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PUBLICATIONS CATEGORY Insurance Processing

IDAG

PROCEDURE MANUAL CLER for Carriers



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Time Processed (System Generated) Transmissions Field Instructions
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Total (System Generated) Reconciliation Reason Field Instructions
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Total Enrollee Records (System Generated) Field Instructions
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Latest Update Information

The following changes have been made to the Centralized Enrollment Clearinghouse System (CLER) procedure:

Section	Description of Change
Viewing a Carrier Enrollee Record 89340.htm?updates	A new column named Employee/Annuitant_Ind has been added to the Carrier Enrollees Results page.
Validating a Carrier Enrollee Record 89341,htm?updates	A new column named Employee/Annuitant_Ind has been added to the Carrier Enrollees Results page.
<i>Viewing Carrier Discrepancy Listing (Report 12) 89336.htm?updates</i>	A new column named Employee/Annuitant_Ind has been added to the report.
<i>Viewing Pay Period Transmissions Payment Amounts (Report 13) 83591.htm?updates</i>	A new column named Employee/Annuitant_Ind has been added to the report.



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:



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), carriers, and individual enrollees, 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).

This section includes the following topics:

System Capabilities and Interface	5
Reports Through CLER	6
Forms	6
Responsibilities	7
CLER Online Help	8
Who to Contact for Help	10

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 are maintained on the database and are 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 Through CLER

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

CLER Online Help

CLER Online Help provides three methods for locating information:

• **Table of Contents**. To access the Online Help Table of Contents, click the question mark (?) icon on the CLER Main Menu. To view the text associated with a topic, just click the topic.





CONTENTS SEARCH BACK FORMARD HONE BUT BUT BUT	Office of Personnel Management Federal Employees Health Benefits Centralized Enrollment Clearinghouse Project at the National Finance Center
	Table Of Contents
	Part 1. Introduction
	Part 2. CLER Processing Instructions
	Part 3. CLER Field Descriptions And Instructions
	Part 4. CLER Reference Tables
	Part 5. <u>Glossary</u>

Figure 1: Online Help Table of Contents

- Word Search. To conduct a word search, click the Search icon in the Help menu bar. Enter a word or words in the space provided to display associated topics. Click any topic to view the associated text.
- Help Button on System Pages. For field instructions/descriptions on a specific page, click the question mark icon [?] on that page.

ONTENTS SEARCH RACK FORMAND HONE DEFLAY LET	Office of Personnel Management Federal Employees Health Benefits Centralized Enrollment Clearinghouse Project at the National Finance Center
	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. 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), carriers, and individual enrollees, as needed.
	Authorized users of CLER can access data when security access is requested by the computer system security officer and clearance is provided by the NFC Information Systems Security Office (ISSO).
	This section presents more information under the following topics:
	System Capabilities And Interface
	External Reports Through CLER
	Internal Reports
	Forms
	Responsibilities

Figure 2: Expanded Online Help Table of Contents Page



Who to Contact for Help

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

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

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 the CLER Web-based application. 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

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 CLERC, CLER Security Access Form, Health Benefit Carrier Personnel, and send it to NFC's OSC via fax at **1-888-496-8192** or **1-303-205-3276** or email at *osc.etix@usda.gov*.

For an electronic and/or paper copy of Form CLERC, CLER Security Access Form, Health Benefit Carrier 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 **504-426-6435** or via email *osc.etix@usda.gov*.

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 according 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.

Log On

To log on:

1. Access the Internet and log on to the CLER Web site at *https://www.nfc.usda.gov/ClientServices/Insurance*. Click 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, click Accessibility or Security, as applicable.



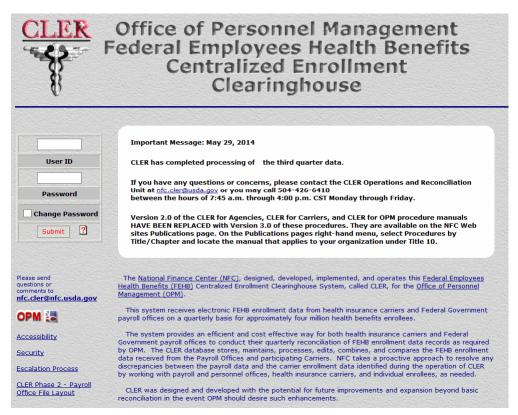


Figure 3: CLER Logon Page

2. Complete the fields as indicated below and click **Submit**. The CLER Main Menu is displayed.

Field	Instruction/Description
User ID	<i>Required, alphanumeric, 8 positions maximum</i> Enter the assigned National Finance Center user ID.
Password	<i>Required</i> Enter the password. If unsuccessful, a message will appear stating that the user ID or password entered is invalid.
Change Password	To change the password, click 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 click Submit .



Figure 4: CLER Main Menu Page

Below is a brief description of each option displayed on the CLER Main Menu.

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

Log On to CLER

To log on:

- 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.

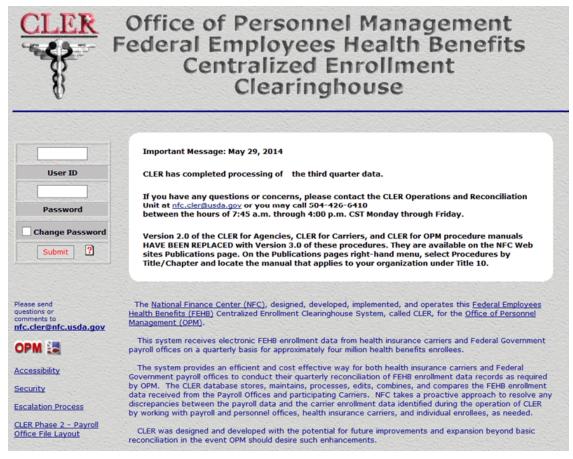


Figure 5: CLER Logon Page

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

User ID

Password



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

CLER	Payroll Office	Carrier	Forms	Transmission	Reports	(\$10)	LO Of
R Main Menu							
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Figure 6: 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.



Log Off

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

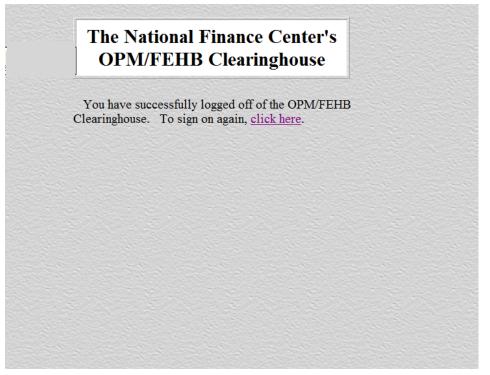


Figure 7: CLER Logoff Page



Transmission of Enrollment Data

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

This section includes the following topics:

Timeline for CLER Quarterly Reconciliation	19
Formatting Enrollment Data Files for Transmission to CLER	22

Timeline for CLER Quarterly Reconciliation

The CLER reconciliation process includes four 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.

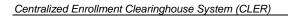
Note: In the sample timeline listed below, payroll office enrollment data is transmitted directly to CLER and consists of data as of the pay period paid by payroll offices between March 1 and May 31.

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. 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.
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.





Date (Month/Day)	Description
3/15	Enrollment data transmitted from carriers must be received by noon Eastern Standard Time (EST) 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 by 5:00 p.m. Central Standard Time (CST) 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. (EST) .
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. (CST) on May 1 .
5/1	 Responses from Agencies are due by 8:00 a.m. (CST). 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.
5/1	On May 1 , after 8:00 a.m. (CST) , 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.



Formatting Enrollment Data Files for Transmission to CLER

For information about formatting enrollment data files for transmission to CLER, carriers should refer to the CLER Carrier Enrollment File Layout document. For a copy of this document, contact the CLER Operations and Reconciliation Unit at **1-855-632-4468**.



Viewing CLER Instructions

The Payroll Office option allows users to view payroll office records.

This section includes the following topics:

Viewing Payroll Office Information Records	;
Viewing and Maintaining Carrier Records66	;
Viewing Reports151	

Viewing Payroll Office Information Records

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

To View a Payroll Office Information Record:

1. Select the **Payroll Office** tab at the top of the CLER Main Menu. The Payroll Office Main Page is displayed.

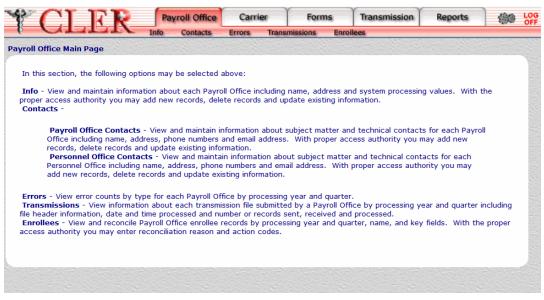


Figure 8: Payroll Office Main Page



2. Select **Info** at the top of the Payroll Office Main Page. The Payroll Office Information page is displayed.

Y	CIFR	Payroll Office	Carrier	Forms	Transmission	Reports	LOG OFF
V	Gubi	Info Contacts	Errors Trans	missions Enro	ollees		
Pay	oll Office Information						
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	ffice ID						
L							
N	ame	City	s	tate			
L				\checkmark			
c	order By: ID 💿 Pay Cycle	e 🔿 Name 🔿 City	0				
	SUBMIT RESET						
-							and the second second

Figure 9: Payroll Office Information Page

3. Complete the fields on the Payroll Office Information page as indicated and click Submit.

OR

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

Field	Instruction/Description
Payroll Office ID	<i>Optional, alphanumeric, 8 position</i> Enter the payroll office identification number.
Name	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the name of the payroll office.
City	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the payroll office's city.
State	<i>Optional, alphanumeric, 2 positions maximum</i> Select the payroll office's, carrier's, carrier contact's, or carrier plan contact's State, U.S. territory, or overseas military abbreviation from the drop-down menu. Refer to the <i>State, U.S. Territory, and</i> <i>Overseas Military Abbreviations Table</i> (on page 226) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.



Field	Instruction/Description
Order By	Optional, default
	Defaults to the <i>ID</i> 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 values:
	ID - Search by payroll office identification number.
	Pay Cycle - Search by pay cycle.
	Name - Search by payroll office name.
	City - Search by payroll office city.

4. The Payroll Office Information Search Results page is displayed.

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Figure 10: Payroll Office Information Search Results Page

Field	Description
ID	System generated Displays the payroll office identification number.
Name	<i>System generated</i> Displays the name of the payroll office.
Address	<i>System generated</i> Displays the payroll office's street or post office box address.
City	System generated Displays the name of the payroll office'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.



State	<i>System generated</i> Displays the payroll 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 <i>State, U.S.</i> <i>Territory, and Overseas Military Abbreviations Table</i> (on page 226).
Zip	<i>System generated</i> Displays the payroll office's ZIP Code.

1. Click **View** next to the applicable record. The Payroll Office Information View page is displayed.

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

F CI F	Re Pa	yroll Office	Carrier	Forms	Transmission	Reports	
	Info	Contacts	Errors Tr	ansmissions E	nrollees		
yroll Office Information	View						
							?
Use the browser Back a	irrow to select a	nother record	to view.				
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Name							
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Transmission File Nam	e						
ID	Date		Time				
	Date	25 2014	Time 08:19:22				

Figure 11: Payroll Office Information View Page

Field	Description
Payroll Office ID	System generated Displays the payroll office identification number.
Name	<i>System generated</i> Displays the name of the payroll office.



Address Line 1	System generated
	Displays the first line payroll office's street or post office box address.
Address Line 2	System generated
	Displays the second line payroll office's street or post office box address.
Address Line 3	System generated
	Displays the third line payroll office's street or post office box address.
City	System generated
	Displays the name of the payroll office'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.
State	System generated
	Displays the payroll 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 <i>State, U.S. Territory, and Overseas Military Abbreviations Table</i> (on page 226).
Zip	System generated
	Displays the payroll office's ZIP Code.
Foreign Country	System generated
	Displays the payroll office's country code. For a list and descriptions of country codes, see <i>Country Codes Table</i> (on page 229).
Start Date	System generated
	Displays the first date the payroll office will be valid.
End Date	System generated
	Displays the last date the payroll office will be valid.
Error Threshold	System generated
	Displays the number of percentage of errors permitted for the payroll office/carrier before a transmission file is rejected.



Threshold Type	System generated Displays the number measure of the error threshold. \mathbf{P} represents percent and \mathbf{N} represents number.
Transmission File Name	<i>System generated</i> Displays the name of the quarterly transmission file sent by the payroll office.
Last Changed ID	System generated Displays the user ID number of the individual who made the most recent change to the record.
Last Changed Date	System generated Displays the date of the most recent change.
Last Changed Time	<i>System generated</i> Displays the time of the most recent change.

For more information see:

Viewing Payroll and Personnel Office Contact Records	
Maintaining Payroll Office Enrollee Records (Marked with Discrepancy (
Viewing a Payroll Office Enrollee Record (Marked with Discrepancy Cod	e 163) 42
Reconciling a Payroll Office Enrollee Record (Marked With Discrepancy	

Viewing Payroll and Personnel Office Contact Records

The Contacts option on the Payroll Office Main Page allows users to view information about subject matter and technical contacts for each payroll office and personnel office. This will aid users in communicating with each other to ensure the resolution of technical concerns related to the transmissions of the enrollment data as well as ensure the resolution of reconciliation matters.

For more information see:

Viewing a Payroll Office Contact Record	29
Viewing a Personnel Office Contact Record	.35



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 at the top of the CLER Main Menu.

CLER	Payroll Office	Carrier	Forms	Transmission	Reports	(90	LO(OF
CONTROL Contacts Carrier Contacts Carrier Contacts Contacts	oyees Health Benefit of CLER based upon it areas of CLER. Se d. nal areas of CLER, cli <u>Contacts</u> <u>ice Contacts</u>	s Centralized En the level of sec ctions that you ick on the follow	rollment Clearing urity access you are not authorize ing links that cor 3. <u>Forms</u> 2809 2810 4. <u>Transmission</u> 5. <u>Reports</u> 0 Pavr 0 Carri 0 Carri 0 Carri 0 Pavr 0 Carri 0 Carri 0 Enrol	house or CLER. From have been granted. ad to access will hav respond to the tabs respond to the tabs <u>cransfer</u> <u>e Entry</u> <u>oll Office Reconciliation</u> <u>at Office Reconciliation</u> <u>at Office Reconciliation</u> <u>at Office Reconciliation</u> <u>at Office Reconciliation</u>	this screen you Click the tabs a a the tabs "grayu and options abo and options abo and options abo and options abo abo and and and and and options abo abo and options abo abo and options abo abo and options abo	it the top ed out"	?
<u>Carrier Conta</u> <u>Carrier Plan C</u> <u>Errors</u> <u>Transmissions</u> <u>Enrollees</u>			Reco Reco Reco Carrie	er Gain/Loss Summar nciliation Reason Sun nciliation Action Sum nciliation Summary er Discrepancy Listing Period Transmissions	i <u>mary</u> mary 1	<u>ts</u>	

Figure 12: CLER Main Menu Page

2. The Payroll Office Main Page is displayed.

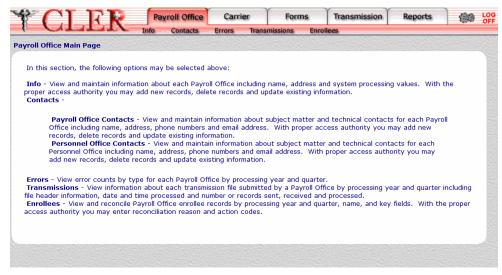


Figure 13: Contacts Main Page



3. Select **Contacts** at the top of the Payroll Office Main Page. The Contacts Main Page is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

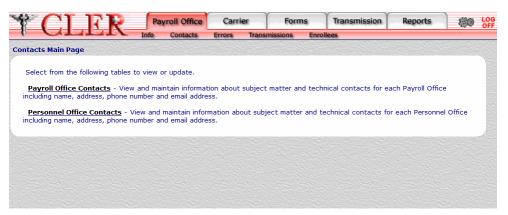


Figure 14: Contacts Main Page

4. Click the Payroll Office Contacts link to display the Payroll Office Contacts page.

P CI	FR	Payroll Office	Carrier	Forms	Transmission	Reports	E LOG
		Info Contacts	Errors Trans	missions Enn	ollees		
Payroll Office Co	ontacts						
		d a new Payroll Office		Enter selection	criteria in the followir	ng fields and clic	? k the
	n to search for reco	ords based on your er	ntries.				
Payroll Office ID	Туре						
	~						
Display: Al	I 💿 Active 🔾	Inactive 🔘					
Order By: I	О 💿 Туре 🔿						
SUBMIT R	RESET						

Figure 15: Payroll Office Contacts Page

5. Complete the fields on the Payroll Office Contacts and select **Submit**.

OR

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

Field	Instruction/Description			
Payroll Office ID	Optional, alphanumeric, 8 position			
	Enter the payroll office identification number.			



Field	Instruction/Description
Туре	Optional
	Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Display	Optional, default
	Defaults to 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 values:
	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.
Order By	Optional, default
	Defaults to the <i>ID</i> 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 values:
	ID - Search by ID number.
	Type - Search by type code.

6. The Payroll Office Contacts Search Results page is displayed.

1 C			Info	Contacts	Errors	Transmissions	Enrollees		 Č
yroll Offi	ce Conta	cts							
		and the second sec							-
ID	Туре	Status	Name	Ph	one	Email	о	ptions	
:	General	Active 1					<u>v</u> View		
Decend	s Found: :								
Record	s round.	L							

Figure 16: Payroll Office Contacts Search Results Page

Field	Description
ID	System generated
	Displays the payroll office identification number.



Туре	System generated
	Displays General type code to indicate that the payroll office contact holds an administrative position.
	Displays Technical type code to indicate that the payroll office contact holds a technical position.
Status	System generated
	Displays active to indicate that the record has been activated in CLER.
	Displays inactive to indicate that the record has been inactivated in CLER.
Name	System generated
	Displays the name of the payroll office contact.
Phone	System generated
	Displays the payroll office contact's telephone number.
Email	System generated
	Displays the payroll office contact's email address.

7. Click **View** next to the applicable record. The Payroll Office Contacts View page is displayed.



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

	Info Co	ontacts Errors Tra	insmissions En	rollees	 , Silva, C
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					?
Use the browser Back ar	row to select anothe	er record to view.			
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ayroll					
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	NT RECON. (CLER)				
SENTRALIZED ENROLLMEI		Foreign C	ountry		
	NT RECON. (CLER)	Foreign C	ountry	~	
CENTRALIZED ENROLLMEI	State Zip		ountry	~	
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CENTRALIZED ENROLLMEI	State Zip		ountry	~	
CENTRALIZED ENROLLMEI	State Zip		ountry	~	
CENTRALIZED ENROLLMEI	State Zip		ountry	~	
CENTRALIZED ENROLLMEI City Phone Number Email Address	State Zip		ountry	~	
CENTRALIZED ENROLLMEI City Phone Number Smail Address	State Zip		ountry	~	
CENTRALIZED ENROLLMEI City Phone Number	State Zip		ountry	~	

Figure 17: Payroll Office Contacts View Page

Field	Instruction/Description
Payroll Office ID	System generated
	Displays the payroll office identification number.
Туре	System generated
	Displays General type code to indicate that the payroll office contact holds an administrative position.
	Displays Technical type code to indicate that the payroll office contact holds a technical position.
Role	System generated
	Displays the title, position, etc., of the payroll office contact/personnel office contact/carrier contact/carrier plan contact.
Address Line 1	System generated
	Displays the first line of the payroll office contact's street or post office box address.





Address Line 2System generated Displays the second line of the carrier's street or post office box address.Address Line 3System generated Displays the third line of the payroll office contact's street or post office box address.CitySystem generated Displays the name of the carrier's city. Note: If the address is an overseas military address, this field displays PPO for fleet post office or APO for army post office in lieu of the city.StateSystem generated Displays the payroll 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 are State, U.S. Territory, and overseas Military Abbreviations are State, U.S. Territory, and Overseas Military Abbreviations, see State, U.S. Territory, and Overseas Military Abbreviations, see State, U.S. Territory, and Overseas Military Abbreviations, see State, U.S. Territory, and Overseas Country Code.Foreign CountrySystem generated Displays the payroll office contact's Country Code. For a list and descriptions of country codes, see Country Codes Table (on page 229).PhoneSystem generated Displays the payroll office contact's telephone number.Fax NumberSystem generated Displays the payroll office contact's fax number.EmailSystem generated Displays the payroll office contact's fax number.EmailSystem generated Displays the payroll office contact's email address.RemarksSystem generated Displays the payroll office contact's fax number.List Changed IDSystem generated Displays the remarks about this record.Last Changed IDSystem generated Displays the user ID		
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Remarks System generated Displays the remarks about this record. Last Changed ID System generated Displays the user ID number of the individual who made the most	Email	System generated
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Last Changed ID System generated Displays the user ID number of the individual who made the most	Remarks	System generated
Displays the user ID number of the individual who made the most		Displays the remarks about this record.
	Last Changed ID	System generated



Last Changed Date	<i>System generated</i> Displays the date of the most recent change.
Last Changed Time	<i>System generated</i> Displays the time of the most recent change.

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 the **Payroll Office** tab at the top of the CLER Main Menu.

	Payroll Office	Carrier	Forms	Transmission	Reports	490	0
R Main Menu							
Welcome to the OPM Federal Emp ccess the various functional areas f the screen to access the differen nd they will not function, if select To learn about the various function	of CLER based upon nt areas of CLER. Se ed.	the level of sec ctions that you	urity access yo are not authori	u have been granted. zed to access will hav	Click the tabs a e the tabs "graye	t the top ed out"	?
1. <u>Payroll Office</u> Info Contacts Payroll Offic: Personnel Of Transmissions Enrollees 2. <u>Carrier</u> Info Enrollent Codes IDS Contacts Carrier Plan. Errors Transmissions Enrollees	fice Contacts acts		Onli Cont Cont	0	ransmission fransmission ary ary Y mary mary a		

Figure 18: CLER Main Menu Page



2. The Payroll Office Main Page is displayed.

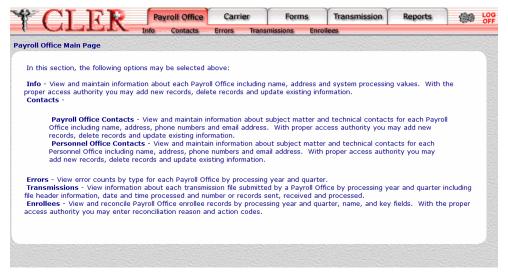


Figure 19: Payroll Office Main Page

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

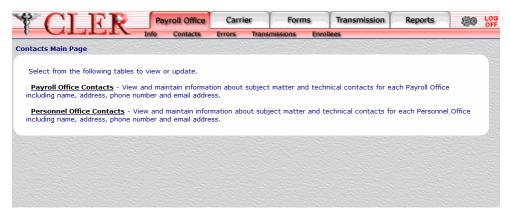


Figure 20: Contacts Main Page



4. Click the **Personnel Office Contacts** link on the Contacts Main Page to display the Personnel Office Contacts page.

PC	TRR	Payr	oll Office	Carrier	Forms	Transmission	Reports	190	LOC
v Q.		Info	Contacts Err	ors Transi	missions Enro	ollees			
ersonnel Offic	ce Contacts								
Click the 📒	Add button to	add a new Pe	rsonnel Office Co	ontacts recor	d. Enter selecti	on criteria in the follo	wing fields and	click the	
SUBMIT butt	on to search for r	ecords based	on your entries.						1602
Payroll Office ID	Personnel Office ID Ty	pe							C SVEL
		~							1000
Display: 4	All 💿 Active 🔿	Inactive ()						10.11.0
Order By:	ID 💿 POI 🔿	Туре 🔿							10.000
	RESET								0000
SOBMIT	RESET								0 AVE

Figure 21: Pesonnel Office Contacts Record

5. Complete the fields on the Personnel Office Contacts page and click Submit.

OR

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

Field	Instruction/Description
Payroll Office ID	<i>Optional, alphanumeric, 8 position</i> Enter the payroll office identification number.
Personnel Office ID	<i>Optional, alphanumeric, 4 positions</i> Enter the personnel office identification (POI) number.
Туре	<i>Optional</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.



