete) Field Description***" on page 394)

5. Select the **View** button next to the applicable record. The Schedules View page is displayed.

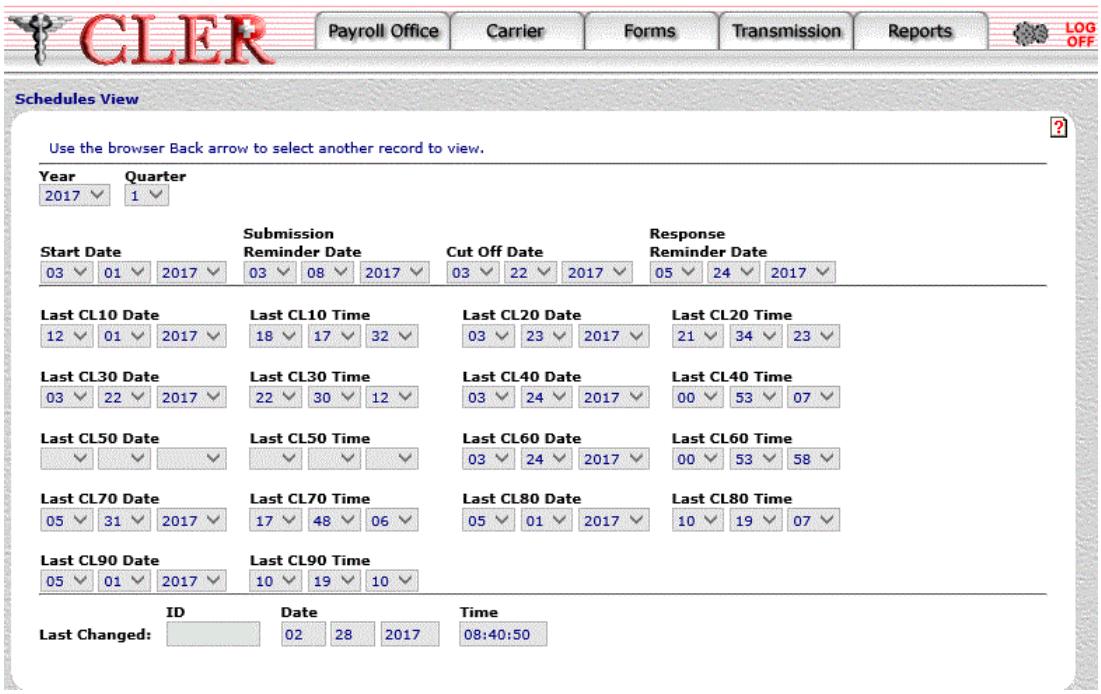


Figure 227: Schedules View Page

The data on the Schedules View page is categorized into the following fields:

Year (see "***Year - (Transmission Year Record) Field Description***" on page 457)

Quarter (see "***Quarter - (Quarter Transmission Record) Field Description***" on page 428)

Start Date (see "***Start Date - Payroll Office Field Description***" on page 441)

Submission Reminder Date (see "***Submission Reminder Date - Field Description***" on page 446)

Cut Off Date (see "***Cut Off Date - Field Description***" on page 358)

Response Reminder Date (see "***Response Reminder Date - Field Description***" on page 436)

Last CL10 Date (see "***Last CL10 Date - Field Description***" on page 382)

Last CL10 Time (see "***Last CL10 Time - Field Description***" on page 382)

Last CL20 Date (see "***Last CL20 Date - Field Description***" on page 382)

Last CL20 Time (see "***Last CL20 Time - Field Description***" on page 382)

Last CL30 Date (see "***Last CL30 Date - Field Description***" on page 382)

Last CL30 Time (see "***Last CL30 Time - Field Description***" on page 382)

Last CL40 Date (see "***Last CL40 Date (System Generated) Field Instructions***" on page 383)

Last CL40 Time (see "***Last CL40 Time - Field Description***" on page 383)

Last CL50 Date (see "***Last CL50 Date - Field Description***" on page 383)
Last CL50 Time (see "***Last CL50 Time - Field Description***" on page 383)
Last CL60 Date (see "***Last CL60 Date - Field Description***" on page 383)
Last CL60 Time (see "***Last CL60 Time - Field Description***" on page 383)
Last CL70 Date (see "***Last CL70 Date Field Instructions***" on page 383)
Last CL70Time (see "***Last CL70 Time - Field Description***" on page 384)
Last CL80 Date (see "***Last CL80 Date - Field Description***" on page 384)
Last CL80 Time (see "***Last CL80 Time - Field Description***" on page 384)
Last CL90 Date (see "***Last CL90 Date - Field Description***" on page 384)
Last CL90 Time (see "***Last CL90 Time - Field Description***" on page 384)
Last Changed ID (see "***Last Changed ID - Field Description***" on page 381)
Last Changed Date (see "***Last Changed Date - Field Description***" on page 381)
Last Changed Time (see "***Last Changed Time - Field Description***" on page 381)

Note: To view another record, select your browser's **Back** button to return to the Schedules search results page, then select the **View** button next to the applicable record.

Viewing System Code Records

The ***System Codes*** option on the Maintenance Main page allows users to view information about system codes, discrepancy codes, warning codes, reconciliation reason codes, reconciliation action codes, and corrective action response codes.

To View a System Code Record:

1. Select the **Gears** button on the CLER Main Menu. The Maintenance Main Page is displayed.

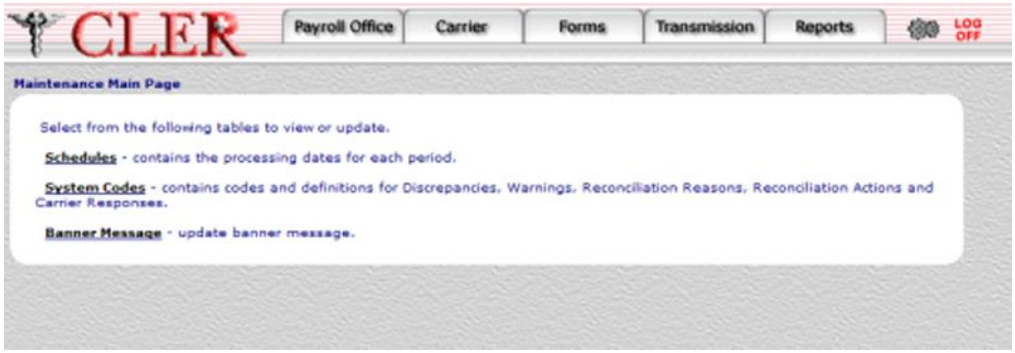


Figure 228: Maintenance Main Page

2. Select ***System Codes*** on the Maintenance Main page to display the System Codes page.

Figure 229: System Codes Main Page

3. Complete the following field to sort search results:

   Display

4. Select the **Submit** button. The Systems Codes Search Results page is displayed.

OR

Select the **Reset** button to change the selection back to ***All***.

Code	Affects Payroll	Affects Carrier	Description	Options		
101	Yes	No	Invalid Payroll Office ID Number On Payroll Office Record	View	Update	Delete
102	No	Yes	Invalid Payroll Office ID Number On Carrier Record	View	Update	Delete
120	Yes	Yes	Invalid/Missing Enrollment Code On Payroll Office Record	View	Update	Delete
121	Yes	Yes	Invalid/Missing Enrollment Code On Carrier Record	View	Update	Delete
140	Yes	No	Missing Enrollee ID Number On Payroll Office Record	View	Update	Delete
141	No	Yes	Missing Enrollee ID Number On Carrier Record	View	Update	Delete
142	Yes	No	Missing Last Name On Payroll Office Record	View	Update	Delete
143	No	Yes	Missing Last Name On Carrier Record	View	Update	Delete
160	Yes	Yes	Enrollee On Carrier Record But No Payroll Office Record Found	View	Update	Delete
161	Yes	Yes	Enrollee On Carrier Record But Reported Under Different Payroll Office	View	Update	Delete
162	Yes	Yes	Enrollee Reported On Carrier Record Under Pay ID, But Found On Another Carr. ID	View	Update	Delete
163	Yes	Yes	Enrollee On Your Payroll Office Record, But No Carrier Record Found	View	Update	Delete
164	Yes	Yes	Enrollee On Payroll Office And Carrier Records But Enrollment Codes Do Not Match	View	Update	Delete
165	Yes	Yes	Enrollee On Multiple Payroll Office Records - Reported To Each P.O.	View	Update	Delete
166	Yes	Yes	Enrollee On Multiple Carrier Records	View	Update	Delete
167	Yes	No	Enrollee ID On Payroll Office More Than Once	View	Update	Delete
201	Yes	Yes	Enrollees Name Does Not Match	View	Update	Delete
202	Yes	No	Withholdings/Contribution Amount Missing Or Incorrrect	View	Update	Delete
203	Yes	No	Invalid Submitting Office Number	View	Update	Delete
301	Yes	No	Invalid As-Of Date	View	Update	Delete
302	Yes	No	The Footer Record Count And/Or Total Amount Not Equal To Detail Count	View	Update	Delete
303	Yes	No	Error Threshold Exceeded	View	Update	Delete
304	Yes	No	No Footer Record	View	Update	Delete
305	Yes	No	Invalid Payroll Office ID On Footer Record	View	Update	Delete
306	Yes	No	Invalid Payroll Office ID On Header record	View	Update	Delete

Figure 230: System Codes Page

The data on the System Codes search results page is categorized into the following fields:

Code (see "***Code - Number Field Description***" on page 353)

Affects Payroll (see "***Affects Payroll - Field Description***" on page 338)

Affects Carrier (on page 338)

Description (on page 361)

Options (see "***Options - (View, Update, Delete) Field Description***" on page 394)

5. Select the **View** button next to the applicable record. The System Codes View page is displayed.

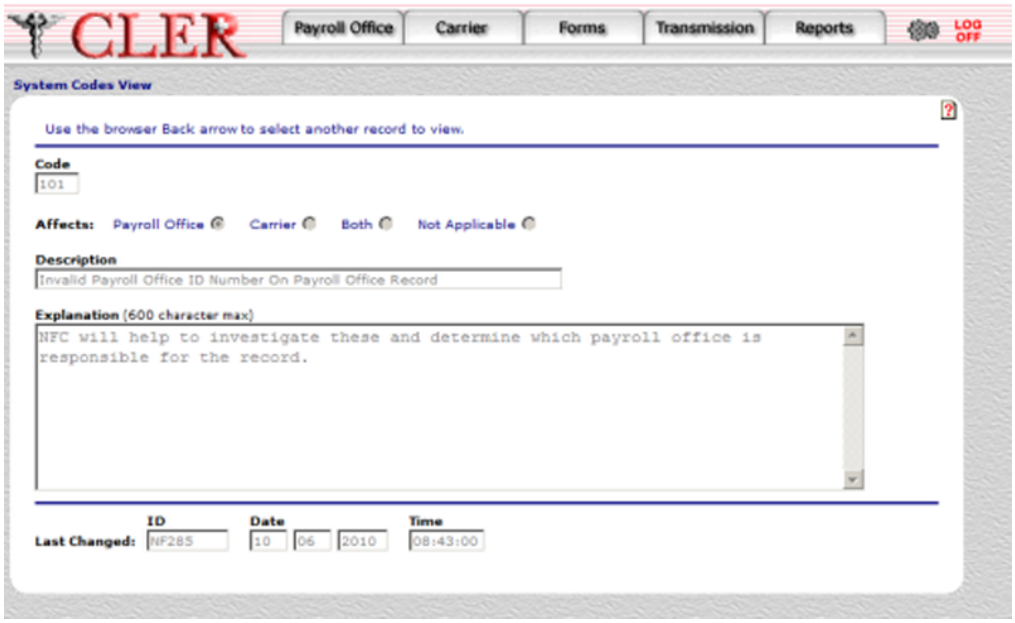


Figure 231: CLER System Codes View Page

The data on the System Codes View page is categorized into the following fields:

Code (see "***Code - Number Field Description***" on page 353)

Affects (on page 338)

Description (see "***Description - (Enrollment) Field Description***" on page 361)

Explanation (see "***Explanation - Field Description***" on page 373)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 381)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 381)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 381)

Note: To view another record, select your browser's **Back** button to return to the System Codes search results page, then select the **View** button next to the applicable record.

CLER Reference Tables

The following reference tables are used throughout the procedure as a guide for various codes and abbreviations:

- ***Discrepancy Codes Table*** (see "***Discrepancy Codes Table***" on page 287)
- ***Warning Codes Table*** (see "***Warning Codes Table***" on page 289)
- ***Payroll Office System Codes Table*** (see "***Payroll Office System Codes Table***" on page 290)
- ***Carrier System Codes Table*** (see "***Carrier System Codes Table***" on page 292)
- ***Reconciliation Reason Codes Table*** (see "***Reconciliation Reason Codes Table***" on page 293)
- ***Reconciliation Action Codes Table*** (see "***Reconciliation Action Codes Table***" on page 297)
- ***Carrier Corrective Action Response Codes Table*** (see "***Carrier Corrective Action Response Codes Table***" on page 298)
- ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (see "***State, U.S. Territory, and Overseas Military Abbreviations Table***" on page 298)
- ***Country Codes Table*** (see "***Country Codes Table***" on page 301)

This section includes the following topics:

Discrepancy Codes Table **287**
Warning Codes Table **289**
Payroll Office System Codes Table **290**
Carrier System Codes Table **292**
Reconciliation Reason Codes Table **293**
Reconciliation Action Codes Table **297**
Carrier Corrective Action Response Codes Table **298**
State, U.S. Territory, and Overseas Military Abbreviations Table **298**
Country Codes Table **301**

Discrepancy Codes Table

A discrepancy code indicates an error occurred during the edit process. A record that has no discrepancies is considered reconciled. The table below lists discrepancy codes for CLER.

Code	Description	Explanation

Code	Description	Explanation
101	Invalid Payroll Office ID Number On Payroll Office Record	NFC will investigate these and determine which payroll office is responsible for the record.
102	Invalid Payroll Office ID Number On Carrier Record	NFC will investigate these and determine which payroll office is responsible for the record.
120	Invalid/Missing Enrollment Code On Payroll Office Record	The enrollment code is for an invalid plan or option or it is missing.
121	Invalid/Missing Enrollment Code On Carrier Record	The enrollment code is for an invalid plan or option or it is missing.
140	Missing Enrollee ID Number On Payroll Office Record	The payroll office record did not contain a value for Enrollee SSN, Alternate SSN, Pseudo SSN, or Other Payroll Office ID.
141	Missing Enrollee ID Number On Carrier Record	The carrier record did not contain a value for Enrollee SSN, Alternate SSN, Pseudo SSN, or Other Payroll Office ID.
142	Missing Last Name On Payroll Office Record	The payroll office record did not contain the last name of the enrollee.
143	Missing Last Name On Carrier Record	The carrier record did not contain the last name of the enrollee.
160	Enrollee On Carrier Record But No Payroll Office Record Found	The carrier reported this enrollee as being under your payroll office but your office reported no record for this enrollee.
161	Enrollee On Carrier Record But Reported Under Different Payroll Office	The enrollee is reported on your payroll office records and a matching carrier record was found for this enrollee, but the carrier record lists the enrollee under a different payroll office.
162	Enrollee Reported On Carrier Record Under Pay ID, But Found In Another Carr. ID	Enrollee is reported on a carrier record under the Carrier ID for the enrollment plan you submitted. However, enrollee record also found on a different Carrier ID.
163	Enrollee On Your Payroll Office Record, But No Carrier Record Found	The payroll office lists this enrollee as having coverage, but there is no corresponding carrier record.
164	Enrollee On Payroll Office And Carrier Records But Enrollment Codes Do Not Match	The enrollee is on a payroll office record and a matching carrier record was found. The enrollment codes of the two records, however, do not match.

Code	Description	Explanation
165	Enrollee On Multiple Payroll Office Records - Reported To Each Payroll Office	This enrollee was included on more than one payroll office record. This situation usually happens when the enrollee is transferring jobs from one Agency to another. Payroll offices that report having this enrollee will receive this error message and should contact the other(s) to resolve this discrepancy. Also, payroll offices that service more than one Agency may have more than one record for an employee. These records will be reported to the servicing payroll office.
166	Enrollee On Multiple Carrier Records	This enrollee was included in the files of one or more carriers. Payroll offices specified in the carrier records will receive this error message and should contact each other to resolve this situation.
167	Enrollee ID On Payroll Office More Than Once	Same enrollee on the same payroll office record more than once.

Warning Codes Table

A warning code indicates that there is a certain condition that was flagged by CLER during the reconciliation process that is not considered a discrepancy error. Agencies, at their discretion, may correct records flagged with these warnings, but the presence of warnings, by themselves, do not make a record unreconciled. The table below lists warning codes for CLER.

Code	Description	Explanation
201	Enrollees Name Does Not Match	For those Agencies that have separate fields for the first, middle, and last name: the first and last name fields of the payroll office's record will be matched to the carrier's record, and, if they are different, there will be a warning. For those Agencies that have one field for the first, middle, and last name: the last name and first name of the carrier record will be compared with the equal number of characters of the last name field of the payroll office record. If they do not match, then there will be a warning.

Code	Description	Explanation
202	Withholdings/Contribution Amount Missing Or Incorrect	The amount of withholdings/contributions does not match the standard expected amount or is missing entirely. Some situations that may result in this warning include: Enrollee transferred from one payroll office to another within a single pay period. Enrollee did not contribute any money that particular pay period. Enrollee record shows an adjustment of previously reported premium amounts.
203	Invalid Submitting Office Number	Submitting office number on payroll office enrollee does not match any payroll office personnel office identifier contact record.

Payroll Office System Codes Table

A payroll office system code indicates the status of a payroll office enrollment data transmission. The following table lists payroll office system codes for CLER.

Code	Description	Explanation
301	Invalid As-Of-Date	Invalid Gregorian date in the As-Of-Date field on the header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An **R** (Replacement) must be in the Processing Code field when the transmission is resubmitted.
302	The Footer Record Count and/or Total Amount not Equal to Detail Count	The Record Count and/or Total Amount listed in the FOOTER record is not equal to the actual count(s) produced from the program. The transmission will be rejected, but the TRAN_RCPT table will be updated. An **R** (Replacement) must be in the Processing Code field when the transmission is resubmitted.
303	Error Threshold Exceeded	The number or percentage of errors exceeded the allowed threshold or no threshold has been set. The transmission will be rejected, but the TRAN_RCPT table will be updated. An **R** (Replacement) must be in the Processing Code field when the transmission is resubmitted.

Code	Description	Explanation
304	No Footer Record	The Footer record was left off the transmission. The transmission will be rejected, but the TRAN_RCPT table will be updated. An **R** (Replacement) must be in the Processing Code field when the transmission is resubmitted.
305	Invalid Payroll Office ID on Footer Record	The Payroll Office ID listed on the Footer record does not match the Payroll Office ID on the Header. The transmission will be rejected, but the TRAN_RCPT table will be updated. An **R** (Replacement) must be in the Processing Code field when the transmission is resubmitted.
306	Invalid Payroll Office ID on Header Record	The Payroll Office ID on the Header record is invalid or not active during this time period. The transmission will be rejected, and no table will be updated. If this is the initial transmission, the processing code will need to be an **I** or **space** (Initial transmission) when the transmission is resubmitted.
307	Invalid Reconciliation Year and/or Quarter	The Reconciliation Year and/or Quarter does not match any record on the Schedule Table. The transmission will be rejected, and no table will be updated. If this is the initial transmission, the processing code will need to be an **I** or **space** (Initial transmission) when the transmission is resubmitted.
308	Invalid Processing Code	Either the Processing Code was invalid or used incorrectly for the type of transmission. The transmission will be rejected, and no table will be updated. If this is the initial transmission, the processing code will need to be an **I** or **space** (Initial transmission) when the transmission is resubmitted.
309	Payroll Office Transmission has Been Replaced	The payroll office transmission has been replaced by another transmission for the applicable year and quarter.
310	Invalid Submission Date	Invalid Gregorian date in the Submission date field on the header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An **R** (Replacement) must be in the Processing Code field when the transmission is resubmitted.

Carrier System Codes Table

A carrier system code indicates the status of a carrier enrollment data transmission. The following table lists carrier system codes for CLER.

Code	Description	Explanation
401	Invalid As-Of Date	Invalid Gregorian date in the As-Of-Date field on the header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An **R** (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
402	The Footer Record Count Not Equal To Detail Count	The Record Count listed in the FOOTER record is not equal to the actual count produced from the program. The transmission will be rejected, but the TRAN_RCPT table will be updated. An **R** (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
403	Error Threshold Exceeded	The number or percentage of errors exceeded the allowed threshold or NO threshold has been set. The transmission will be rejected, but the TRAN_RCPT table will be updated. An **R** (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
404	No Footer Record	The Footer record was left off the transmission. The transmission will be rejected, but the TRAN_RCPT table will be updated. An **R** (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
405	Invalid Carrier ID On Footer Record	The Carrier ID listed on the Footer record does not match the Carrier ID on the Header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An **R** (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
406	Invalid Carrier ID On Header Record	The Carrier ID on the Header record is invalid or not active during this time period. The transmission will be rejected and no table will be updated. If this is the initial transmission, the processing code will need to be an **I** or **space** (for Initial transmission) when the transmission is resubmitted.

Code	Description	Explanation
407	Invalid Reconciliation Year And/Or Quarter	The Reconciliation Year and/or Quarter does not match any on the Schedule Table. The transmission will be rejected and no table will be updated. If this is the initial transmission, the processing code will need to be an **I** or **space** (for Initial transmission) when the transmission is resubmitted.
408	Invalid Processing Code	Either the Processing Code was Invalid or used incorrectly for the type of transmission. The transmission will be rejected and no table will be updated. If this is the initial transmission, the processing code will need to be an **I** or **space** (for Initial transmission) when the transmission is resubmitted.
409	Carrier Transmission Has Been Replaced	The carrier transmission has been replaced by another transmission for the applicable year and quarter.
410	Invalid Submission Date	Invalid Gregorian date in the Submission date field on the header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An **R** (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.

Reconciliation Reason Codes Table

Reconciliation reason codes are used by Agencies to explain the cause of a discrepancy. After an Agency researches a discrepancy, it will enter one of the following codes into CLER to describe the reason the discrepancy occurred:

Code	Description	Explanation
501	Payroll/Personnel Office Did Not Process 2809 Or 2810	Use this code when the 2809, 2810, or Employee Express transaction was not received or not processed by the payroll office. Once the payroll/personnel office has processed the change, it needs to be transmitted to the carrier.
502	Payroll/Personnel Office Did Not Process 2809 Or 2810 Correctly	Use this code when the 2809, 2810, or Employee Express transaction was created but was either entered into the system incorrectly or was not properly processed by the payroll/personnel office. Once the payroll/personnel office has processed the change, it needs to be transmitted to the carrier.

Code	Description	Explanation
520	Carrier Did Not Process 2809 Or 2810	Use this code when the 2809, 2810, or Employee Express transaction was either not received or not processed by the carrier. The payroll/personnel office should then use CLER to create a 2809 or 2810 transaction that will be sent to the carrier. The 2809 or 2810 may be faxed or mailed to the carrier in lieu of using CLER. The 2809 or 2810 that is provided to the carrier is a reissue of the initial form.
521	Carrier Did Not Process 2809 Or 2810 Correctly	Use this code when the 2809, 2810, or Employee Express transaction was not received or processed correctly by the carrier. The payroll/personnel office should then use CLER to create a 2809 or 2810 transaction that will be sent to the carrier. The 2809 or 2810 may be faxed or mailed to the carrier in lieu of using CLER. The 2809 or 2810 that is provided to the carrier is a reissue of the initial form.
522	Carrier Enrolled Person Without Payroll/Personnel Office Authorization	The enrollee sent his/her information directly to the carrier (bypassing the personnel office). The carrier should never enroll an individual unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event this does happen, the payroll office should work with the personnel office, enrollee, and carrier to get proper enrollment paperwork that it can use to update the payroll office system.
523	Carrier Changed Plan - Enrollee Out Of Service Area	The enrollee requested a plan that is not allowed for the area in which he/she lives and the carrier automatically switched the enrollee to the correct plan. This should never happen as the carrier should never make enrollment changes unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event it does happen, the payroll office should work with the personnel office, enrollee, and carrier to get proper enrollment paperwork that it can use to update the payroll office system.

Code	Description	Explanation
524	Carrier Changed Option Without Payroll/Personnel Office Authorization	The enrollee sent his/her information directly to the carrier (bypassing the personnel office) or the carrier automatically changed the option when the enrollee got married or when the last dependent turned 22 years of age. The carrier should never make enrollment changes unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event it does happen, the payroll office should work with the personnel office, enrollee, and carrier to get the proper enrollment paperwork that they can use to update the payroll office system.
525	Carrier Rejected SF 2809 - Enrollee Out Of Service Area	The enrollee requested a plan that is not allowed for the area in which he/she lives so the carrier rejected the enrollment or enrollment change. The payroll office should work with the personnel office and enrollee to get the proper paperwork so that it can update its system and send the enrollment or enrollment change to the carrier.
526	Carrier Terminated Coverage Due To Death Of Enrollee	This should never happen as the carrier should never make enrollment changes unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event it does happen, the payroll office should work with the personnel office, enrollee, and carrier to get proper enrollment paperwork that they can use to update the payroll office system.
540	Enrollee In Unpaid Status - No Deductions For Pay Period	Some payroll offices only send in records for those enrollees for whom premiums were paid (either by deductions from enrollee pay or by contribution from the enrollees Agency). If an enrollee did not pay that pay period but was truly enrolled, then use this code to indicate why the discrepancy occurred. For this situation, no change would be required to either the payroll office's records or the carrier's records.
541	Enrollee Separation Not Submitted Timely	Use this code if the enrollee's separation paperwork is not received promptly by the payroll office and is therefore still reported by the payroll/personnel office (and possibly the carrier) as being enrolled.
542	Enrollee Reported Under Two Payroll Offices - Transfer During Pay Period	Use this code if two different payroll offices or Agencies report an enrollee because that enrollee was transferring-in during the reconciliation pay period. For this situation, no corrective action is required as both payroll offices and Agencies properly reported this enrollee to CLER.

Code	Description	Explanation
550	Transfer In Not Processed Timely By Gaining Payroll Office	Use this code when the gaining payroll office has not processed the transfer in for the enrollee's prior payroll office. Contact the other payroll office so that it can obtain the proper paperwork and update its records.
551	Transfer In Not Processed Timely By OWCP	Use this code if the carrier reports an enrollee as belonging to your payroll office even though that enrollee should be handled by the Office of Workers Compensation Program (OWCP).
552	Transfer In Not Processed Timely By Gaining Payroll Office	Use this code if the carrier reports a retiree as still belonging to the enrollee's prior payroll office. A transfer in to correct both records needs to be processed.
560	Retiree Transfer In Not Processed Timely	This code should be used when the discrepancy is due solely to the difference in extraction date between the payroll office and carriers (refer to the Payroll Office Enrollment File Layout Specifications for more details). For example, the carriers extract their data on the first of the month and a payroll office that pays biweekly might extract data on the fifth. Between the first and fifth of the month, some enrollees may have dropped or changed coverage while others may have enrolled for the first time.
570	Pseudo SSN Used	Enrollees are not required to provide their SSN to the carrier so some enrollees provide a fake or pseudo SSN. This can result in a discrepancy unless the payroll office system also sends the pseudo SSN to CLER so that records can be properly matched. Use this code whenever the discrepancy is due to a pseudo SSN.
580	Other - See Comments	Use this code when no other code is suitable. Comments must be supplied to explain the reconciliation reason.
590	OPM USE ONLY - Multiple Accounts with Shared CSA/CSF number	Civil Service Retirement Claim (CSA/CSF) number shared by more than one annuitant/survivor.
591	OPM USE ONLY - Enrollee Dropped Due to Death/Suspend Status - PO to investigate	Enrollment is dropped due to death or because the case is in suspend status - Payroll office will investigate these and notify carrier of the termination effective date.

Reconciliation Action Codes Table

Reconciliation action codes are used by Agencies to describe which system(s) needs to be updated as part of resolving a discrepancy. After an Agency researches a discrepancy, it will enter one of the codes listed below in CLER.

Code	Description	Explanation
601	Payroll/Personnel Office Correction Required - Processed Through Payroll System	Use this code when only the payroll office's system needs to be updated. At its discretion, the payroll office may send the carrier a confirmation of the fact that the payroll office records were updated.
610	Carrier Correction Required - Submitted By Payroll/Personnel Office Through CLER	Use this code when only the carrier's system needs to be changed and the carrier was informed of those changes through the use of CLER's 2809 or 2810 online forms.
611	Carrier Correction Required - Submitted By Payroll/Personnel Office By Fax	Use this code when only the carrier system needs to be changed and the payroll/personnel office informed the carrier via a fax of the SF 2809 or SF 2810 form.
612	Carrier Correction Required - Submitted By Payroll/Personnel Office By Mail	Use this code when only the carrier system needs to be changed and the payroll/personnel office informed the carrier via a copy of the SF 2809 or SF 2810 through the mail.
620	Correction Required By Carrier And Payroll Office - Processed Through Payroll System	Use this code when both the payroll office and the carrier need to correct their records.
630	Action Required By Another Payroll/Personnel Office	Use this code when the enrollee is no longer the responsibility of your payroll office but has, instead, transferred to another payroll office.
640	No Action Required	Use this code when neither the payroll office nor carrier needs to make changes to their records. For example, this code would be used in conjunction with reconciliation reason codes: 540 Enrollee In Unpaid Status - No Deductions for Pay Period. 542 Enrollee Reported Under Two Payroll Offices - Transfer During The Pay Period. 560 Discrepancy Due to Timing.

Carrier Corrective Action Response Codes Table

Carrier corrective action response codes are entered into CLER by carriers to record agreement with and completion of the requested correction specified by the Agency office, or disagreement with the corrective action specified by the Agency office. The following table lists the carrier corrective action response codes for CLER.

Code	Description	Explanation
701	Agree And Correction Processed Successfully	The carrier would enter this code when they agree with the change requested by the payroll office and have successfully updated its records.
721	Disagree - Enrollee Out Of Servicing Area	The carrier is unable to process the requested change because they do not offer that plan for the area where the individual lives.
722	Disagree - Last Dependent Reached Age 22	The carrier cannot change the individual to a family option because the enrollee no longer has dependents under age 22.
723	Disagree - Enrollment Terminated Due To Non-Payment of Membership Fees	The carrier cannot enroll or update enrollment for this individual because the enrollment has been terminated due to the non-payment of dues.
724	Other - See Comments	Use this code when no other code is suitable. Comments must be supplied to explain the Corrective Action.

State, U.S. Territory, and Overseas Military Abbreviations Table

The following table lists valid state, U.S. territory, and overseas military abbreviations for CLER.

Abbreviation	Description
AA	Armed Forces Americas (except Canada and United States of America)
AE	Armed Forces Africa, Canada, Europe, and Middle East
AK	Alaska
AL	Alabama
AP	Armed Forces Pacific
AR	Arkansas

Abbreviation	Description
AS	American Samoa
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia
DE	Delaware
FL	Florida
FM	Federated States of Micronesia
GA	Georgia
GU	Guam
HI	Hawaii
IA	Iowa
ID	Idaho
IL	Illinois
IN	Indiana
KS	Kansas
KY	Kentucky
LA	Louisiana
MA	Massachusetts
MD	Maryland
ME	Maine
MH	Marshall Islands
MI	Michigan
MN	Minnesota
MO	Missouri

Abbreviation	Description
MP	Northern Mariana Islands
MS	Mississippi
MT	Montana
NC	North Carolina
ND	North Dakota
NE	Nebraska
NH	New Hampshire
NJ	New Jersey
NM	New Mexico
NV	Nevada
NY	New York
OH	Ohio
OK	Oklahoma
OR	Oregon
PA	Pennsylvania
PR	Puerto Rico
PW	Palau
RI	Rhode Island
SC	South Carolina
SD	South Dakota
TN	Tennessee
TX	Texas
UT	Utah
VA	Virginia
VI	Virgin Islands

Abbreviation	Description
VT	Vermont
WA	Washington
WI	Wisconsin
WV	West Virginia
WY	Wyoming

Country Codes Table

The following table lists valid country codes for CLER.

Country	Code
Afghanistan	AF
Albania	AL
Algeria	AG
American Samoa	AQ
Andorra	AN
Angola	AO
Anguilla	AV
Antarctica	AY
Antigua and Barbuda	AC
Argentina	AR
Armenia	AM
Aruba	AA
Ashmore and Cartier Islands	AT
Australia	AS
Austria	AU
Azerbaijan	AJ
Bahamas, The	BF

Country	Code
Bahrain	BA
Baker Island	FQ
Bangladesh	BG
Barbados	BB
Bassas da India	BS
Belarus	BO
Belgium	BE
Belize	BH
Benin	BN
Bermuda	BD
Bhutan	BT
Bolivia	BL
Bosnia and Herzegovina	BK
Botswana	BC
Bouvet Island	BV
Brazil	BR
British Indian Ocean Territory	IO
British Virgin Islands	VI
Brunei	BX
Bulgaria	BU
Burkina Faso	UV
Burma	BM
Burundi	BY
Cambodia	CB
Cameroon	CM

Country	Code
Canada	CA
Cape Verde	CV
Cayman Islands	CJ
Central African Republic	CT
Chad	CD
Chile	CI
China	CH
Christmas Island	KT
Clipperton Island	IP
Cocos (Keeling) Islands	CK
Colombia	CO
Comoros	CN
Congo, Democratic Republic of the	CG
Congo, Republic of the	CF
Cook Islands	CW
Coral Sea Islands	CR
Costa Rica	CS
Cote d'Ivoire	IV
Croatia	HR
Cuba	CU
Cyprus	CY
Czech Republic	EZ
Denmark	DA
Djibouti	DJ
Dominica	DO
Dominican Republic	DR

Country	Code
East Timor	TT
Ecuador	EC
Egypt	EG
El Salvador	ES
Equatorial Guinea	EK
Eritrea	ER
Estonia	EN
Ethiopia	ET
Europa Island	EU
Falkland Islands (Islas Malvinas)	FA
Faroe Islands	FO
Fiji	FJ
Finland	FI
France	FR
French Guiana	FG
French Polynesia	FP
French Southern and Antarctic Lands	FS
Gabon	GB
Gambia, The	GA
Gaza Strip	GZ
Georgia	GG
Germany	GM
Ghana	GH
Gibraltar	GI
Glorioso Islands	GO

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Greece	GR
Greenland	GL
Grenada	GJ
Guadeloupe	GP
Guatemala	GT
Guernsey	GK
Guinea	GV
Guinea-Bissau	PU
Guyana	GY
Haiti	HA
Heard Island and McDonald Islands	HM
Honduras	HO
Hong Kong	HK
Howland Island	HQ
Hungary	HU
Iceland	IC
India	IN
Indonesia	ID
Iran	IR
Iraq	IZ
Ireland	EI
Israel	IL
Italy	IT
Jamaica	JM
Jan Mayen	JN
Japan	JA

Country	Code
Jarvis Island	DQ
Jersey	JE
Johnston Atoll	JQ
Jordan	JO
Juan de Nova Island	JU
Kazakhstan	KZ
Kenya	KE
Kingman Reef	KQ
Kiribati	KR
Korea, North	KN
Korea, South	KS
Kuwait	KU
Kyrgyzstan	KG
Laos	LA
Latvia	LG
Lebanon	LE
Lesotho	LT
Liberia	LI
Libya	LY
Liechtenstein	LS
Lithuania	LH
Luxembourg	LU
Macau	MC
Macedonia, The Republic of	MK
Madagascar	MA

Country	Code
Malawi	MI
Malaysia	MY
Maldives	MV
Mali	ML
Malta	MT
Man, Isle of IM	IM
Marshall Islands	RM
Martinique	MB
Mauritania	MR
Mauritius	MP
Mayotte	ME
Mexico	MX
Micronesia, Federated States of	FM
Midway Islands	MQ
Moldova	MD
Monaco	MN
Mongolia	MG
Montserrat	MH
Morocco	MO
Mozambique	MZ
Namibia	WA
Nauru	NR
Navassa Island	BQ
Nepal	NP
Netherlands	NL
Netherlands Antilles	NT

Country	Code
New Caledonia	NC
New Zealand	NZ
Nicaragua	NU
Niger	NG
Nigeria	NI
Niue	NE
Norfolk Island	NF
Northern Mariana Islands	CQ
Norway	NO
Oman	MU
Pakistan	PK
Palau	PS
Palmyra Atoll	LQ
Panama	PM
Papua New Guinea	PP
Paracel Islands	PF
Paraguay	PA
Peru	PE
Philippines	RP
Pitcairn Islands	PC
Poland	PL
Portugal	PO
Qatar	QA
Reunion	RE
Romania	RO

Country	Code
Russia	RS
Rwanda	RW
Saint Helena	SH
Saint Kitts and Nevis	SC
Saint Lucia	ST
Saint Pierre and Miquelon	SB
Saint Vincent and the Grenadines	VC
Samoa	WS
San Marino	SM
Sao Tome and Principe	TP
Saudi Arabia	SA
Senegal	SG
Serbia and Montenegro	YI
Seychelles	SE
Sierra Leone	SL
Singapore	SN
Slovakia	LO
Slovenia	SI
Solomon Islands	BP
Somalia	SO
South Africa	SF
South Georgia and the Islands	SX
Spain	SP
Spratly Islands	PG
Sri Lanka	CE
Sudan	SU

Country	Code
Suriname	NS
Svalbard	SV
Swaziland	WZ
Sweden	SW
Switzerland	SZ
Syria	SY
Taiwan	TW
Tajikistan	TI
Tanzania	TZ
Thailand	TH
Togo	TO
Tokelau	TL
Tonga	TN
Trinidad and Tobago	TD
Tromelin Island	TE
Tunisia	TS
Turkey	TU
Turkmenistan	TX
Turks and Caicos Islands	TK
Tuvalu	TV
Uganda	UG
Ukraine	UP
United Arab Emirates	AE
United Kingdom	UK
United States	US

Country	Code
Uruguay	UY
Uzbekistan	UZ
Vanuatu	NH
Vatican City	VT
Venezuela	VE
Vietnam	VM
Wake Island	WQ
Wallis and Futuna	WF
West Bank	WE
Western Sahara	WI
Yemen	YM
Zambia	ZA
Zimbabwe	ZI

Embedded Topics

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%
System generated
Displays the percentage of matching records to enrollee records

Accepted - Field Description

Accepted
System generated
Displays the number of transmissions that passed front-end edits and were accepted for processing.

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Action - Field Description

Action
System generated
Displays the reconciliation action code. Refer to the Reconciliation Action Codes Table for a list and descriptions of these codes

Action Code - Field Instruction

Action Code
Optional
Select the drop-down menu and select the reconciliation action code. Refer to the Reconciliation Action Codes Table for a list and descriptions of these codes.

Address - Carrier Field Description

Address
System generated
Displays the street or P.O. Box address of the carrier

Address - Payroll Office Field Description

Address
System generated
Displays the street or P.O. Box address of the payroll office

Address Line 1 - Carrier Contact Field Description

Address Line 1
System generated
Displays the first line of the carrier contact's street or P.O. Box address

Address Line 1 - Carrier Field Description

Address Line 1
System generated
Displays the first line of the carrier's street or P.O. Box address

Address Line 1 - Carrier Plan Contact Field Description

Address Line 1
System generated
Displays the first line of the carrier plan contact's street or P.O. Box address

Address Line 1 - Coordinator Field Description

Address Line 1
System generated
Displays the first line of the domestic or foreign street, P.O. Box, rural route, etc., address of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage

Address Line 1 - Enrollee Field Description

Address Line 1

System generated
Displays the first line of the enrollee's domestic or foreign street, apartment number, P.O. Box, or rural route address

Address Line 1 - Enrollee/Survivor Field Description

Address Line 1
System generated
Displays the first line of the enrollee or survivor annuitant's new domestic or foreign street, apartment number, P.O. Box, or rural route address

Address Line 1 - Form 2809 Add (Part A) Field Instruction

Address Line 1
Required, alphanumeric, 35 positions
Enter the first line of the enrollee's street or P.O. Box address.

Address Line 1 - Form 2809 Add (Part I) Field Instruction

Address Line 1
Required, alphanumeric, 35 positions maximum
Enter the first line of the domestic or foreign street, P.O. Box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Address Line 1 - Form 2810 Add (Part A) Field Instruction

Address Line 1
Required, alphanumeric, 35 positions
Enter the first line of the enrollee's domestic or foreign street, apartment or P.O. Box, rural route, etc., if applicable.

Address Line 1 - Form 2810 Add (Parts B through F) Field Instruction

Address Line 1
Conditional, alphanumeric, 35 positions
If the ***Change of Enrollee Information*** radio button is selected, and the first line of the street address for the enrollee or survivor annuitant is different than the address listed in Part A-Address Line 1, enter the first line of the enrollee's domestic or foreign street, apartment or P.O. Box, rural route, etc., if applicable.

Address Line 1 - Payroll Office Contact Field Description

Address Line 1
System generated
Displays the first line of the payroll office contact's street or P.O. Box address.

Address Line 1 - Payroll Office Contacts Add Field Instruction

Address Line 1
Optional, alphanumeric, 40 positions
Enter the first line of the payroll office's street or P.O. Box address.