Field	Instruction/Description
Display	Optional, default
	Defaults to 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 values:
	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.
Order By	Optional, default
	Defaults to the <i>ID</i> 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 values:
	ID - Search by payroll office identification number.
	POI - Search by personnel office identification number.
	Type - Search by type code.

6. The Personnel Office Contacts Search Results page is displayed.

General Active General Active		A Group I	
Concerni Active		View	
General Active	1	View	
Records Found: 2			

Figure 22: Personnel Office Contacts Search Results Page

Field	Description	
ID	System generated	
	Displays the payroll office identification number.	



POI	System generated
	Displays the POI number.
	Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.
Туре	System generated
	Displays General type code to indicate that the payroll office contact holds an administrative position.
	Displays Technical type code to indicate that the payroll office contact holds a technical position.
Status	System generated
	Displays active to indicate that the record has been activated in CLER.
	Displays inactive to indicate that the record has been inactivated in CLER.
Name	System generated
	Displays the name of the personnel office contact.
Phone	System generated
	Displays the carrier contact's telephone number.
Email	System generated
	Displays the personnel office contact's email address.

1. Click **View** next to the applicable record. The Personnel Office Contacts View page is displayed.



Note: To view another record, click your browser's Back button to return to the Personnel Office Contacts Search Results page. Click **View** next to the applicable record.