Address Line 1 - Payroll Office Field Description

Address Line 1
System generated
Displays the first line of the payroll office's street or P.O. Box address

Address Line 1 - Personnel Office Contact Field Description

Address Line 1
System generated
Displays the first line of the personnel office contact's street or P.O. Box address

Address Line 2 - Carrier Contact Field Description

Address Line 2
System generated
Displays the second line of the carrier contact's street or P.O. Box address

Address Line 2 - Carrier Field Description

Address Line 2
System generated
Displays the second line of the carrier's street or P.O. Box address

Address Line 2 - Carrier Plan Contact Field Description

Address Line 2
System generated
Displays the second line of the carrier plan contact's street or P.O. Box address

Address Line 2 - Coordinator Field Description

Address Line 2
System generated
Displays the second line of the domestic or foreign street, P.O. Box, rural route, etc., address of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage

Address Line 2 - Enrollee Field Description

Address Line 2
System generated
Displays the second line of the enrollee's domestic or foreign street, apartment number, P.O. Box, or rural route address

Address Line 2 - Enrollee/Survivor Field Description

Address Line 2
System generated
Displays the second line of the enrollee or survivor annuitant's new domestic or foreign street, apartment number, P.O. Box, or rural route address

Address Line 2 - Form 2809 Add (Part A) Field Instruction

Address Line 2
Required, alphanumeric, 35 positions
Enter the second line of the enrollee's street or P.O. Box address.

Address Line 2 - Form 2809 Add (Part I) Field Instruction

Address Line 2
Conditional, alphanumeric, 35 positions maximum
If applicable, enter the second line of the domestic or foreign street, P.O. box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Address Line 2 - Form 2810 Add (Part A) Field Instruction

Address Line 2
Required, alphanumeric, 35 positions

Enter the second line of the enrollee's domestic or foreign street, apartment or P.O. Box, rural route, etc., if applicable.

Address Line 2 - Form 2810 Add (Parts B through F) Field Instruction

Address Line 2
Conditional, alphanumeric, 35 positions
If the ***Change of Enrollee Information*** radio button is selected, and the second line of the street address for the enrollee or survivor annuitant is different than the address listed in Part A-Address Line 2, enter the second line of the enrollee's domestic or foreign street, apartment or P.O. Box, rural route, etc., if applicable.

Address Line 2 - Payroll Office Contact Field Description

Address Line 2
System generated
Displays the second line of the payroll office contact's street or P.O. Box address

Address Line 2 - Payroll Office Contacts Add Field Instruction

Address Line 2
Optional, alphanumeric, 40 positions
Enter the second line of the payroll office's street or P.O. Box address.

Address Line 2 - Payroll Office Field Description

Address Line 2
System generated
Displays the second line of the payroll office's street or P.O. Box address

Address Line 2 - Personnel Office Contact Field Description

Address Line 2
System generated
Displays the second line of the personnel office contact's street or P.O. Box address

Address Line 2 - Personnel Office Contacts Add Field Instruction

Address Line 2
Optional, alphanumeric, 40 positions maximum
Enter the second line of the personnel office's street or P.O. Box address

Address Line 3 - Carrier Contact Field Description

Address Line 3
System generated
Displays the third line of the carrier contact's street or P.O. Box address

Address Line 3 - Carrier Field Description

Address Line 3
System generated
Displays the third line of the carrier's street or P.O. Box address

Address Line 3 - Carrier Plan Contact Field Description

Address Line 3
System generated
Displays the third line of the carrier plan contact's street or P.O. Box address

Address Line 3 - Coordinator Field Description

Address Line 3
System generated
Displays the third line of the domestic or foreign street, P.O. Box, rural route, etc., address of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage

Address Line 3 - Enrollee Field Description

Address Line 3
System generated
Displays the third line of the enrollee's domestic or foreign street, apartment number, P.O. Box, or rural route address

Address Line 3 - Enrollee/Survivor Field Description

Address Line 3
System generated
Displays the third line of the enrollee or survivor annuitant's new domestic or foreign street, apartment number, P.O. Box, or rural route address

Address Line 3 - Form 2809 Add (Part A) Field Instruction

Address Line 3
Required, alphanumeric, 35 positions
Enter the third line of the enrollee's street or P.O. Box address.

Address Line 3 - Form 2809 Add (Part I) Field Instruction

Address Line 3
Conditional, alphanumeric, 35 positions maximum
If applicable, enter the third line of the domestic or foreign street, P.O. Box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Address Line 3 - Form 2810 Add (Part A) Field Instruction

Address Line 3
Required, alphanumeric, 35 positions
Enter the third line of the enrollee's domestic or foreign street, apartment or P.O. Box, rural route, etc., if applicable.

Address Line 3 - Form 2810 Add (Parts B through F) Field Instruction

Address Line 3
Conditional, alphanumeric, 35 positions
If the ***Change of Enrollee Information*** radio button is selected, and the third line of the street address for the enrollee or survivor annuitant is different than the address listed in Part A-Address Line 3, enter the third line of the enrollee's domestic or foreign street, apartment or P.O. Box, rural route, etc., if applicable.

Address Line 3 - Payroll Office Contact Field Description

Address Line 3
System generated
Displays the third line of the payroll office contact's street or P.O. Box address

Address Line 3 - Payroll Office Contacts Add Field Instruction

Address Line 3
Optional, alphanumeric, 40 positions
Enter the third line of the payroll office's street or P.O. Box address.

Address Line 3 - Payroll Office Field Description

Address Line 3
System generated
Displays the third line of the payroll office's street or P.O. Box address

Address Line 3 - Personnel Office Contact Field Description

Address Line 3
System generated
Displays the third line of the personnel office contact's street or P.O. Box address
Affects
System generated
Selected radio button indicates if the system code affects the **`Payroll Office`**, **`Carrier`**, **`Both`** or is **`Not Applicable`**
Affects Carrier
System generated
Indicates if this code affects the carrier
`Yes` - This code affects the carrier
`No` - This code does not affect the carrier

Affects Payroll - Field Description

Affects Payroll
System generated
Indicates if this code affects the payroll office
`Yes` - This code affects the payroll office
`No` - This code does not affect the payroll office

Agcy Field Description

Agcy
System generated
Displays the Agency identification code

Agency - Enrollee Field Description

Agency
System generated
Displays the Agency identification code of the office where the enrollee is employed

Agency - Enrollee Field Instruction

Agency
Required, alphanumeric, four positions
Enter the Agency identification code of the office where the enrollee is employed.

Agency - Field Instruction

Agency
Optional, alphanumeric, four positions
Enter the Agency identification code of the office where the enrollee is employed (example: **AG90** for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Agency - with Note (No Example) Field Description

Agency
System generated
Displays the Agency identification code of the office where the enrollee is employed

Note: The Other ID field is displayed in lieu of the this field when **24900002, 24900003**, or **160099xx** is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

Agency ID - Field Description

Agency ID
System generated
Displays the Agency identification code of the enrollee's employing, personnel, or point-of-contact office (Example: **AG90** for U.S. Department of Agriculture, Office of the Chief Financial Officer)

Agency ID - Field Instruction

Agency ID
Optional, alphanumeric, four positions
Enter the Agency identification code of the office where the enrollee is employed (example: **AG90** for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Agency Name - Field Description

Agency Name
System generated

Displays the name of the employing, personnel, or point-of-contact that is responsible for coordinating the enrollee's FEHB coverage

Agency Name - Form 2809 Add (Part I) Field Instruction

Agency Name
Required, alphanumeric, 35 positions maximum
Enter the name of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Agency Use - Field Description

Agency Use
System generated
Displays remarks used by the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee’s FEHB coverage

Agency Use - Field Instruction

Agency Use
Optional
Enter remarks from the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee’s FEHB coverage

Amount - Field Description

Amount
System generated
Displays the enrollee's withholding/premium amounts received

Amount - Field Description

Amount
Optional
Enter the enrollee's withholding/premium amounts for the applicable enrollment code.

Amount - Pay Period Field Description

Amount
System generated

Displays the enrollee's withholding/premium per pay period

Amount Received - Field Description

Amount Received
System generated
Displays the total withholding/premium amounts received

Amount Sent - Field Description

Amount Sent
System generated
Displays the total withholding/premium amounts sent, as indicated on the transmission file header record

Annuitant Indicator - Field Description

Annuitant Indicator
System generated
Displays the annuitant indicator symbol:
`I` indicates Interim
`R` indicates Regular
`S` indicates Suspend

Annuity Claim # - Form 2810 Add (Part A) Field Instruction

Annuity Claim #
Optional, alphanumeric, nine positions
Enter the civil service annuitant (CSA) number assigned to the enrollee by OPM.

Annuity Claim # - Form 2810 View (Part A) Field Description

Annuity Claim #
System generated
Displays the civil service annuitant (CSA) number assigned to the enrollee by OPM

As of Date - (Required) Field Instruction

As of Date
Required

Select the first drop-down menu and select the month, select the second drop-down menu and select the day and select the third drop-down menu and select the year.

As of Date - Carrier Transmissions Field Description

As of Date
System generated
Displays the date the transmitted enrollment data was extracted

As of Date - Field Description

As of Date
System generated
Displays the date the transmitted enrollment data was extracted from the payroll/personnel office database

As of Date for Pay Period Transmission From - Field Instruction

As of Date for Pay Period Transmission From
Optional
Select the first drop-down menu and select the month, select the second drop-down menu and select the day, and select the third drop-down menu and select the year.

As of Date for Pay Period Transmission To - Field Instruction

As of Date for Pay Period Transmission To
Optional
Select the first drop-down menu and select the month, select the second drop-down menu and select the day and select the third drop-down menu and select the year.

As of Date From - (Required) Field Instruction

As of Date From
Required
Select the first drop-down menu and select the month, select the second drop-down menu and select the day and select the third drop-down menu and select the year.

As of Date From - Field Instruction

As of Date From

Optional
Select the first drop-down menu and select the month, select the second drop-down menu and select the day and select the third drop-down menu and select the year.

As of Date To - (Required) Field Instruction

As of Date To
Required
Select the first drop-down menu and select the month, select the second drop-down menu and select the day and select the third drop-down menu and select the year.

As of Date To - Field Instruction

As of Date To
Optional
Select the first drop-down menu and select the month, select the second drop-down menu and select the day and select the third drop-down menu and select the year.

Authorized Official - First Name (SF 2809) Field Description

Authorized Official - First Name
System generated
Displays the first name of the Agency official who is authorized to sign the Standard Form 2809, Health Benefits Election Form

Authorized Official - Initial (SF 2809) Field Description

Authorized Official - Initial
System generated
Displays the middle initial of the Agency official who is authorized to sign the Standard Form 2809, Health Benefits Election Form

Authorized Official - Last Name (SF 2809) Field Description

Authorized Official - Last Name
System generated
Displays the last name of the Agency official who is authorized to sign the Standard Form 2809, Health Benefits Election Form

Authorized Official Date Signed - Form 2810 Add (Part H) Field Instruction

Authorized Official Date Signed
Required, alphanumeric, eight positions
Enter the date (MMDDYYYY) the authorized Agency official signed the document.

Authorized Official Date Signed - Form 2810 View (Part H) Field Description

Authorized Official Date Signed
System generated
Displays the date (MMDDYYYY) the authorized Agency official signed the document

Authorized Official First Name - Form 2809 Add (Part I) Field Instruction

Authorized Official - First Name
Required, alphanumeric, 17 positions maximum
Enter the first name of Agency Official who is authorized to sign the Form 2809.

Authorized Official Initial - Form 2809 Add (Part I) Field Instruction

Authorized Official - Initial
Optional, alphanumeric, one position
Enter the middle initial of Agency Official who is authorized to sign the Form 2809.

Authorized Official Last Name - Form 2809 Add (Part I) Field Instruction

Authorized Official - Last Name
Required, alphanumeric, 25 positions
Enter the last name of Agency Official who is authorized to sign the Form 2809. If the Agency Official has a title (e.g., Jr, Sr, I, II, or II), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Carr - Field Description

Carr
System generated
Displays the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit

Carrier - (Drop-down - Required) Field Instruction

Carrier
Required
Select the drop-down menu and select the carrier code.

Carrier - (Drop-down) Field Instruction

Carrier
Optional
Select the drop-down menu and select the carrier code.

Carrier - Field Description

Carrier
System generated
Displays the carrier code

Carrier - Field Instruction

Carrier
Optional, alphanumeric, four positions
Enter the carrier code.

Carrier Code - Field Description

Carrier Code
System generated
Displays the enrollment code submitted by the carrier

Carrier Comments - Field Description

Carrier Comments
System generated
Display the carrier's comments

Carrier Comments - Field Instruction

Carrier Comments
Optional, 400 characters maximum
Enter comments about the reconciliation actions for this record.

Carrier Eff. Date - Field Description

Carrier Eff. Date
System generated
Displays the enrollment effective date (MM/DD/YYYY) submitted by the carrier

Carrier Errors - Field Description

Carrier Errors
System generated
Displays the count of errors that have reconciliation reason and action code entered that indicate the carrier is at fault

Carrier ID - (Carrier Enrollees) Field Instruction

Carrier ID
Required
Select the drop-down menu and select the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Carrier ID - (Select - Required) Field Instruction

Carrier ID
Required
Select the drop-down menu and select the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Carrier ID - Field Description

Carrier ID
System generated
Displays the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit

Carrier ID - Field Instruction

Carrier ID
Optional, alphanumeric, seven positions
Enter the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Carrier Name - Field Description

Carrier Name
System generated
Displays the enrollee's name submitted by the carrier

Carrier SSN - Field Description

Carrier SSN
System generated
Displays the enrollee's SSN submitted by the carrier

Change (#) - Field Description

Change (#)
System generated
Displays the change in the number of enrollment code changes from the prior quarter to the current quarter

Change (%) - Field Description

Change (%)
System generated
Displays the change in percent of enrollment code changes from the prior quarter to the current quarter

Change Actual - Field Description

Change Actual
System generated
Displays the number that indicates the actual changes in values between prior and current reconciliation years/quarters

Change Password - Field Instruction

Change Password
To change the password, select the checkbox. The Change Your Password pop-up window is displayed, prompting the user to enter and confirm the new password. Type the new password in the Enter New Password and Confirm New Password fields and select **Submit.**

Change Percent - Field Description

Change Percent
System generated
Displays the percent changes in values between prior and current reconciliation years/quarters

Check Box to Create Report Without Totals - Field Instruction

Check Box to Create Report Without Totals
Optional
Select this check box to omit totals from the report.

City - Carrier Contact Field Description

City
System generated
Displays the city of the carrier contact

Note: If the address is an overseas military address, this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Carrier Field Description

City
System generated
Displays the city of the carrier

Note: If the address is an overseas military address, this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Carrier Field Instruction

City
Optional, alphanumeric, 25 positions maximum
Enter the city of the carrier

Note: If the address is an overseas military address, type **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Carrier Plan Contact Field Description

City
System generated
Displays the city of the carrier plan contact

Note: If the address is an overseas military address, this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Coordinator Field Description

City
System generated
Displays the name of the domestic or foreign city for the enrollee's employing, personnel, or point-of-contact office

Note: If the address is an overseas military address this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Enrollee Field Description

City
System generated
Displays the name of the enrollee's domestic or foreign city

Note: If the address is an overseas military address this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Enrollee/Survivor Field Description

City
System generated
Displays the new name of the city for the enrollee or survivor annuitant's address.

Note: If the address is an overseas military address this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Form 2809 Add (Part I) Field Instruction

City
Required, alphanumeric, 23 positions maximum
Enter the name of the domestic or foreign city for the enrollee's employing, personnel, or point-of-contact office.

Note: If the address is an overseas military address, type **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Form 2809/2810 Add (Part A) Field Instruction

City
Required, alphanumeric, 23 positions maximum
Enter the name of the enrollee's domestic domestic or foreign city.

Note: If the address is an overseas military address, type **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Form 2810 Add (Parts B thru F) Field Instruction

City
Conditional, alphanumeric, 23 positions maximum
If the ***Change of Enrollee Information*** radio button is selected, and the domestic or foreign city for the enrollee or survivor annuitant's address is different than the city listed in Part A- City, type the name of the new city for the enrollee or survivor annuitant's address. If the address is an overseas military address, type FPO for fleet post office or APO for army post office in lieu of the city.

City - Payroll Office Field Description

City
System generated
Displays the city of the payroll office

Note: If the address is an overseas military address, this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Payroll Office Field Instruction

City
Optional, alphanumeric, 25 positions maximum
Enter the city of the payroll office.

Note: If the address is an overseas military address, type **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Personnel Office Contact Field Description

City
System generated
Displays the name of the personnel office contact's city

Note: If the address is an overseas military address, this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Personnel Office Contacts Add Field Instruction

City
Optional, alphanumeric, 25 positions maximum
Enter the city of the personnel office.

Note: If the address is an overseas military address, type **FPO** for fleet post office or **APO** for army post office in lieu of the city.

Code - (Form 2809 Part A Continued) Field Instruction

Code
Optional
Select the drop-down menu and choose the code used to identify the family member's relation to the enrollee.
The relationship codes are as follows:
01 - Spouse
09 - Adopted Child
10 - Foster Child
17 - Stepchild
19 - Unmarried dependent child under age 22
99 - Eligible unmarried disabled child over age 22

Code - Carrier Enrollment Code Field Description

Code
System generated
Displays the enrollment code submitted by the carrier

Code - Carrier Transmissions Search Results Field Description

Code
System generated
Displays the transmission processing code
`Initial` code indicates an initial transmission file
`Add` code indicates an additional file
`Replace` indicates a replacement file.

Code - Carrier Transmissions View Field Description

Code
System generated
Displays the transmission processing code as follows:
`I` or blank - Initial file
`A` - Additional file
`R` - Replace all previous files

Code - Enrollment Payroll Field Description

Code
System generated
Displays the enrollment code submitted by the payroll office

Code - Field Description

Code
System generated
Displays the enrollment code

Code - Form 2809 View (Part A Continued) Field Description

Code
System generated

Displays one of the following codes that identifies the family member's relation to the enrollee:
`01` - Spouse
`09` - Adopted child
`10` - Foster child
`17` - Stepchild
`19` - Unmarried dependent child under age 22
`99` - Eligible unmarried disabled child over age 22

Code - Number Field Description

Code
System generated
Displays the code number

Code - Payroll Office Transmission Search Results Field Description

Code
System generated
Displays the transmission processing code as follows:
`Initial` - Indicates an initial transmission file
`Additional` - Indicates an addition to the transmission file
`Replace` - Indicates a replacement of the transmission file

Confirmed Errors - Field Description

Confirmed Errors
System generated
Displays the count of errors that have reconciliation reason and action code entered that indicate the carrier is at fault and the carrier accepts the claim

Contact (Payroll) First Name - Field Description

Contact (Payroll) First Name
System generated
Displays the first name of the payroll office contact

Contact (Payroll) First Name - Form 2809 Add (Part I) Field Instruction

Contact (Payroll) First Name
Conditional, alphanumeric, 17 positions maximum

If the Last Name field under Contact (Payroll) is completed, enter the first name of the payroll office contact.

Contact (Payroll) Initial - Field Description

Contact
System generated
Displays the middle initial of the payroll office contact

Contact (Payroll) Initial - Form 2809 Add (Part I) Field Instruction

Contact (Payroll) Initial
Conditional, alphanumeric, one position
If the Last Name field under Contact (Payroll) is completed, enter the middle initial of the payroll office contact.

Contact (Payroll) Last Name - Field Description

Contact (Payroll) Last Name
System generated
Displays the last name of the payroll office contact

Contact (Payroll) Last Name - Form 2809 Add (Part I) Field Instruction

Contact (Payroll) Last Name
Conditional, alphanumeric, 25 positions maximum
Enter the last name of the payroll office contact. If the contact has a title (e.g., Jr, Sr, I, II, or II), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the Last Name field under Contact (Personnel) is not completed, this field is required; otherwise, this field is optional.

Contact (Payroll) Phone - Field Description

Contact (Payroll) Phone
System generated
Displays the daytime area code and telephone number of the payroll office contact

Contact (Payroll) Phone - Form 2809 Add (Part I) Field Instruction

Contact (Payroll) Phone
Conditional, numeric, 10 positions
If the Last Name field under Contact (Payroll) is completed, enter the daytime area code and telephone number of the payroll office contact. Do not type alpha characters, spaces, dashes, parenthesis, periods, etc.

Contact (Personnel) First Name - Field Description

Contact (Personnel) First Name
System generated
Displays the first name of the personnel office contact

Contact (Personnel) First Name - Form 2809 Add (Part I) Field Instruction

Contact (Personnel) First Name
Conditional, alphanumeric, 17 positions maximum
If the Last Name field under Contact (Personnel) is completed, enter the first name of the personnel office contact.

Contact (Personnel) Initial - Field Description

Contact (Personnel) Initial
System generated
Displays the middle initial of the personnel office contact

Contact (Personnel) Initial - Form 2809 Add (Part I) Field Instruction

Contact (Personnel) Initial
Conditional, alphanumeric, one position
If the Last Name field under Contact (Personnel) is completed, enter the middle initial of the personnel office contact.

Contact (Personnel) Last Name - Field Description

Contact (Personnel) Last Name
System generated
Displays the last name of the personnel office contact

Contact (Personnel) Last Name - Form 2809 Add (Part I) Field Instruction

Contact (Personnel) Last Name
Conditional, alphanumeric, 25 positions maximum
Enter the last name of the personnel office contact. If the contact has a title (e.g., Jr, Sr, I, II, or II), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the Last Name field under Contact (Payroll) is not completed, this field is required; otherwise, this field is optional.

Contact (Personnel) Phone - Field Description

Contact (Personnel) Phone
System generated
Displays the daytime area code and telephone number of the personnel office contact

Contact (Personnel) Phone - Form 2809 Add (Part I) Field Instruction

Contact (Personnel) Phone
Conditional, numeric, 10 positions
If the Last Name field under Contact (Personnel) is completed, enter the daytime area code and telephone number of the personnel office contact. Do not type alpha characters, spaces, dashes, parenthesis, periods, etc.

Corrective Action (Code) - Field Description

Corrective Action
System generated
Displays the code that identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field
A short description is displayed next to the code. To view a detailed explanation of the carrier's corrective action response code, select **Explain** or see ***Carrier Corrective Action Response Codes Table*** (on page 298).

Corrective Action - Field Description

Corrective Action
System generated
Displays the carrier's response to the reconciliation action code displayed next to the Reconciliation Action field

To view a detailed explanation of the carrier's corrective action response, see ***Carrier Corrective Action Response Codes Table*** (on page 298).

Corrective Action - Field Instruction

Corrective Action
Required
Select the drop-down menu to choose the code that identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field. A short description is displayed next to the code. To view a detailed explanation of the carrier's corrective action response code, select **Explain** or see ***Carrier Corrective Action Response Codes Table*** (on page 298).

Corrective Actions % - Field Description

Corrective Actions %
System generated
Displays the percentage of discrepancies/reconciliation actions validated to total corrective actions

Corrective Actions Unvalidated - Field Description

Corrective Actions Unvalidated
System generated
Displays the number of discrepancies/reconciliation actions that were not validated by the carrier

Corrective Actions Validated - Field Description

Corrective Actions Validated
System generated
Displays the number of discrepancies/reconciliation actions that were validated by the carrier

Country - (Payroll Office Contacts Add) Field Instruction

Country
Optional
Select the drop-down menu and select the country code of the payroll office.
For a list and descriptions of country codes, see ***Country Codes Table*** (on page 301).

Country - Personnel Office Contacts Add Field Instruction

Country
Optional
Select the drop-down menu and select the country code of the personnel office.
For a list and descriptions of country codes, see ***Country Codes Table*** (on page 301).

Country - Personnel Office Contacts Add Field Instruction

Country
Optional
Select the drop-down menu and select the country code of the personnel office.
For a list and descriptions of country codes, see ***Country Codes Table*** (on page 301).

Cut Off Date - Field Description

Cut Off Date
System generated
Displays the date that CLER accepts no quarterly enrollment data from carriers or payroll offices

Date - Form 2809 Add (Part D) Field Instruction

Date
Conditional, numeric, eight positions
Enter the date (MMDDYYYY) of the event that initiated the enrollee's action.

Note: If the Nature of Action in Part A is **`Start`** or **`Change`**, this field is required. If the Nature of Action in Part A is **`Stop`** or **`Suspend`**, do not complete this field.

Date - Form 2809 Update (Part D) Field Instruction

Date
Required, numeric, eight positions
Enter the date (MMDDYYYY) of the event that initiated the enrollee's action.

Date - Form 2809 View (Parts C and D) Field Description

Date
System generated
Displays the date (MMDDYYYY) of the event that initiated the enrollee's action

Date Due - Field Description

Date Due
System generated
Displays the transmission due date (MMDDYYYY) for the reconciliation quarter

Date of Action - Field Description

Date of Action
System generated
Displays the date (MMDDYYYY) the enrollee made this election

Date of Action - Form 2809 Add (Part H) Field Instruction

Date of Action
Required, numeric, eight positions
Enter the date (MMDDYYYY) the enrollee made this election.

Date of Birth (Enrollee) - Field Description

Date of Birth
System generated
Displays the date of birth of the enrollee (MMDDYYYY)

Date of Birth (Enrollee/Survivor) - Field Description

Date of Birth
System generated
Displays the date of birth of the enrollee or survivor annuitant (MMDDYYYY)

Date of Birth - (Form 2809 Part A Continued) Field Instruction

Date of Birth
Optional, numeric, eight positions
Enter the date of birth (MMDDYYYY) of the enrollee's family member who is enrolled/enrolling in FEHB.

Date of Birth - Form 2809 View (Part A Continued) Field Description

Date of Birth
System generated

Displays the date of birth (MMDDYYYY) of the enrollee's family member who is enrolled/enrolling in FEHB

Date of Birth - Form 2809/2810 Add (Part A) Field Instruction

Date of Birth
Required, numeric, eight positions
Enter the date of birth for the enrollee (MMDDYYYY).

Date of Birth - Form 2810 Add (Parts B thru F) Field Instruction

Date of Birth
Conditional, numeric, eight positions
If the ***Change of Enrollee Information*** box is selected, enter the enrollee or survivor annuitant's date of birth MMDDYYYY; otherwise, do not complete this field. .

Date of Death - Field Description

Date of Death
System generated
Displays the date of death of the deceased enrollee (MMDDYYYY)

Date of Death - Form 2810 Add (Parts G and H) Field Instruction

Date of Death
Conditional, numeric, eight positions
If the enrollee is deceased, type the enrollee's date of death (MMDDYYYY); otherwise, do not complete this field.

Date Processed - (Processed Run) Field Description

Date Processed
System generated
Displays the current system date when the process was run

Date Processed - Field Description

Date Processed
System generated
Displays the current system date when the process was run

Date Received - Form 2809 Add (Part I) Field Instruction

Date Received
Required, numeric, eight positions
Enter the date (MMDDYYYY) the Agency received the original Form 2809.

Date Received - Form 2809 View (Part I) Field Description

Date Received
System generated
Displays the date (MMDDYYYY) the Agency received the original Form 2809

Deceased Annuitant SSN - Field Description

Deceased Annuitant SSN
System generated
Displays the deceased annuitant enrollee's SSN

Deceased Annuitant SSN - Field Instruction

Deceased Annuitant SSN
Optional, numeric
Enter the deceased annuitant enrollee's SSN.

Description - (Enrollment) Field Description

Description
System generated
Displays the descriptive text regarding the enrollment record
Description
System generated
Displays an explanation of the system code

Discrepancies # - Field Description

Discrepancies #
System generated
Displays the number of discrepancies

Discrepancies % - Field Description

Discrepancies %
System generated
Displays the percentage of reconciled discrepancies to reported discrepancies

Discrepancies - Field Description

Discrepancies
System generated
Displays a code that identifies an error or warning
For lists and descriptions of error and warning codes, see ***Discrepancy Codes Table*** (on page 287) and ***Warning Codes Table*** (on page 289).

Note: Check marks are displayed next to discrepancy codes that have been addressed by Agencies and carriers. Red check marks are displayed next to discrepancies that Agencies addressed by selecting the appropriate reconciliation action and reason codes on the Payroll Office Enrollees Reconcile page. Green check marks are displayed next to discrepancies that have been addressed by carriers. To display the most current check marks, select **Refresh** at the top of the Payroll Office Enrollees Search Results page.

Discrepancies Recon - Field Description

Discrepancies Recon
System generated
Displays the number of reconciled discrepancies

Discrepancy - (Explain/Duplicate - Code 166) Field Description

Discrepancy
System generated
Displays the discrepancy code that identifies an error or warning
A short description is displayed next to the code. To view a detailed explanation of the discrepancy code, select ***Explain*** or see ***Discrepancy Codes Table*** (on page 287). If Discrepancy Code `166` is displayed in the the Discrepancy field, the ***Duplicate*** button is also displayed. Select ***Duplicate*** to display the duplicate payroll office enrollee record for this enrollee record.

Discrepancy - (No Note) Field Description

Discrepancy
System generated
Displays the code that identifies an error or warning

For lists and descriptions of error and warning codes, see ***Discrepancy Codes Table*** (on page 287) and ***Warning Codes Table*** (on page 289).

Display - (All Records) Field Instruction

Display
Optional, default
Defaults to the ***All Records*** display option
To choose another type of option, select the radio button next to one of the following options:
All Records - Displays all records related to the search criteria
Matches - Displays all matched records related to the search criteria
No Matches - Displays records with no matches related to the search criteria
No matches are discrepancies where the carrier record is not found.
Discrepancies - Displays all records with discrepancies related to the search criteria
Warnings - Displays all records with warnings related to the search criteria
Unreconciled - Displays all records with unreconciled discrepancies related to the search criteria
Unreconciled discrepancies are discrepancies where the payroll office has not entered a reconciliation reason or reconciliation action code.
Reconciled - Displays all records with reconciled discrepancies related to the search criteria
Confirmed - Displays all records with confirmed discrepancies related to the search criteria
Confirmed discrepancies are discrepancies where the carrier is in agreement with the payroll office's reconciliation reason and reconciliation action.
Disputed - Displays all records with disputed discrepancies related to the search criteria
Disputed discrepancies are discrepancies where the carrier is not in agreement with the payroll office's reconciliation reason and reconciliation action.
Not Validated - Displays all records with discrepancies that are not validated
Not validated discrepancies are discrepancies that the carrier has not yet agreed that the Agency's reconciliation reason and actions are correct.

Display - (All) Field Instruction

Display
Optional, default
Defaults to the ***All*** display option
To choose another type of option, select the radio button next to one of the following options:
All - Displays all records related to the search criteria
Released - Displays all records released for processing
Cancelled - Displays all records that were cancelled before being processed
Not Released - Displays all records not released for processing
Processed - Displays all processed records

Display - (Carrier Code) Field Instruction

Display

Optional default
Defaults to the ***All*** display option
Allows users to display search results by the options listed below
To choose a display option, select the radio button next to one of the following menu options:
All - Displays all contacts for the carrier code and type code entered
Active - Displays active contacts for the carrier code and type code entered
Inactive - Displays inactive contacts for the carrier code and type code entered

Display - (Payroll Office Contact) Field Instruction

Display
Optional, default
Defaults to the ***All*** display option
Allows users to display search results by the options listed below.
To choose a display option, select the radio button next to one of the following menu options:
All - Displays all contacts for the payroll office ID and type code entered
Active - Displays active contacts for the payroll office ID and type code entered
Inactive - Displays inactive contacts for the payroll office ID and type code entered

Display - (Personnel Office Contact) Field Instruction

Display
Optional, default
Defaults to the ***All*** display option
Allows users to display search results by the options listed below
To choose a display option, select the radio button next to one of the following menu options:
All - Displays all contacts for the payroll office ID, personnel office ID, and type code entered
Active - Displays active contacts for the payroll office ID, personnel office ID, and type code entered
Inactive - Displays inactive contacts for the payroll office ID, personnel office ID, and type code entered

Display - Field Instruction

Display
Optional, default
Defaults to the ***All*** display option
To choose another type of search results display, select the radio button next to one of the following options:
All - Displays all records related to the search criteria
Unreconciled - Displays all records with unreconciled discrepancies related to the search criteria
Errors - Displays all records with errors related to the search criteria
Warnings - Displays all records with warnings related to the search criteria

Reconciled - Displays all records with reconciled discrepancies related to the search criteria
Matches - Displays all records that match to the search criteria
Not Validated - Displays all records with discrepancies that are not validated

Display - Payroll Office Contact Field Instruction

Display
Optional, default
Defaults to the ***All*** display option
Allows users to display search results by the options listed below
To choose a display option, select the radio button next to one of the following menu options:
All - Displays all contacts for the payroll office ID and type code entered
Active - Displays active contacts for the payroll office ID and type code entered
Inactive - Displays inactive contacts for the payroll office ID and type code entered

Display Total Payment Amounts - (Report 13) Field Instruction

Display Total Payment Amounts
Or
Display Payment Amounts for Enrollee
Optional, default
Defaults to the ***Display Total Payment Amounts*** menu option, which displays the total payment amounts. To display the payment amounts for enrollees, select the radio button next to the menu option ***Display Payment Amounts for Enrollees.***

Disputed Errors - Field Description

Disputed Errors
System generated
Displays the count of errors that have reconciliation reason and action code entered that indicate the carrier is at fault and the carrier disputes the claim

Eff. Date - (Carrier) Field Description

Eff. Date
System generated
Displays the enrollment effective date (MMDDYYYY) submitted by the carrier

Eff. Date - (Payroll) Field Description

Eff. Date
System generated

Displays the enrollment effective date (MMDDYYYY) submitted by the payroll office

Effective Date - (Action) Field Description

Effective Date
System generated
Displays the date (MMDDYYYY) the requested actions goes into effect

Effective Date - Field Description

Effective Date
System generated
Displays the effective date of the enrollment

Effective Date - Form 2809 View (Part I) Field Instruction

Effective Date
Required, alphanumeric, eight positions
Enter the date (MMDDYYYY) the requested action goes into effect.

Effective Date - Form 2810 Add Field Instruction

Effective Date
Required, alphanumeric, eight positions
Enter the date (MMDDYYYY) the requested action goes into effect.

Effective Date of Coverage - Field Description

Effective Date of Coverage
System generated
Displays the effective date of the enrollment

Effective Date of Coverage - Field Instruction

Effective Date of Coverage
Optional
Enter the effective date of the enrollment. Select the first drop-down menu and select the month, select the second drop-down menu and select the day and select the third drop-down menu and select the year.

Email - (Carrier Contact) Field Description

Email
System generated
Displays the email address of the carrier contact

Email - (Carrier Plan Contact) Field Description

Email
System generated
Displays the email address of the carrier plan contact

Email Address - (Carrier Contact) Field Description

Email Address
System generated
Displays the email address of the carrier contact

Email Address - (Carrier Plan Contact) Field Description

Email Address
System generated
Displays the email address of the carrier plan contact

Email Address - (Payroll Office Contact) Field Description

Email Address
System generated
Displays the email address of the payroll office contact

Email Address - (Payroll Office Contacts Add) Field Instruction

Email Address
Optional, alphanumeric, 60 positions maximum
Enter the email address of the payroll office contact

Email Address - (Personnel Office Contact) Field Description

Email Address
System generated
Displays the email address of the personnel office contact

Email Address - (Personnel Office Contact) Field Description

Email Address
System generated
Displays the email address of the personnel office contact

Email Address - (Personnel Office Contacts Add) Field Instruction

Email Address
Optional, alphanumeric, 60 positions maximum
Enter the email address of the personnel office contact.

Email Date - Field Description

Email Date
System generated
Displays the date the last email was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter

Email Time - Field Description

Email Time
System generated
Displays the time the last email was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter

Employee/Annuitant Indicator - Field Description

Employee/Annuitant Indicator
System generated
Displays the employee/annuitant indicator: **`Interim`**, **`Regular`** or **`Suspend`**

Employee/Annuitant Indicator - Field Instruction

Employee/Annuitant Indicator
Optional
Select the drop-down menu and select the employee/annuitant indicator: ***Interim***, ***Regular*** or ***Suspend***.

End Date - (Carrier Enrollment Code) Field Description

End Date
System generated
Displays the last date the carrier enrollment code will be valid

End Date - (Carrier Plan) Field Description

End Date
System generated
Displays the last date (MMDDYYYY) the carrier plan will be valid
If the date is not known, 12/31/9999 is displayed.

End Date - (Carrier) Field Description

End Date
System generated
Displays the last date the carrier will be valid

End Date - (Payroll Office) Field Description

End Date
System generated
Displays the last date the payroll office will be valid

Enrollee - (Carrier) Field Description

Enrollee
System generated
Displays the enrollee's name submitted by the carrier

Enrollee SSN - Field Description

Enrollee SSN
System generated
Displays the SSN or pseudo SSN of the enrollee

Enrollees (Left/Drop) - Field Description

Enrollees (Left/Drop)
System generated

Displays the number of dropped enrollees

Enrollees (New/Add) - Field Description

Enrollees (New/Add)
System generated
Displays the number of new or added enrollees

Enrollees - Field Description

Enrollees
System generated
Displays the number of enrollee records that meet the criteria entered on the Reconciliation Summary page

Enrollment Changes % - (Added) Field Description

Enrollment Changes %
System generated
Displays the percent of enrollment changes that were added

Enrollment Changes % - (Dropped) Field Description

Enrollment Changes %
System generated
Displays the percent of enrollment changes that were dropped

Enrollment Changes Added - Field Description

Enrollment Change Added
System generated
Displays the number of enrollment changes that were added

Enrollment Changes Dropped - Field Description

Enrollment Changes Dropped
System generated
Displays the number of enrollment changes that were dropped

Enrollment Code - (Drop-down) Field Instruction

Enrollment Code
Optional
Select the drop-down menu and select the enrollment code

Enrollment Code - (Optional) Field Instruction

Enrollment Code
Optional, alphanumeric, three positions
Enter the enrollment code.

Enrollment Code - (Required) Field Instruction

Enrollment Code
Required, alphanumeric, three positions
Enter the enrollment code.

Enrollment Code - Field Description

Enrollment Code
System generated
Displays the enrollment code

Enrollment Code - Field Instruction

Enrollment Code
Optional, alphanumeric, three positions
Enter the enrollment code.

Enrollment ID - Field Description

Enrollment ID
System generated
Displays the SSN of the deceased annuitant

Error Code - (Select) Field Instruction

Error Code
Optional

Select the applicable error code from the list. For a list descriptions of error codes, see ***Discrepancy Codes Table*** (on page 287).

Error Threshold - (Carrier) Field Description

Error Threshold
System generated
Displays the number or percentage of errors permitted for the carrier before a transmission file is rejected

Error Threshold - (Payroll Office) Field Description

Error Threshold
System generated
Displays the number or percentage of errors permitted for the payroll office before a transmission file is rejected

Errors - Field Description

Errors
System generated
Displays the sum of error codes displayed in the Discrepancy field

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Errors Reconciled - Field Description

Errors Reconciled
System generated
Displays the count of errors that have reconciliation reason and action code entered

Event That Permits Change - Field Description

Event That Permits Change
System generated
Displays the FEHB Event Code that identifies the event that initiated the enrollee's action
For a list of applicable event codes, see Event Code That Permits Change Table.

Event That Permits Change - Form 2809 (Part D) Field Instruction

Event That Permits Change
Conditional
Select the drop-down menu and select the FEHB Event Code that identifies the event that initiated the enrollee's action. For a list of applicable event codes, see Event Code That Permits Change Table.

Event That Permits Change - Form 2809 Update (Part D) Field Instruction

Event That Permits Change
Required
Select the drop-down menu and select the FEHB Event Code that identifies the event that initiated the enrollee's action. For a list of applicable event codes, see Event Code That Permits Change Table.

Explanation - Field Description

Explanation
System generated
Displays the detailed explanation of the code

Fail Count - Field Description

Fail Count
System generated
Displays the number of times this record has failed the quarterly edit process

Fail Count From - Field Instruction

Fail Count From
Optional, numeric, three positions maximum
Enter a specific fail count number to search for enrollee records by a specific fail count number.

OR

Enter the number that starts the range of fail count numbers to search for enrollee records by a range of fail count numbers, then proceed to the To field.

Fail Count To - Field Instruction

Fail Count To

Optional, numeric, three positions maximum
Enter the number that was entered in the From field, to search enrollee records by a specific fail count number.

OR

Enter the number that ends the range of fail count numbers to search for enrollee records by a range of fail count numbers.

Fax Number - (Carrier Contact) Field Description

Fax Number
System generated
Displays the fax number of the carrier contact

Fax Number - (Carrier Plan Contact) Field Description

Fax Number
System generated
Displays the fax number of the carrier plan contact

Fax Number - (Payroll Office Contact) Field Description

Fax Number
System generated
Displays the fax number of the payroll office contact

Fax Number - (Payroll Office Contacts Add) Field Instruction

Fax Number
Optional, alphanumeric, 25 positions maximum
Enter the fax number of the payroll office contact.

Fax Number - (Personnel Office Contact) Field Description

Fax Number
System generated
Displays the fax number of the personnel office contact

Fax Number - (Personnel Office Contacts Add) Field Instruction

Fax Number
Optional, numeric, 25 positions maximum
Enter the fax number of the personnel office contact.

First Name - (Enrollee New/Survivor) Field Description

First Name
System generated
Displays the enrollee's new first name or the first name of the new survivor annuitant, as applicable

First Name - (Form 2809 Part A Continued) Field Instruction

First Name
Optional, alphanumeric
Enter the first name of the enrollee's family member who is enrolled/enrolling in FEHB.

First Name - (Required) Enrollee Field Instruction

First Name
Required, alphanumeric, 12 positions maximum
Enter the first name of the enrollee.