	K-	Payroll Offi				Reports	Ø 9
~~~~		Info Contact	s Errors	Transmissions	Enrollees		
sonnel Office Conta	cts View						R
Use the browser Bac	k arrow to s	select another rec	ord to view.				?
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City		State Zip	Foreig	gn Country			
		✓			$\checkmark$		
hone Number		Fax Number					
mail Address							
lemarks							
ID		Date	Time				

Figure 23: Personnel Office Contacts View Page

Field	Description
Payroll Office ID	System generated
	Displays the payroll office identification number.
Personnel Office ID	System generated
	Displays the personnel office identification number.
Туре	System generated
	Displays <b>General</b> type code to indicate that the payroll office contact holds an administrative position.
	Displays <b>Technical</b> type code to indicate that the payroll office contact holds a technical position.
Role	System generated Displays the title, position, etc., of the payroll office
	contact/personnel office contact/carrier contact/carrier plan contact.



Name	System generated
	Displays the name of the personnel office contact.
Address Line 1	System generated
	Displays the first line of the personnel office contact's street or post office box address.
Address Line 2	System generated
	Displays the second line of the personnel office contact's street or post office box address.
Address Line 3	System generated
	Displays the third line of the personnel office contact's street or post office box address.
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 <b>FPO</b> for fleet post office or <b>APO</b> for army post office in lieu of the city.
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, <i>State, U.S.</i> <i>Territory, and Overseas Military Abbreviations Table</i> (on page 226).
Zip	System generated
	Displays the personnel office contact's ZIP Code.
Foreign Country	System generated
	Displays the personnel office contact's country code. For a list and descriptions of country codes, see <i>Country Codes Table</i> (on page 229).
Phone Number	System generated
	Displays the carrier plan contact's telephone number.
Fax Number	System generated
	Displays the personnel office contact's fax number.
Email Address	System generated
	Displays the personnel office contact's email address.



Remarks	<i>System generated</i> Displays the remarks about this record.
Last Changed ID	<i>System generated</i> Displays the user ID number of the individual who made the most recent change to the record.
Last Changed Date	System generated Displays the date of the most recent change.
Last Changed Time	<i>System generated</i> Displays the time of the most recent change.

## Maintaining Payroll Office Enrollee Records (Marked with Discrepancy Code 163)

The Enrollees option on the Payroll Office Main Page allows carrier users to view and reconcile payroll office enrollee records marked with Discrepancy Code 163. For a description of Discrepancy Code 163, see *Discrepancy Codes Table* (on page 217).

Note: Agency users are able to view and validate carrier enrollee records marked with Discrepancy Code 160. Thus, the Validate function allows Agency users to communicate with carriers about carrier enrollee records marked with Discrepancy Code 160. For a description of Discrepancy Code 160, see *Discrepancy Codes Table* (on page 217).

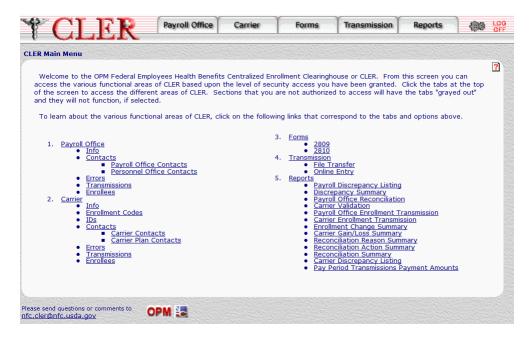
## Viewing a Payroll Office Enrollee Record (Marked with Discrepancy Code 163)

The view function allows carrier users to view payroll office enrollee records marked with Discrepancy Code 163. For a description of Discrepancy Code 163, see *Discrepancy Codes Table* (on page 217).

#### To View a Payroll Office Enrollee Record Marked with Discrepancy Code 163:

1. Select the Payroll Office tab at the top of the CLER Main Menu.





2. The Payroll Office Main Page is displayed.

	R R	Pa	yroll Office	Carri	ier For	ns	Transmission	Reports	- 60
		Info	Contacts	Errors	Transmissions	Enro	ollees	· · · · · ·	
yroll Office Main Pa	ge								
In this section, the	following op	tions ma	y be selected	above:					
Info - View and ma proper access autho Contacts -							nd system processin ormation.	g values. With t	he
Office includi records, dele <b>Personnel (</b> Personnel Off	ng name, ad te records a <b>Office Conta</b> fice including	ldress, pl and updat <b>acts</b> - Vi g name, a	none numbers te existing info ew and mainta	and email ormation. ain informate numbers	address.  With pr tion about subjec and email addres:	oper ac t matte	nd technical contact cess authority you n r and technical cont proper access auth	nay add new (	I
file header informatio	iew informat on, date and nd reconcile	ion abou l time pro Payroll C	t each transm icessed and ni Office enrollee	ission file s umber or re records by	submitted by a Pa acords sent, rece r processing year	yroll Of ved and	fice by processing ye		

Figure 24: Payroll Office Main Page



3. Select **Enrollees** at the top of the Payroll Office Main Page. The Payroll Office Enrollees page is displayed.

2° C	TER	Payroll Office	e Carrier	Forms	Transmission	Reports	190
		Info Contacts	i Brons Tra	smissions Enr	ollees		
roll Office	Enrollees						
Enter colo	ction critoria in the fe	ollowing fields and click	the SUBMIT button t	o courch for record	de bagad an your antria	. Fielde marke	? 1ith *
are require		nowing neids and click	Che SOBMIT DUCCON C	o search for record	us based on your entrie	s, rielus marke	a wich
Payroll							
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0000000	2004 1						
Agency P	Enro DI Carrier Cod	ollment  e SSN - from	Ott SSN-to Fro	her ID Othe m To	r ID		
syency P							
Last Name Doe		First Name John	Middle 1	Name			
		Teenin					
Display:	All Records 💿	Matches O No Mate	hes O Discrepan	cies O Wai	rnings O		
	Unreconciled O R	econciled O Confir	med O Disp	uted O Not Vali	idated O		
	0						
Order By:	1st Name	2nd SSNO	💌 3rd				
	4th	💽 5th	💽 6th				
SUBMIT	RESET						

Figure 25: Payroll Office Enrollees Page

4. Complete the fields on the Payroll Office Enrollees page and click Submit.

### OR

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

Field	Instruction/Description
Payroll Office ID*	<i>Required</i> Select the payroll office identification number from the drop-down menu.
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter*	<i>Required default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.



Field	Instruction/Description
Agency	<i>Optional, alphanumeric, 4 positions</i> Enter the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).
POI	<i>Optional, alphanumeric, 4 positions</i> Enter the POI of the office where the enrollee's records are maintained.
Carrier	<i>Optional, alphanumeric, 4 positions</i> Enter your company's carrier code. Only the carrier code for your company should be entered in this field. If the carrier code is not entered, this field defaults to your company's carrier code.
Enrollment Code	<i>Optional, alphanumeric, 3 positions</i> Enter the enrollment/carrier enrollment code.
SSN - From	Optional, alphanumeric, 9 positionsTo search for a specific enrollee record by Social Security number (SSN), enter the SSN and skip the To field.To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field.Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.
SSN - To	Optional, alphanumeric, 9 positions         To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.         Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.



Field	Instruction/Description
Other ID - From	Optional, alphanumeric, 15 positions maximum
	To search for a specific enrollee record by Other ID, enter the Other ID and skip the To field.
	To search for a range of enrollee records by a range of Other IDs, type the Other ID that starts the range, then go to the To field.
	Note for RSP: Enter the civil service annuitant (CSA) or civil service final (CSF) identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXX, and the CSF identifier is typed as FXXXXXXXX.
	These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.
	Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.
Other ID - To	Optional, alphanumeric, 15 positions maximum
	To search for a range of enrollee records by a range of Other IDs, enter the Other ID that ends the range; otherwise, leave blank.
	Note for RSP: Enter the CSA or CSF identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXX, and the CSF identifier is typed as FXXXXXXX.
	These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.
	Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.



Field	Instruction/Description
Last Name	Optional, alphanumeric, 25 positions maximum
	Enter the enrollee's last name. If the enrollee has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III). If there is a case of an enrollee having only one name, enter that one name in this field.
First Name	Optional, alphanumeric, 12 positions maximum
	Enter the enrollee's first name. This must be provided with the exception of an enrollee with only one name.
Middle Name	Optional, alphanumeric, 12 positions maximum
	Enter the enrollee's middle name/initial.
Display (Payroll Office	Optional, default
Enrollees)	Defaults to <b>All</b> display. This field 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 values:
	All Records - Displays all records related to the search criteria.
	<b>Matches</b> - Displays all matched records related to the search criteria.
	<b>No Matches</b> - Displays records with no matches related to the search criteria. No Matches are discrepancies where the carrier record is not found.
	<b>Discrepancies</b> - Displays all records with discrepancies related to the search criteria.
	<b>Warnings</b> - Displays all records with warnings related to the search criteria.
	<b>Unreconciled</b> - 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.
	<b>Reconciled</b> - Displays all records with reconciled discrepancies related to the search criteria.
	<b>Confirmed</b> - 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.
	<b>Disputed</b> - 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.
	<b>Not Validated</b> - 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.



Field	Instruction/Description
Order By: 1st	Optional, default
	Defaults to the <b>Name</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.
Order By: 2nd	Optional, default
	Defaults to the <b>SSNO</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	<b>Pers. Office ID</b> - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.



Field	Instruction/Description
Order By: 3rd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.
Order By: 4th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.





Field	Instruction/Description
Order By: 5th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.
Order By: 6th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.



 The Payroll Office Enrollees Search Results page is displayed showing the payroll office enrollee records. Only payroll office enrollee records marked with Discrepancy Code 163 are displayed.

	Payro	oll Office	Carrier		าร์อกเธ		fransmission	Reports	
	Info	Contacts inc	usi Ti	<u>simamis</u>	sions	Enrollee	s		
yroll Office Enrollees									
Payroll Office ID (	00000000: Payroll Office	)						Refresh	
Year/Quarter 2004/	1								
Enrollee SSN	LastName	<b>First</b> Name	Carrier	Code	Agency	POI	Discrepancies	Fail Count	Options
	Doe	John	XXXX	000	XX00	0000	1634	7 View	Reconcile
00000000	000								
00000000	500								

Figure 26: Payroll Office Enrollees Seach Results Page

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.

	Linfo	Contacts Ent	is trai	smissions	Enn	ollees		-		0
roll Office Enrolle	es									ABS R
	00000000: Payroll Offi	ce							Refresh	
Year/Quarter 2	004/1		First				Fail			
Other ID	Enrollee SSN	Last Name	Name	Carrier	Code	Discrepancies	Count		Options	
xxxxxxxx	000000000	Doe	John	xxxx	000	163	7	View	Reconcile	

Figure 27: Payroll Office Enrolles Search Results (Other ID) Page

Field	Description
Payroll Office ID	System generated Displays the payroll office identification number.
Year	System generated Displays the reconciliation year.
Quarter	System generated Displays the reconciliation quarter.

Other ID Only Page



Other ID	<i>System generated</i> Used by the RSP and 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 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.
Enrollee SSN	System generated Displays the enrollee's SSN.
Last Name	<i>System generated</i> Displays the enrollee's last name.
First Name	<i>System generated</i> Displays the enrollee's first name.
Carrier	<i>System generated</i> Displays the carrier code.
Code	System generated Displays the enrollment code.

## Enrollees Search Results Page Only

Field	Description
Agency	<i>System generated</i> Displays the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).
	Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.



POI	System generated         Displays the POI of the office where the enrollee's records are maintained.         Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.
Discrepancies	System generatedDisplays Discrepancy Code 163. For a detailed explanation of Discrepancy Code 163, see Discrepancy Codes Table (on page 217).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 have been addressed by Agencies. 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.
Fail Count	System generated Displays the number of times this record has failed the quarterly edit process.

1. Click **View** next to the applicable record. The Payroll Office Enrollees View page is displayed showing the selected payroll office enrollee record.



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

CIFR	Payroll Office	Carrier	Formes	Transmission	Reports	LO OF
	Info Contacts	Brous Trais	amissions Enr	ollees		
ayroll Office Enrollees ¥iew						
Use the browser Back arrow to sele	ct another record to vi	ew.				?
Payroll						
Office ID Year Quarter S	ubmission					
00000000 2004 1 1						
Enroll Agency POI Carrier Code	ment SSN					
XX00 0000 XXXX 000						
Last Name	<b>First Name</b>	Middle Name				
Doe	John		]			
Effective Date Amount						
422.47						
Deceased						
Annuitant SSN Pseudo SSN O	ther Payroll ID	Other Carrier ID	)			
Submitter Use #1 Submit	ter Use #2	Submitter Use #3				
	Source Fail Count					
03 10 2004 22:31:28	7					
						10000000
0.1						
Select another discrepancy: 1 2						
Discrepancy 163 - Enroll	ee On Your Payroll O	ffice Record, But	: No Carrier	Explain		
Reconciliation Reason 521 - Carrie					Explain	
	r Correction Require	d - Submitted By	Payroll/Per	-	Explain	
Corrective Action				2		
Payroll Office Comments (400 chara	acter max)	Carrier Comm	<b>nents</b> (400 chara	cter max)		
		w.			<b>W</b>	
					_	
ID Last Payroll Update: XX000		ime 11:27:26				
Last Carrier Update:						

Figure 28: Payroll Office Enrollees View Page

Field	Instruction/Description
Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
Year	System generated Displays the reconciliation year.
Quarter	System generated Displays the reconciliation quarter.



Field	Instruction/Description
Submission	System generated
	Displays the transmission submission for this enrollee record.
Agency	System generated
	Displays the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).
	Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.
POI	System generated
	Displays the POI of the office where the enrollee's records are maintained.
	Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.
Carrier	System generated
	Displays the carrier code.
Enrollment Code	System generated
	Displays the enrollment code/carrier enrollment code.
SSN	System generated
	Displays the enrollee's SSN.
Last Name	System generated
	Displays the enrollee's last name.
First Name	System generated
	Displays the enrollee's first name.
Middle Name	System generated
	Displays the enrollee's middle name or initial.
Effective Date	System generated
	Displays the effective date of the enrollment.



Field	Instruction/Description
Amount	System generated
	Displays the enrollee's withholding/premium.
Deceased Annuitant	System generated
SSN	Displays the deceased annuitant enrollee's SSN.
Pseudo SSN	System generated
	Displays the pseudo SSN used by the Agency and carrier to identify the enrollee.
Other Payroll ID	System generated
	Displays an identifier used by the Agency to identify the enrollee.
Other Carrier ID	System generated
	Displays an identifier used by the carrier to identify the enrollee.
Submitter Use #1	System generated
	Displays remarks that were entered by the organization that created the record/enrollment record.
Submitter Use #2	System generated
	Displays remarks that were entered by the organization that created the record/enrollment record.
Submitter Use #3	System generated
	Displays remarks that were entered by the organization that created the record/enrollment record.
Date Processed	System generated
	Displays the date the record was processed.
Time Processed	System generated
	Displays the time the record was processed (using military time).
Source	System generated
	Displays the source of transmission data indicator. The value in the first position equals $\mathbf{M}$ for mainframe or $\mathbf{S}$ for server. The value in the second position equals $\mathbf{T}$ for transmission or $\mathbf{M}$ for manual entry.
Fail Count	System generated
	Displays the number of times this record has failed the quarterly edit process.



Field	Instruction/Description
Select another discrepancy	<i>Optional</i> Select each discrepancy number to view the corresponding code and message if multiple discrepancies are shown.
Discrepancy	<i>System generated</i> Displays Discrepancy Code 163. A short description is displayed next to the code. To view a detailed explanation of this code, click <b>Explain</b> or see <i>Discrepancy Codes Table</i> (on page 217).
Reconciliation Reason	<i>System generated</i> Displays the code that identifies the cause of a discrepancy as reported by the Agency. A short description is displayed next to the code. Select <b>Explain</b> to view a detailed explanation of the reconciliation reason code or see <i>Reconciliation Reason Codes</i> <i>Table</i> (on page 221).
Reconciliation Action	<i>System generated</i> Displays the code that identifies the action requested by the Agency to resolve a discrepancy. A short description is displayed next to the code. Select <b>Explain</b> to view a detailed explanation of the reconciliation reason code or see <i>Reconciliation Action</i> <i>Codes Table</i> (on page 224).
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. Select <b>Explain</b> to view a detailed explanation of the reconciliation reason code or see <b>Carrier Corrective Action Response Codes Table</b> (on page 225).
Payroll Office Comments	<i>System generated</i> Displays the payroll office's or Agency's comments.
Carrier Comments	<i>System generated</i> Displays the carrier's comments.
Last Payroll Update ID	System generated Displays the user ID number of the payroll office representative who made the most recent change to the record.
Last Payroll Update Date	<i>System generated</i> Displays the date of the most recent change.
Last Payroll Update Time	<i>System generated</i> Displays the time of the most recent change.



Field	Instruction/Description
Last Carrier Update ID	System generated
	Displays the user ID number of the carrier representative/individual who made the most recent change to the record.
Last Carrier Update Date	System generated Displays the date of the most recent change.
Last Carrier Update Time	System generated Displays the the time of the most recent change.

# Reconciling a Payroll Office Enrollee Record (Marked With Discrepancy Code 163)

The reconcile function allows carrier users to communicate with payroll offices about payroll office enrollee records marked with Discrepancy Code 163. For a description of Discrepancy Code 163, see *Discrepancy Codes Table* (on page 217).

## To Reconcile a Payroll Office Enrollee Record Marked with Discrepancy Code 163:

1. Select the **Payroll Office** tab at the top of the CLER Main.

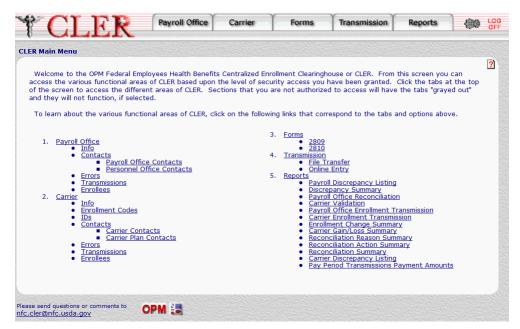


Figure 29: CLER Main Menu Page



2. The Payroll Office Main Page is displayed.

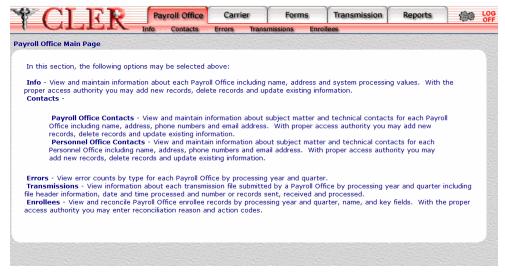


Figure 30: Payroll Office Main Page

3. Select **Enrollees** at the top of the Payroll Office Main Page. The Payroll Office Enrollees page is displayed.

20	TER	Payroll Offic	ce Carrier	Fame	Transmission	Reports	100 L
		Info Contact	s Errers fran	amissions Enn	ollees		
roll Office	e Enrollees	lauta falda and altal	d. cupart land			- Fields - and -	?
are require		lowing neros and click	the SOBMIT Button (	o search for record	is based on your entrie	s, rields marke	d with
Payroll Office ID* 0000000		rter*					
Agency	Enro POI Carrier Code	llment SSN - from	Ott SSN - to Fro	er ID Other m To	TD		
Last Name Doe	1	First Name	Middle M	ame			
DOC							
Display:	All Records 💿	Matches O No Mat	ches O Discrepan	ies O War	nings O		
	Unreconciled O Re	_	-	ited O Not Vali	-		
Order By:	1st Name	2nd SSNO	3rd				
	4th	5th	💽 6th				
SUBMIT	RESET						



4. Complete the fields on the Payroll Office Enrollees page and click Submit.

#### OR

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



5. The Payroll Office Enrollees Search Results page is displayed showing the payroll office enrollee records. Only payroll office enrollee records marked with Discrepancy Code 163 are displayed.

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.

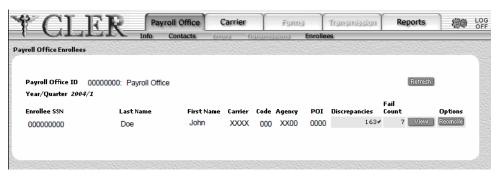


Figure 32: Payroll Office Enrollees Search Results Page

Field	Description
Payroll Office ID	System generated Displays the payroll office identification number.
Year	System generated Displays the reconciliation year.
Quarter	System generated Displays the reconciliation quarter.
Enrollee SSN	<i>System generated</i> Displays the enrollee's SSN.
Last Name	<i>System generated</i> Displays the enrollee's last name.
First Name	<i>System generated</i> Displays the enrollee's first name.
Carrier	System generated Displays the carrier code.
Code	System generated Displays the enrollment code submitted by the payroll office/carrier.



System generated Displays the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).
Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.
System generated
Displays the POI of the office where the enrollee's records are maintained.
Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.
System generated
Displays Discrepancy Code 163. For a detailed explanation of Discrepancy Code 163, see <i>Discrepancy Codes Table</i> (on page 217).
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 have been addressed by Agencies. Green check marks are displayed next to discrepancies that have been addressed by carriers. To display the most current check marks, select <b>Refresh</b> at the top of the Payroll Office Enrollees Search Results page.
System generated Displays the number of times this record has failed the quarterly edit process.



1. Click **Reconcile** next to the applicable record. The Carrier Enrollees Reconcile page is displayed showing the selected payroll office enrollee record.

YCIF	Payroll Office	e Carrier	Funs	Transmission	Reports	LOG OFF
	Info Contacts	trons train	amissions Enro	ollees		
Carrier Enrollees Reconcile	Office Enrollee record and clic	ck the Feconcile Rec	ord button to save	your entries. Fields m	arked with * are	required.
Payroll Office ID Year Q 00000000 2004 3	Quarter Submission					
Agency POI Carrier		]				
Last Name Doe	First Name John	Middle Name	]			
Effective Date Amou						
Deceased Annuitant SSN Pseudo S	SN Other Payroll ID	Other Carrier II				
Submitter Use #1	Submitter Use #2	Submitter Use #3				
	Processed Source Fail Count	t				
Select another discrepance	y: 1 <u>2</u>					
Discrepancy 163	3 - Enrollea On Your Payroll	l Office Record, Bu	: No Carrier	Explain	-	
	1 - Carrier Did Not Process 3				Explain Explain	
Reconciliation Action 611 Corrective Action*	1 - Carrier Correction Requi	ired - Submitted By	Payroll/Pe1	<b>•</b>	Explain	
Payroll Office Comments (	400 character max)	Carrier Com	<b>nents</b> (400 charac	:ter max)		100
					×	
ID Last Payroll Update: XX Last Carrier Update:	Date 000 03 31 2004	Time 11:27:26				
Reconcile Record	Clear Data Cancel					

Figure 33: Carrier Enrollees Reconcile Page

2. Complete the fields on the Carrier Enrollees Reconcile page and click **Reconcile Record**. If no errors occur, a pop-up message is displayed to confirm the record has been reconciled.

Field	Instruction/Description
Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
Year	System generated Displays the reconciliation year.



Quarter	System generated
	Displays the reconciliation quarter.
Submission	System generated
Submission	
	Displays the transmission submission for this enrollee record.
Agency	System generated
	Displays the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).
	Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.
POI	System generated
	Displays the POI of the office where the enrollee's records are maintained.
	Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.
Carrier	System generated
	Displays the carrier code.
Enrollment Code	System generated
	Displays the enrollment code/carrier enrollment code.
SSN	System generated
	Displays the enrollee's SSN.
Last Name	System generated
	Displays the enrollee's last name.
First Name	System generated
	Displays the enrollee's first name.
Middle Name	System generated
	Displays the enrollee's middle name or initial.
Effective Date	System generated
	Displays the effective date of the enrollment.





Amount	System generated
	Displays the enrollee's withholding/premium.
Deceased Annuitant	System generated
SSN	Displays the deceased annuitant enrollee's SSN.
Pseudo SSN	System generated
	Displays the pseudo SSN used by the Agency and carrier to identify the enrollee.
Other Payroll ID	System generated
	Displays an identifier used by the Agency to identify the enrollee.
Other Carrier ID	System generated
	Displays an identifier used by the carrier to identify the enrollee.
Submitter Use #1	System generated
	Displays remarks that were entered by the organization that created the record/enrollment record.
Submitter Use #2	System generated
	Displays remarks that were entered by the organization that created the record/enrollment record.
Submitter Use #3	System generated
	Displays remarks that were entered by the organization that created the record/enrollment record.
Date Processed	System generated
	Displays the date the record was processed.
Time Processed	System generated
	Displays the time the record was processed (using military time).
Source	System generated
	Displays the source of transmission data indicator. The value in the first position equals $\mathbf{M}$ for mainframe or $\mathbf{S}$ for server. The value in the second position equals $\mathbf{T}$ for transmission or $\mathbf{M}$ for manual entry.
Fail Count	System generated
	Displays the number of times this record has failed the quarterly edit process.