First Name - Enrollee Field Description

First Name
System generated
Displays the first name of the enrollee

First Name - Enrollee Field Instruction

First Name
Optional, alphanumeric, 12 positions maximum
Enter the first name of the enrollee.

First Name - Form 2809 View (Part A Continued) Field Description

First Name
System generated

Displays the first name of the enrollee's family member who is enrolled/enrolling in FEHB

First Name - Form 2810 Add (Part E) Field Instruction

First Name
Conditional, alphanumeric, 12 positions
If the ***Change of Enrollee Information*** box is selected, and the first name for the enrollee or survivor annuitant is different than the first name listed in Part A, enter the enrollee or survivor annuitant's new first name.

Foreign Country (Carrier Plan Contact) - Field Description

Foreign Country
System generated
Displays the country code of the carrier plan contact
For a list and descriptions of country codes, see ***Country Codes Table*** (on page 301).

Foreign Country - (Carrier Contact) Field Description

Foreign Country
System generated
Displays the country code of the carrier contact
For a list and descriptions of country codes, see ***Country Codes Table*** (on page 301).

Foreign Country - (Carrier) Field Description

Foreign Country
System generated
Displays the country code of the carrier
For a list and descriptions of country codes, see ***Country Codes Table*** (on page 301).

Foreign Country - (Enrollee Point of Contact) Field Description

Foreign Country
System generated
Displays the country code for the enrollee's employing, personnel, or point-of-contact office
For a list and descriptions of country codes, see ***Country Codes Table*** (on page 301).

Foreign Country - (Enrollee) Field Description

Foreign Country
System generated
Displays the enrollee's country code
For a list and descriptions of country codes, see ***Country Codes Table*** (on page 301).

Foreign Country - (Enrollee/Survivor) Field Description

Foreign Country
System generated
Displays the new country code for the enrollee's employing, personnel, or point-of-contact office
For a list and descriptions of country codes, see ***Country Codes Table*** (on page 301).

Foreign Country - (Payroll Office) Field Description

Foreign Country
System generated
Displays the country code of the payroll office
For a list and descriptions of country codes, see ***Country Codes Table*** (on page 301).

Foreign Country - (Personnel Office) Field Description

Foreign Country
System generated
Displays the country code of the personnel office
For a list and descriptions of country codes, see ***Country Codes Table*** (on page 301).

Foreign Country - Form 2809 Add (Part I) Field Instruction

Foreign Country
Conditional
Select the drop-down menu and select the employing, personnel, or point-of-contact office's country code. For a list and descriptions of country codes, see ***Country Codes Table*** (on page 301).

Note: If the State field is completed, do not complete this field. If the State field is not completed, and the address is from a country other than the United States, a country other than the United States, a country code must be entered.

Foreign Country - Form 2809 View (Part A) Field Description

Foreign Country
System generated
Displays the country code of the enrollee
For a list and descriptions of country codes, see ***Country Codes Table*** (on page 301).

Foreign Country - Form 2809/2810 Add (Part A) Field Instruction

Foreign Country
Conditional
Select the drop-down menu and select the country code of the payroll office. For a list and descriptions of country codes, see ***Country Codes Table*** (on page 301).

Note: If the State field is completed, do not complete this field. If the State field is not completed, and the address is from a country other than the United States, a country other than the United States, a country code must be entered.

Foreign Country - Form 2810 Add (Parts B thru F) Field Instruction

Foreign Country
Conditional
If (1) the ***Change of Enrollee Information*** box is selected, (2) the address is foreign, and (3) the country code for the enrollee or survivor annuitant's address is different than the country code listed in Part A - Country Code, select the drop-down menu and select the new country code for the enrollee or survivor annuitant's address. For a list and descriptions of country codes, see ***Country Codes Table*** (see "***Country Codes Table***" on page 301).

From (Quarter/Year - Carrier) - Field Description

From (Quarter/Year) Carrier
System generated
Displays the carrier's code

From (Quarter/Year - Code) - Field Description

From (Quarter/Year) Code
System generated
Displays the enrollment code

From (Quarter/Year) - Field Description

From (Quarter/Year)
System generated
Displays the number of enrollees covered by the enrollment code displayed in the Code field during the selected quarter and year

ID - (Payroll Office) Field Description

ID
System generated
Displays the payroll office identification number

ID - Field Description

ID
System generated
Displays the payroll office identification number

Indicator - Field Description

Indicator
System generated
Displays the code that indicates if the transmission has been validated by the carrier
The code **Y** indicates the transmission has been validated, **C** indicates the transmission has been cancelled, and an empty field indicates the transmission has not been validated.

Initial - (Enrollee New/Survivor) Field Description

Initial
System generated
Displays the enrollee's new middle initial or the middle initial of the new survivor annuitant, as applicable

Initial - (Form 2809 Part A Continued) Field Instruction

Initial
Optional, alphanumeric
Enter the middle initial of the enrollee's family member who is enrolled/enrolling in FEHB.

Initial - Field Description

Initial
System generated
Displays the middle name of the enrollee

Initial - Field Instruction

Initial
Optional, alphanumeric, one position
Enter the middle initial of the enrollee.

Initial - Form 2809 View (Part A Continued) Field Description

Initial
System generated
Displays the middle initial of the enrollee's family member who is enrolled/enrolling in FEHB

Initial - Form 2810 Add (Part E) Field Instruction

Initial
Conditional, alphanumeric, 1 position
If the ***Change of Enrollee Information*** box is selected, and the initial for the enrollee or survivor annuitant is different than the initial listed in Part A, enter the enrollee or survivor annuitant's new initial.

Last Carrier Update Date - Field Description

Last Carrier Update Date
System generated
Displays the date of the most recent change

Last Carrier Update ID - Field Description

Last Carrier Update ID
System generated
Displays the user identification number of the carrier representative who made the most recent change to the record

Last Carrier Update Time - Field Description

Last Carrier Update Time
System generated
Displays the time of the most recent change

Last Changed Date - (Payroll Office) Field Description

Last Changed Date
System generated
Displays the date of the most recent change

Last Changed Date - Field Description

Last Changed Date
System generated
Displays the date of the most recent change

Last Changed ID - (Payroll Office) Field Description

Last Changed ID
System generated
Displays the user identification number of the individual who made the most recent change to the record

Last Changed ID - Field Description

Last Changed ID
System generated
Displays the user identification number of the individual who made the most recent change to the record

Last Changed Time - (Payroll Office) Field Description

Last Changed Time
System generated
Displays the time of the most recent change

Last Changed Time - Field Description

Last Changed Time

System generated
Displays the time of the most recent change

Last CL10 Date - Field Description

Last CL10 Date
System generated
Displays the last date of the initial editing and processing of the payroll office enrollment file transmission

Last CL10 Time - Field Description

Last CL10 Time
System generated
Displays the last time of the initial editing and processing of the payroll office enrollment file transmission

Last CL20 Date - Field Description

Last CL20 Date
System generated
Displays the last date of the initial editing and processing of the carrier enrollment file transmission

Last CL20 Time - Field Description

Last CL20 Date
System generated
Displays the last time of the initial editing and processing of the carrier enrollment file transmission

Last CL30 Date - Field Description

Last CL30 Date
System generated
Displays the last date the payroll office enrollment record fields were edited and matched

Last CL30 Time - Field Description

Last CL30 Time

System generated
Displays the last date the payroll office enrollment record fields were edited and matched

Last CL40 Date (System Generated) Field Instructions

Last CL40 Date
System generated
Displays the last date the carrier enrollment record fields were edited and matched

Last CL40 Time - Field Description

Last CL40 Time
System generated
Displays the last date the carrier enrollment record fields were edited and matched

Last CL50 Date - Field Description

Last CL50 Date
Reserved for future use

Last CL50 Time - Field Description

Last CL50 Time
Reserved for future use

Last CL60 Date - Field Description

Last CL60 Date
System generated
Displays the last date the error statistics record fields were updated

Last CL60 Time - Field Description

Last CL60 Time
System generated
Displays the last time the error statistics record fields were updated

Last CL70 Date Field Instructions

Last CL70 Date

Reserved for future use

Last CL70 Time - Field Description

Last CL70 Time
Reserved for future use

Last CL80 Date - Field Description

Last CL80 Date
System generated
Displays the last date the 2809 corrective action files were processed and transmitted to OPM Data Hub

Last CL80 Time - Field Description

Last CL80 Time
System generated
Displays the last time the 2809 corrective action files were processed and transmitted to OPM Data Hub

Last CL90 Date - Field Description

Last CL90 Date
System generated
Displays the last date the 2810 corrective action files were processed and transmitted to OPM Data Hub

Last CL90 Time - Field Description

Last CL90 Time
System generated
Displays the last time the 2810 corrective action files were processed and transmitted to OPM Data Hub

Last Name - (Enrollee/Survivor) Field Description

Last Name
System generated

Displays the enrollee's new last name or the last name of the new survivor annuitant, as applicable

Last Name - (Form 2809 Part A Continued) Field Instruction

Last Name
Optional, alphanumeric
Enter the last name of the enrollee's family member who is enrolled/enrolling in FEHB.

Last Name - (Required) Field Instruction

Last Name
Required, alphanumeric, 25 positions maximum
Enter the enrollee's last name.

Note: If the enrollee has a title (e.g., Jr., Sr., I, II, or III) it should be entered after the last name without punctuation.

OR

If the enrollee has only one name, enter that one name in this field.

Last Name - Enrollee Field Description

Last Name
System generated
Displays the last name of the enrollee

Last Name - Enrollee Field Instruction

Last Name
Optional, alphanumeric, 25 positions maximum
Enter the last name of the enrollee.

Note: If the enrollee has a title (e.g., Jr, Sr, I, II, or III) it should be entered after the last name without punctuation.

OR

If the enrollee has only one name, enter that name in this field.

Last Name - Form 2809 View (Part A Continued) Field Description

Last Name
System generated
Displays the last name of the enrollee's family member who is enrolled/enrolling in FEHB

Last Name - Form 2810 Add (Part E) Field Instruction

Last Name
Conditional, alphanumeric, 25 positions maximum
If the Change of Enrollee Information box is selected, and the last name for the enrollee or survivor annuitant is different than the last name listed in Part A, enter the enrollee or survivor annuitant's new last name.

Note: If the enrollee or survivor annuitant has a title (e.g., Jr., Sr., I, II, or III) it should be entered after the last name without punctuation.

OR

If the enrollee or survivor annuitant has only one name, enter that one name in this field.

Last Payroll Update Date - Field Description

Last Payroll Update Date
System generated
Displays the date of the most recent change

Last Payroll Update ID - Field Description

Last Payroll Update ID
System generated
Displays the user identification number of the payroll office representative who made the most recent change to the record

Last Payroll Update Time - Field Description

Last Payroll Update Time
System generated
Displays the time of the most recent change

Last Validate Date - Field Description

Last Validate Date
System generated
Displays the date of transmission was last validated

Last Validate ID - Field Description

Last Validate ID
System generated
Displays the user identification number of the person who last validated the transmission

Last Validate Time - Field Description

Last Validate Time
System generated
Displays the time the transmission was last validated

Married - (Enrollee - Required) Field Instruction

Married
Required
Select the radio button next to one of the following:
Y - Indicates the enrollee is married
N - Indicates the enrollee is single

Married - (Enrollee) Field Description

Married
System generated
Selected radio button indicates the following value:
Y - Enrollee is married
N - Enrollee is single

Match - Field Description

Match
System generated
Displays the number of matching records that meet the criteria entered on the Reconciliation Summary page

Medicare Spouse - (Enrollee) Field Instruction

Medicare Spouse

Conditional

Select the check box next to one of the following values, if applicable:
A - Indicates the enrollee or enrollee's spouse who is enrolled/enrolling in FEHB is covered by Medicare Part A
B - Indicates the enrollee or enrollee's spouse who is enrolled/enrolling in FEHB is covered by Medicare Part B

Medicare Spouse - Field Description

Medicare Spouse
System generated
Selected check box indicates one of the following values:
A - Enrollee's spouse who is enrolled/enrolling in FEHB is covered by Medicare Part A
B - Enrollee's spouse who is enrolled/enrolling in FEHB is covered by Medicare Part B

Medicare You - (Enrollee) Field Instruction

Medicare You
Conditional
Select the check box next to one of the following values, if applicable:
A - Indicates the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by Medicare Part A
B - Indicates the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by Medicare Part B

Medicare You - Field Description

Medicare You
System generated
Selected check box indicates one of the following values:
A - Enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by Medicare Part A
B - Enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by Medicare Part B

Middle Name - Enrollee Field Description

Middle Name

System generated
Displays the middle name or initial of the enrollee

Middle Name - Enrollee Field Instruction

Middle Name
Optional, alphanumeric, 12 positions maximum
Enter the middle name of the enrollee.

Middle Name - Field Instruction

Middle Name
Optional, alphanumeric, 12 positions maximum
Enter the middle name of the enrollee.

Name - (Carrier Contact) Field Description

Name
System generated
Displays the name of the carrier contact

Name - (Carrier) Field Instruction

Name
Optional, alphanumeric, 40 positions
Enter the name of the carrier.

Name - (Payroll Office) Field Description

Name
System generated
Displays the name of the payroll office

Name - (Payroll Office) Field Instruction

Name
Optional, alphanumeric, 40 positions
Enter the name of the payroll office.

Name - Carrier Field Description

Name
System generated
Displays the name of the carrier

Name - Carrier Plan Contact Field Description

Name
System generated
Displays the name of the carrier plan contact

Name - Enrollee Carrier Field Description

Name
System generated
Displays the enrollee's name submitted by the carrier

Name - Enrollee Field Description

Name
System generated
Displays the name of the enrollee

Name - Enrollee Payroll Field Description

Name
System generated
Displays the enrollee's name submitted by the payroll office

Name - Payroll Office Contact Field Description

Name
System generated
Displays the name of the payroll office contact

Name - Personnel Office Contact Field Description

Name
System generated

Displays the name of the personnel office contact

Name - Personnel Office Contacts Add Field Instruction

Name
Optional, alphanumeric, 30 positions maximum
Enter the name of the personnel office.

Nature of Action - Field Description

Nature of Action
System generated
Selected radio button indicates one of the following:
Start - Creates a new enrollment in FEHB
Change - Change to a current FEHB enrollment
Stop - Indicates the cancellation of an FEHB enrollment

Nature of Action - Field Instruction

Nature of Action
Required
Select the applicable radio button to indicate one of the following:
Start - Creates a new enrollment in FEHB
Change - Change to a current FEHB enrollment
Stop - Indicates the cancellation of an FEHB enrollment

New Enrollment Code - Field Description

New Enrollment Code
System generated
Displays the new enrollment code for the enrollee

New Enrollment Code - Form 2809 Add (Part C) Field Instruction

New Enrollment Code
Conditional
Enter the new enrollment code for the enrollee.

New Enrollment Code - Form 2809 Update (Part C) Field Instruction

New Enrollment Code

Required
Enter the new enrollment code for the enrollee.

New Enrollment Code Number - (Survivor Annuitant) Field Description

New Enrollment Code Number
System generated
Displays the new enrollment code for the survivor annuitant

New Enrollment Code Number - Form 2810 Add (Part F) Field Instruction

New Enrollment Code Number
Conditional, alphanumeric, three positions
If the ***Change in Enrollment/Survivor Annuitant*** box is selected, enter the enrollee or survivor annuitant's new enrollment code number; otherwise, do not complete this field.

New Plan Name - Field Description

New Plan Name
System generated
Displays the name of the FEHB health insurance plan in which the individual is enrolled/enrolling

New Plan Name - Form 2809 Add (Part C) Field Instruction

New Plan Name
Conditional
Enter the name of the new FEHB health insurance plan in which the individual is enrolled/enrolling

New Plan Name - Form 2809 Update (Part C) Field Instruction

New Plan Name
Required
Enter the name of the new FEHB health insurance plan in which the individual is enrolled/enrolling.

Not Received - Field Description

Not Received

System generated
Displays the number of transmissions that were expected but not received

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Options - (View Only) Field Description

Options
System generated
View - Allows the user to view the record

Options - (View, Activate, Update) Field Description

Options
System generated
View - Allows the user to view the record
Activate/Inactivate - Allows the user to make the record active or inactive in the system
Update - Allows the user to make changes to the record

Options - (View, Activate, Update, Delete) Field Description

Options
System generated
View - Allows the user to view the record
Activate/Inactivate - Allows the user to make the record active or inactive in the system
Update - Allows the user to make changes to the record
Delete - Allows the user to remove the record (For NFC use only)

Options - (View, List, Add) Field Description

Options
System generated
View - Allows the user to view the record
List - Allows the user to view the list of enrollees in the record
Add - Allows the user to add enrollees to the record
Update - Allows the user to make changes to the record
Release - Allows the user to release the record
Cancel - Allows the user to cancel the record

Options - (View, Reconcile) Field Description

Options
System generated
View - Allows the user to view the record
Reconcile - Allows the user to reconcile the record

Options - (View, Update, Cancel) Field Description

Options
System generated
View - Allows the user to view the record
Update - Allows the user to make changes to the record
Release - Allows the user to release the record
Cancel - Allows the user to cancel the record

Options - (View, Update, Delete) Field Description

Options
System generated
View - Allows the user to view the record
Update - Allows the user to make changes to the record
Delete - Allows the user to remove the record

Options - (View, Update, Release) Field Description

Options
System generated
View - Allows the user to view the record
Update - Allows the user to make changes to the record
Release - Allows the user to release the record
Cancel - Allows the user to cancel the record

Options - (View, Validate) Field Description

Options
System generated
View - Allows the user to view the record
Validate - Allows the user to validate the record

Order By - (Agency ID) Field Instruction

Order By
Optional, default
Defaults to the ***Agency ID*** sort option
This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:
Agency ID - Sorts search results by Agency identification code
SSN - Sorts search results by enrollee Social Security number
Name - Sorts search results by enrollee name
User ID - Sorts search results by user identification number
Status - Sorts search results by status (e.g., released, processed, not released, or cancelled release)

Order By - (Carrier - Code Sort) Field Instruction

Order By
Optional, default
Defaults to the ***Carrier*** sort option
This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:
Carrier - Sorts search results by carrier code
Code - Sorts search results by carrier enrollment code

Order By - (Carrier - Plan Sort) Field Instruction

Order By
Optional, default
Defaults to the ***Carrier*** sort option
This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:
Carrier - Sorts search results by carrier code
Plan - Sorts search results by plan code
Type - Sorts search results by type code

Order By - (Carrier ID - Type Sort) Field Instruction

Order By
Optional, default
Defaults to the ***ID*** sort option
This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:
ID - Sorts search results by carrier ID
Type - Sorts search results by type code

Order By - (Carrier, Name, City, State Sorts) Field Instruction

Order By
Optional, default
Defaults to the ***Carrier*** sort option
This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:
Carrier - Sorts search results by carrier code
Name - Sorts search results by name
City - Sorts search results by city
State - Sorts search results by State

Order By - (ID - Year/Quarter - Pay Cycle) Field Instruction

Order By
Optional, default
Defaults to the ***ID*** sort option
This field allows users to sort search results by the options listed below.
To choose a sort option, select the radio button next to one of the following menu options:
ID - Sorts search results by payroll office identification number (ID)
Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter
Pay Cycle - Sorts search results by pay cycle type

Order By - (Payroll Office Contact) Field Instruction

Order By
Optional, default
Defaults to the ***ID*** sort option
This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:
ID - Sorts search results by payroll office identification number (ID)
Year - Sorts search results by year

Order By - (Payroll Office Contact) Field Instruction

Order By
Optional, default
Defaults to the ***ID*** sort option
This field allows users to sort search results by the options listed below.
To choose a sort option, select the radio button next to one of the following menu options:
ID - Sorts search results by payroll office identification number (ID)
Type - Sorts search results by type code

Order By - (Payroll Office Information) Field Instruction

Order By
Optional, default
Defaults to the ***ID*** sort option
This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:
ID - Sorts search results by payroll office identification number (ID)
Pay Cycle - Sorts search results by the pay cycle
Name - Sorts search results by payroll office name
City - Sorts search results by payroll office city

Order By - (Personnel Office Contact) Field Instruction

Order By
Optional, default
Defaults to the ***ID*** sort option
This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:
ID - Sorts search results by payroll office identification number (ID)
POI - Sorts search results by personnel office ID
Type - Sorts search results by type code

Order By - (Transmission) Field Instruction

Order By
Optional, default
Defaults to the ***ID*** sort option
This field allows users to sort search results by the options listed below.
To choose a sort option, select the radio button next to one of the following menu options:
ID - Sorts search results by payroll office identification number (ID)
Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter
Transmission Type - Sorts search results by pay period or reconciliation transmissions
Pay Cycle - Sorts search results by biweekly, monthly, or other pay cycles

Order By 1st - (Carrier - Action Code) Field Instruction

Order By 1st
Optional default
Defaults to the ***Carrier*** option
To choose another type of sort option, select the drop-down menu and select one of the following menu options:
Action Code - Sort search results by reconciliation action code
Agency - Sorts search results by Agency code

Carrier - Sorts search results by carrier code
Enrollment Code - Sorts search results by enrollment code
Payroll Office - Sorts search results by payroll office identification number
Personnel Office ID - Sorts search results by personnel office identification number

Order By 1st - (Carrier - Agency) Field Instruction

Order By 1st
Optional default
Defaults to the ***Carrier*** option
To choose another type of sort option, select the drop-down menu and select one of the following menu options:
Agency - Sorts search results by Agency code
Carrier - Sorts search results by carrier code
Enrollment Code - Sorts search results by enrollment code
Pers. Office ID - Sorts search results by personnel office identification number

Order By 1st - (Carrier - Reason Code) Field Instruction

Order By 1st
Optional, default
Defaults to the ***Carrier*** option
To choose another type of sort option, select the drop-down menu and select one of the following menu options:
Agency - Sorts search results by Agency code
Carrier - Sorts search results by carrier code
Enrollment Code - Sorts search results by enrollment code
Payroll Office - Sorts search results by payroll office identification number
Personnel Office ID - Sorts search results by personnel office identification number
Reason Code - Sorts search results by reconciliation reason code

Order By 1st - (Carrier ID) Field Instruction

Order By 1st
Optional, default
Defaults to the ***Carrier ID*** option
To choose another type of sort option, select the drop-down menu and select one of the following menu options:
Carrier ID - Sorts search results by carrier identification number
Name - Sorts search results by enrollee name
Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter
Submission Date - Sorts search results by submission date
Status - Sorts search results by transmission status

Order By 1st - (Enrollee) Field Instruction

Order By 1st
Optional, default
Defaults to the ***Name*** option
To choose another type of sort option in the first sort search order, select the drop-down menu and select one of the following menu options:
Agency - Sorts research results by agency code
Carrier - Sorts research results by carrier code
Enrollment Code - Sorts search results by enrollment code
Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process
Name - Sorts search results by enrollee name
Pers. Office ID - Sorts search by the personnel office identification number
SSNO - Sorts search results by enrollee SSN
Other ID - Sorts search results by the identifier used by RSP/OWCP to identify the enrollee
Transmission Type - Sorts search results by the transmission type
Employee/Annuitant - Sorts search results by the employee/annuitant type
As of Date - Sorts search results by the as of date range

Order By 1st - (Payroll Office) Field Instruction

Order By 1st
Optional, default
Defaults to the ***Payroll Office*** option
To choose another type of sort option, select the drop-down menu and select one of the following menu options:
Payroll Office - Sorts search results by payroll office identification number
Name - Sorts search results by enrollee name
Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter
Submission Date - Sorts search results by submission date
Status - Sorts search results by transmission status

Order By 1st - (Report - Name Enrollment Code) Field Instruction

Order By 1st
Optional, default
Defaults to the ***Name*** option
To choose another type of sort option, select the drop-down menu and select one of the following menu options:
Agency - Sorts search results by Agency code.
Enrollment Code - Sorts search results by enrollment code.

Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process.
Name - Sorts search results by enrollee name.
Pers. Office ID - Sorts search results by personnel office identification number.
SSNO - Sorts search results by enrollee Social Security number.
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee.

Order By 1st - (Report 12) Field Instruction

Order By 1st
Optional, default
Defaults to the ***Name*** option
To choose another type of sort option select the drop-down menu and select one of the following menu options to display the selected criteria in the first sort search order:
Enrollment Code - Sorts search results by enrollment code.
Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process.
Name - Sorts search results by enrollee name.
SSNO - Sorts search results by enrollee Social Security number.
Payroll ID - Sorts search results by payroll office identification number.

Order By 1st - (Report 13) Field Instruction

Order By 1st
Optional, default
Defaults to the ***Carrier*** option
To choose another type of sort option, select the drop-down menu and select one of the following menu options:
Carrier - Sorts search results by carrier code.
Pay Cycle - Sorts search results by pay cycle.
Enrollment Code - Sorts search results by enrollment code.
As of Date - Sorts search results by as of dates.

Order By 2nd - (Carrier - Action Code) Field Instruction

Order By 2nd
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the second sort search order:
Action Code - Sort search results by reconciliation action code.
Agency - Sorts search results by Agency code.
Carrier - Sorts search results by carrier code.

Enrollment Code - Sorts search results by enrollment code.
Payroll Office - Sorts search results by payroll office identification number.
Personnel Office ID - Sorts search results by personnel office identification number.

Order By 2nd - (Carrier - Agency) Field Instruction

Order By 2nd
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the second sort search order:
Agency - Sorts search results by Agency code.
Carrier - Sorts search results by carrier code.
Enrollment Code - Sorts search results by enrollment code.
Pers. Office ID - Sorts search results by personnel office identification number.

Order By 2nd - (Carrier ID) Field Instruction

Order By 2nd
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the second sort search order:
Carrier ID - Sorts search results by carrier identification number.
Name - Sorts search results by enrollee name.
Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter.
Submission Date - Sorts search results by submission date.
Status - Sorts search results by transmission status.

Order By 2nd - (Carrier) Field Instruction

Order By 2nd
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the second sort search order:
Agency - Sorts search results by Agency code.
Carrier - Sorts search results by carrier code.
Enrollment Code - Sorts search results by enrollment code.
Payroll Office - Sorts search results by payroll office identification number.
Personnel Office ID - Sorts search results by personnel office identification number.
Reason Code - Sorts search results by reconciliation reason code.

Order By 2nd - (Enrollee) Field Instruction

Order By 2nd

Optional, default
Defaults to the ***SSNO*** option
To choose another type of sort option select the drop-down menu and select one of the following menu options to display the selected criteria in the second sort search order:
Enrollment Code - Sorts search results by enrollment code
Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process
Name - Sorts search results by enrollee name
SSNO - Sorts search results by enrollee SSN
Payroll ID - Sorts search results by payroll office identification number

Order By 2nd - (Payroll Office) Field Instruction

Order By 2nd
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the second sort search order:
Payroll Office - Sorts search results by payroll office identification number.
Name - Sorts search results by enrollee name.
Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter.
Submission Date - Sorts search results by submission date.
Status - Sorts search results by transmission status.

Order By 2nd - (Report - SSNO Enrollment Code) Field Instruction

Order By 2nd
Optional, default
Defaults to the ***SSNO*** option
To choose another type of sort option, select the drop-down menu and select one of the following menu options:
Agency - Sorts search results by Agency code.
Enrollment Code - Sorts search results by enrollment code.
Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process.
Name - Sorts search results by enrollee name.
Pers. Office ID - Sorts search results by personnel office identification number.
SSNO - Sorts search results by enrollee Social Security number.
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee.

Order By 2nd - (Report 13) Field Instruction

Order By 2nd

Optional
To choose a sort option, select the drop-down menu and select one of the following menu options:
Carrier - Sorts search results by carrier code.
Pay Cycle - Sorts search results by pay cycle.
Enrollment Code - Sorts search results by enrollment code.
As of Date - Sorts search results by as of dates.

Order By 2nd - Field Instruction

Order By 2nd
Optional
Defaults to the ***SSNO*** sort option if no sort option is selected
To choose another sort option, select the drop-down menu and select one of the following options to display the selected criteria in the second sort order:
Agency - Sorts search results by Agency code
Carrier - Sorts search results by carrier code
Enrollment Code - Sorts search results by enrollment code
Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process
Name - Sorts search results by enrollee name
Pers. Office ID - Sorts search results by personnel office identification number
SSNO - Sorts search results by enrollee Social Security number
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee
Transmission Type - Sorts search results by the transmission type
Employee/Annuitant - Sorts search results by the employee/annuitant type
As of Date - Sorts search results by the As of Date range

Order By 3rd - (Carrier - Action Code) Field Instruction

Order By 3rd
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the third sort search order:
Action Code - Sort search results by reconciliation action code.
Agency - Sorts search results by Agency code.
Carrier - Sorts search results by carrier code.
Enrollment Code - Sorts search results by enrollment code.
Payroll Office - Sorts search results by payroll office identification number.
Personnel Office ID - Sorts search results by personnel office identification number.

Order By 3rd - (Carrier - Agency) Field Instruction

Order By 3rd
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the third sort search order:
Agency - Sorts search results by Agency code.
Carrier - Sorts search results by carrier code.
Enrollment Code - Sorts search results by enrollment code.
Pers. Office ID - Sorts search results by personnel office identification number.

Order By 3rd - (Carrier ID) Field Instruction

Order By 3rd
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the third sort search order:
Carrier ID - Sorts search results by carrier identification number.
Name - Sorts search results by enrollee name.
Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter.
Submission Date - Sorts search results by submission date.
Status - Sorts search results by transmission status.

Order By 3rd - (Carrier) Field Instruction

Order By 3rd
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the third sort search order:
Agency - Sorts search results by Agency code.
Carrier - Sorts search results by carrier code.
Enrollment Code - Sorts search results by enrollment code.
Payroll Office - Sorts search results by payroll office identification number.
Personnel Office ID - Sorts search results by personnel office identification number.
Reason Code - Sorts search results by reconciliation reason code.

Order By 3rd - (Enrollee) Field Instruction

Order By 3rd
Optional
Select the drop-down menu and select one of the following options to display the selected criteria in the third sort search order:

Enrollment Code - Sorts search results by enrollment code
Name - Sorts search results by enrollee name
SSNO - Sorts search results by enrollee SSN

Order By 3rd - (Payroll Office) Field Instruction

Order By 3rd
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the third sort search order:
Payroll Office - Sorts search results by payroll office identification number.
Name - Sorts search results by enrollee name.
Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter.
Submission Date - Sorts search results by submission date.
Status - Sorts search results by transmission status.

Order By 3rd - (Report - Enrollment Code) Field Instruction

Order By 3rd
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the third sort search order:
Agency - Sorts search results by Agency code.
Enrollment Code - Sorts search results by enrollment code.
Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process.
Name - Sorts search results by enrollee name.
Pers. Office ID - Sorts search results by personnel office identification number.
SSNO - Sorts search results by enrollee Social Security number.
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee.

Order By 3rd - (Report 13) Field Instruction

Order By 3rd
Optional
To choose a sort option, select the drop-down menu and select one of the following menu options:
Carrier - Sorts search results by carrier code.
Pay Cycle - Sorts search results by pay cycle.
Enrollment Code - Sorts search results by enrollment code.
As of Date - Sorts search results by as of dates.

Order By 3rd - Field Instruction

Order By 3rd
Optional
Select the drop-down menu and select one of the following options to display the selected criteria in the third sort order:
Agency - Sorts search results by Agency code
Carrier - Sorts search results by carrier code
Enrollment Code - Sorts search results by enrollment code
Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process
Name - Sorts search results by enrollee name
Pers. Office ID - Sorts search results by personnel office identification number
SSNO - Sorts search results by enrollee Social Security number
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee
Transmission Type - Sorts search results by the transmission type
Employee/Annuitant - Sorts search results by the employee/annuitant type
As of Date - Sorts search results by the As of Date range

Order By 4th - (Carrier - Action Code) Field Instruction

Order By 4th
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the fourth sort search order:
Action Code - Sort search results by reconciliation action code.
Agency - Sorts search results by Agency code.
Carrier - Sorts search results by carrier code.
Enrollment Code - Sorts search results by enrollment code.
Payroll Office - Sorts search results by payroll office identification number.
Personnel Office ID - Sorts search results by personnel office identification number.

Order By 4th - (Carrier - Agency) Field Instruction

Order By 4th
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the fourth sort search order:
Agency - Sorts search results by Agency code.
Carrier - Sorts search results by carrier code.
Enrollment Code - Sorts search results by enrollment code.
Pers. Office ID - Sorts search results by personnel office identification number.

Order By 4th - (Carrier) Field Instruction

Order By 4th
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the fourth sort search order:
Agency - Sorts search results by Agency code.
Carrier - Sorts search results by carrier code.
Enrollment Code - Sorts search results by enrollment code.
Payroll Office - Sorts search results by payroll office identification number.
Personnel Office ID - Sorts search results by personnel office identification number.
Reason Code - Sorts search results by reconciliation reason code.

Order By 4th - (Enrollee) Field Instruction

Order By 4th
Optional
Select the drop-down menu and select one of the following options to display the selected criteria in the fourth sort search order:
Enrollment Code - Sorts search results by enrollment code
Name - Sorts search results by enrollee name
SSNO - Sorts search results by enrollee SSN

Order By 4th - (Report - Enrollment Code) Field Instruction

Order By 4th
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the fourth sort search order:
Agency - Sorts search results by Agency code.
Enrollment Code - Sorts search results by enrollment code.
Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process.
Name - Sorts search results by enrollee name.
Pers. Office ID - Sorts search results by personnel office identification number.
SSNO - Sorts search results by enrollee Social Security number.
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee.

Order By 4th - (Report 13) Field Instruction

Order By 4th
Optional

To choose a sort option, select the drop-down menu and select one of the following menu options:
Carrier - Sorts search results by carrier code.
Pay Cycle - Sorts search results by pay cycle.
Enrollment Code - Sorts search results by enrollment code.
As of Date - Sorts search results by as of dates.

Order By 4th - Field Instruction

Order By 4th
Optional
Select the drop-down menu and select one of the following options to display the selected criteria in the fourth sort order:
Agency - Sorts search results by Agency code
Carrier - Sorts search results by carrier code
Enrollment Code - Sorts search results by enrollment code
Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process
Name - Sorts search results by enrollee name
Pers. Office ID - Sorts search results by personnel office identification number
SSNO - Sorts search results by enrollee Social Security number
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee
Transmission Type - Sorts search results by the transmission type
Employee/Annuitant - Sorts search results by the employee/annuitant type
As of Date - Sorts search results by the As of Date range

Order By 5th - (Carrier - Action Code) Field Instruction

Order By 5th
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the fifth sort search order:
Action Code - Sort search results by reconciliation action code.
Agency - Sorts search results by Agency code.
Carrier - Sorts search results by carrier code.
Enrollment Code - Sorts search results by enrollment code.
Payroll Office - Sorts search results by payroll office identification number.
Personnel Office ID - Sorts search results by personnel office identification number.

Order By 5th - (Carrier) Field Instruction

Order By 5th

Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the fifth sort search order:
Agency - Sorts search results by Agency code.
Carrier - Sorts search results by carrier code.
Enrollment Code - Sorts search results by enrollment code.
Payroll Office - Sorts search results by payroll office identification number.
Personnel Office ID - Sorts search results by personnel office identification number.
Reason Code - Sorts search results by reconciliation reason code.

Order By 5th - (Enrollee) Field Instruction

Order By 5th
Optional
Select the drop-down menu and select one of the following options to display the selected criteria in the fifth sort search order:
Enrollment Code - Sorts search results by enrollment code
Name - Sorts search results by enrollee name
SSNO - Sorts search results by enrollee SSN

Order By 5th - (Report - Enrollment Code) Field Instruction

Order By 5th
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the fifth sort search order:
Agency - Sorts search results by Agency code.
Enrollment Code - Sorts search results by enrollment code.
Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process.
Name - Sorts search results by enrollee name.
Pers. Office ID - Sorts search results by personnel office identification number.
SSNO - Sorts search results by enrollee Social Security number.
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee.

Order By 5th - (Report 13) Field Instruction

Order By 5th
Optional
To choose a sort option, select the drop-down menu and select one of the following menu options:
Carrier - Sorts search results by carrier code.
Pay Cycle - Sorts search results by pay cycle.

Enrollment Code - Sorts search results by enrollment code.
As of Date - Sorts search results by as of dates.

Order By 5th - Field Instruction

Order By 5th
Optional
Select the drop-down menu and select one of the following options to display the selected criteria in the fifth sort order:
Agency - Sorts search results by Agency code
Carrier - Sorts search results by carrier code
Enrollment Code - Sorts search results by enrollment code
Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process
Name - Sorts search results by enrollee name
Pers. Office ID - Sorts search results by personnel office identification number
SSNO - Sorts search results by enrollee Social Security number
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee
Transmission Type - Sorts search results by the transmission type
Employee/Annuitant - Sorts search results by the employee/annuitant type
As of Date - Sorts search results by the As of Date range

Order By 6th - (Carrier - Action Code) Field Instruction

Order By 6th
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the sixth sort search order:
Action Code - Sort search results by reconciliation action code.
Agency - Sorts search results by Agency code.
Carrier - Sorts search results by carrier code.
Enrollment Code - Sorts search results by enrollment code.
Payroll Office - Sorts search results by payroll office identification number.
Personnel Office ID - Sorts search results by personnel office identification number.

Order By 6th - (Carrier) Field Instruction

Order By 6th
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the sixth sort search order:
Agency - Sorts search results by Agency code.

Carrier - Sorts search results by carrier code.
Enrollment Code - Sorts search results by enrollment code.
Payroll Office - Sorts search results by payroll office identification number.
Personnel Office ID - Sorts search results by personnel office identification number.
Reason Code - Sorts search results by reconciliation reason code.

Order By 6th - (Enrollee) Field Instruction

Order By 6th
Optional
Select the drop-down menu and select one of the following options to display the selected criteria in the sixth sort search order:
Enrollment Code - Sorts search results by enrollment code
Name - Sorts search results by enrollee name
SSNO - Sorts search results by enrollee SSN

Order By 6th - (Report - Enrollment Code) Field Instruction

Order By 6th
Optional
Select the drop-down menu and select one of the following menu options to display the selected criteria in the sixth sort search order:
Agency - Sorts search results by Agency code.
Enrollment Code - Sorts search results by enrollment code.
Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process.
Name - Sorts search results by enrollee name.
Pers. Office ID - Sorts search results by personnel office identification number.
SSNO - Sorts search results by enrollee Social Security number.
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee.

Order By 6th - Field Instruction

Order By 6th
Optional
Select the drop-down menu and select one of the following options to display the selected criteria in the sixth sort order:
Agency - Sorts search results by Agency code
Carrier - Sorts search results by carrier code
Enrollment Code - Sorts search results by enrollment code
Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process
Name - Sorts search results by enrollee name

Pers. Office ID - Sorts search results by personnel office identification number
SSNO - Sorts search results by enrollee Social Security number
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee
Transmission Type - Sorts search results by the transmission type
Employee/Annuitant - Sorts search results by the employee/annuitant type
As of Date - Sorts search results by the As of Date range

Order By 7th - Agency Field Instruction

Order By 7th
Optional
Select the drop-down menu and select one of the following options to display the selected criteria in the seventh sort search order:
Agency - Sorts search results by Agency code
Carrier - Sorts search results by carrier code
Enrollment Code - Sorts search results by enrollment code
Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process
Name - Sorts search results by enrollee name
Pers. Office ID - Sorts search results by personnel office identification number
SSNO - Sorts search results by enrollee Social Security number
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee
Transmission Type - Sorts search results by the transmission type
Employee/Annuitant - Sorts search results by the employee/annuitant type
As of Date - Sorts search results by the As of Date range

Order By 8th - Agency Field Instruction

Order By 8th
Optional
Select the drop-down menu and select one of the following options to display the selected criteria in the eighth sort search order:
Agency - Sorts search results by Agency code
Carrier - Sorts search results by carrier code
Enrollment Code - Sorts search results by enrollment code
Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process
Name - Sorts search results by enrollee name
Pers. Office ID - Sorts search results by personnel office identification number
SSNO - Sorts search results by enrollee Social Security number
Other ID - Sorts search results by the identifier used by the Retirement Services Program

(RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee
Transmission Type - Sorts search results by the transmission type
Employee/Annuitant - Sorts search results by the employee/annuitant type
As of Date - Sorts search results by the As of Date range

Order by 9th - Agency Field Instruction

Order By 9th
Optional
Select the drop-down menu and select one of the following options to display the selected criteria in the ninth sort search order:
Agency - Sorts search results by Agency code
Carrier - Sorts search results by carrier code
Enrollment Code - Sorts search results by enrollment code
Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process
Name - Sorts search results by enrollee name
Pers. Office ID - Sorts search results by personnel office identification number
SSNO - Sorts search results by enrollee Social Security number
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee
Transmission Type - Sorts search results by the transmission type
Employee/Annuitant - Sorts search results by the employee/annuitant type
As of Date - Sorts search results by the As of Date range

Other (Name) - Field Description

Other (Name)
System generated
Displays the name of the health insurance program other than TRICARE or Civilian Health and Medical Program of the Uniformed Services (CHAMPUS) that covers the enrollee or enrollee's family member

Other - (Enrollee) Field Instruction

Other
Conditional
Select the check box to indicate the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by a health insurance program other than Tricare or CHAMPUS.
If selected, enter the name of the insurance carrier; otherwise, do not complete this field.