Select another discrepancy         Optional Select each discrepancy number to view the corresponding code and message if multiple discrepancies are shown.           Discrepancy         System generated Displays Discrepancy Code 163. A short description is displayed next to the code. To view a detailed explanation of this code, click Explain or see Discrepancy Codes Table (on page 217).           Reconciliation Reason         System generated Displays the code that identifies the cause of a discrepancy as reported by the Agency. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Reason Codes Table (on page 221).           Reconciliation Action         System generated Displays the code that identifies the action requested by the Agency to resolve a discrepancy. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Action Codes Table (on page 224).           Corrective Action*         System generated Displays the code that identifies the action requested by the Agency to resolve a discrepancy. A short description is displayed next to the code. Select Explain to view a detailed displayed in the Reconciliation Action field. A short description is displayed in the Reconciliation reason code or see Carrier Corrective Action field. System generated Displays the payroll office's or Agency's comments.           Carrier Comments         System generated Displays the payroll office's or Agency's comments.           Carrier Comments         Conditional, alphanumeric, 400 positions maximum Enter comments explaining the corrective action must be entered in this field. <t< th=""></t<>
Select each discrepancy number to view the corresponding code and message if multiple discrepancies are shown.         Discrepancy       System generated         Displays Discrepancy Code 163. A short description is displayed next to the code. To view a detailed explanation of this code, click Explain or see Discrepancy Codes Table (on page 217).         Reconciliation Reason       System generated         Displays the code that identifies the cause of a discrepancy as reported by the Agency. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Reason Codes Table (on page 221).         Reconciliation Action       System generated         Displays the code that identifies the action requested by the Agency to resolve a discrepancy. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Action Codes Table (on page 224).         Corrective Action*       System generated         Click from the drop-down menu and select. Displays the code that identifies the carrier's response to the reconciliation action code idsplayed in the Reconciliation Action field. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Carrier Corrective Action Response Codes Table (on page 225).         Payroll Office Comments       System generated         Displays the payroll office's or Agency's comments.         Carrier Comments       Conditional, alphanumeric, 400 positions maximum Enter comments
Displays Discrepancy Code 163. A short description is displayed next to the code. To view a detailed explanation of this code, click Explain or see Discrepancy Codes Table (on page 217).         Reconciliation Reason       System generated         Displays the code that identifies the cause of a discrepancy as reported by the Agency. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Reason Codes Table (on page 221).         Reconciliation Action       System generated         Displays the code that identifies the action requested by the Agency to resolve a discrepancy. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Action Codes Table (on page 224).         Corrective Action*       System generated         Cirk from the drop-down menu and select. 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. Select Explain to view a detailed explanation of the reconciliation action code displayed next to the code. Select Explain to view a detailed explanation of the reconciliation action code displayed next to the code. Select Explain to view a detailed explanation of the reconciliation action code displayed next to the code. Select Explain to view a detailed explanation of the reconciliation action code displayed next to the code. Select Explain to view a detailed explanation of the reconciliation action code displayed next to the code. Select Explain to view a detailed explanation of the reconciliation action code displayed next to the code. Select Explain to view a detail
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Reason       Displays the code that identifies the cause of a discrepancy as reported by the Agency. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Reason Codes Table (on page 221).         Reconciliation Action       System generated         Displays the code that identifies the action requested by the Agency to resolve a discrepancy. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Action Codes Table (on page 224).         Corrective Action*       System generated         Click from the drop-down menu and select. 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. Select Explain to view a detailed explanation of the reconciliation Action field. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation Action field. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation Action field. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation Action field.         Payroll Office       Conditional, alphanumeric, 400 positions maximum Enter comments about this record.         Note: If 724 was selected in the Corrective Action field, comments explaining the corrective action must be entered in this field.         Last Payroll Update ID       System generated         Displays the user ID number of the payroll office
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Click from the drop-down menu and select. 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. Select Explain to view a detailed explanation of the reconciliation reason code or see Carrier Corrective Action Response Codes Table (on page 225).Payroll Office CommentsSystem generated Displays the payroll office's or Agency's comments.Carrier CommentsConditional, alphanumeric, 400 positions maximum Enter comments about this record.Note: If 724 was selected in the Corrective Action field, comments explaining the corrective action must be entered in this field.Last Payroll Update IDSystem generated Displays the user ID number of the payroll office representative who made the most recent change to the record.
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Comments       Displays the payroll office's or Agency's comments.         Carrier Comments       Conditional, alphanumeric, 400 positions maximum         Enter comments about this record.       Inter comments about this record.         Note: If 724 was selected in the Corrective Action field, comments explaining the corrective action must be entered in this field.         Last Payroll Update ID       System generated         Displays the user ID number of the payroll office representative who made the most recent change to the record.
Displays the payroll office's or Agency's comments.         Carrier Comments       Conditional, alphanumeric, 400 positions maximum         Enter comments about this record.       Enter comments about this record.         Note: If 724 was selected in the Corrective Action field, comments explaining the corrective action must be entered in this field.         Last Payroll Update ID       System generated         Displays the user ID number of the payroll office representative who made the most recent change to the record.
Eventional, uphanimerie, roo positions maximum         Enter comments about this record.         Note: If <b>724</b> was selected in the Corrective Action field, comments explaining the corrective action must be entered in this field.         Last Payroll Update ID       System generated         Displays the user ID number of the payroll office representative who made the most recent change to the record.
Note: If 724 was selected in the Corrective Action field, comments explaining the corrective action must be entered in this field.         Last Payroll Update ID       System generated         Displays the user ID number of the payroll office representative who made the most recent change to the record.
comments explaining the corrective action must be entered in this field.         Last Payroll Update ID       System generated         Displays the user ID number of the payroll office representative who made the most recent change to the record.
Displays the user ID number of the payroll office representative who made the most recent change to the record.
who made the most recent change to the record.
Last Payroll Undato Sustan agrangeted
Last Payroll Update System generated
Date Displays the date of the most recent change.



Last Payroll Update Time	<i>System generated</i> Displays the time of the most recent change.
Last Carrier Update ID	<i>System generated</i> Displays the user ID number of the carrier representative/individual who made the most recent change to the record.
Last Carrier Update Date	System generated Displays the date of the most recent change.
Last Carrier Update Time	System generated Displays the the time of the most recent change.

1. Click **OK** to close the pop-up.

Note: To reconcile another record, click **Cancel** to return to the Payroll Office Enrollees Search Results page. Click **Reconcile** next to the applicable record.

# **Viewing and Maintaining Carrier Records**

The Carrier option allows users to view and maintain information about each carrier office. With proper access authority, new records may be added and current records may be updated or deleted.

For more information see:

Viewing Carrier Information Records60	6
Maintaining Carrier and Carrier Plan Contact Records7	7
Maintaining Carrier Transmission Records122	2
Maintaining Carrier Enrollee Records13	1

# 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.

	Payroll Office	Carrier	Forms	Tra	nsmission	Reports	- 499	- LO
	Info IDs Enr	rollment Codes	Contacts	Errors	Transmissio	ns Enrollees		
arrier Main Page								
In this section, the following opt	tions may be selected a	above:						
Info - View and maintain informa	ation about each Carrie	er including name	, address and s	stem pr	ocessing value	es. With the pror	er	
access authority you may add ne	ew records, delete reco	ords and update	existing informat	ion.				
Enrollment Codes - View and n ranges. With the proper access								
IDs - View and maintain information							proper	
access authority you may add ne	ew records, delete reco	ords and update	existing informat	ion.				
Contacto -								
Contacts -								
Carrier Contacts - View			t matter and te	chnical c				
Carrier Contacts - View including name, address, p	phone number and ema		t matter and te	chnical c				
Carrier Contacts - View including name, address, delete records and update	phone number and ema e existing information.	ail address. With	t matter and te	chnical c authority	you may add	new records,		
Carrier Contacts - View including name, address, J delete records and updat Carrier Plan Contacts - plan including name, addr	phone number and ema e existing information. · View and maintain info ess, phone number and	ail address. With formation about s d email address.	t matter and te proper access a subject matter a	chnical c authority nd techn	you may add	l new records, for each Carrier		
Carrier Contacts - View including name, address, delete records and update Carrier Plan Contacts -	phone number and ema e existing information. · View and maintain info ess, phone number and	ail address. With formation about s d email address.	t matter and te proper access a subject matter a	chnical c authority nd techn	you may add	l new records, for each Carrier		
Carrier Contacts - View including name, address, delete records and updat Carrier Plan Contacts - plan including name, addr records, delete records ar	phone number and ema e existing information. · View and maintain info ess, phone number and nd update existing info	ail address. With formation about s d email address. rmation.	t matter and te proper access a subject matter a With proper acc	chnical c authority nd techn	you may add	l new records, for each Carrier		
Carrier Contacts - View including name, address, j delete records and updatt Carrier Plan Contacts - plan including name, addr records, delete records ar Errors - View error counts by ty Transmissions - View informati	phone number and ema e existing information. View and maintain infi ess, phone number and nd update existing info ype for each Carrier by ion about each transmi	ail address. With formation about s d email address. rmation. r processing year ission file submitt	t matter and te proper access subject matter and With proper acc and quarter. ted by a Carrier l	chnical c authority nd techn ess auth	you may add ical contacts iority you may ssing year and	l new records, for each Carrier y add new	g file	
Carrier Contacts - View including name, address, delete records and updat Carrier Plan Contacts - plan including name, addr records, delete records ar Errors - View error counts by ty Transmissions - View informati header information, date and time	phone number and ema e existing information. • View and maintain info ess, phone number and nd update existing info ype for each Carrier by ion about each transmi e processed and numb	ail address. With formation about s d email address. rmation. processing year ission file submitt er of records sen	t matter and te proper access a subject matter a With proper acc and quarter. ted by a Carrier I tr, received and	chnical c authority nd techn ess auth by proce processe	you may add ical contacts lority you may ssing year and	l new records, for each Carrier y add new d quarter including		
Carrier Contacts - View including name, address, j delete records and updatt Carrier Plan Contacts - plan including name, addr records, delete records ar Errors - View error counts by ty Transmissions - View informati	phone number and ema e existing information. View and maintain infi- ess, phone number and nd update existing infor ype for each Carrier by ion about each transmi e processed and number arrier enrollee records	ail address. With ormation about s d email address. rmation. processing year sission file submitt er of records sen by processing ye	t matter and te proper access a subject matter a With proper acc and quarter. ted by a Carrier I tr, received and	chnical c authority nd techn ess auth by proce processe	you may add ical contacts lority you may ssing year and	l new records, for each Carrier y add new d quarter including		

#### Figure 34: Carrier Main Page

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

CIFR	Payroll Offic	ce Carrier	Forms	Transmission	Reports	LOG OFF
( CITTL	Info IDs	Enroliment Codes	Contacts	Errors Transmissions	Enrollees	
Carrier Information						
						?
			ter selection crit	eria in the following field	Is and click the	
SUBMIT button to search for reco	rds based on your	entries.				
Carrier						
						100
Name	City		State			
			✓			
t						1
Order By: Carrier 🖲 Name 🤇	🔿 City 🔿 Sta	ite 🔿				
SUBMIT RESET						

## Figure 35: Carrier Information Page

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

Carrier Name City State Order By



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.

rrier Informat		info IDs Enrollme		Contacts	Errors Transmissi	ons Enrollees	
Carrier	Name	Address	City	State Zip	Options		
carrie			,		View Update	Dielete	
Records Four	nd: 1						

Figure 36: 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 268)

*Name* (see "*Name - Carrier Field Description*" on page 313)

Address

City

State

Zip

Options



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

2	$\mathbf{CI}$	$\mathbf{R}$	Pa	yroll Offic	e Carrier	Forms	Tra	ansmission	Reports	<b>190</b>
	C I		Info	IDs	Enrollment Codes	Contacts	Errors	Transmissions	Enrollees	
rier I	informatio	on View				2000				
Use	the brown	or Back area	ow to select a	anthar race	rd to view					?
		er back and	ow to select a	nouner reco	rd to view.					
arrie	er									
lame	e									
Addre	ess									
City			State		Foreign Co	untry		~		
			~					v		
	Date		End Date							
01 🔪	01 🗸	2001 🗸	12 💙 31	♥ 9999	$\sim$					
		ID	Date		Time					
ast (	Changed:		01	08 2004	17:09:06					

Figure 37: 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 268)

Name (see "Name - Carrier Field Description" on page 313)

Address Line 1

Address Line 2

Address Line 3

City

State

Zip

Foreign Country

Start Date

End Date

Last Changed ID



Last Changed Date

Last Changed Time

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.

For more information see:

Viewing Carrier ID Records7	0
Viewing Carrier Enrollment Code Records7	2

# 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.

*		Payroll Of	fice Carrier	Forms	Transmission	Reports	- 480	LOG
-\$	CLER	Info IDs	Enrollment Codes	Contacts E	rrors Transmissio	ns Enrollees		0.11
Carri	ier Main Page							
Iu ac Fa Ta Iu ac	n this section, the following option nfo - View and maintain informaticess authority you may add new inrollment Codes - View and maindess. With the proper access authority cess authority you may add new contacts - Carrier Contacts - View a including name, address, pf delete records and update Carrier Plan Contacts - V plan including name, address records, delete records and	ion about each records, delet aintain informat uthority you ma on about each on about each records, delet and maintain inf none number ar existing informa <i>View</i> and maintai <i>S</i> , phone numb	Carrier including name e records and update ion about each Carrier y add new records, dd Carrier ID including val e records and update formation about subjet d email address. With ation. ain information about s er and email address	existing informati 's enrollment cod leter records and id date ranges ar existing informati ct matter and tec n proper access a subject matter and	on. es including plan, opti update existing infor nd system processing on. thnical contacts for ea uthority you may add id technical contacts	on and valid date mation. values. With the ach Carrier new records, for each Carrier	9	
T he E	trors - View error counts by typ ransmissions - View information eader information, date and time inrollees - View and validate Car uthority you may enter corrective	n about each tr processed and rrier enrollee re	ansmission file submitt number of records ser cords by processing ye	ted by a Carrier b nt, received and p	processed.		-	

Figure 38: Carrier Main Page



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



#### Figure 39: Carrier Identifiers Page

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

Carrier ID

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.

arrier Identifiers		IDs Enrol	liment Codes	Contacts I	Errors	the local division of the local division in	Enrollees	And in case of the local division of the loc
Carrie: ID	Name	Start Date	End Date	Options				
		01/02/2001 1	2/31/9999 View	Update	Delete			
Records Found: 1		01/02/2001 1	2/31/9999 0080	opuate	Vece			

Figure 40: 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 268)

Name (see "Name - Carrier Field Description" on page 313)

Start Date

End Date

Options



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

CI	RR	Payroll	Office Carrier	Forms	Tran	smission	Reports	190 LO
1 OI		Info IDs	Enroliment Codes	Contacts	Errors	Transmissions	Enrollees	
arrier Identifiers	View							
Use the browse	er Back arrow t	o select another	record to view.					?
Carrier ID								
$\checkmark$								
Start Date		nd Date	9999 🗸					
Error Threshold	100 Thr	eshold Type (pe	ercent or number) P 🗸					
	ID	Date	Time					
Last Changed:		01 18	2002 14:15:53					

Figure 41: Carrier Identifiers View Page

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

Carrier ID Start Date End Date Error Threshold Threshold Type Last Changed ID Last Changed Date Last Changed Time

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 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:

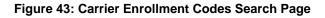
1. Select the *Carrier* tab on the CLER Main Menu. The Carrier Main page is displayed.

CI FP	Payroll (	Office Carrier	Forms	Tran	smission	Reports	180	LOG
1 OLLIN	Info IDs	Enrollment Codes	Contacts	Errors	Transmissions	Enrollees		
Carrier Main Page								
In this section, the following opti	ons may be se	lected above:						
Info - View and maintain informal access authority you may add new Enrollment Codes - View and m ranges. With the proper access a IDs - View and maintain informat access authority you may add new Contacts -	w records, dele aaintain informa authority you n tion about each	ete records and update ation about each Carrier may add new records, do n Carrier ID including va	existing informa r's enrollment co elete records ar lid date ranges	ation. odes includi nd update e and system	ing plan, option existing information	and valid date tion.		
Carrier Contacts - View including name, address, p delete records and update Carrier Plan Contacts - plan including name, addre records, delete records an	hone number a existing inform View and main ess, phone num	and email address. With nation. Itain information about s Iber and email address.	h proper access subject matter	authority	you may add ne cal contacts for	ew records, r each Carrier		
Errors - View error counts by ty Transmissions - View informatio header information, date and time Enrollees - View and validate Ca authority you may enter correctiv	n about each processed an arrier enrollee r	transmission file submit d number of records ser ecords by processing y	ted by a Carrier nt, received and	d processed	i			

Figure 42: Carrier Main Page

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

CIER	Payroll Office	Carrier	Forms	Transmission	Reports	100 Lop
OLLIN	Info IDs Enr	oliment Codes	Contacts E	rrors Transmission	ns Enrolleas	
rier Enrollment Codes						
						?
Click the Add button to add a SUBMIT button to search for record	a new Carrier Enrollmen	t Codes record.	Enter selection cr	iteria in the following f	elds and click the	
Enrollment	is based on your entries	5,				
Carrier Code						
Order By: Carrier 🖲 Code 🤇	)					
SUBMIT RESET						
Sobrer Reper						



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

Carrier

Enrollment Code

Order By

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.

rrier Enrollment Codes						
Carrie: Region Code	Name	Start Date End	Date	Options		
		01/01/2001 12/3	1/9999 View	Update De	ete	
		01/01/2001 12/3	1/9999 View	Update Die	ete	
		01/01/2016 12/3	1/9999 View	Update Die	dte	
		01/01/2002 12/3	1/9999 View	Update Die	ete	
		01/01/2002 12/3	1/9999 View	Update Die	ete	
		01/01/2016 12/3	1/9999 View	Update Die	ete	
		01/01/2008 12/3	1/2009 View	Update Die	ete	
		01/01/2008 12/3	1/2009 View	Update Die	ete	

Figure 44: 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 268)

Region

Code

Name (see "Name - Carrier Field Description" on page 313)

Start Date

End Date

Options



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

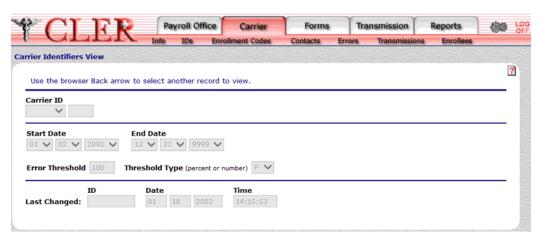


Figure 45: Carrier Identifiers View Page

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

Carrier ID

Start Date

End Date

Error Threshold

Threshold Type

Last Changed ID

Last Changed Date

Last Changed Time

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.



# Maintaining Carrier and Carrier Plan Contact Records

The Contacts option on the Carrier Main Page allows users to view and maintain information about subject matter and technical contacts for each carrier. With proper access authority, new records may be added and current records may be updated.

This section includes the following topics:

Adding a Carrier Contact Record	77
Adding a Carrier Plan Contact Record	82
Viewing a Carrier Contact Record	86
Viewing a Carrier Plan Contact Record	92
Activating or Inactivating a Carrier Contact Record	98
Activating or Inactivating a Carrier Plan Contact Record	102
Updating a Carrier Contact Record	106
Updating a Carrier Plan Contact Record	112
Viewing Carrier Error Records	118

# Adding a Carrier Contact Record

The Add function allows users to add carrier contact records.



# To Add a Carrier Contact Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

E CLER	Payroll Office	Carrier	Form	Transmission	Reports	<b>(</b> )0	C
: R Main Menu Welcome to the OPM Federal Empl access the various functional areas	of CLER based upon	the level of sec	urity access	you have been granted	I. Click the tabs a	at the top	5
of the screen to access the differen and they will not function, if select To learn about the various functio 1. <u>Payroll Office</u> <u>Info</u> Contacts	ed.	ck on the follow	ing links that 3. <u>Forms</u>	correspond to the tab			
Payroll Office     Personnel Of     Errorissions     Errollees 2. Carrier Info Errollment Codes IDs Carrier Contacts Carrier Contacts	ffice Contacts		5. <u>Reports</u> 5. <u>Reports</u> 6 6 6 6 6 6 6	ile Transfer Inline Entry avroll Discrepancy List iscrepancy Summary avroll Office Reconcilia arrier Validation avroll Office Enrollment arrier Enrollment Trans arrier Enrollment Change Sum arrier Gan/Loss Sum	<u>tion</u> : <u>Transmission</u> mission mary		
Earrier Conta <u>Carrier Plan</u> <u>Errors</u> <u>Transmissions</u> <u>Enrollees</u>			• E	econciliation Reason S econciliation Action Su econciliation Summary arrier Discrepancy List ay Period Transmission	<u>mmary</u> mmary		

Figure 46: CLER Main Menu Page

2. The Carrier Main Page is displayed.

4		Pay	roll Off	ice Carrier	Forms	τ	ransmission	Reports	<i>(</i> )()	LOG
ł	CLUR	Info	IDs	Enrollment Codes	Contacts	Errors	Transmissions	Enrollees		
Car	rier Main Page									
	In this section, the following optic	ons may	be selec	ted above:						
a r a	Info - View and maintain informat iccess authority you may add new Enrollment Codes - View and m. anges. With the proper access a IDs - View and maintain informati iccess authority you may add new Contacts -	v record aintain ir uthority ion abou v record	s, delete nformatic you may It each C s, delete	e records and update on about each Carrier / add new records, d arrier ID including va e records and update	existing inform 's enrollment co elete records a id date ranges existing inform	ation. odes incl nd updat and syst ation.	uding plan, option e existing informa tem processing va	n and valid date ntion. alues. With the		
	Carrier Contacts - View including name, address, pl delete records and update Carrier Plan Contacts - plan including name, addree records, delete records and	hone nu existing View and ss, phon	mber and informat d maintai ie numbe	d email address. With tion. in information about s er and email address.	oproper access subject matter	authori	ty you may add no nnical contacts fo	ew records, r each Carrier		
h	Errors - View error counts by typ Transmissions - View informatio leader information, date and time Enrollees - View and validate Ca uuthority you may enter corrective	n about process rrier enr	each tra ed and r ollee rec	ansmission file submit number of records ser ords by processing y	ed by a Carrient, received an	d proces	sed.			
		1000	1536			1.1			1.425	

Figure 47: Carrier Main Page



3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.



Figure 48: Contacts Main Page

4. Click the Carrier Contacts link to display the Carrier Contacts page.

Y CI FR	Payroll Office	Carrier Form	Transmission	Reports	
1 OLLIN	Info IDs Enrolln	nent Codes Contacts	Errors Transmissio	ons Enrollees	a factor d
Carrier Contacts					
Click the Add button to add a button to search for records based Carrier ID Type		record. Enter selection cr	iteria in the following field	ds and click the S	SUBMIT