Other - Field Description

Other
System generated
Selected check box indicates that the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by a health insurance program other than TRICARE or Civilian Health and Medical Program of the Uniformed Services (CHAMPUS)

Other Carrier ID - Field Description

Other Carrier ID
System generated
Displays the identifier used by the carrier to identify the enrollee

Other Carrier ID - Field Description

Other Carrier ID
Optional, alphanumeric
Enter the identifier used by the carrier to identify the enrollee.

Other ID - Field Description

Other ID
System generated
Used by the Retirement Services Program (RSP) and Office of Worker's Compensation Programs (OWCP). RSP personnel use this field to reference an enrollee's civil service annuitant or civil service final identifier. OWCP personnel use this field to reference an enrollee's claim identifier.

Note: The Agency and personnel office identifier (POI) fields are displayed in lieu of this field when a payroll office identification number other than **24900002, 24900003**, or **160099xx** is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

Other ID From - Field Instruction

Other ID From
Optional, alphanumeric, 15 positions
To search for a specific enrollee record by the Other ID, enter the Other ID.

OR

To search for a range of enrollee records by a range of Other IDs, enter the Other ID that starts the range, then go to the ***Other ID To*** field.

Note for RSP: Enter the CSA or CSF identifier without the first two characters (i.e., CS). For example, the CSA identifier is entered as **AXXXXXXXX**, and the CSF identifier is entered as **FXXXXXXXX**.

Other ID To - Field Instruction

Other ID To
Optional, alphanumeric, 15 positions maximum
Enter the Other identification (ID) number that ends the range or leave blank, when searching for a range of enrollee records by Other IDs.

Other Insurance - (Enrollee - Required) Field Instruction

Other Insurance
Required
Select the radio button next to one of the following values:
Y - Indicates the enrollee's family member is enrolled in another group health insurance program
N - Indicates the enrollee's family member is not enrolled in another group health insurance program

Other Insurance - Field Description

Other Insurance
System generated
Selected radio button values identified below indicate the following:
Y - Enrollee's family is enrolled in another group health insurance program.
N - Enrollee's family member is not enrolled in another group health insurance program.

Other Payroll ID - Field Description

Other Payroll ID
System generated
Displays the identifier used by the Agency to identify the enrollee

Other Payroll ID - Field Description

Other Payroll ID

Optional, alphanumeric
Enter the identifier used by the Agency to identify the enrollee.

Part B - Termination - Field Description

Part B - Termination
System generated
Selected radio button indicates the enrollment is terminated

Part B - Termination - Field Instruction

Part B - Termination
Required, if applicable
Select the box to indicate the enrollment is to be terminated.

Part C - Transfer In - Field Description

Part C - Transfer In
System generated
Selected radio button indicates the enrollment is being transferred from one payroll office to another

Part C - Transfer In - Field Instruction

Part C - Transfer In
Required, if applicable
Select the box to indicate the enrollment is to be transferred from one payroll office to another.

Part D - Reinstatement - Field Description

Part D - Reinstatement
System generated
Selected radio button indicates the enrollment is being reinstated

Part D - Reinstatement - Field Instruction

Part D - Reinstatement
Required, if applicable
Select the box to indicate the enrollment is to be reinstated.

Part E - Change of Enrollee Information - Field Description

Part E - Change of Enrollee Information
System generated
Selected radio button indicates one of the following:
Enrollee's name has changed.
Enrollment has changed from the enrollee's name to the name of the survivor annuitant.
Enrollment has changed from the survivor annuitant's name of another survivor annuitant.

Part E - Change of Enrollee Information - Field Instruction

Part E - Change of Enrollee Information
Required, if applicable
Select the box to indicate one of the following:
Enrollee's name has changed.
Enrollment has changed from the enrollee's name to the name of the survivor annuitant.
Enrollment has changed from the survivor annuitant's name to another survivor annuitant.
Enrollee or survivor annuitant's address has changed.

Part F - Change in Enrollment/Survivor Annuitant - Field Description

Part F - Change in Enrollment/Survivor Annuitant
System generated
Selected radio button indicates the survivor annuitant's enrollment code has changed

Part F - Change in Enrollment/Survivor Annuitant - Field Instruction

Part F - Change in Enrollment/Survivor Annuitant
Required, if applicable
Select the box to indicate the enrollee or survivor annuitant's enrollment code has changed.

Password - Field Instruction

Password
Enter password.
If unsuccessful, a message will appear stating that the user ID or password entered is invalid.

Pay Cycle - (Biweekly, Monthly, Other) Field Description

Pay Cycle
System generated
Displays one of the following pay cycle types:

- ***Biweekly***
- ***Monthly***
- ***Other***

Pay Cycle - (Optional) Field Instruction

Pay Cycle
Optional
Select the payroll office pay cycle from the drop-down menu:

- ***Biweekly***
- ***Monthy***
- ***Other***

Pay Cycle - (Required) Field Instruction

Pay Cycle
Required
Select the payroll office pay cycle from the drop-down menu:

- ***Biweekly***
- ***Monthy***
- ***Other***

Pay Cycle - Field Description

Pay Cycle
System generated
Displays the pay cycle type:
M - Monthly
B - Bi-Weekly
O - Other

Pay Ofc - Field Description

Pay Ofc
System generated
Displays the payroll office identification number

Payroll Office - Field Description

Payroll Office
System generated
Displays the payroll office identification number

Payroll Office - Field Instruction

Payroll Office
Optional, alphanumeric, eight positions
Enter the payroll office identification number.

Payroll Office Code - Field Description

Payroll Office Code
System generated
Displays the enrollment code submitted by the payroll office

Payroll Office Comments - Field Description

Payroll Office Comments
System generated
Displays the comments that were entered on the Payroll Office Enrollee Reconcile page

Payroll Office Comments - Field Instruction

Payroll Office Comments
Optional, 400 character maximum
Enter comments about the reconciliation actions for this record.

Payroll Office Discrepancy - Field Description

Payroll Office Discrepancy
System generated
Displays the error or warning code generated by CLER. See the Discrepancy Codes Table and Warning Codes Table for a list and descriptions of error and warning codes

Payroll Office Eff. Date - Field Description

Payroll Office Eff. Date
System generated

Displays the enrollment effective date (MMDDYYYY) submitted by the payroll office

Payroll Office Fail Count - Field Description

Payroll Office Fail Count
System generated
Displays the number of times the initial discrepancy has been identified and reported

Payroll Office ID - (Optional) Field Instruction

Payroll Office ID
Optional, alphanumeric, eight positions
Enter the Payroll Office identification number.

Payroll Office ID - (Select - Optional) Field Instruction

Payroll Office ID
Optional
Select the drop-down menu and select the payroll office identification number.

Payroll Office ID - (Select - Required) Field Instruction

Payroll Office ID
Required
Select the drop-down menu and select the applicable Payroll Office ID.

Payroll Office ID - Field Description

Payroll Office ID
System generated
Displays the payroll office identification number

Payroll Office Name - Field Description

Payroll Office Name
System generated
Displays the name of the enrollee submitted by the payroll office

Payroll Office Number - Field Description

Payroll Office ID
System generated
Displays the payroll office identification number

Payroll Office Payroll ID - Field Description

Payroll Office Payroll ID
System generated
Displays the payroll office identification number

Percent Discrepancies Reconciled - Field Description

Percent Discrepancies Reconciled
System generated
Displays the percentage of records reconciled to total discrepancies that meet the criteria entered on the Discrepancy Summary page

Personnel Office ID - (Optional) Field Instruction

Personnel Office ID
Optional, alphanumeric, four positions
Enter the personnel office identification number.

Personnel Office ID - (Required) Field Instruction

Personnel Office ID
Required, alphanumeric, four positions
Enter the personnel office number for the enrollee's employing, personnel, or point-of-contact office.

Personnel Office ID - Enrollee Field Description

Personnel Office ID
System generated
Displays the personnel office number for the enrollee's employing, personnel, or point-of-contact office

Personnel Office ID - Field Description

Personnel Office ID
System generated
Displays the personnel office identification number

Phone - (Carrier Contact) Field Description

Phone
System generated
Displays the telephone number of the carrier contact

Phone - (Carrier Contact) Field Description

Phone
System generated
Displays the telephone number of the carrier contact

Phone - (Enrollee) Field Description

Phone
System generated
Displays the daytime area code and telephone number of the enrollee

Phone - (Payroll Office Contact) Field Description

Phone
System generated
Displays the telephone number of the payroll office contact

Phone - (Personnel Office Contact) Field Description

Phone
System generated
Displays the telephone number of the personnel office contact

Phone - Form 2809 (Part H) Field Instruction

Phone
Optional

Enter the telephone number of the agency or payroll office contact.

Phone Number - (Carrier Plan Contact) Field Description

Phone Number
System generated
Displays the telephone number of the carrier plan contact

Phone Number - (Payroll Office Contact) Field Description

Phone Number
System generated
Displays the telephone number of the payroll office contact

Phone Number - (Payroll Office Contact) Field Description

Phone Number
System generated
Displays the telephone number of the payroll office contact

Phone Number - (Payroll Office Contacts Add) Field Instruction

Phone Number
Optional, alphanumeric, 25 positions maximum
Enter the telephone number of the payroll office contact.

Phone Number - (Personnel Office Contact) Field Description

Phone Number
System generated
Displays the telephone number of the personnel office contact

Phone Number - Personnel Office Contacts Add Field Instruction

Phone Number
Optional, numeric, 25 positions maximum
Enter the telephone number of the personnel office contact.

Plan - (Carrier) Field Description

Plan
System generated
Displays the first two positions of the carrier enrollment code

Plan - Field Instruction

Plan
Optional, alphanumeric, two positions
Enter the first two positions of the carrier enrollment code.

POI - (Personnel Office Contact) Field Description

POI
System generated
Displays the personnel office identification number

POI - (Required) Field Instruction

POI
Required, alphanumeric, four positions
Enter the personnel office identifier of the office where the enrollee's records are maintained.

POI - Field Description

POI
System generated
Displays the personnel office identification number

POI - Payroll Office Enrollee Field Instruction

POI
Optional, alphanumeric, four positions
Enter the personnel office identifier of the office where the enrollee's records are maintained.

POI - With Note Field Description

POI
System generated

Displays the personnel office identifier of the office where the enrollee's records are maintained.

Note: The Other ID field is displayed in lieu of the this field when **24900002, 24900003**, or **160099xx** is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

Policyholder First Name - (Enrollee) Field Instruction

Policyholder First Name
Conditional, alphanumeric, 17 positions max
Enter the first name of the individual who holds the policy from another group health insurance program under which the enrollee or family member is covered. If the policyholder has a title (e.g.,I,II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the Other Insurance Field is Y, complete this field. If the Other Insurance Field is N, do not complete this field.

Policyholder First Name - Field Description

Policyholder First Name
System generated
Displays the first name of the individual who holds the policy from another group insurance program under which the enrollee or family member is covered

Policyholder Initial - (Enrollee) Field Instruction

Policyholder Initial
Conditional, alphanumeric, one position
Enter the middle initial of the individual who holds the policy from another group health insurance program under which the enrollee or family member is covered. If the policyholder has a title (e.g.,I,II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the Other Insurance Field is Y, complete this field. If the Other Insurance Field is N, do not complete this field.

Policyholder Initial - Field Description

Policyholder Initial
System generated

Displays the middle initial of the individual who holds the policy from another group insurance program under which the enrollee or family member is covered

Policyholder Last Name - (Enrollee) Field Instruction

Policyholder Last Name
Conditional, alphanumeric, 25 positions max
Enter the last name of the individual who holds the policy from another group health insurance program under which the enrollee or family member is covered. If the policyholder has a title (e.g.,I,II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the Other Insurance Field is Y, complete this field. If the Other Insurance Field is N, do not complete this field.

Policyholder Last Name - Field Description

Policyholder Last Name
System generated
Displays the last name of the individual who holds the policy from another group insurance program under which the enrollee or family member is covered

Present Enrollment Code - (Enrollee) Field Description

Present Enrollment Code
System generated
Displays the present enrollment code for the enrollee

Present Enrollment Code - Form 2809 Add (Part B) Field Instruction

Present Enrollment Code
Conditional
Enter the present enrollment code for the enrollee.

Present Enrollment Code - Form 2809 Update (Part B) Field Instruction

Present Enrollment Code
System generated
Displays the present enrollment code for the enrollee

Present Plan Name - Field Description

Present Plan Name
System generated
Displays the name of the FEHB health insurance plan in which the enrollee is currently enrolled

Present Plan Name - Form 2809 Add (Part B) Field Instruction

Present Plan Name
Conditional
Enter the name of the FEHB health insurance plan in which the enrollee is currently enrolled.

Present Plan Name - Form 2809 Update (Part B) Field Instruction

Present Plan Name
System Generated
Displays the name of the FEHB health insurance plan in which the enrollee is currently enrolled

Processed Date - Field Description

Processed Date
System generated
Displays the date the record was processed

Processed Time - Field Description

Processed Time
System generated
Displays the time the record was processed

Processing Code - Field Description

Processing Code
System generated
Displays one of the following processing codes:
Initial - Initial file for the quarter.
Add - Add to existing enrollments.
Replace - Replace all files and records that have been previously sent for this quarter.

Processing Code - Field Instruction

Processing Code
Required
Select the drop-down menu and choose one of the following processing codes:
Initial - Initial file for the quarter
Add - Add to existing enrollments
Replace - Replace all files and records that have been previously sent for this quarter

Pseudo SSN - Field Description

Pseudo SSN
System generated
Displays the pseudo SSN used by the Agency and carrier to identify the enrollee

Pseudo SSN - Field Description

Pseudo SSN
Optional, numeric
Enter the pseudo SSN used by the Agency and carrier to identify the enrollee.

Qtr - Field Description

Qtr
System generated
Displays the reconciliation quarter

Quarter - (Error Statistics) Field Description

Quarter
System generated
Displays the reconciliation quarter for the requested error statistics

Quarter - (Quarter Transmission Record) Field Description

Quarter
System generated
Displays the reconciliation quarter for the requested transmission record

Quarter - (Reconciliation 2810 Form) Field Description

Quarter
System generated
Displays the reconciliation quarter the 2810 form was created

Quarter - (Reconciliation Quarter) Field Description

Quarter
System generated
Displays the reconciliation quarter

Quarter - (Select - Reconciliation) Field Instruction

Quarter
Required, default
Defaults to the current reconciliation quarter
To choose a different reconciliation quarter select the drop-down menu and select the desired reconciliation quarter.

Quarter - (Select) Field Instruction

Quarter
Required, default
Defaults to the current quarter
To choose a different quarter, select the drop-down menu and select the desired quarter.

Quarter - Field Description

Quarter
System generated
Displays the reconciliation quarter

Quarter - Field Instruction

Quarter
Optional, alphanumeric, one position
Enter the reconciliation quarter for the requested error statistics.

Quarter - Payroll Office Transmissions Search Results Field Description

Quarter
System generated
Displays the reconciliation quarter for the requested transmission record

Quarter - Payroll Office Transmissions Search Results Field Description

Quarter
System generated
Displays the reconciliation quarter for the requested transmission record

Quarter From - Field Instruction

Quarter From
Required, default
Defaults to the current reconciliation quarter
To choose a different quarter that begins the range of reconciliation quarters, select the drop-down menu and select the quarter.

Quarter To - Field Instruction

Quarter To
Required, default
Defaults to the current reconciliation quarter
To choose a different quarter that ends the range of reconciliation quarters, select the drop-down menu and select the quarter.

Reason - Field Description

Reason
System generated
Displays the reconciliation reason code
Refer to the ***Reconciliation Reason Codes Table*** (on page 293) for a list and description of reconciliation reason codes.

Reason Code - Field Description

Reason Code
System generated
Displays the reconciliation reason code

Refer to the ***Reconciliation Reason Codes Table*** (on page 293) for a list and description of reconciliation reason codes.

Reason Code - Field Instruction

Reason Code
Optional
Select the drop-down menu and select the reconciliation reason code.
Refer to the ***Reconciliation Reason Codes Table*** (on page 293) for a list and description of these codes.

Reconciliation Action - Field Description

Reconciliation Action
System generated
Displays the code that identifies the action requested by the Agency to resolve the discrepancy
A short description is displayed next to the code. To view a detailed explanation of the reconciliation action code, select **Explain** or see ***Reconciliation Action Codes Table*** (on page 297).

Reconciliation Action - Field Instruction

Reconciliation Action
Required
Select the drop-down menu to choose the code that identifies the action requested by the Agency to resolve the discrepancy.
A short description is displayed next to the code. To view a detailed explanation of the reconciliation action code, select **Explain** or see ***Reconciliation Action Codes Table*** (on page 297).

Reconciliation Date - Field Description

Reconciliation Date
System generated
Displays the reconciliation date

Reconciliation Date From - Field Instruction

Reconciliation Date From
Optional

Select the date that begins the range of reconciliation dates by selecting the first drop-down menu and select the month; select the second drop-down menu and select the day; and select the third drop-down menu and select the year.

Reconciliation Date To - Field Instruction

Reconciliation Date To
Optional
Select the date that ends the range of reconciliation dates by selecting the first drop-down menu and select the month; select the second drop-down menu and select the day; and select the third drop-down menu and select the year.

Reconciliation Fail Count - Field Description

Reconciliation Fail Count
System generated
Displays the number of times the initial discrepancy has been identified

Reconciliation Reason - Field Description

Reconciliation Reason
System generated
Displays the cause of the discrepancy as reported by the Agency
A short description is displayed next to the code. To view a detailed explanation of the reconciliation reason code, select **Explain** or see ***Reconciliation Reason Codes Table*** (on page 293).

Reconciliation Reason - Field Instruction

Reconciliation Reason
Required
Select the drop-down menu to choose the cause of the discrepancy as reported by the Agency.
A short description is displayed next to the code. To view a detailed explanation of the reconciliation reason code, select **Explain** or see ***Reconciliation Reason Codes Table*** (on page 293).

Reconciliation Total Records - Field Description

Reconciliation Total Records
System generated
Displays the sum of enrollee records displayed on the report

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Reconciliation User ID - Field Description

Reconciliation User ID
System generated
Displays the user identification number of the person who entered the reconciliation reason code

Reconciliation With Errors - Field Description

Reconciliation With Errors
System generated
Displays the sum of enrollee records with codes displayed in the Reason and Action fields

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Reconciliation Without Errors - Field Description

Reconciliation Without Errors
System generated
Displays the sum of enrollee records with no codes displayed in the Reason and Action fields

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Records - Field Description

Records
System generated
Displays the number of records contained in the transmission

Records Processed - Field Description

Records Processed
System generated
Displays the number of records accepted to store in the CLER tables

Records Received - Field Description

Records Received
System generated
Displays the number of records found in the transmission file during processing

Records Reconciled - Field Description

Records Reconciled
System generated
Displays the count of records that have a reconciliation reason and action code entered for every error on the record

Records Sent - Field Description

Records Sent
System generated
Displays the number of records sent in the transmission

Records With Errors - (Payroll Office) Field Description

Records With Errors
System generated
Displays the total number of payroll office enrollee records with errors

Note: Records with warnings are not included.

Records With Warnings - (Payroll Office) Field Description

Records With Warnings
System generated
Displays the total number of payroll office records with warnings

Note: Records with errors are not included.

Region - Field Description

Region
System generated

Displays the carrier's enrollment data transmission location code assigned by NFC's CLER Operations and Reconciliation Unit

Rejected - Field Description

Rejected
System generated
Displays the number of transmissions that did not pass front-end edits and were rejected

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Release Date - (Form 2809 Search Results) Field Description

Release Date
System generated
Displays the date of the record was released for processing

Release Date - (Online Entries) Field Description

Release Date
System generated
Displays the date of the record was released for processing

Released By - Field Description

Released By
System generated
Displays the user identification number of the individual who released the record for processing

Released Date - Field Description

Released Date
System generated
Displays the date the record was released for processing

Released ID - Field Description

Released ID
System generated
Displays the user identification number of the individual who released the record for processing

Released Time - Field Description

Released Time
System generated
Displays the time the record was released for processing

Remarks - (400 Max) Field Instruction

Remarks
Optional, alphanumeric, 400 positions maximum
Enter remarks regarding the creation of this record.

Remarks - Field Description

Remarks
System generated
Displays the remarks about this record

Remarks - Field Instruction

Remarks
Optional, alphanumeric, 80 positions maximum
Enter remarks about this record.

Report # - Field Description

Report #
System generated
Displays the number of the original report (e.g., notification to carrier or transmittal number)

Report # - Field Instruction

Report #
Optional, alphanumeric, seven positions maximum
Enter the number of the original report (e.g., notification to carrier and transmittal number).

Response Reminder Date - Field Description

Response Reminder Date
System generated

Displays the date a reminder regarding the lack of response to discrepancy reasons and actions codes will be sent to carriers

Role - (Carrier Contact) Field Description

Role
System generated
Displays the title, position, etc., of the carrier contact

Role - (Carrier Plan Contact) Field Description

Role
System generated
Displays the title, position, etc., of the carrier plan contact

Role - (Payroll Office Contact) Field Description

Role
System generated
Displays the title, position, etc., of the payroll office contact

Role - (Payroll Office Contacts Add) Field Instruction

Role
Optional, alphanumeric, 40 positions
Enter the title, position, etc., of the payroll office contact.