Display: All  Active In Order By: ID  Type	active 🔿				

Figure 49: Carrier Contacts Page



5. Click Add on the Carrier Contacts page to display the Carrier Contacts Add page.

E CI R R	Payroll Offic	e Carrier	Forms	Trans	mission	Reports	
	Info IDs	Enrollment Codes	Contacts	Errors	Transmission	s Enrollees	
rrier Contacts Add							
							?
Enter data for the Carrier Con	itacts record and click	k the Add Record b	utton to save yo	ur entries.	Fields marke	d with * are red	luired.
Carrier ID* Type*	1						
× ×							
Role							
Name							
Address							
Address							
City	State Zip	Foreign Co	ountry		$\checkmark$		
	<b>`</b>				•		
Phone Number	Fax Number						
Email Address							
Remarks							
				]			
Add Record Clear Data	Cancel						

Figure 50: Carrier Contacts Add Page

6. Complete the fields on the Carrier Contacts Add page.

Field	Instruction/Description
Carrier ID*	<i>Required</i> Select the carrier ID number from the drop-down menu.
Туре*	Required Select either <b>General</b> for an administrative contact or <b>Technical</b> for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Role	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the title, position, etc., of the carrier contact/carrier plan contact.
Name	<i>Optional, alphanumeric, 30 positions maximum</i> Enter the name of the carrier contact.



Field	Instruction/Description
Address Line 1	Optional, alphanumeric, 40 positions maximum
	Enter the first line of the carrier contact's street or post office box address.
Address Line 2	Optional, alphanumeric, 40 positions maximum
	Enter the second line of the carrier contact's street or post office box address.
Address Line 3	Optional, alphanumeric, 40 positions maximum
	Enter the third line of the carrier contact's street or post office box address.
City	Optional, alphanumeric, 25 positions maximum
	Enter the name of the carrier contact's city.
State	Optional, alphanumeric, 2 positions maximum
	Select the payroll office's, carrier's, carrier contact's, or carrier plan contact's State, U.S. territory, or overseas military abbreviation from the drop-down menu. Refer to the <i>State, U.S. Territory, and Overseas Military Abbreviations Table</i> (on page 226) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.
Zip	Optional, alphanumeric, 11 positions maximum
	Enter the carrier contact's ZIP Code.
Foreign Country	Optional
	Select the carrier contact's country code from the drop-down menu. For a list and descriptions of country codes, see <i>Country Codes Table</i> (on page 229).
Phone Number	Optional, alphanumeric, 25 positions
	Enter the carrier contact's telephone number.
Fax Number	Optional, alphanumeric, 25 positions
	Enter the carrier contact's fax number.
Email Address	Optional, alphanumeric, 60 positions
	Enter the carrier contact's email address.
Remarks	Optional, alphanumeric, 80 positions
	Enter remarks about this record.

7. Click Add Record. If no errors occur, a pop-up message is displayed to confirm the record has been added.



8. Click **OK** to close the pop-up.

Note: To add another record, click **Cancel** to refresh the Carrier Contacts Add page and complete the fields for the new record.

# Adding a Carrier Plan Contact Record

The Add function allows users to add carrier plan contact records.

## To Add a Carrier Plan Contact Record:

1. Select the Carrier tab at the top of the CLER Main Menu.

R Main Menu Welcome to the OPM Federal Employe access the various functional areas of ( of the screen to access the different ar							22
access the various functional areas of ( of the screen to access the different ar							120
and they will not function, if selected. To learn about the various functional	reas of CLER. Se	the level of sec actions that you	urity access y are not autho	you have been granted. prized to access will hav	Click the tabs a re the tabs "gray	at the top ed out"	
1. <u>Payroll Office</u> Info Contacts Payroll Office Co Personnel Office Errors Transmissions Errollees 2. <u>Carrier</u> Info Errollment Codes IDs Contacts Carrier Contacts Carrier Plan Cont Errors Transmissions Errollees	Contacts		• 22 • Fi • Fi • O 5. <u>Reports</u> • Pi • C • C • E • C • C • R • C	300 310 310 le Transfer nline Entry avroll Discrepancy Listin Screpancy Summary avroll Office Reconciliati arrier Validation avroll Office Enrollment. Trans arrier Enrollment Transn arrier Gain/Loss Summar aconciliation Reason Su aconciliation Reason Su aconciliation Summary arrier Discrepancy Listin ay Period Transmissions	on Transmission hission ary Y mmary himary himary g	ts	

Figure 51: CLER Main Menu Page



2. The Carrier Main Page is displayed.

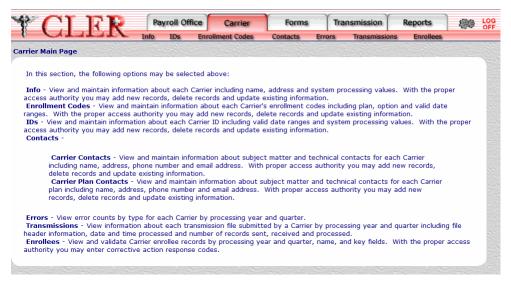
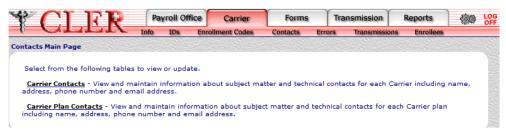


Figure 52: Carrier Main Page

3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.





4. Click the Carrier Plan Contacts link to display the Carrier Plan Contacts page.

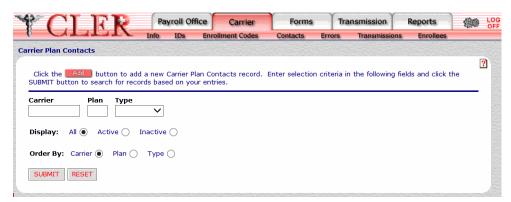


Figure 54: Carrier Plan Contacts Page



5. Click Add on the Carrier Plan Contacts page to display the Carrier Plan Contacts Add page.

	K	R	Pa	yroll Offic	ce Carrier	Forms	Tr	ansmission	Reports	
	، نار،		Info	IDs	Enroliment Codes	Contacts	Errors	Transmissions	Enrollees	
rier Plan Conta	ts Add									
										?
Enter data for t equired.	he Carrie	er Plan Co	ontacts	record an	d click the Add Reco	ord button to s	ave your	entries. Fields m	narked with * ar	e
Carrier*	Plan*	Type*	$\checkmark$							
			•							
tole										
lame										
Address										
luuress										
City			State	1	Foreign Co	ountry				
			~	·				$\checkmark$		
Phone Number			Fax Nu	mber						
mail Address										
Remarks										
Add Record	Clear	Data	Cancel							

# Figure 55: Carrier Plan Contacts Add Page

6. Complete the fields on the Carrier Plan Contacts Add page.

Field	Instruction/Description
Carrier*	<i>Required</i> Select the carrier code from the drop-down menu.
Plan*	<i>Required, alphanumeric, 2 positions</i> Enter the first two positions of the carrier enrollment code.
Туре*	Required Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Role	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the title, position, etc., of the carrier contact/carrier plan contact.



NameOptional, alphanumeric, 40 positions maximum Enter the name of the carrier plan contact.Address Line 1Optional, alphanumeric, 40 positions maximum Enter the first line of the carrier contact's street or post office box address.Address Line 2Optional, alphanumeric, 40 positions maximum
Address Line 1       Optional, alphanumeric, 40 positions maximum         Enter the first line of the carrier contact's street or post office box address.
Enter the first line of the carrier contact's street or post office box address.
address.
Address Line 2Optional, alphanumeric, 40 positions maximum
Enter the second line of the carrier contact's street or post office box address.
Address Line 3Optional, alphanumeric, 40 positions maximum
Enter the third line of the carrier contact's street or post office box address.
City Optional, alphanumeric, 25 positions maximum
Enter the name of the carrier plan contact's city.
State         Optional, alphanumeric, 2 positions maximum
Select the payroll office's, carrier's, carrier contact's, or carrier pla contact's State, U.S. territory, or overseas military abbreviation from the drop-down menu. Refer to the <i>State, U.S. Territory, and</i> <i>Overseas Military Abbreviations Table</i> (on page 226) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.
Zip System generated
Displays the carrier plan contact's ZIP Code.
Foreign Country Optional
Select the carrier plan contact's country code from the drop-down menu. For a list and descriptions of country codes, see <b>Country Codes Table</b> (on page 229).
Phone Number         Optional, alphanumeric, 25 positions
Enter the carrier plan contact's telephone number.
Fax Number         Optional, alphanumeric, 25 positions
Enter the carrier plan contact's fax number.
Email Address         Optional, alphanumeric, 60 positions
Enter the carrier plan contact's email address.
<b>Remarks</b> <i>Optional, alphanumeric, 80 positions</i>



- 7. Click Add Record. If no errors occur, a pop-up message is displayed to confirm the record has been added.
- 8. Click **OK** to close the pop-up.

Note: To add another record, click **Cancel** to refresh the Carrier Plan Contacts Add page and complete the fields for the new record.

## Viewing a Carrier Contact Record

The View function allows users to view carrier contact records.

#### To View a Carrier Contact Record:

GLLK	Payroll Office	Carrier	Forms	Transmission	Reports	(90)	L.C
R Main Menu							
Welcome to the OPM Federal Emp access the various functional areas of the screen to access the differe and they will not function, if select To learn about the various function	of CLER based upon nt areas of CLER. Se ed.	the level of sec octions that you	urity access yo are not authori	u have been granted. zed to access will hav	Click the tabs a e the tabs "gray	it the top ed out"	?
1. Payroll Office Info Contacts Payroll Offic Payroll Offic P	ifice Contacts		Onli     Cont     Cont	0	ransmission ission ary y mary mary a	19	

Figure 56: CLER Main Menu Page



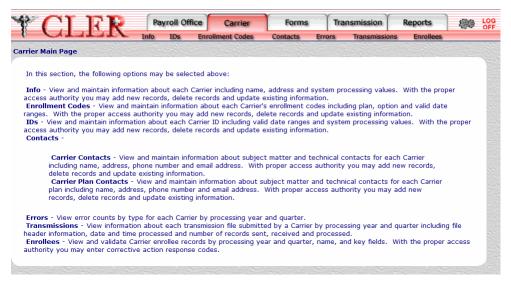


Figure 57: Carrier Main Page

3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.



#### Figure 58: Contacts Main Page

4. Click the Carrier Contacts link to display the Carrier Contacts page.

	Payroll Offic	ce Carrier	Forms	Transmission	Reports	LOG OFF
1 OLDK	Info IDs	Enrollment Codes	Contacts	Errors Transmission	ns Enrollees	
Carrier Contacts						
						?
Click the Add button to add button to search for records based		ntacts record. Ente	r selection criter	ia in the following field	s and click the S	UBMIT
Comice ID Trans						
Carrier ID Type						
						9
Display: All 🖲 Active 🔾 Ir	nactive 🔿					
Order By: ID 💿 Type ()						
SUBMIT RESET						

Figure 59: Carrier Contacts Page

5. Complete the fields on the Carrier Contacts page and click Submit.



# OR

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

Field	Instruction/Description
Carrier ID	Required, alphanumeric, 7 positions
	Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Туре	Optional
	Select either <b>General</b> for an administrative contact or <b>Technical</b> for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Display	Optional, default
	Defaults to <b>A11</b> 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 values:
	<b>All</b> - 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.
	<b>Inactive</b> - Displays inactive contacts for the payroll office ID and type code entered.
Order By	Optional, default
	Defaults to the <i>ID</i> 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 values:
	ID - Search by ID number.
	<b>Type</b> - Search by type code.

6. The Carrier Contacts Search Results page is displayed.

FCI RR	Payroll Office Carrier	Forms	Transmission	Reports	CON DE
	nfo IDs Enrollment Code	s Contacts Er	rrors Transmission	s Enrollees	
rrier Contacts					
Carrier ID Type Status Nar	ne Phone	Fmail		Options	
General Inactive		Lindi	View	_ <u>.</u>	ate
General Inactive			View	Activate Upda	ate
General Inactive			View	Activate Upd.	ate
General Inactive			View	Activate Upda	

Figure 60: Carrier Contacts Search Results Page



Field	Description
Carrier ID	System generated
	Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Туре	System generated
	Displays <b>General</b> type code to indicate that the payroll office contact holds an administrative position.
	Displays <b>Technical</b> type code to indicate that the payroll office contact holds a technical position.
Status	System generated
	Displays <b>active</b> to indicate that the record has been activated in CLER.
	Displays <b>inactive</b> to indicate that the record has been inactivated in CLER.
Name	System generated
	Displays the name of the carrier contact.
Phone	System generated
	Displays the carrier contact's telephone number.
Email	System generated
	Displays the carrier contact's email address.

7. Click View next to the applicable record. The Carrier Contacts View page is displayed.



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

CI.	<b>FR</b>		yroll Office	Carrier	Forms	Tra	ansmission	Reports	<b>4919</b>
	and r	Info	IDs Enr	roliment Codes	Contacts	Errors	Transmissions	Enrollees	
rier Contacts Vi	iew					1.000			
Use the browse	r Back arrow to	select ar	other record	to view.					?
BLUE CROSS ANI	D BLUE SHIELD								
Carrier ID	Туре								
$\checkmark$	General 🗸 🗸								
Role									
Name									
Address									
City		State	-	Foreign Co	ountry		$\checkmark$		
_		DC V					*		
Phone Number		Fax Nu	mhor						
Phone Number			iibei						
Email Address									
Email Address									
Remarks									
kemarks									
	ID	<b>Date</b>	15 2006	<b>Time</b> 12;11:21	1				

Figure 61: Carrier Contacts View Page

Field	Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Туре	System generated Displays <b>General</b> type code to indicate that the payroll office contact holds an administrative position. Displays <b>Technical</b> type code to indicate that the payroll office contact holds a technical position.
Role	System generated Displays the title, position, etc., of the payroll office contact/personnel office contact/carrier contact/carrier plan contact.



Displays the name of the carrier contact.         Address Line 1       System generated         Displays the first line of the carrier contact's street or post office box address.         Address Line 2       System generated         Displays the second line of the carrier contact's street or post office box address.         Address Line 3       System generated         Displays the third line of the carrier contact's street or post office box address.         Address Line 3       System generated         Displays the third line of the carrier contact's street or post office box address.         City       System generated         Displays the name of the carrier contact's city.         Note: If the address is an overseas military address, this field displays <b>FPO</b> for fleet post office or <b>APO</b> for army post office in lieu of the city.         State       System generated         Displays the carrier contact's State, U.S. territory, or overseas military abbreviations. For a list and descriptions of State, U.S. territory, and Overseas Military Abbreviations fable (on page 226).         Zip       System generated         Displays the carrier contact's CIP Code.         Foreign Country       System generated         Displays the carrier contact's country code. For a list and descriptions of country codes, see Country Codes Table (on page 229).         Phone Number       System Generated         Displays the carrier con		
Address Line 1       System generated         Displays the first line of the carrier contact's street or post office box address.         Address Line 2       System generated         Displays the second line of the carrier contact's street or post office box address.         Address Line 3       System generated         Displays the third line of the carrier contact's street or post office box address.         Address Line 3       System generated         Displays the third line of the carrier contact's street or post office box address.         City       System generated         Displays the name of the carrier 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.         State       System generated         Displays the carrier contact's State, U.S. territory, or overseas military abbreviations. For a list and descriptions of State, U.S. territory, and Overseas Military Abbreviations of State, U.S. territory, and Overseas Military Abbreviations Table (on page 226).         Zip       System generated         Displays the carrier contact's Code.         Foreign Country       System generated         Displays the carrier contact's country code. For a list and descriptions of country codes, see Country Codes Table (on page 229).         Phone Number       System Generated         Displays the carrier contact's telephone numbe	Name	System generated
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Displays the carrier contact's telephone number.         Fax Number       System generated         Displays the carrier contact's fax number.         Email Address       System generated		descriptions of country codes, see Country Codes Table (on
Fax Number     System generated       Displays the carrier contact's fax number.       Email Address     System generated	Phone Number	System Generated
Email Address     System generated		Displays the carrier contact's telephone number.
Email Address     System generated	Fax Number	System generated
System Select alea		Displays the carrier contact's fax number.
Displays the carrier contact's email address.	Email Address	System generated
		Displays the carrier contact's email address.



Remarks	System generated Displays the remarks about this record.
Last Carrier Update ID	<i>System generated</i> Displays the user ID number of the carrier representative/individual who made the most recent change to the record.
Last Carrier Update Date	System generated Displays the date of the most recent change.
Last Carrier Update Time	System generated Displays the the time of the most recent change.

## Viewing a Carrier Plan Contact Record

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

#### To View a Carrier Plan Contact Record:

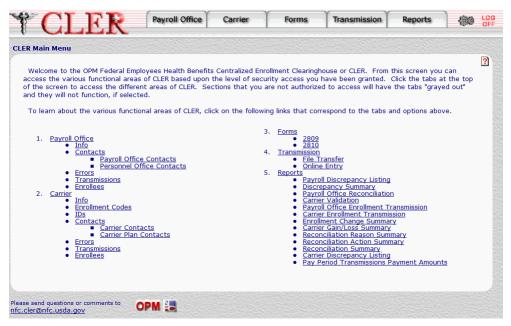


Figure 62: CLER Main Menu Page



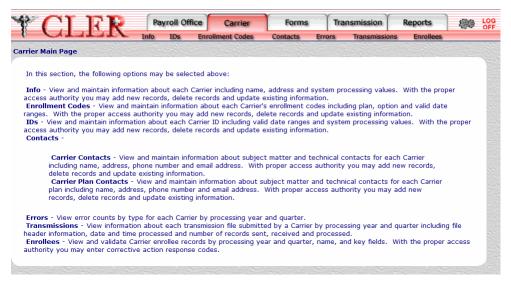


Figure 63: Carrier Main Page

3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.





4. Click the Carrier Plan Contacts link to display the Carrier Plan Contacts page.

	Payroll Off	ice Carrier	Forms	Transmis	sion Reports	
	Info IDs	Enroliment Codes	Contacts	Errors Tran	smissions Enrollee	
rrier Plan Contacts						
Click the Add button to add a	new Cemies D	an Contrate second	Cotor colection	anitania in the f	blowing fields and clic	?
SUBMIT button to search for records			Enter selection	criteria in the id	biowing neids and clic	k trie
Carrier Plan Type						
	$\checkmark$					
Display: All 🖲 Active () Ina	active ()					
	0					
Order By: Carrier 💿 Plan 🔿	Туре 🔿					
SUBMIT RESET						

Figure 65: Carrier Plan Contacts Page

5. Complete the fields on the Carrier Plan Contacts page and click Submit.



# OR

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

Field	Instruction/Description
Carrier	<i>Optional, alphanumeric, 7 positions</i> Enter the carrier ID code.
Plan	<i>Optional, alphanumeric, 2 positions</i> Enter the first two positions of the carrier enrollment code.
Туре	Optional Select either <b>General</b> for an administrative contact or <b>Technical</b> for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Display	<ul> <li>Optional, default</li> <li>Defaults to 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 values:</li> <li>All - Displays all contacts for the payroll office ID and type code entered.</li> <li>Active - Displays active contacts for the payroll office ID and type code entered.</li> <li>Inactive - Displays inactive contacts for the payroll office ID and type code entered.</li> </ul>
Order By	<ul> <li>Optional, default</li> <li>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 values:</li> <li>Carrier - Search by carrier code.</li> <li>Plan - Search by plan code.</li> <li>Type - Search by type code.</li> </ul>



6. The Carrier Plan Contacts Search Results page is displayed.

1	١T	$\mathbf{F}$	R	Payroll Off	fice Carrier	Forms	Tra	nsmission	Reports	CFF
C				Info IDs	Enroliment Codes	Contacts	Errors	Transmissions	Enrollees	
lan	Conta	icts								
rrier	Plan	Туре	Status	Name	Phone		Ema	ail	o	otions
		General	Active						View	otivate Update

## Figure 66: Carrier Plan Contacts Search Results Page

Field	Description
Carrier	System generated
	Displays the carrier ID code.
Plan	System generated
	Displays the first two positions of the carrier enrollment code.
Туре	System generated
	Displays <b>General</b> type code to indicate that the payroll office contact holds an administrative position.
	Displays <b>Technical</b> type code to indicate that the payroll office contact holds a technical position.
Status	System generated
	Displays <b>active</b> to indicate that the record has been activated in CLER.
	Displays <b>inactive</b> to indicate that the record has been inactivated in CLER.
Name	System generated
	Displays the name of the carrier plan contact.
Phone	System generated
	Displays the carrier plan contact's telephone number.
Email	System generated
	Displays the carrier plan contact's email address.

7. Click **View** next to the applicable record. The Carrier Plan Contacts View page is displayed.



Note: To view another record, click your browser's Back button to return to the Carrier Plan Contacts Search Results page. Click **View** next to the applicable record.

	$\mathbf{C}$	R .	Payroll Off		Forms		nsmission	Reports	<b>(3</b> )3
<u></u>	له استعلی اس	L In	fo IDs	Enrollment Codes	Contacts	Errors	Transmissions	Enrollees	
rier Plan Conta	acts View								
Use the brows	er Back an	row to selec	t another red	cord to view.					Li
arrier	Plan	Туре	_						
$\sim$		General	$\checkmark$						
ole									
ame									
ddress									
aaress									
City		Sta	te Zip	Foreign C	ountry				
			$\checkmark$				$\checkmark$		
hone Number		Fax	Number						
mail Address									
temarks									
temarks									
temarks	ID	Dat	e	<b>Time</b> 10:31:16					

Figure 67: Carrier Plan Contacts View Page

Field	Description
Carrier	System generated Displays the carrier code.
Plan	<i>System generated</i> Displays the first two positions of the carrier enrollment code.
Туре	System generated Displays <b>General</b> type code to indicate that the payroll office contact holds an administrative position. Displays <b>Technical</b> type code to indicate that the payroll office contact holds a technical position.
Role	<i>System generated</i> Displays the title, position, etc., of the payroll office contact/personnel office contact/carrier contact/carrier plan contact.



Name	System generated
	Displays the name of the carrier plan contact.
Address Line 1	System generated
	Displays the first line of the carrier plan contact's street or post office box address.
Address Line 2	System generated
	Displays the second line of the carrier plan contact's street or post office box address.
Address Line 3	System generated
	Displays the third line of the carrier plan contact's street or post office box address.
City	System generated
	Displays the name of the carrier plan contact's city.
	Note: If the address is an overseas military address, this field displays <b>FPO</b> for fleet post office or <b>APO</b> for army post office in lieu of the city.
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 <i>State, U.S.</i> <i>Territory, and Overseas Military Abbreviations Table</i> (on page 226).
Zip	System generated
	Displays the carrier plan contact's ZIP Code.
Foreign Country	System generated
	Displays the carrier plan contact's country code. For a list and descriptions of country codes, see <i>Country Codes Table</i> (on page 229).
Phone Number	System Generated
	Displays the carrier plan contact's telephone number.
Fax Number	System generated
	Displays the carrier plan contact's fax number.
Email Address	System generated
	Displays the carrier plan contact's email address.



Remarks	System generated Displays the remarks about this record.
Last Changed ID	<i>System generated</i> Displays the user ID number of the individual who made the most recent change to the record.
Last Changed Date	System generated Displays the date of the most recent change.
Last Changed Time	<i>System generated</i> Displays the time of the most recent change.

## Activating or Inactivating a Carrier Contact Record

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

## To Activate or Inactivate a Carrier Contact Record:

	areas of CLER based upon fferent areas of CLER. Se elected.	n the level of sec ections that you	ving links that of the second	u have been granted. zed to access will hav orrespond to the tabs	. Click the tabs at ve the tabs "graye	the top d out"	?
Welcome to the OPM Federal access the various functional a of the screen to access the dif and they will not function, if se To learn about the various fur <u>1. Payroll Office</u> <u>• Info</u> <u>• Contacts</u> <u>• Payroll C • Personn</u> <u>• Errors</u> <u>• Transmissions</u> <u>• Errollees</u>	areas of CLER based upon fferent areas of CLER. Se elected. Inctional areas of CLER, c Office Contacts	n the level of sec ections that you	ving links that of the second	u have been granted. zed to access will hav orrespond to the tabs 19 00 17 Transfer	. Click the tabs at ve the tabs "graye	the top d out"	?
access the various functional a of the screen to access the dif and they will not function, if se To learn about the various fur 1. <u>Payroll Office</u> • <u>Info</u> • <u>Contacts</u> • <u>Payroll C</u> • <u>Payroll </u>	areas of CLER based upon fferent areas of CLER. Se elected. Inctional areas of CLER, c Office Contacts	n the level of sec ections that you	ving links that of the second	u have been granted. zed to access will hav orrespond to the tabs 19 00 17 Transfer	. Click the tabs at ve the tabs "graye	the top d out"	?
Info     Contacts     Payroll C     Personn     Errors     Transmissions     Enrollees			• <u>28</u> • <u>28</u> 4. <u>Transmissi</u> • <u>Fill</u> • On	0 on Transfer			
Info     Enrollment Code     IDs     Contacts     Carrier C	_			roll Discrepancy Listin crepancy Summary roll Office Reconciliati rier Validation roll office Enrollment. rier Enrollment Transn ollment Change Summar onciliation Action Sun onciliation Reason Su onciliation Action Sun onciliation Summary, rier Discrepancy Listin Period Transmissions	Transmission nission ary ry mmary nmary	2	

Figure 68: CLER Main Menu Page



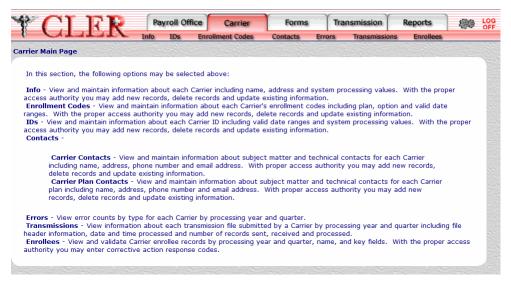


Figure 69: Carrier Main Page

3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.



Figure 70: Contacts Main Page

4. Click the Carrier Contacts link to display the Carrier Contacts page.

	Payroll Offic	ce Carrier	Forms	Transmission	Reports	LOG OFF
1 OLDK	Info IDs	Enrollment Codes	Contacts	Errors Transmission	ns Enrollees	
Carrier Contacts						
						?
Click the Add button to add button to search for records based		ntacts record. Ente	r selection criter	ia in the following field	s and click the S	UBMIT
Comice ID Trans						
Carrier ID Type						
						9
Display: All 🖲 Active 🔾 Ir	nactive 🔿					
Order By: ID 💿 Type ()						
SUBMIT RESET						

Figure 71: Carrier Contacts Page

5. Complete the fields on the Carrier Contacts page and click Submit.



# OR

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

Field	Instruction/Description
Carrier ID	Required, alphanumeric, 7 positions
	Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Туре	Optional
	Select either <b>General</b> for an administrative contact or <b>Technical</b> for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Display	Optional, default
	Defaults to <b>All</b> 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 values:
	<b>All</b> - 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.
	<b>Inactive</b> - Displays inactive contacts for the payroll office ID and type code entered.