Role - (Personnel Office Contact) Field Description

Role
System generated
Displays the title, position, etc., of the personnel office contact

Role - (Personnel Office Contacts Add) Field Instruction

Role
Optional, alphanumeric, 40 positions maximum
Enter the title, position, etc., of the personnel office contact.

Sex - (Enrollee - Required) Field Instruction

Sex
Required
Select the radio button next to one of the following values:
M - Indicates the enrollee is male
F - Indicates the enrollee is female

Sex - (Enrollee) Field Description

Sex
System generated
Selected radio button indicates the following value:
M - Enrollee is a male
F - Enrollee is a female

Sex - (Enrollee/Survivor) Field Description

Sex
System generated
Selected radio button indicates the following value:
M - Enrollee or survivor annuitant is a male
F - Enrollee or survivor annuitant is a female

Sex - (Form 2809 Part A Continued) Field Instruction

Sex
Optional
Select the applicable radio button to indicate the following value:
M - Enrollee's family member who is enrolled/enrolling in FEHB is a male
F - Enrollee's family member who is enrolled/enrolling in FEHB is a female

Sex - Form 2809 View (Part A Continued) Field Description

Sex
System generated
Selected radio button indicates the following value:
M - Enrollee's first family member who is enrolled/enrolling in FEHB is a male
F - Enrollee's first family member who is enrolled/enrolling in FEHB is a female

Sex - Form 2810 Add (Part E) Field Instruction

Sex
Conditional
Select the applicable radio button to indicate the following value:
M - Enrollee or survivor annuitant is a male.
F - Enrollee or survivor annuitant is a female.

Source - Field Description

Source
System generated
Displays the source of transmission data indicator
The value in the first position equals **M** for mainframe or **S** for server. The value in the second position equals **T** for transmission or **M** for manual entry.

SSN - (Enrollee) Field Description

SSN
System generated
Displays the enrollee's SSN or pseudo SSN

SSN - (Enrollee/Survivor) Field Description

SSN
System generated
Displays the enrollee or survivor annuitant's Social Security number (SSN) or pseudo SSN

SSN - (Form 2809 Part A Continued) Field Instruction

SSN
Optional, numeric
Enter the SSN or pseudo SSN of the enrollee's family member who is enrolled/enrolling in FEHB.

SSN - (Required) Field Instruction

SSN
Required, numeric, nine positions
Enter the SSN of the enrollee. If the enrollee does not want his/her SSN provided to the carrier, a psuedo SSN may be used if the psuedo SSN is also reported to CLER.

SSN - Field Instruction

SSN
Optional, numeric, nine positions
Enter the SSN or pseudo SSN to search for a specific enrollee record.

SSN - Form 2809 View (Part A Continued) Field Description

SSN
System generated
Displays the Social Security number of the enrollee's family member who is enrolled/enrolling in FEHB

SSN - Form 2810 Add (Part E) Field Instruction

SSN
Conditional, numeric, nine positions
Enter the enrollee or survivor annuitant's SSN or pseudo SSN.

SSN From - Field Instruction

SSN - From
Optional, numeric, nine positions
Enter the SSN that begins the search range of enrollee records by SSN.

SSN To - Field Instruction

SSN - To
Optional, numeric, nine positions
Enter the SSN that ends the search range of enrollee records by SSN.

Start Date - (Carrier Enrollment Code) Field Description

Start Date
System generated
Displays the first date the carrier enrollment code will be valid

Start Date - (Carrier Plan) Field Description

Start Date

System generated
Displays the first date (MMDDYYYY) the carrier plan will be valid
If the date is not known, 01/01/2001 is displayed.

Start Date - (Carrier) Field Description

Start Date
System generated
Displays the first date the carrier will be valid

Start Date - (Processed) Field Description

Start Date
System generated
Displays the date the input from carriers and payroll offices was processed

Start Date - Payroll Office Field Description

Start Date
System generated
Displays the first date the payroll office will be valid

State - (Carrier Contact) Field Description

State
System generated
Displays the carrier contact's State, U.S. territory, or overseas military abbreviation
For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (on page 298).

State - (Carrier Plan Contact) Field Description

State
System generated
Displays the carrier plan contact's State, U.S. territory, or overseas military abbreviation
For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (on page 298).

State - (Carrier) Field Description

State

System generated
Displays the carrier's State, U.S. territory, or overseas military abbreviation
For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (on page 298).

State - (Carrier) Field Instruction

State
Optional
Select the drop-down menu and select the carrier's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (on page 298).

State - (Coordinator) Field Description

State
System generated
Displays the State, U.S. territory, or overseas military abbreviation for the enrollee's employing, personnel, or point-of-contact office
For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (on page 298).

State - (Enrollee) Field Description

State
System generated
Displays the enrollee's State, U.S. territory, or overseas military abbreviation
For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (on page 298).

State - (Enrollee) Field Description

State
Conditional
Select the drop-down menu to choose the enrollee's State, U.S. territory, or overseas military abbreviation.
For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (on page 298).

State - (Enrollee/Survivor) Field Description

State
System generated
Displays the new State, U.S. territory, or overseas military abbreviation for the enrollee or survivor annuitant's address
For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (on page 298).

State - (Payroll Office) Field Instruction

State
Optional
Select the drop-down menu and select the payroll office's, carriers, carrier contact's, or carrier plan contact's State, U.S. territory, or overseas military abbreviation.
For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (on page 298).

State - (Personnel Office Contact) Field Description

State
System generated
Displays the personnel office contact's State, U.S. territory, or overseas military abbreviation
For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (on page 298).
State
Conditional
Select the drop-down menu and select the employing, personnel, or point of contact office's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (on page 298).

State - Payroll Office Field Description

State
System generated
Displays the State, U.S. territory, or overseas military abbreviation of the payroll office
For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (on page 298).

State - Personnel Office Contacts Add Field Instruction

State

Optional
Select the drop-down menu and select the personnel office's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (on page 298).

Status - (Active/Inactive) Field Description

Status
System generated
`Active` status indicates that the record has been activated in CLER.
`Inactive` status indicates that the record has been inactivated in CLER.

Status - (Payroll Office Contacts) Search Results Field Description

Status
System generated
Displays the status of the record
`Active` - Indicates that the record has been activated in CLER
`Inactive` - Indicates that the record has been inactivated in CLER

Status - (Payroll Office Errors) View Field Description

Status
System generated
Displays **`000`** for an accepted transmission; otherwise, a payroll office enrollment data transmission
For a list and descriptions of payroll office systems, see ***Payroll Office System Codes Table*** (see "***Payroll Office System Codes Table***" on page 290).

Status - (Processed, Canceled, Released, Not Released) Field Description

Status
System generated
Displays the status of the transmission: **`Processed`**, **`Canceled`**, **`Released`**, or **`Not Released`**

Status - (Transmission Carrier) Field Description

Status

System generated
Displays `000` for an accepted transmission; otherwise, a carrier system code is displayed
It indicates the status of a carrier enrollment data transmission. For a list and descriptions of carrier system codes, see Carrier System Codes Table.

Status - (Transmission Payroll Office) Field Description

Status
System generated
Displays `000` for an accepted transmission; otherwise, a payroll office system code is displayed
It indicates the status of a payroll office enrollment data transmission. For a list and descriptions of payroll office system codes, see Payroll Office System Codes Table.

Submission - (Number) Field Description

Submission
System generated
Displays the transmission submission number for this record

Submission - (Payroll Office Enrollees) Reconcile Field Description

Submission
System generated
Displays the transmission submission for this record

Submission - Field Description

Submission
System generated
Displays the transmission file submitted for the reconciliation quarter is assigned a sequential submission number

Submission Date - (Carrier Transmissions) Search Results Field Description

Submission Date
System generated
Displays the date transmission was submitted

Submission Date - (Carrier) Field Description

Submission Date
System generated
Displays the date (MMDDYYYY) the carrier enrollment data file was submitted for processing

Submission Date - (Payroll) Field Description

Submission Date
System generated
Displays the date (MMDDYYYY) the payroll office enrollment data file was submitted for processing

Submission Date - Field Description

Submission Date
System generated
Displays the date the transmission file was submitted

Submission Reminder Date - Field Description

Submission Reminder Date
System generated
Displays the date the submission reminder is sent

Submitter Use #1 - Field Description

Submitter Use #1
System generated
Displays the remarks that were entered by the organization that created the record

Submitter Use #1 - Field Description

Submitter Use #1
Optional, alphanumeric
Enter remarks about the record.

Submitter Use #2 - Field Description

Submitter Use #2

System generated
Displays the remarks that were entered by the organization that created the record

Submitter Use #2 - Field Instruction

Submitter Use #2
Optional, alphanumeric
Enter remarks about the record.

Submitter Use #3 - Field Description

Submitter Use #3
System generated
Displays the remarks that were entered by the organization that created the record

Submitter Use #3 - Field Instruction

Submitter Use #3
Optional, alphanumeric
Enter remarks about the record.

Survivor Annuity Claim # - Field Description

Survivor Annuity Claim #
System generated
Displays the civil service final (CSF) number assigned to the enrollee by the Office of Personnel Management

Survivor Annuity Claim # - Field Instruction

Survivor Annuity Claim #
Optional, alphanumeric
Enter the civil service final (CSF) number assigned to the enrollee by the Office of Personnel Management.

Threshold Type - (Payroll Office) Field Description

Threshold Type
System generated
Displays the measure of the error threshold as follows:

P - Percent
N - Number

Threshold Type - Field Description

Threshold Type
System generated
Displays the measure of the error threshold
The code **P** represents percent and code **N** represents number.

Time Processed - (Process Run) Field Description

Time Processed
System generated
Displays the current system time when the process was run

Time Processed - Field Description

Time Processed
System generated
Displays the current system time when the process was run

To (Quarter/Year - Carrier) - Field Description

To (Quarter/Year) Carrier
System generated
Displays the carrier's code

To (Quarter/Year - Code) - Field Description

To (Quarter/Year) Code
System generated
Displays the enrollment code

To (Quarter/Year) - Field Description

To (Quarter/Year)
System generated
Displays the number of enrollees covered by the enrollment code displayed in the Code field during the selected quarter and year

Total - (Reconciliation Action Codes) Field Description

Total
System generated
Displays the number of specified reconciliation action codes that meet the criteria entered on the Reconciliation Action Summary page

Total - (Reconciliation Reason Codes) Field Description

Total
System generated
Displays the number of specified reconciliation reason codes that meet the criteria entered on the Reconciliation Reason Summary page

Total - (Transmission Records) Field Description

Total
System generated
Displays the sum of transmission records displayed on the report

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Total Discrepancies Found - Field Description

Total Discrepancies Found
System generated
Displays the total number of records with discrepancies that meet the criteria entered on the Discrepancy Summary page

Total Discrepancies Reconciled - Field Description

Total Discrepancies Reconciled
System generated
Displays the total number of reconciled records that meet the criteria entered on the Discrepancy Summary page

Total Enrollee Records - Field Description

Total Enrollee Records
System generated

Displays the total number of enrollees that meet the criteria entered on the Discrepancy Summary page

Total Errors - (Total Field) Field Description

Total Errors
System generated
Displays the sum of the numbers displayed in the Total field

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Total Errors - Field Description

Total Errors
System generated
Displays the number the errors identified in transmission file

Total Matches Found - Field Description

Total Matches Found
System generated
Displays the total number of matched records that meet the criteria entered on the Discrepancy Summary page

Total Records - (Enrollee) Field Description

Total Records
System generated
Displays the total number of enrollee records displayed on the report.

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Total Records - (Records) Field Description

Total Records
System generated
Displays the total number of records displayed on the report

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Total Warnings - Field Description

Total Warnings
System generated
Displays the total number of warnings identified

Transmission File Name - (Payroll Office) Field Description

Transmission File Name
System generated
Displays the name of the quarterly transmission file sent by the payroll office

Transmission Type - (Optional) Field Instruction

Transmission Type
Optional
Select the drop-down menu and select the transmission type.

Transmission Type - (Required) Field Instruction

Transmission Type
Required
Select the drop-down menu and select the transmission type.
The options are ***Pay Period*** and ***Transmission***.

Transmission Type - Field Description

Transmission Type
System generated
Displays the transmission type:
P - Pay Period
T - Transmission

Transmissions - Field Instruction

Transmissions
Optional, default
Defaults to the ***All*** option
To choose a different display option, select the drop-down menu and select one of the option as follows:

All - Displays all records related to the search criteria
Accepted - Displays all accepted records related to the search criteria
Rejected - Displays all rejected records related to the search criteria
Not Received - Displays statistics for all transmissions that were not received

TRICARE/CHAMPUS - (Enrollee) Field Instruction

TRICARE/CHAMPUS
Conditional
If the enrollee's family member who is enrolled/enrolling in FEHB is covered by Tricare or Civilian Health and Medical Program of the Uniformed Services (CHAMPUS), select the check box next to TRICARE/CHAMPUS; otherwise, do not complete this field.

TRICARE/CHAMPUS - Field Description

TRICARE/CHAMPUS
System generated
Selected check box indicates that the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by TRICARE or Civilian Health and Medical Program of the Uniformed Services (CHAMPUS).

Type - (Carrier Contact) Field Description

Type
System generated
Displays whether the carrier contact is an **`General`** type code for a administrative contact or **`Technical`** type code for a technical contact

Type - (Carrier Contact) Field Instruction

Type
Optional
Select the Type code **`General`** for an administrative contact or **`Technical`** for a technical contact from the drop-down menu.
The Type code indicates whether the carrier contact is an administrative contact or a technical contact.

Type - (Carrier Plan Contact) Field Instruction

Type
System generated

Displays whether the carrier plan contact is an **`General`** type code for a administrative contact or **`Technical`** type code for a technical contact

Type - (Payroll Office Contact) Field Description

Type
System generated
Displays whether the payroll office contact is a **`General`** type code for an Administrative contact or **`Technical`** type code for a Technical contact

Type - (Payroll Office Contact) Field Instruction

Type
Optional
Select the drop-down menu and select the Type code identified below that indicates whether the payroll office contact is an administrative or technical contact.
`General` - Administrative contact
`Technical` - Technical contact

Type - (Payroll Office Contacts Add) Field Instruction

Type
Required
Select the drop-down menu and select the Type code identified below that indicates whether the payroll office contact is an administrative or technical contact.
`General` - indicates the contact is an Administrative contact
`Technical` - indicates the contact is a Technical contact

Type - (Personnel Office Contact - Optional) Field Instruction

Type
Optional
Select the drop-down menu and select the Type code, **`General`** for an administrative contact or **`Technical`** for a technical contact. The Type code indicates whether the personnel office contact is an administrative contact or a technical contact.

Type - (Personnel Office Contact) Field Description

Type
System generated
Displays which type of contact the personnel office contact is by displaying one of the following codes:

General - Administrative contact
Technical - Technical contact

Type - Personnel Office Contacts Field Instruction

Type
Required
Select the drop-down menu and select the Type code identified below that indicates whether the personnel office contact is an administrative or technical contact.
General - Indicates contact is an Administrative contact
Technical - Indicates contact is a Technical contact

Type - Personnel Office Contacts Search Results Field Description

Type
System generated
Displays whether the personnel office contact is an administrative or technical contact as follows:
General - Indicates the contact is an Administrative contact
Technical - Indicates the contact is a Technical contact

Unrecon - Field Description

Unrecon
System generated
Displays the number of unreconciled discrepancies

User ID - (Form) Field Instruction

User ID
Optional, alphanumeric, eight positions maximum
Enter the user identification (ID) number of the person creating the form.

User ID - (Reconciliation) Field Description

User ID
System generated
Displays the user identification number of the person who entered the reconciliation reason code

User ID - (Report) Field Instruction

User ID
Optional, alphanumeric, eight positions maximum
Enter the user identification (ID) number of the person creating the report.
User ID
Required, alphanumeric, eight positions maximum
Enter the assigned NFC user ID.

Validation - Field Description

Validation
System generated
Displays the status of the validation
The **`Validated`** code is displayed when the transmission is validated. The **`Cleared`** code is displayed when the transmission validation is cleared.

Validation Date - Field Description

Validation Date
System generated
Displays the date that the record was validated

Validation Date From - Field Instruction

Validation Date From
Optional
Select the date that begins the range of reconciliation dates by selecting the first drop-down menu and select the month; select the second drop-down menu and select the day; and select the third drop-down menu and select the year.

Validation Date To - Field Instructions

Validation Date To
Optional
Select the date that ends the range of reconciliation dates by selecting the first drop-down menu and select the month; select the second drop-down menu and select the day; and select the third drop-down menu and select the year.

Warning Code - (Select) Field Instruction

Warning Code

Optional
Select the drop-down menu and select the warning code. For a list and descriptions of these codes, see ***Warning Codes Table*** (on page 289).

Warnings - Field Description

Warnings
System generated
Displays the sum of warning codes displayed in the Discrepancy field

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Whld Amt - Field Description

Whld Amt
System generated
Displays the enrollee's withholding amount

Year - (Error Statistics) Field Description

Year
System generated
Displays the reconciliation year for the requested error statistics

Year - (Payroll Office Enrollees) Search Results Field Description

Year
System generated
Displays the reconciliation year

Year - (Reconciliation Year for Transmission Record) Field Instruction

Year
Optional, alphanumeric, four positions
Enter the reconciliation year for the requested transmission record.

Year - (Reconciliation Year) Field Description

Year

System generated
Displays the reconciliation year

Year - (Reconciliation) 2810 Form Field Description

Year
System generated
Displays the reconciliation year the 2810 form was created

Year - (Required) Field Instruction

Year
Required, default
Defaults to the current year
To choose a different year, select the drop-down menu and select the desired year.

Year - (Transmission Year Record) Field Description

Year
System generated
Displays the reconciliation year for the requested transmission record

Year - Field Description

Year
System generated
Displays the reconciliation year for the requested error statistics

Year - Field Instruction

Year
Optional, alphanumeric, four positions
Enter the reconciliation year for the requested error statistics.

Year From - (Range - Required) Field Instruction

Year From
Required, default
Defaults to the current reconciliation year
To choose a different year that begins the range of reconciliation years, select the drop-down menu and select the desired reconciliation year.

Year To - (Range - Required) Field Instruction

Year To
Required, default
Defaults to the current reconciliation year
To choose a different year that ends the range of reconciliation years, select the drop-down menu and select the desired reconciliation year.

Year/Quarter - Field Description

Year/Quarter
System generated
Displays the reconciliation year/quarter

Year/Quarter From - Field Description

Year/Quarter From
System generated
Displays the reconciliation year/quarter that begins the range of reconciliation years/quarters

Year/Quarter To - Field Description

Year/Quarter To
System generated
Displays the reconciliation year/quarter that ends the range of reconciliation years/quarters

ZIP - (Carrier Contact) Field Description

ZIP
System generated
Displays the ZIP Code of the carrier contact

ZIP - (Carrier Plan Contact) Field Description

ZIP

System generated
Displays the ZIP Code of the carrier plan contact

ZIP - (Carrier) Field Description

ZIP
System generated
Displays the ZIP Code of the carrier

ZIP - (Coordinator) Field Description

ZIP
System generated
Displays the domestic ZIP Code or foreign postal code for the enrollee's employing, personnel, or point-of-contact office

ZIP - (Coordinator) Field Instruction

Zip
Conditional, alphanumeric, 11 positions
Enter the employing, personnel, or point-of-contact office's domestic ZIP Code or foreign postal code.

ZIP - (Enrollee) Field Description

ZIP
System generated
Displays the domestic ZIP Code or foreign postal code of the enrollee

ZIP - (Enrollee) Field Description

ZIP
Optional, numeric, 11 positions maximum
Enter the ZIP Code of the enrollee.

ZIP - (Enrollee/Survivor) Field Description

ZIP
System generated
Displays the new ZIP Code or foreign postal code for the enrollee or survivor annuitant's address

Zip - (Form 2809 Part A Continued) Field Instruction

Zip

Optional, numeric
Enter the domestic ZIP Code or foreign postal code of the enrollee's family member who is enrolled/enrolling in FEHB.

ZIP - (Payroll Office Contacts Add) Field Instruction

ZIP
Optional, alphanumeric, 11 positions maximum
Enter the payroll office's ZIP Code.

ZIP - (Personnel Office Contact) Field Description

ZIP
System generated
Displays the ZIP Code of the personnel office contact

ZIP - Form 2809 View (Part A Continued) Field Description

Zip
System generated
Displays the domestic ZIP Code or foreign postal code of the enrollee's family member who is enrolled/enrolling in FEHB

ZIP - Payroll Office Field Description

ZIP
System generated
Displays the ZIP Code of the payroll office

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