Order By	Optional, default
	Defaults to the <i>ID</i> 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 values:
	ID - Search by ID number.
	<b>Type</b> - Search by type code.

6. The Carrier Contacts Search Results page is displayed.



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

P (		$\mathbf{R}$	Pay	roll Office	Carrier	Forms	Transmission	Reports	60	LOG
00			Info	IDs Enro	oliment Codes	Contacts	Errors Transmissions	Enrollees		
arrier Conta	acts									
0		Chatura	Nama	Dhawa		Email		0		
Carrier II			Name :	Phone		Email		Options		
I	General	Inactive					View	Activate Up	odate	
	General	Inactive					View	Activate Up	date	
	General	Inactive					View	Activate Up	date	
								Activate Up		

Figure 72: Carrier Contacts Search Results Page

Field	Instruction/Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Туре	System generated Displays <b>General</b> type code to indicate that the payroll office contact holds an administrative position. Displays <b>Technical</b> type code to indicate that the payroll office contact holds a technical position.
Status	System generated Displays <b>active</b> to indicate that the record has been activated in CLER. Displays <b>inactive</b> to indicate that the record has been inactivated in CLER.
Name	<i>Optional, alphanumeric, 30 positions maximum</i> Enter the name of the carrier contact.
Phone	System generated Displays the carrier contact's telephone number.
Email	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier contact's email address.

- 7. Click Activate to activate an inactivated record. A pop-up message is displayed to confirm the record has been activated.
- 8. Click **OK** to close the pop-up.



- 9. Click **Inactivate** to inactivate an activated record. A pop-up message is displayed to confirm the record has been inactivated.
- 10. Click **OK** to close the pop-up.

## Activating or Inactivating a Carrier Plan Contact Record

The Activate/Inactivate function allows users to activate and inactivate carrier plan contact records.

## To Activate or Inactivate a Carrier Plan Contact Record:



Figure 73: CLER Main Menu Page



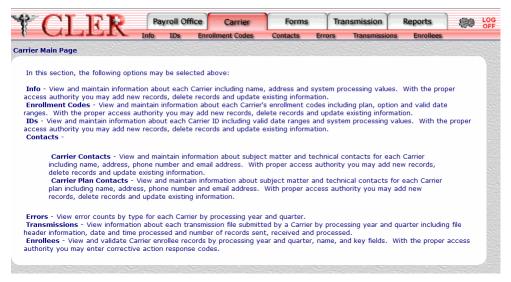


Figure 74: Carrier Main Page

3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.





4. Click the Carrier Plan Contacts link to display the Carrier Plan Contacts page.

Payroll O	ffice Carrier	Forms	Transmission	Reports	CF CF
CLICIN Info IDs	Enroliment Codes	Contacts Err	ors Transmissions	Enrollees	
arrier Plan Contacts					
Click the Add button to add a new Carrier	Plan Contacts record	Enter selection crit	eria in the following fir	alde and click th	?
SUBMIT button to search for records based on ye		Enter selection cht		sids and click di	
Carrier Plan Type					
<b>`</b>					
Display: All 💿 Active 🔿 Inactive 🔿					172.10
Order By: Carrier 💿 Plan 🔿 Type 🔿					
SUBMIT RESET					200

Figure 76: Carrier Plan Contacts Page

5. Complete the fields on the Carrier Plan Contacts page and click Submit.



# OR

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

Field	Instruction/Description
Carrier	<i>Optional, alphanumeric, 7 positions</i> Enter the carrier ID code.
Plan	<i>Required, alphanumeric, 2 positions</i> Enter the first two positions of the carrier enrollment code.
Туре	Optional Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Display	<ul> <li>Optional, default</li> <li>Defaults to 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 values:</li> <li>All - Displays all contacts for the payroll office ID and type code entered.</li> <li>Active - Displays active contacts for the payroll office ID and type code entered.</li> <li>Inactive - Displays inactive contacts for the payroll office ID and type code entered.</li> </ul>
Order By	Optional, default Defaults to the <b>Carrier</b> 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 values: <b>Carrier</b> - Search by carrier code. <b>Plan</b> - Search by plan code. <b>Type</b> - Search by type code.

6. The Carrier Plan Contacts Search Results page is displayed.



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

(	1	- R	R	Payroll Off	fice Carrier	Forms	Tra	nsmission	Reports	E COS
C				Info IDs	Enroliment Codes	Contacts	Errors	Transmissions	Enrollees	
er Plan	Conta	icts								
arrier	Plan	Туре	Status	Name	Phone		Ema	il	Ор	tions
		General	Active						View	ctivate Up date

Figure 77: Carrier Plan Contacts Search Results Page

Field	Description
Carrier	System generated
	Displays the carrier code.
Plan	System generated
	Displays the first two positions of the carrier enrollment code.
Туре	System generated
	Displays <b>General</b> type code to indicate that the payroll office contact holds an administrative position.
	Displays <b>Technical</b> type code to indicate that the payroll office contact holds a technical position.
Status	System generated
	Displays <b>active</b> to indicate that the record has been activated in CLER.
	Displays <b>inactive</b> to indicate that the record has been inactivated in CLER.
Name	System generated
	Displays the name of the carrier plan contact.
Phone	System generated
	Displays the carrier plan contact's telephone number.
Email	System generated
	Displays the carrier plan contact's email address.

7. Click **Activate** to activate an inactivated record. A pop-up message is displayed to confirm the record has been activated.



- 8. Click **OK** to close the pop-up.
- 9. Click **Inactivate** to inactivate an activated record. A pop-up message is displayed to confirm the record has been inactivated.
- 10. Click **OK** to close the pop-up.

## Updating a Carrier Contact Record

The Update function allows users to update carrier contact records.

#### To Update a Carrier Plan Contact Record:

• Enrollees         • Discreps           2. Carrier         • Payroll           • Info         • Carrier           • Enrollment Codes         • Payroll	ve been granted. to access will have	Click the tabs at th re the tabs "grayed o	ne top
access the various functional areas of CLER based upon the level of security access you ha of the screen to access the different areas of CLER. Sections that you are not authorized and they will not function, if selected. To learn about the various functional areas of CLER, click on the following links that corres 1. <u>Payroll Office</u> • Info • Contacts • Errors • Errors • Errollees 2. <u>Carrier</u> • Info • Enrollees • Errollees • Erroll	ve been granted. to access will have	Click the tabs at th re the tabs "grayed o	n ne top
1. <u>Payroll Office</u> <u>Info</u> <u>Contacts</u> <u>Payroll Office Contacts</u> <u>Payroll Office Contacts</u> <u>Payroll Office Contacts</u> <u>Errors</u> <u>Transmissions</u> <u>Errollees</u> 2. <u>Carrier</u> <u>Info</u> <u>Enrollees</u> <u>Payroll Office Contacts</u> <u>Payroll Office Contacts</u> <u>Carrier</u> <u>Payroll Office Contacts</u> <u>Carrier</u> <u>Payroll Office Contacts</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u> <u>Carrier</u>			
Contacts     Carrier Contacts     Carrier Plan Contacts     Carrier Plan Contacts     Errors     Errors     Transmissions     Transmissions     Enrollees     Carrier 1     Carrier Contacts     Carrier Contact     Carrier C	intry Discrepancy Listing Summary Office Reconciliatic Validation Office Inconciliatic Office Incollement 1 Enrollment Transmi Ent Change Summary Gain/Loss Summary Iation Reason Sun liation Action Sum liation Summary Discrepancy Listing	on Transmission ission ary Y mmary mary	

Figure 78: CLER Main Menu Page



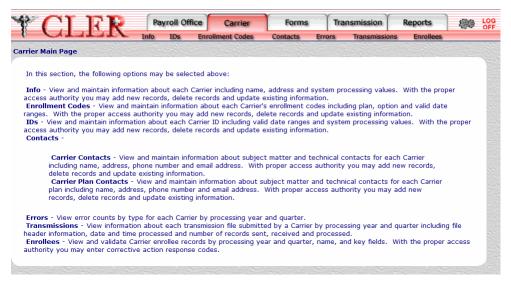


Figure 79: Carrier Main Page

3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.



#### Figure 80: Contacts Main Page

4. Click the Carrier Contacts link to display the Carrier Contacts page.

	Payroll Offic	ce Carrier	Forms	Transmission	Reports	LOG OFF
1 OLDK	Info IDs	Enrollment Codes	Contacts	Errors Transmission	ns Enrollees	
Carrier Contacts						
						?
Click the Add button to add button to search for records based		ntacts record. Ente	r selection criter	ia in the following field	s and click the S	UBMIT
Comion ID Toma						
Carrier ID Type						
						9
Display: All 🖲 Active 🔾 Ir	nactive 🔿					
Order By: ID 💿 Type ()						
SUBMIT RESET						

Figure 81: Carrier Contacts Page

5. Complete the fields on the Carrier Contacts page and click Submit.



# OR

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

Field	Instruction/Description					
Carrier ID	Required, alphanumeric, 7 positions					
	Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.					
Туре	Optional					
	Select either <b>General</b> for an administrative contact or <b>Technical</b> for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.					
Display	Optional, default					
	Defaults to <b>All</b> 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 values:					
	<b>All</b> - 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.					
	<b>Inactive</b> - Displays inactive contacts for the payroll office ID and type code entered.					
Order By	Optional, default					
	Defaults to the <i>ID</i> 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 values:					
	ID - Search by ID number.					
	<b>Type</b> - Search by type code.					

6. The Carrier Contacts Search Results page is displayed.

15 (		R	Payroll Office	Carrier	Forms	Transmission	Reports	See LO
0 0		T I	fo IDs En	rollment Codes	Contacts I	Transmission	s Enrolled	95
arrier Con	ntacts						1000	
Carrior	ID Type Sta	atus Nan	ne Phone		Email		Options	
	General Ina		:		Lindi	View		Update
	General Ina	1				View		Update
	General Ina	ctive				View	Activate	Update
	General Ina					View	Activate	Update

Figure 82: Carrier Contacts Search Results Page



Field	Instruction/Description				
Carrier ID	System generated				
	Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.				
Туре	System generated				
	Displays <b>General</b> type code to indicate that the payroll office contact holds an administrative position.				
	Displays <b>Technical</b> type code to indicate that the payroll office contact holds a technical position.				
Status	System generated				
	Displays <b>active</b> to indicate that the record has been activated in CLER.				
	Displays <b>inactive</b> to indicate that the record has been inactivated in CLER.				
Name	Optional, alphanumeric, 30 positions maximum				
	Enter the name of the carrier contact.				
Phone	System generated				
	Displays the carrier contact's telephone number.				
Email	System generated				
	Displays the carrier contact's email address.				



7. Click **Update** next to the applicable record. The Carrier Contacts Update page is displayed.

CI	RR	Payro	II Office	Carrier	Forms	Tra	ansmission	Reports	- 1919 - L
		Info II	)s Enr	oliment Codes	Contacts	Errors	Transmissions	Enrollees	
ier Contacts U	pdate								
Enter data for i	the Carrier Contac	to record a	nd aliak th	a Undata Bacar	d button to any		trica Fielda ma	rked with * are	?
equired.	the carrier contac	ts record a	nu click u	le opuate Recor		e your er	rules. Fields Illa	ikeu with are	
arrier ID*	Type*								
$\sim$	General 🗸								
ble									
ame									
ddress									
ity		State Zip		Foreign Co	untry				
		L . 🗸					$\checkmark$		
hone Number		Fax Numbe	er						
mail Address									
1									
lemarks									
Update Recor	d Clear Dat	a Cance	1						

Figure 83: Carrier Contacts Update Page

8. Complete the applicable fields on the Carrier Contacts Update page.

Field	Instruction/Description
Carrier ID*	<i>Required</i> Select the carrier ID number from the drop-down menu.
Type*	Required Select either <b>General</b> for an administrative contact or <b>Technical</b> for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Role	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the title, position, etc., of the carrier contact/carrier plan contact.
Name	<i>Optional, alphanumeric, 30 positions maximum</i> Enter the name of the carrier contact.



Field	Instruction/Description
Address Line 1	Optional, alphanumeric, 40 positions maximum
	Enter the first line of the carrier contact's street or post office box address.
Address Line 2	Optional, alphanumeric, 40 positions maximum
	Enter the second line of the carrier contact's street or post office box address.
Address Line 3	Optional, alphanumeric, 40 positions maximum
	Enter the third line of the carrier contact's street or post office box address.
City	Optional, alphanumeric, 25 positions maximum
	Enter the name of the carrier contact's city.
State	Optional, alphanumeric, 2 positions maximum
	Select the payroll office's, carrier's, carrier contact's, or carrier plan contact's State, U.S. territory, or overseas military abbreviation from the drop-down menu. Refer to the <i>State, U.S. Territory, and Overseas Military Abbreviations Table</i> (on page 226) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.
Zip	Optional, alphanumeric, 11 positions maximum
	Enter the carrier contact's ZIP Code.
Foreign Country	Optional
	Select the carrier contact's country code from the drop-down menu. For a list and descriptions of country codes, see <i>Country Codes Table</i> (on page 229).
Phone Number	System generated
	Displays the carrier contact's telephone number.
Fax Number	Optional, alphanumeric, 25 positions
	Enter the carrier contact's fax number.
Email Address	Optional, alphanumeric, 60 positions
	Enter the carrier contact's email address.
Remarks	Optional, alphanumeric, 80 positions
	Enter remarks about this record.

9. Click **Update Record**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.

10. Click **OK** to close the pop-up.

Note: To update another record, click **Cancel** to return to the Carrier Contacts Search Results page. Click **Update** next to the applicable record.

## Updating a Carrier Plan Contact Record

The Update function allows users to update carrier plan contact records.

## To Update a Carrier Plan Contact Record:

GLEK	Payroll Office	Carrier	Form	is Tran	smission	Reports	490	Ċ
ER Main Menu Welcome to the OPM Federal Empl	loyees Health Benefit	s Centralized En	rollment Cle	aringhouse or	CLER. From	this screen you	can	1
access the various functional areas of the screen to access the differen and they will not function, if select To learn about the various functio	nt areas of CLER. Se ed.	ctions that you	are not aut	horized to acc	ess will have	e the tabs "gray	ed out"	
1. Payroll Office Info Contacts Payroll Office Personnel Of Transmissions Enrollees 2. Carrier Info Enrollment Codes IDs Contacts Carrier Plant Enrollees Enrollees Enrollees	ifice Contacts		4. <u>Transmi</u> 5. <u>Reports</u>	File Transfer Online Entry Payroll Discrep Discrepancy S Payroll Office Carrier Validat Payroll Office Carrier Enrollment Charrier Gain/LC Reconciliation Reconciliation Carrier Discrep	ummary Reconciliatio Enrollment T ent Transmis ange Summary Reason Sum Action Sum Summary Summary Jancy Listing	ransmission ssion ry g mary nary	ts	

Figure 84: CLER Main Menu Page



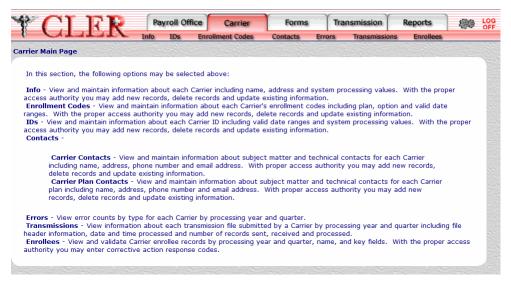


Figure 85: Carrier Main Page

3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.





4. Click the Carrier Plan Contacts link to display the Carrier Plan Contacts page.

	Payroll Of	fice Carrier	Forms	Transmission	n Reports	194
GLER	Info IDs	Enrollment Codes	Contacts	Errors Transmis	ssions Enrollees	
rier Plan Contacts						
Click the Add button to add	a now Carrier P	lan Contacts record.	Enter colection	critoria in the follow	ving fields and click	?
SUBMIT button to search for reco			Enter selection	criteria in the follow	and click	ule
Carrier Plan Type						
	$\checkmark$					
Display: All 🖲 Active () I	nactive ()					
	0					
Order By: Carrier 💿 Plan 🔾	Туре 🔿					
SUBMIT RESET						

Figure 87: Carrier Plan Contacts Page

5. Complete the fields on the Carrier Plan Contacts page and click Submit.



# OR

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

Field	Instruction/Description
Carrier	<i>Optional, alphanumeric, 7 positions</i> Enter the carrier ID code.
Plan	Required, alphanumeric, 2 positions
	Enter the first two positions of the carrier enrollment code.
Туре	Optional
	Select either <b>General</b> for an administrative contact or <b>Technical</b> for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Display	Optional, default
	Defaults to <b>All</b> 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 values:
	<b>All</b> - 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.
	<b>Inactive</b> - Displays inactive contacts for the payroll office ID and type code entered.
Order By	Optional, default
	Defaults to the <i>Carrier</i> 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 values:
	Carrier - Search by carrier code.
	Plan - Search by plan code.
	<b>Type</b> - Search by type code.



6. The Carrier Plan Contacts Search Results page is displayed.

er Plan Contacts	ees
er Plan Contacts	
Carrier Plan Type Status Name Phone Email	Options
General Active	Inactivate Update

## Figure 88: Carrier Plan Contacts Page

Field	Description
Carrier	System generated
	Displays the carrier ID code.
Plan	System generated
	Displays the first two positions of the carrier enrollment code.
Туре	System generated
	Displays <b>General</b> type code to indicate that the payroll office contact holds an administrative position.
	Displays <b>Technical</b> type code to indicate that the payroll office contact holds a technical position.
Status	System generated
	Displays <b>active</b> to indicate that the record has been activated in CLER.
	Displays <b>inactive</b> to indicate that the record has been inactivated in CLER.
Name	System generated
	Displays the name of the carrier plan contact.
Phone	System generated
	Displays the carrier plan contact's telephone number.
Email	System generated
	Displays the carrier plan contact's email address.



7. Click **Update** next to the applicable record. The Carrier Plan Contacts Update page is displayed.

er Contacts Update	Info IDs I	Inrollment Codes	Contacts	Errors Transmiss		2000
er Contacts Update				errors transmiss	ions Enrollees	
						?
nter data for the Carrier Contac	cts record and click	the Update Recor	d button to sav	e your entries. Fields	marked with * are	_
quired.						
rrier ID* Type*						
Seneral V						
le						
ime						
Idress						
ty	State Zip	Foreign Co	ountry	~		
• •	· . 🗸			~		
one Number	Fax Number					
nail Address						
·						
<u> </u>						
emarks				_		
Update Record Clear Data	a Cancel					

Figure 89: Carrier Contacts Update Page

8. Complete the applicable fields on the Carrier Plan Contacts Update page.

Field	Instruction/Description
Carrier ID*	<i>Required</i> Select the carrier ID number from the drop-down menu.
Type*	Required Select either <b>General</b> for an administrative contact or <b>Technical</b> for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Role	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the title, position, etc., of the carrier contact/carrier plan contact.
Name	<i>Optional, alphanumeric, 30 positions maximum</i> Enter the name of the carrier contact.



- 9. Click **Update Record**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.
- 10. Click **OK** to close the pop-up.



Note: To update another record, click **Cancel** to return to the Carrier Plan Contacts Search Results page. Click **Update** next to the applicable record.

## Viewing Carrier Error Records

The Errors option on the Carrier Main Page allows users with the proper access authority to view error counts by type for each carrier by processing year and quarter.

#### To View a Carrier Error Record:

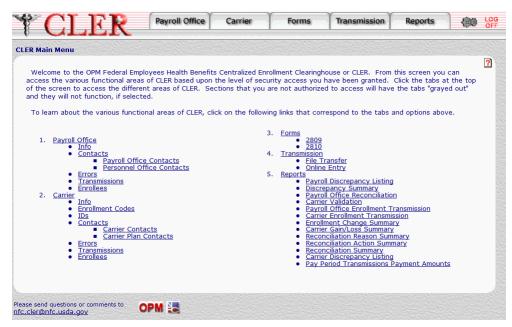


Figure 90: CLER Main Menu Page



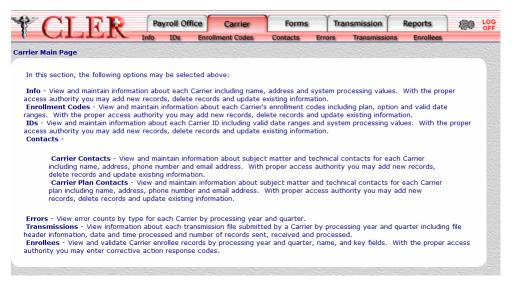


Figure 91: Carrier Main Page

3. Select Errors at the top of the Carrier Main Page. The Carrier Errors page is displayed.

TO FR	Payroll Office	Carrier	Forms	Transmission	Reports	LOG OFF
( OLLIN	Info IDs Enr	rollment Codes	Contacts E	rrors Transmission	ns Enrollees	
Carrier Errors						
r						?
Enter selection criteria in the fol	lowing fields and click	the SUBMIT but	ton to search for	records based on you	ur entries.	
Carrier ID Year Quar	ter					
Order By: Carrier ID () Year	/Quarter ()					
Order By: Carrier ID 🖲 Year	/Quarter ()					
SUBMIT RESET						

#### Figure 92: Carrier Errors Page

4. Complete the fields on the Carrier Errors page and click Submit.

#### OR

Click Reset to clear all data entered.

Field	Instruction/Description
Carrier ID	<i>Required, alphanumeric, 7 positions</i> Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	<i>Optional, alphanumeric, 4 positions</i> Enter the reconciliation year for the requested error statistics.



Quarter	<i>Optional, alphanumeric, 1 position</i> Enter the reconciliation quarter for the requested error statistics.
Order By	Optional, default Defaults to the <b>Carrier</b> 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 values: <b>Carrier ID</b> - Search by Carrier ID. <b>Year/Quarter</b> - Search by reconciliation year and reconciliation quarter.

5. The Carrier Errors Search Results page is displayed.

8 (	Тľ	RR.	Payroll Office	Carrier	Forms	Transmission	Reports	CFF
10		1717	Info IDs Enro	oliment Codes C	Contacts Ern	ors Transmissio	ns Enrollees	
Carrier Erro	ors							
		The second second second second						Sec. 1
Carrier 1	ID Year Q	uarter Reco	rds with Errors Record	ls with Warnings To	otal Errors Tot	al Warnings Opt	ions	
Carrier I	ID Year Q 2014	uarter Reco	rds with Errors Record	<b>Is with Warnings</b> To 0	otal Errors Tot 0		ions ew	
Carrier ] I		-		-				
l.		2		-				

Figure 93: Carrier Errors Search Results Page

Field	Description
Carrier ID	System generated Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	<i>System generated</i> Displays the reconciliation year for the requested error statistics.
Quarter	<i>System generated</i> Displays the reconciliation quarter for the requested error statistics.
Records with Errors	System generated Displays the total number of carrier enrollee records with errors. Records with warnings are not included.
Records with Warnings	System generated Displays the total number of carrier records with warnings. Records with errors are not included.
Total Errors	System generated Displays the total number of errors identified.



Total Warnings	System generated
	Displays the total number of warnings identified.

6. Click View next to the applicable record. The Carrier Errors View page is displayed.

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

P CI	TRP	Payroll Office	Carrier	Forms	Transmission	Reports	Se Los
		Info IDs Enn	oliment Codes	Contacts E	rrors Transmission	s Enrollees	
rrier Errors Vie	ew						
Use the brow	oor Back arrow to	select another record t	a view NOTE	Como of the data	, in this sostion is und	ated at the end	?
		and may not be comple			a in this section is upo	ateu at the enu	or the
BLUE CROSS A	ND BLUE SHIEL	D					
Carrier ID	Year Qu	uarter					
		auter					
n d dat	Dd-						
Records with	Errors Records	with warnings					
Total Errors	Total Warr	nings					
Records Reco	nciled Errors R	econciled					
Carrier Errors	Disputed E	rrors Confirmed Err	ors				0000
Ç.,		1					

Figure 94: Carrier Errors Vlew Page

Field	Description
Carrier ID	System generated
	Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	System generated
	Displays the reconciliation year for the requested error statistics.
Quarter	System generated
	Displays the reconciliation quarter for the requested error statistics.
Records with Errors	System generated
	Displays the total number of carrier enrollee records with errors. Records with warnings are not included.
Records with	System generated
Warnings	Displays the total number of carrier records with warnings. Records with errors are not included.



Total Errors	System generated
	Displays the total number of errors identified.
Total Warnings	System generated
	Displays the total number of warnings identified.
Records Reconciled	System generated
	Displays the count of records that have a reconciliation reason and action entered for every error on the record.
Errors Reconciled	System generated
	Displays the count of errors that have a reconciliation reason and action entered.
Carrier Errors	System generated
	Displays the count of errors that have a reconciliation reason and action entered that indicates that the carrier is at fault.
Disputed Errors	System generated
	Displays the count of errors that have a reconciliation reason and action entered that indicate that the carrier is at fault and that the carrier disputes.
Confirmed Errors	System generated
	Displays the count of errors that have a reconciliation reason and action entered that indicate that the carrier is at fault and that the carrier accepts.

## Maintaining Carrier Transmission Records

The Transmissions option on the Carrier Main Page allows users to view and maintain information about each transmission file submitted by a carrier by processing year and quarter.

For more information see:

Viewing a Carrier Transmission Record	.122
Validating a Carrier Transmission Record	.127

## Viewing a Carrier Transmission Record

The View function allows users to view carrier transmission records.



## To View a Carrier Transmission Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

I ULLK	Payroll Office	Carrier	F	orms	Transmission	Reports	60	0
ER Main Menu								
Welcome to the OPM Federal Em access the various functional area of the screen to access the differ and they will not function, if selec To learn about the various funct	is of CLER based upon ent areas of CLER. Se ted.	the level of sec ctions that you	urity aco are not	ess you authoriz	have been granted. ed to access will have	Click the tabs a the tabs "gray	at the top ed out"	?
			3. <u>Forr</u> 4. <u>Tra</u>	2809     2810     smissior     File     Onlin     Discr     Discr     Carri     Carri     Carri     Carri     Carri     Carri     Carri     Carri     Recco     Recco     Recco	) Transfer	r iransmission ssion rry L umary mary mary		

Figure 95: CLER Main Menu Page

2. The Carrier Main Page is displayed.

T T T	Payr	roll Office	Carrier	Forms	TG	ansmission	Reports	18	LOG
1 OLDIN	Info	IDs Enr	oliment Codes	Contacts	Errors	Transmissions	Enrollees		
Carrier Main Page									
In this section, the following opl Info - View and maintain inform: access authority you may add ne Enrollment Codes - View and r ranges. With the proper access IDs - View and maintain informa access authority you may add ne Contacts -	ation about w records naintain inf authority y tion about	t each Carrie , delete reco formation ab you may add each Carrier	er including name ords and update out each Carrier new records, de r ID including val	existing inform 's enrollment c elete records a id date ranges	ation. odes inclu nd update and syst	ding plan, option e existing informa	and valid date		
Carrier Contacts - View including name, address, delete records and updat Carrier Plan Contacts - plan including name, addr records, delete records a	phone num e existing i View and ess, phone	ber and ema information. maintain info number and	il address. With ormation about s I email address.	oproper access subject matter	and tech	y you may add n nical contacts fo	ew records, r each Carrier		
Errors - View error counts by ty Transmissions - View informati header information, date and tim Enrollees - View and validate C authority you may enter correcti	on about e e processe arrier enro	each transmi d and numbe llee records	ssion file submitter of records ser by processing ye	ed by a Carrie it, received an	d process	ed.			

Figure 96: Carrier Main Page



3. Select **Transmissions** at the top of the Carrier Main Page. The Carrier Transmissions page is displayed.

	Payroll Office	Carrier	Forms	Transmission	Reports	_ @@ _ <mark>.</mark> (
-OLDI	Info IDs Enr	rollment Codes	Contacts Er	rors Transmission	ns Enrollees	
rrier Transmissions						
						?
Enter selection criteria in the fo	llowing fields and click	the SUBMIT but	ton to search for	records based on you	ur entries.	
Carrier ID Year Quar	rter					
	rter ır/Quarter ()					

## Figure 97: Carrier Transmissions Page

4. Complete the fields on the Carrier Transmissions page and click **Submit**.

## OR

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

Field	Instruction/Description
Carrier ID	Required, alphanumeric, 7 positions
	Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	Optional, alphanumeric, 4 positions
	Enter the reconciliation year for the requested transmission record.
Quarter	System generated
	Displays the reconciliation quarter for the requested transmission record.
Order By	Optional, default
	Defaults to the <i>ID</i> 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 values:
	ID - Search by ID number.
	<b>Type</b> - Search by type code.



5. The Carrier Transmissions Search Results page is displayed.

CIFR.	Payroll Office	Carrier	Forms	Transmission	Reports	- 400 La
6 OLLER	Info IDs En	rollment Codes	Contacts Er	rors Transmissio	ns Enrollees	
arrier Transmissions						
A Contract of the						
Carrier ID Year Quarter Subm	nission Submission D	ate Code Status	s Validation	Options		
Carrier ID Year Quarter Subm	iission Submission D	ate Code Status	s Validation	-		
Carrier ID Year Quarter Subm	nission Submission D	ate Code Status		· ·		
Carrier ID Year Quarter Subm	iission Submission D	ate Code Status		· ·		

Figure 98: Carrier Transmission Search Results Page

6. Click **View** next to the applicable record. The Carrier Transmissions View page is displayed.

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

e CI	R R	Payroll C	Office Carrier	Forms	T	ansmission	Reports	
		Info IDs	Enrollment Codes	Contacts	Errors	Transmissions	Enrollees	
rier Transmissio	s View							
								?
Use the browser	Back arrow to s	select another	record to view.					
BLUE CROSS AND	BLUE SHIELD							
Carrier ID	Year Qua	arter						
I								
Submission Sub	nission Date	As of Dat	e					
	Dute							
Records Sent			rds Processed					
kecords Sent	kecoras ke	ceived keco	ras processea					
Date Processed	Time Pro	ocessed Cod	e Status			Source		
		1. C						
Email Date	Email Tir	me						
Last Validate Dat	e Last Val	idate Time L	ast Validate ID Indic	ator				
(	1							

Figure 99: Carrier Transmissions View Page

Field	Description
Carrier ID	System generated Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	System generated Displays the reconciliation year for the requested transmission record.



System generated Displays the reconciliation quarter for the requested transmission
record.
System generated
Displays the number of transmissions submitted for the reconciliation quarter selected.
System generated
Displays the date the transmission was submitted.
System generated
Displays the date the transmitted enrollment data was extracted.
System generated
Displays the number of records sent in the transmission.
System generated
Displays the number of records found in the transmission file during processing.
System generated
Displays the number of records accepted to store in the CLER tables.
System generated
Displays the current system date when the process was run.
System generated
Displays the current application time when the process was run.
System generated
Displays the transmission processing code. The code I (Initial) or <b>blank</b> indicates an initial file, code <b>A</b> (Add) indicates an additional file, and code <b>R</b> (Replace) indicates replace all previous files.
System generated
Displays <b>000</b> 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 <i>Carrier System Codes Table</i> (on page 219).



Source	System generated
	Displays the source of transmission data indicator. The value in the first position equals $\mathbf{M}$ for mainframe or $\mathbf{S}$ for server. The value in the second position equals $\mathbf{T}$ for transmission or $\mathbf{M}$ for manual entry.
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	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.
Last Validate Date	System generated
	Displays the date the transmission was last validated.
Last Validate Time	System generated
	Displays the time the transmission was last validated.
Last Validate ID	System generated
	Displays the user ID number of the person who last validated the transmission.
Indicator	System generated
	Displays if the transmission has been validated by the carrier. $\mathbf{Y}$ indicates the transmission has been validated, $\mathbf{C}$ indicates the transmission has been cancelled, and an empty field indicates the transmission has not been validated.

## Validating a Carrier Transmission Record

The Validate function allows users to confirm that the carrier agrees with all of the reconciliation reason and action codes entered by the payroll offices for the enrollee records in the selected transmission file. Entries the carrier makes to dispute the reconciliation of individual enrollee records, before or after using this option, will not be affected.



### To Validate a Carrier Transmission Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

CLER	Payroll Office	Carrier	Forms	Transmission	Reports	<b>(</b> )00	LOC OFI
ER Main Menu							?
Welcome to the OPM Federal Emple access the various functional areas of the screen to access the differen and they will not function, if selecte To learn about the various function	of CLER based upon t areas of CLER. Se d.	the level of sec ctions that you	urity access you are not authoriz	have been granted. ed to access will have	Click the tabs a the tabs "gray	at the top ed out"	
1. Payroll Office • Info • Contacts • Payroll Office • Personnel Off • Errors • Errollees 2. Carrier • Info • Enrollees • Dos • Contacts • Carrier Conta • Carrier Conta • Carrier Conta • Carrier Conta • Carrier Plan C • Errors • Transmissions • Enrollees	<u>cts</u>		5. <u>Reports</u> Payr Disc: Payr Carr Carr Enro Carr Recc Recc Recc Carr		n ransmission ssion ry f mary nary	<u>ts</u>	
ase send questions or comments to .cler@nfc.usda.gov	PM 🔡						

Figure 100: CLER Main Menu Page

2. The Carrier Main Page is displayed.

4	CIFR	Payro	II Office	Carrier	Forms	Tr	ansmission	Reports	<i>(</i> )()	LOG
		Info II	Ds Enro	ollment Codes	Contacts	Errors	Transmissions	Enrollees		
Ca	arrier Main Page									
	In this section, the following opt	ions may be	selected a	above:						
	Info - View and maintain informa	ation about e	each Carrie	r including name	, address and	system p	rocessing values.	With the prop	er	
	access authority you may add ne									
	Enrollment Codes - View and n ranges. With the proper access a									
	IDs - View and maintain informat	tion about e	ach Ćarrier	ID including val	id date ranges	and syst			proper	
	access authority you may add ne Contacts -	w records, o	delete reco	rds and update	existing inform	ation.				
	contacts									
	Carrier Contacts - View									
	including name, address, p delete records and update			il address. With	proper access	s authorit	y you may add ne	ew records,		1
	Carrier Plan Contacts -	View and m	naintain info							
	plan including name, addre records, delete records ar				With proper a	ccess au	thority you may a	dd new		20
			soung into	ind dom.						
	Errors - View error counts by ty									
	Transmissions - View information header information, date and time							uarter including	) file	
	Enrollees - View and validate C authority you may enter corrective	arrier enrolle	e records l	by processing ye				ith the proper a	access	
		1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1				1.1.1.1		and the second		

Figure 101: Carrier Main Page



3. Select **Transmissions** at the top of the Carrier Main Page. The Carrier Transmissions page is displayed.

	Payroll Office	Carrier	Forms	Transmission	Reports	
ATTT	Info IDs Enr	rollment Codes	Contacts En	rors Transmission	ns Enrollees	
rrier Transmissions						
						?
Enter selection criteria in the fol	llowing fields and click	the SUBMIT but	ton to search for	records based on you	ir entries.	
Carrier ID Year Quar	ter					
Order By: Carrier ID 🔍 Year	r/Quarter 🔿					
SUBMIT RESET						

### Figure 102: Carrier Transmissions Page

4. Complete the fields on the Carrier Transmissions page and click Submit.

### OR

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

Field	Instruction/Description
Carrier ID	<i>Required, alphanumeric, 7 positions</i> Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	<i>Optional, alphanumeric, 4 positions</i> Enter the reconciliation year for the requested transmission record.
Quarter	<i>Optional, alphanumeric, 1 position</i> Enter the reconciliation quarter for the requested transmission record.
Order By	Optional, default Defaults to the <b>Carrier</b> 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 values: <b>Carrier ID</b> - Search by carrier ID. <b>Year/Quarter</b> - Search by reconciliation year and reconciliation quarter.

5. The Carrier Transmissions Search Results page is displayed.



Note: The **Validate** button is displayed next to transmission files that have not been validated or whose validation has been cleared of all enrollee records that do not have individual validation entries. The **CIr Valid** button is displayed next to transmission files that have been validated.

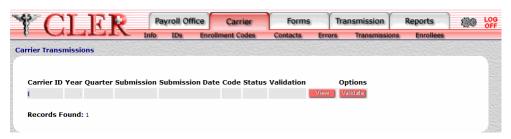


Figure 103: Carrier Transmissions Search Results Page

Field	Description
Carrier ID	System generated
	Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	System generated
	Displays the reconciliation year for the requested transmission record.
Quarter	System generated
	Displays the reconciliation quarter for the requested transmission record.
Submission	System generated
	Displays the number of transmissions submitted for the reconciliation quarter selected.
Submission Date	System generated
	Displays the date the transmission was submitted.
Code	System generated
	Displays the transmission processing code. The code I (Initial) or <b>blank</b> indicates an initial file, code A (Add) indicates an additional file, and code R (Replace) indicates replace all previous files.
Status	System generated
	Displays <b>000</b> 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 <i>Carrier System Codes Table</i> (on page 219).



Validation	System generated
	Displays the status of the validation. The <b>Validated</b> code is displayed when the transmission is validated. The <b>Cleared</b> code is displayed when the transmission validation is cleared.

- 6. Click **Validate** next to the applicable transmission file to validate all enrollee records in the transmission file that do not have individual validation entries. If no errors occur, a pop-up message is displayed to confirm that the record has been validated.
- 7. Click **OK** to close the pop-up.
- 8. To clear the previous validation setting for the enrollee records in a transmission file, click **CIr Valid** next to the applicable transmission file. If no errors occur, a pop-up message is displayed to confirm the validated record has been cleared.
- 9. Click **OK** to close the pop-up.

## Maintaining Carrier Enrollee Records

The Enrollees option on the Carrier Main Page allows users to view and validate carrier enrollee records by processing year, quarter, name, and key fields. With the proper access authority, corrective action response codes may be entered.

For more information see:

Viewing a Carrier Enrollee Record131	
Viewing a Matching Carrier Enrollee Record or Duplicate Payroll Office Enrollee Record	
Validating a Carrier Enrollee Record145	

## Viewing a Carrier Enrollee Record

This topic has been updated to add the Employee/Annuitant_Ind field description and screen captures have been updated to reflect updates.

The View function allows users to view carrier enrollee records.



## To View a Carrier Enrollee Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

StER Main Menu         Welcome to the OPM Federal Employees Health Benefits Centralized Enrollment Clearinghouse or CLER. From this screen you can access the various functional areas of CLER. Sections that you are not authorized to access will have the tabs "grayed out" and they will not function, if selected.         To learn about the various functional areas of CLER, click on the following links that correspond to the tabs and options above.         1.       Payroll Office <ul> <li>Payroll Office</li> <li>Contacts</li> <li>Enrollees</li> <li>Contacts</li> <li>Enrollees</li> <li>Contacts</li> <li>Contacts</li></ul>	CLER	Payroll Office	Carrier	Forms	Transmission	Reports	<b>(90</b> )	LOC OFI
Welcome to the OPM Federal Employees Health Benefits Centralized Enrollment Clearinghouse or CLER. From this screen you can access the various functional areas of CLER. Sections that you are not authorized to access will have the tabs "grayed out" and they will not function, if selected.         To learn about the various functional areas of CLER, click on the following links that correspond to the tabs and options above.         1.       Payroll Office         Info       2809         Contacts       2810         Errors       7 Transmissions         Errors       7 Transmissions         Errorles       9 Payroll Office Contacts         Errors       7 Transmissions         Errorles       9 Payroll Office Reconcilation         Carrier       0 Online Entry         Ios       Contacts         Contacts       9 Payroll Discrepancy Listing         Errors       9 Payroll Office Reconcilation         Carrier       0 Online Entry         Ios       Contacts         Contacts       9 Payroll Office Enrollment Transmission         Contacts       9 Payroll Office Enrollment Transmission         Carrier Ontacts       9 Carrier Contacts         Errors       9 Carrier Contacts         Contacts       9 Payroll Office Enrollment Transmission         Carrier Olatots       9 Carrier Contacts <td>ER Main Menu</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	ER Main Menu							
1.     Payroll Office     2809       1.     Contacts     2810       • Contacts     File Transfer       • Personnel Office Contacts     Online Entry       • Transmissions     Payroll Office Reconcilation       • Transmissions     Payroll Office Reconcilation       • Enrollees     Payroll Office Reconcilation       • Contacts     Payroll Office Reconcilation       • Contacts     Payroll Office Reconcilation       • Carrier     Payroll Office Enrollment Transmission       • Contacts     Carrier Transmission       • Contacts     Carrier Tonloment Codes       • Contacts     Carrier Contacts       • Carrier Plan Contacts     Carrier Contacts       • Transmissions     Reconciliation Acton Summary       • Carrier Plan Sissions     Reconciliation Acton Summary       • Transmissions     Reconciliation Summary       • Transmissions     Reconciliation Acton Summary	access the various functional areas of of the screen to access the different and they will not function, if selected	of CLER based upon t areas of CLER. Se d.	the level of sec actions that you	urity access you are not authorize	have been granted. ed to access will have	Click the tabs a e the tabs "gray	at the top ved out"	?
	2. Carrier Info Contacts Payroll Office Personnel Offi Errors Transmissions Errollees 2. Carrier Info Enrollment Codes IDs Contacts Carrier Plan Co Carrier Plan Co Errors Transmissions	<u>ce Contacts</u>		4. <u>Transmission</u> 2810 5. <u>Reports</u> 2810 5. <u>Reports</u> 2810 0nin 5. <u>Reports</u> 2800 2000 2000 2000 2000 2000 2000 200	ransfer e Entry Bl Discrepancy Listing epancy Summary en Validation Il Office Reconciliatio Validatione Enrollment T re Enrollment Transmi ment Change Summary recliation Reason Sum recliation Reason Sum nciliation Summary rolisteion Summary rolisteion Summary er Discrepancy Listing	ransmission ssion Iry L Imary mary	<u>ts</u>	

Figure 104: CLER Main Menu Page

The Carrier Main Page is displayed.

4		Payroll	Office	Carrier	Forms	Tra	Insmission	Reports	LOG
	( OLDIN	Info IDs	Enn	oliment Codes	Contacts	Errors	Transmissions	Enrollees	
C	arrier Main Page								
	In this section, the following optic	ons may be se	elected a	above:					
	Info - View and maintain informal access authority you may add nev Enrollment Codes - View and m ranges. With the proper access a IDs - View and maintain informati access authority you may add nev Contacts - Carrier Contacts - View including name, address, p delete records and update Carrier Plan Contacts - plan including name, address - plan including name, address -	v records, del aintain inform uthority you i ion about eac v records, del and maintain hone number existing infor View and mai	lete reco ation abo may add th Carrier lete reco informati and ema mation. ntain info	rds and update out each Carrier new records, de ID including val rds and update ion about subject il address. With primation about s	existing inform 's enrollment c elete records a id date ranges existing inform ct matter and t n proper access subject matter	ation. odes inclu nd update and syste ation. technical c s authority and techr	ding plan, option existing informa m processing va contacts for eacl y you may add no nical contacts for	and valid date tion. Ilues. With the h Carrier ew records, r each Carrier	
	Errors - View error counts by typ	d update exis	ting infor	mation.		ccess auti	ioncy you may a	uu new	
	Transmissions - View informatio header information, date and time Enrollees - View and validate Ca authority you may enter corrective	n about each processed ar rrier enrollee	transmis nd numbe records l	ssion file submitter of records ser by processing ye	ted by a Carrie ht, received an	d processe	ed.	-	
									1525

Figure 105: Carrier Main Page



2. Select **Enrollees** at the top of the Carrier Main Page. The Carrier Enrollees page is displayed.

CI	FR		I Office	Carrier	Forms	Transmission	Reports	199 k
	<u> </u>	Info IC	s Enrolimer	nt Codes Co	ntacts E	rrors Transmissio	ons Enrollees	
rier Enrollees								
Enter selection	n criteria in the	e following fields	and click the S	UBMIT button t	o search for	records based on yo	ur entries. Fields	marked
vith * are requ	red.							
Carrier ID*		Quarter*						
· · · · · ·	2014 🗸	3 🗸						
Payroll Office	Enrollment Code	SSN - from	to					
Jince	Code	33N - 110111						
ast Name		Fir	st Name	MI	ddle Name			
rror Warni Code Code	ng							
101 🔨 201								
102 202 120 203								
Display: A	l Records 🔘	Matches 〇	No Matches (	Discrepanc	ies 🔿	Warnings 🔿		
	econciled ()	Reconciled ()	Confirmed (		0	Validated ()		
Drder By: 19	st Name	✓ 2nd 3	SSNO	✓ 3rd	×	✓		
41	:h	Ƴ 5th		$\checkmark$				
SUBMIT RE	SET							

Figure 106: Carrier Enrollees Page

3. Complete the following fields on the Carrier Enrollees page and select the Submit button.

### OR

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

*Carrier ID* (see "*Carrier ID* - (*Carrier Identifiers Search Results*) *Field Description*" on page 272)

Year (see "Year (Drop-Down) Field Instructions" on page 382)

Quarter (see "Quarter* (Drop-Down) Field Instructions" on page 359)

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

*Enrollment Code* (see "*Enrollment Code Field Instructions*" on page 296)

SSN - From (see "SSN From - Field Instruction" on page 367)

SSN - To (see "SSN To - Field Instruction" on page 368)

*Last Name* (see "*Last Name - Enrollee Field Instruction*" on page 308)

*First Name* (see "*First Name - Enrollee Field Instruction*" on page 301)



Middle Name (see "Middle Name - Field Instruction" on page 311)
Error Code (see "Error Code - Field Instruction" on page 297)
Warning Code (see "Warning Code - Field Instruction" on page 380)
Display (see "Display - Field Instruction" on page 284)
Order By: 1st (see "Order By 1st - (Carrier ID) Field Instruction" on page 316)
Order By: 2nd (see "Order By 2nd - (Carrier ID) Field Instruction" on page 322)
Order By: 3rd (see "Order By 3rd - (Carrier ID) Field Instruction" on page 328)
Order By: 4th (see "Order By 4th - (Enrollee) Field Instruction" on page 333)
Order By: 5th (see "Order By 5th - (Enrollee) Field Instruction" on page 339)

and the second second		Info IDs	Enroliment Cod	103	Contacts Erro	ors Transmis	SIUITS	Enrollees	
ier Enrollees					C. C			and the second	
arrier ID BCB	S100: BLUE CRO	SS AND BLUE	SHIELD				Refresh		
/ear/Quarter	2021/1								
nrollee SSN	Last Name	First Name	Payroll Office	Code	Discrepancies		Fail Count	(	Options
xxxxxxxxxxx	DOE	JANE	24777777	111	202	R	0	View	Validate
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	DOE	JANE	24777777	111		R	0	View	

Figure 107: Carrier Enrollees Search Results Page

The following fields are displayed on the Carrier Enrollees Search Results page:

Carrier ID (see "Carrier ID - (Carrier Enrollees) Field Instruction" on page 272)

Year (see "Year - (Reconciliation Year) Field Description" on page 383)

Quarter (see "Quarter - (Reconciliation Quarter) Field Description" on page 357)

*Enrollee SSN* (see "*Enrollee SSN - Field Description*" on page 294)

Last Name (see "Enrollees (New/Add (System Generated) Field Instructions" on page 295)

First Name (see "First Name - Enrollee Field Description" on page 301)

*Payroll Office* (see "*Payroll Office - Carrier Enrollees Search Results Field Description*" on page 350)



Code (see "Code - Carrier Enrollment Code Field Description" on page 278)

*Discrepancies* (see "*Discrepancy - Field Description*" on page 283)

Employee/Annuitant_Ind (see "Employee/Annuitant Indicator - Field Description" on page 292)

*Fail Count* (see "*Fail Count - Field Description*" on page 298)

4. Select the **View** button next to the applicable record. The Carrier Enrollees View page is displayed.

rrier Enrollees View									?
Use the browser Back a following button(s):#1.		ct another re	cord to vie	w. To see m	atching Payroll C	Office recor	ds for this Enroll	ee record, click o	
Carrier ID Year	Quart	er Submis	sion						
Payroll Enro	llment								
Office ID Code		N							
Last Name			First Nam	ne	Middle Na	me			
Effective Date of Cove	rage								
Deceased									
Annuitant SSN P	eudo SSN	Othe	r Payroll I	D	Other Carri	er ID			
Submitter Use #1		Submitter l	Jse #2		Submitter Use	#3			
					Submitter Use	#3			
		Submitter U ocessed So		il Count	Submitter Use	#3			
					Submitter Use	#3			
Date Processed	Time Pro				Submitter Use	#3			
Date Processed	Time Pro	cessed So	urce Fa	il Count		#3			
Date Processed Select another discrepar Discrepancy	Time Pro	cessed So	urce Fa	il Count	Submitter Use	#3	Er	<u>۹</u> ۳.	
Date Processed Select another discrepar Discrepancy Reconciliation Reason Reconciliation Action	Time Pro	cessed So	urce Fa	il Count		#3		an]	
Date Processed Select another discrepan Discrepancy Reconciliation Reason Reconciliation Action Corrective Action	Time Pro	holdings/Con	urce Fa	il Count	g Or Incorrrect		~	חנם]	
Date Processed Select another discrepan Discrepancy Reconciliation Reason Reconciliation Action Corrective Action	Time Pro	holdings/Con	urce Fa	il Count			~	הנ	
Date Processed Select another discrepan Discrepancy Reconciliation Reason Reconciliation Action Corrective Action	Time Pro	holdings/Con	urce Fa	il Count	g Or Incorrrect		~	Jan j	
Date Processed Select another discrepan Discrepancy Reconciliation Reason Reconciliation Action Corrective Action	Time Pro	holdings/Con	urce Fa	il Count	g Or Incorrrect		~	Sin)	
Date Processed Select another discrepan Discrepancy Reconciliation Reason Reconciliation Action Corrective Action	Time Pro	holdings/Con	urce Fa	il Count	g Or Incorrrect		~	311	
Submitter Use #1 Date Processed Select another discrepar Discrepancy Reconciliation Reason Reconciliation Action Corrective Action Payroll Office Comme	Time Pro	holdings/Con	urce Fa	il Count	g Or Incorrrect		~	30	
Date Processed Select another discrepan Discrepancy Reconciliation Reason Reconciliation Action Corrective Action	Time Pro	holdings/Con	urce Fa	il Count	g Or Incorrrect tents (400 chard		~	30	

Figure 108: Carrier Enrollees View Page

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

The following fields are displayed on the Carriers Enrollees View page:

*Carrier ID* (see "*Carrier ID* - (*Carrier Identifiers Search Results*) *Field Description*" on page 272)



Year (see "Year - (Reconciliation Year) Field Description" on page 383)

Quarter (see "Quarter - Field Description" on page 357)

Submission (see "Submission - (Number) Field Description" on page 371)

*Payroll Office ID* (see "*Payroll Office ID - Field Description*" on page 352)

*Enrollment Code* (see "*Enrollment Code - Field Description*" on page 296)

*SSN* (see "*SSN - Field Description*" on page 366)

*Last Name* (see "*Last Name - Enrollee Field Description*" on page 308)

*First Name* (see "*First Name - Enrollee Field Description*" on page 301)

*Middle Name* (see "*Middle Name - Enrollee Field Description*" on page 311)

*Effective Date* (see "*Effective Date (System Generated) Field Instructions*" on page 290)

**Deceased Annuitant SSN** (see "**Deceased Annuitant SSN - Field Description**" on page 281)

*Pseudo SSN* (see "*Order By: 3rd Reconciliation Reason Field Instructions*" on page 332)

Other Payroll ID (see "Other Payroll ID - Field Description" on page 349)

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

Submitter Use #1 (see "Submitter Use #1 - Field Description" on page 372)

*Submitter Use #2* (see "*Submitter Use #2 - Field Description*" on page 372)

Submitter Use #3 (see "Submitter Use #3 - Field Description" on page 373)

**Date Processed** (see "**Date Processed - (Record Processed) Field Description**" on page 281)

*Time Processed* (see "*Time Processed - (Record Processed) Field Description*" on page 373)

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

Fail Count (see "Fail Count - Field Description" on page 298)



Select Another Discrepancy (see "Select Another Discrepancy - Field Instruction" on page 365)

*Discrepancy* (see "*Discrepancy - Field Description*" on page 283)

*Reconciliation Reason* (see "*Reconciliation Reason - Field Description*" on page 362)

**Reconciliation Action** (see "Reconciliation Action - Field Description" on page 360)

*Corrective Action* (see "*Corrective Action - Field Description*" on page 280)

*Payroll Office Comments* (see "*Payroll Office Comments - Field Description*" on page 351)

*Carrier Comments* (see "*Carrier Comments - Field Description*" on page 270)

Last Payroll Update ID (see "Last Payroll Update ID - Field Description" on page 309)

*Last Payroll Update Date* (see "*Last Payroll Update Date - Field Description*" on page 309)

*Last Payroll Update Time* (see "*Last Payroll Update Time - Field Description*" on page 310)

Last Carrier Update ID (see "Last Carrier Update ID - Field Description" on page 304)

*Last Carrier Update Date* (see "*Last Carrier Update Date - Field Description*" on page 304)

Last Carrier Update Time (see "Display Total Payment Amounts Field Instructions" on page 289)

# 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.

8 CH R 🔛	Payroll Office	Carrier	Forms	Transmission	Reports	LOG OFF	
	Info Contacts	Errors Tran	smissions Enr	ollees			
yroll Office Enrollees							
Enter selection criteria in the f marked with * are required.	ollowing fields and clic	k the SUBMIT b	utton to search f	or records based on	your entries.	Fields	
Payroll Office ID*							
Transmission Type* If Reconciliation is selected, the If Pay Period is selected, the A be completed.							
Year* 2015 V Quarter* 4	<u>-</u>						
AS of Date for Pay Period Tran From:							
To: 🗸 🗸	1						
	Firollment Code SSN - from First Name		Other ID From dle Name Emj	Other ID To ployee/Annuitant In	dicator		
Code Code 201 101 202 120 203							
Display: All Records () Unreconciled () R	0	-	epancies () Disputed () No	Warnings () ot Validated ()			
Order By: 1st	2nd SSNO		3rd		4th		
5th	6th		7th		Sth		
9th			×1		>		•
	~						

Figure 109: Payroll Office Enrollees Page

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

Payroll Office ID

*Transmission Type* (see "*Transmission Type - (Required) Field Instruction*" on page 377)

Year (see "Year - (Required) Field Instruction" on page 383)

Quarter (see "Quarter - (Select - Reconciliation) Field Instruction" on page 358)

As of Date for Pay Period Transmission From

As of Date for Pay Period Transmission To

Agency

POI



	Carrier
	Enrollment Code
	SSN - from (see "SSN From - Field Instruction" on page 367)
	SSN - to
	Other ID From
	Other ID To
	Last Name (see "Last Name - Enrollee Field Instruction" on page 308)
	<i>First Name</i> (see " <i>First Name - Enrollee Field Instruction</i> " on page 301)
	Middle Name
	Employee/Annuitant Indicator
	Error Code
	Warning Code
	Display
	Order By 1st
	Order By 2nd
	Order By 3rd
	Order By 4th
	Order By 5th
	Order By 6th
	Order By 7th
	Order By 8th
	Order By 9th
4.	Select the Submit button to confirm all data entered. The Payroll Office En

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.

CLER	Payroll Office	Carrier	P	Form	ns.	Transm	nission	Reports		30 y	00	
OLER	Info Contacts	Errors	Transmis	sions	Ere	lees						
roll Office Enrollees Pay Period	Transmissions											
Payroll Office ID								Retricts				
Pay Period Transmissions from	As of Date 01/01/2	213 to As (	Of Date	03/01	/2013							
						Employee Annuitant	As of			Fail		
nrollee SSN Last Name	First Name			gency		Indicator		Amount	Warning			Options
		8088	111		9999	R	3/1/2013	\$522.22		0	View	
		8085			9999		2/1/2013			0	Minor.	
		BCBS			9999		3/1/2013			0	View	
		BCBS			9999		2/1/2013			0	View.	
		BCBS			9999		2/1/2012			0	5769	
		8085			9999		3/1/2013			0	59km	
	j.	8088			9999		2/1/2013			0	VAN	
		8088			2222		3/1/2013			0	View	
		BCBS			9999		2/1/2013			0	9000	
		8085			9999		2/1/2013			0	Vign	
							2/1/2013			0	View View	
		8085			9999		3/1/2013 2/1/2013			0	View	
		8085			2222		3/1/2013			0	View	
		BCBS			2222		2/1/2013			0	View	
		BCBS			9999		2/1/2013			0	View	
		BCBS			9999		2/1/2013	+		0	View	
					9999		3/1/2013			0	View	
		8088			9999		3/1/2013			0	View	
		BCBS			2222		2/1/2013			0	View	
		BCBS			9999		3/1/2013			0	View	
		BCBS			9999		2/1/2013			0	View	
		8085	111		9999	R	3/1/2013	\$522.22		0	View	
1		8085	111		9999	R	3/1/2013	\$522.22		0	View	
			111		9999			\$522.22		0	View	

Figure 110: 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 294)

Last Name (see "Last Name - Enrollee Field Description" on page 308)

First Name (see "First Name - Enrollee Field Description" on page 301)

Carrier (see "Carrier - Field Description" on page 268)

Code

Agency

POI



*Employee Annuitant Indicator* (see "*Employee/Annuitant Indicator - Field Description*" on page 292)

As of Date (see "As of Date - Carrier Transmissions Field Description" on page 267) Amount (see "Amount - Field Description" on page 267) Warning (see "Warnings - Field Description" on page 381) Fail Count (see "Fail Count - Field Description" on page 298)

Options



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

CT	RR	Payroll Office	Carrier	Forms	Transmission	Reports	
CLL.		Info Contacts	Errors Transı	missions Enro	ollees		
following button(s):	ack arrow to sele	ect another record to vi	iew. To see matc	hing Carrier reco	rds for this Enrollee re	cord, click on the	?
Payroll Office ID	<b>Year</b> 2018		Quarter Sub 1 1	mission			
Transmission Type R	R	1	As of Date 3/1/2018				
Agency POI	Carrier (	Enrollment Code SSN JN4					
Last Name		First Name	Middle Na	ime			
Effective Date of C 10 19 2016	overage Amo 676						
Deceased Annuitant SSN P	seudo SSN	Other Payroll ID	Other Car	rier ID			
Submitter Use #1	Subr	nitter Use #2	Submitter Us	e #3			
Date Processed 03 07 2018	Time Proc 10:59:19	essed Source Fail M 0	Count				
							$\equiv$
Select another discr	epancy:						
Discrepancy Reconciliation Rea Reconciliation Act	particular control and an and an and an and an and an and					~	
Corrective Action					]		
Payroll Office Com	ments (400 cha	aracter max)	Carrier Cor	nments (400 ch	aracter max)		
			~			~	
			~			~	
Last Payroll Updat Last Carrier Updat	Paral and a standard of a standard standard	Date	Time	_			

Figure 111: 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.

		Payroll Office	e Carrier	Forms	Transmission	Reports	OF
		Info IDs I	Enrollment Codes	Contacts Er	rors Transmissio	ns Enrollees	
roll Office Enrolled	es View						
							?
Use the browser Ba	ck arrow to sel	ect another record t	to view.				
Dffice ID	Year		production protection	ubmission			
	2018		1 1				
Transmission Type	20101000000000	nnuitant Indicato					
R	R		3/1/2018				
Agency POI		Enrollment Code SSN					
Agency POI	Contraction of the Contract	JN4					
Last Name	topological design of the	First Name	Middle	Namo			
Last Name		FIFSt Name	Middle	name			
Effective Date of C		unt	Nincerelation				
10 19 2016	overage Amo 676						
menaness introduced interaction		ann an an an an Alberta Charles a					
Deceased Annuitant SSN P	seudo SSN	Other Payroll II	D Other C	arrier ID			
and the second states of the							
		Contraction of the					
Submitter Use #1	Sub	mitter Use #2	Submitter	Use #3			
Submitter Use #1	Sub	mitter Use #2	Submitter I	Use #3			
Date Processed	Time Proc	essed Source F	ail Count	Use #3			
Date Processed		essed Source F		Use #3			
Date Processed	Time Proc	essed Source F	ail Count	Use #3			
Date Processed	Time Proc	essed Source F	ail Count	Use #3			
Date Processed 03 07 2018	Time Proc 10:59:19	essed Source F	ail Count	Use #3			_
Select another discre	Time Proc 10:59:19	essed Source F	ail Count	Use #3			
Date Processed       03     07       2018   Select another discrepancy Reconciliation Rea	Time Proc 10:59:19	essed Source F	ail Count	Use #3		× 7	
Date Processed         03       07       2018         Select another discreding the second	Time Proc 10:59:19	essed Source F	ail Count	Use #3		v v	
Date Processed 03 07 2018 Select another discre Discrepancy Reconciliation Rea Reconciliation Acti Corrective Action	Time Proc 10:59:19	essed Source F	Fail Count			× v	
Date Processed 03 07 2018 Select another discre Discrepancy Reconciliation Rea Reconciliation Acti Corrective Action	Time Proc 10:59:19	essed Source F	Fail Count	Use #3	aracter max)	× ×	
Date Processed 03 07 2018 Select another discre Discrepancy Reconciliation Rea Reconciliation Acti Corrective Action	Time Proc 10:59:19	essed Source F	Fail Count		aracter max)	× ×	
Date Processed           03         07         2018           Select another discre         Discrepancy           Reconciliation Rea         Reconciliation Acti           Corrective Action         Discrepancy	Time Proc 10:59:19	essed Source F	Fail Count		aracter max)	× ×	
Date Processed           03         07         2018           Select another discre         Discrepancy           Reconciliation Rea         Reconciliation Acti           Corrective Action         Discrepancy	Time Proc 10:59:19	essed Source F	Fail Count		aracter max)	× ×	
Date Processed           03         07         2018           Select another discre         Discrepancy           Reconciliation Rea         Reconciliation Acti           Corrective Action         Discrepancy	Time Proc 10:59:19	essed Source F	Fail Count		aracter max)	× ×	
Date Processed 03 07 2018 Select another discre	Time Proc 10:59:19	aracter max)	Fail Count 0 Carrier C		aracter max)	× ×	
Date Processed 03 07 2018 Select another discre Discrepancy Reconciliation Rea Reconciliation Acti Corrective Action	Time Proc 10:59:19	essed Source F	Fail Count		aracter max)	× ×	
Date Processed         03       07       2018         Select another discrepancy         Discrepancy         Reconciliation Rea         Reconciliation Action         Corrective Action         Payroll Office Com	Time Proc 10:59:19	aracter max)	Fail Count 0 Carrier C		aracter max)	× ×	

Figure 112: 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 352)

Year



Quarter (see "Quarter - Field Description" on page 357)

Submission

Transmission Type (see "Transmission Type - Field Description" on page 377)

*Employee Annuitant Indicator* (see "*Employee/Annuitant Indicator - Field Description*" on page 292)

As of Date (see "As of Date - Carrier Transmissions Field Description" on page 267)

Agency

POI

*Carrier* (see "*Carrier - Field Description*" on page 268)

Enrollment Code (see "Enrollment Code - Field Description" on page 296)

SSN

Last Name (see "Last Name - Enrollee Field Description" on page 308)

First Name (see "First Name - Enrollee Field Description" on page 301)

*Middle Name* (see "*Middle Name - Enrollee Field Description*" on page 311)

Effective Date of Coverage

Amount

*Deceased Annuitant SSN* (see "*Deceased Annuitant SSN - Field Description*" on page 281)

Pseudo SSN (see "Pseudo SSN - Field Description" on page 357)

Other Payroll ID (see "Other Payroll ID - Field Description" on page 349)

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

Submitter Use #1 (see "Submitter Use #1 - Field Description" on page 372)

Submitter Use #2

Submitter Use #3 (see "Submitter Use #3 - Field Description" on page 373)

Date Processed

Time Processed



*Source* (see "*Source - Field Description*" on page 365)

Fail Count (see "Fail Count - Field Description" on page 298)

Discrepancy

*Reconciliation Reason* (see "*Reconciliation Reason - Field Description*" on page 362)

Reconciliation Action (see "Reconciliation Action - Field Description" on page 360)

**Corrective Action** 

*Payroll Office Comments* (see "*Payroll Office Comments - Field Description*" on page 351)

Carrier Comments (see "Carrier Comments - Field Description" on page 270)

Last Payroll Update ID (see "Last Payroll Update ID - Field Description" on page 309)

*Last Payroll Update Date* (see "*Last Payroll Update Date - Field Description*" on page 309)

*Last Payroll Update Time* (see "*Last Payroll Update Time - Field Description*" on page 310)

Last Carrier Update ID (see "Last Carrier Update ID - Field Description" on page 304)

*Last Carrier Update Date* (see "*Last Carrier Update Date - Field Description*" on page 304)

*Last Carrier Update Time* (see "*Last Carrier Update Time - Field Description*" on page 305)

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.

## Validating a Carrier Enrollee Record

This topic has been updated to add the Employee/Annuitant_Ind field description and screen captures have been updated to reflect updates.

The Validate function allows users to validate carrier enrollee records.



## To Validate a Carrier Enrollee Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

And the second second second second			Forms	Transmission	Reports	信約	OFF
Main Menu							
elecome to the OPM Federal Emple tess the various functional areas the screen to access the differen I they will not function, if selecte to learn about the various function	of CLER based upon It areas of CLER. Se Id.	the level of sec ctions that you	urity access yo are not authori	u have been granted. zed to access will have	Click the tabs a the tabs "gray	at the top ed out"	?
1. Payroll Office Info Contacts Payroll Office Personnel Off Errors Errollees 2. Carrier Enrollees 1Ds Contacts Carrier Contacts Carrier Contacts Carrier Plan C Errors Transmissions Enrollees	ice Contacts		5. Reports Pay Diss Pay Car Pay Car Enr Car Enr Car Rec Rec Rec Car Car Car	0	n ransmission ssion ry f mary nary	<u>ts</u>	

Figure 113: CLER Main Menu Page

The Carrier Main Page is displayed.

4	CI FR	Payroll	Office	Carrier	Forms	Tra	ansmission	Reports	<i>(</i> #09	LOG
		Info IDs	En En	roliment Codes	Contacts	Errors	Transmissions	Enrollees		
C	arrier Main Page									
	In this section, the following opti	ons may be s	elected	above:						
	Info - View and maintain informa access authority you may add net Enrollment Codes - View and m ranges. With the proper access a IDs - View and maintain informat access authority you may add net Contacts -	w records, de aintain inform authority you ion about eac	lete reco nation ab may ado ch Carrie	ords and update oout each Carrier I new records, d Ir ID including va	existing inform 's enrollment c elete records a lid date ranges	ation. odes inclu nd update and syste	ding plan, option existing informa	and valid date		
	Carrier Contacts - View including name, address, p delete records and update Carrier Plan Contacts - plan including name, addre records, delete records an	hone number existing infor View and mai ss, phone nu	and em mation. intain inf mber an	ail address. With formation about a d email address.	h proper acces subject matter	and tech	you may add ne nical contacts for	ew records, r each Carrier		
	Errors - View error counts by ty Transmissions - View informatic header information, date and time Enrollees - View and validate Ca authority you may enter correctiv	n about each processed a arrier enrollee	n transm nd numb records	ission file submit er of records ser by processing y	ted by a Carrie nt, received an	d process	ed.	-		
-										

Figure 114: Carrier Main Page



2. Select **Enrollees** at the top of the Carrier Main Page. The Carrier Enrollees page is displayed.

C	TRI		yroll Office	Carrier	Forms	Tra	ansmission	Reports	199
	Liter	Info	IDs En	rollment Codes	Contacts	Errors	Transmissions	Enrollees	
rier Enroll	ees								
Enter colo	ation aritoria in l	the following f	iolda and aliak	the SUBMIT but	top to coorch	for record		ontring Fields	?
vith * are i		the following i	ielus anu click	. the SOBMET Dut	ton to search	Tor record	s based on your	enules. Fields	markeu
arrier ID*	Year*	Quarter*							
	✓ 2014 ✓	3 🗸							
ayroll	Enrollmen								
office	Code	SSN - from	to						
ast Name			First Name		Middle Nar	ne			
asentanie									
	arning ode								
101 🔨 2	01								
	02 03								
	All Records 🖲	) Matches		ches 🔿 Discre	pancies ()		ngs ()		
)isplay:			0	0					
		) Reconciled	Conti	rmed 🔿 🛛 🕻		Not Valida			
Order By:	1st Name	✓ 2	nd SSNO	✓ 3rd		~			
	4th		th	<b>v</b>					
SUBMIT	RESET								

Figure 115: Carrier Enrollees Page

3. Complete the following fields on the Carrier Enrollees page and select the Submit button.

### OR

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

Carrier ID (see "Carrier ID* Carrier Validation Field Instructions" on page 273)

Year (see "Year (System Generated) Field Instructions" on page 384)

Quarter (see "Quarter (Drop-Down) Field Instructions" on page 357)

Payroll Office (see "Payroll Office (Optional) Field Instructions" on page 351)

*Enrollment Code* (see "*Enrollment Code Field Instructions*" on page 296)

SSN - From (see "SSN - From Field Instructions" on page 366)

SSN - To (see "SSN - To Field Instructions" on page 367)

Last Name (see "Last Name Field Instructions" on page 309)

*First Name* (see "*First Name Field Instructions*" on page 301)

*Middle Name* (see "*Middle Name Field Instructions*" on page 311)



Error Code (see "Error Codes Field Instructions" on page 297) Warning Code (see "Warning Code (Optional) Field Instructions" on page 381) Display (see "Display Field Instructions" on page 287) Order By: 1st (see "Order By: 1st Carrier Validation Field Instructions" on page 319) Order By: 2nd (see "Order By: 2nd Carrier Validation Field Instructions" on page 324) Order By: 3rd (see "Order By: 3rd Carrier Validation Field Instructions" on page 330) Order By: 4th (see "Order By 4th - (Enrollee) Field Instruction" on page 333) Order By: 5th (see "Order By 5th - (Enrollee) Field Instruction" on page 339)

The Carrier Enrollees Search Results page is displayed.

rier Enrollees									
Carrier ID							Refresh		
Year/Quarter									
Enrollee SSN	Last Name	First Name	Payroll Office	Code	Discrepancies	Employee/ Annuitant_Ind	Fail Count	Options	
							View	Validate	
Records Found	: 1								

Figure 116: Carrier Enrollees Search Results Page

The following fields are displayed on the Carrier Enrollees Search Results page:

*Carrier ID* (see "*Carrier ID* - (*Carrier Identifiers Search Results*) *Field Description*" on page 272)

Year (see "Year - (Payroll Office Enrollees) Search Results Field Description" on page 383)

Quarter (see "Quarter - Field Description" on page 357)

*Enrollee SSN* (see "*Enrollee SSN - Field Description*" on page 294)

Last Name (see "Last Name - Enrollee Field Description" on page 308)

First Name (see "First Name - Enrollee Field Description" on page 301)

*Payroll Office* (see "*Payroll Office - Carrier Enrollees Search Results Field Description*" on page 350)



Code (see "Code - Carrier Enrollment Code Field Description" on page 278)

*Discrepancies* (see "*Discrepancy - Field Description*" on page 283)

Employee/Annuitant_Ind (see "Employee/Annuitant Indicator - Field Description" on page 292)

Fail Count (see "Fail Count - Field Description" on page 298)

4. Select the **Validate** button next to the applicable record. The Carrier Enrollees Validate page is displayed.

Note: The **Validate** button on the Carrier Enrollees Search Results page is only displayed next to records with discrepancies.

	Info IDs Enn	oliment Codes	Contacts E	rrors Transm	issions Enro	ollees	-
rier Enrollees Validate	and the cont	VIIIIIEIR COUCS	condets e	itera iterail	CINC	inces .	
rier chronees vandate							?
Enter data for the Carrier Enro					rked with * are i	required. To	-
see matching Payroll Office reco	rds for this Enrollee record,	click on the fol	lowing button(s):#	Matching			
Carrier ID Year Q	uarter Submission						
Payroll Enrollment Office ID Code	SSN						
ast Name	First Na	me	Middle Name				
Effective Date of Coverage							
Deceased Annuitant SSN Pseudo S	SN Other Payroll	ID	Other Carrier I	)			
Submitter Use #1	Submitter Use #2	s	ubmitter Use #3				
Date Processed Time	e Processed Source F	ail Count					
Date Processed Time	e Processed Source F	ail Count -					
Date Processed Time	e Processed Source F	ail Count -					
Date Processed Time	e Processed Source F	ail Count					
Date Processed Time	e Processed Source F	ail Count					
Select another discrepancy: 1	e Processed Source F	. 9			Explain		
Select another discrepancy: 1 Discrepancy Reconciliation Reason		. 9			Explain		
Select another discrepancy: 1 Discrepancy Reconciliation Reason Reconciliation Action		. 9			(Explain)		
Select another discrepancy: 1 Discrepancy 201 - Reconciliation Reason Reconciliation Action Corrective Action*	Enrollees Name Does Not N	- 4atch		v	Explain		
Select another discrepancy: 1 Discrepancy 201 - Reconciliation Reason Reconciliation Action Corrective Action*	Enrollees Name Does Not N	- 4atch	ents (400 character		Explain		
Select another discrepancy: 1 Discrepancy 201 - Reconciliation Reason Reconciliation Action Corrective Action*	Enrollees Name Does Not N	- 4atch	ents (400 character		Explin		
Select another discrepancy: 1 Discrepancy 201 - Reconciliation Reason Reconciliation Action Corrective Action*	Enrollees Name Does Not N	- 4atch	ents (400 character		Explin		
Select another discrepancy: 1 Discrepancy 201 - Reconciliation Reason Reconciliation Action Corrective Action*	Enrollees Name Does Not N	- 4atch	ents (400 character		Explin		
Select another discrepancy: 1 Discrepancy 201 - Reconciliation Reason Reconciliation Action Corrective Action*	Enrollees Name Does Not N	- 4atch	ents (400 character		Explin		
Select another discrepancy: 1 Discrepancy 201 - Reconciliation Reason Reconciliation Action Corrective Action*	Enrollees Name Does Not N 0 character max)	- 4atch			Explin		
Select another discrepancy: 1 Discrepancy Reconciliation Reason Corrective Action*	Enrollees Name Does Not N	- 4atch			Explin		
Select another discrepancy: 1 Discrepancy 201 - Reconciliation Reason Reconciliation Action Corrective Action*	Enrollees Name Does Not N 0 character max)	- 4atch			Explin		

Figure 117: Carrier Enrollees Validate Page

Note: To view matching payroll office records for this enrollee record, select the **Matching** button at the top of the page.



- 5. Select the Validate Record button. If no errors occur, a pop-up message is displayed to confirm that the record has been validated.
- 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. Select the **Validate** button next to the applicable record.



# **Viewing Reports**

The Reports option allows users to create customized reports based on information in CLER.

This section includes the following topics:

Viewing Payroll Discrepancy Listing (Report 1)151
Viewing Discrepancy Summary (Report 2)156
Viewing Payroll Office Reconciliation (Report 3)161
Viewing Payroll Office Reconciliation (Report 3)171
Viewing Carrier Validation (Report 4)176
Viewing Payroll Office Enrollment Transmission (Report 5)184
Viewing Carrier Enrollment Transmission (Report 6)184
Viewing Enrollment Change Summary (Report 7)190
Viewing Carrier Gain/Loss Summary (Report 8)193
Viewing Reconciliation Reason Summary (Report 9)196
Viewing Reconciliation Action Summary (Report 10)199
Viewing Reconciliation Summary (Report 11)202
Viewing Carrier Discrepancy Listing (Report 12)
Viewing Pay Period Transmissions Payment Amounts (Report 13)212

## 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 118: 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.

Payroll Office Carrier	Forms	Transmission	Reports OF
Reports Selection	1. Payroll Discrepa	GO	
1. Payroll Discrepancy Listing Enter selection criteria in the following fields, select the output optio to display the report or send it to a spreadsheet or text file on your co function. Fields marked with * are required. Leaving an entry blank w selection entries in addition to the required items.	omputer. Reports may	/ be printed by using	the browser's print
000000001     2014     3     From     From       To     To     To     To       Agency     Office ID     Carrier     Code     Code       V     V     V	SSN From To To Je	Other ID	
ex. AG90 Display: All  Unreconciled Errors Warnings Rec Order By: 1st Name  2nd SSNO  3rd 4th  5th  6th	·	S Not Validated	0
Check box to create report without totals:	. <u> </u>	1	

Figure 119: 1. Payroll Discrepancy Listing Report Search Page



 Complete the following fields on the 1. Payroll Discrepancy Listing page: Payroll Office ID

Year (see "Year - (Required) Field Instruction" on page 383) Quarter (see "Quarter - (Select) Field Instruction" on page 357) Fail Count From (see "Fail Count From - Field Instruction" on page 299) Fail Count To (see "Fail Count To - Field Instruction" on page 299) SSN From (see "SSN From - Field Instruction" on page 367) SSN To Other ID From Other ID From Other ID To Agency Personnel Office ID Carrier Enrollment Code (see "Enrollment Code - (Drop-down) Field Instruction" on page 296) Error Code

Warning Code

Display (see "Display - Field Instruction" on page 284)

Order By 1st

Order By 2nd

Order By 3rd

Order By 4th

Order By 5th

Order By 6th

# Check Box to Create Report Without Totals (see "Check Box to Create Report Without Totals - Field Instruction" on page 275)

Centralized Enrollment Clearinghouse System (CLER)



- 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.

Payroll Discrepancy Listing											
Payroll Office							Carrier				
SSN	Name	Code	Eff. Date	Whid Amt	Agency	ΡΟΙ	Name	Code	Eff. Date	Discrepancy	Fail Count
Errors: Warnings: Total Records:											

## Figure 120: Payroll Discrepancy Listing Report Page

The following fields are displayed on the Payroll Office section of the Payroll Discrepancy Listing report:

SSN Name Code Eff. Date Whld Amt Agency POI



The following fields are displayed on the Carrier section of the Payroll Discrepancy Listing report:

Name

Code (see "Code - Carrier Enrollment Code Field Description" on page 278)

*Eff. Date* (see "*Eff. Date - (Carrier) Field Description*" on page 290)

Discrepancy

Fail Count (see "Fail Count - Field Description" on page 298)

*Errors* (see "*Errors - Field Description*" on page 297)

Warnings (see "Warnings - Field Description" on page 381)

**Total Records** 

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	Whid Amt	Name	Code	Eff. Date	Discrepancy	Fail Count
Errors: 0										
Warnings: 0										
Total Records: 0										

#### Figure 121: 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 SSN Name



Code

Eff. Date

Whld Amt

The following fields are displayed on the Carrier section of the Payroll Discrepancy Listing (Other ID) report:

Name

Code (see "Code - Carrier Enrollment Code Field Description" on page 278)

*Eff. Date* (see "*Eff. Date - (Carrier) Field Description*" on page 290)

Discrepancy

Fail Count (see "Fail Count - Field Description" on page 298)

*Errors* (see "*Errors - Field Description*" on page 297)

Warnings (see "Warnings - Field Description" on page 381)

Total Records

7. Close the report to return to the 1. Payroll Discrepancy Listing page.

## Viewing Discrepancy Summary (Report 2)

The Discrepancy Summary (Report 2) 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 one quarter with those that occurred in any other quarter.



#### To View a Discrepancy Summary Report:

1. Select the **Reports** tab at the top of the CLER Main Menu.

$\mathbf{Cl}$	LER-	Payroll Office	Carrier	For	ms	Transmission	Reports	490	0
ER Main Menu									
access the var of the screen t and they will n	ious functional area to access the different ot function, if select	ployees Health Benefit s of CLER based upon ant areas of CLER. Se ted. ional areas of CLER, cli	the level of sec ctions that you	urity acces are not au	ss you ha ithorized	ave been granted. to access will have	Click the tabs a the tabs "gray	at the top ed out"	?
i o learn abou	it the various functi	onal areas of CLER, CI		3. <u>Forms</u>		spond to the tabs	and options abo	ve.	
1. <u>Payroll</u>	<u>Office</u> Info			•	<u>2809</u> 2810				
•	Contacts     Payroll Office	ce Contacts		4. Transi	<u>mission</u> File Tra	nsfer			
	Personnel C     Errors	Office Contacts		5. Report	Online E	Intry			
	<u>Transmissions</u> Enrollees			•	Payroll	<u>Discrepancy Listing</u> ancy Summary	1		
2. <u>Carrier</u>	Info			•	Payroli	Office Reconciliation	n		
	Enrollment Codes			•	Pavroll	Office Enrollment T Enrollment Transmi	ransmission		
:	Contacts Contacts				Enrollm	ent Change Summa Gain/Loss Summary	ry		
	<ul> <li>Carrier Plan</li> </ul>				Reconc	iliation Reason Sun	imary		
	Errors Transmissions			•	Reconc	iliation Action Sum iliation Summary			
•	Enrollees			:	Carrier Pav Per	Discrepancy Listing iod Transmissions	l Pavment Amoun	ts	
							-,		
se send questions cler@nfc.usda.		OPM 🛃							

Figure 122: CLER Main Menu Page

2. The Reports Selection page is displayed.

r ( ) k k	Payroll Office	Carrier	Forms	Transmission	Reports	190
			*			
ports Selection			1. Payroll Discr	epancy Listing	<b>V</b> G	0
Select a report from the drop do	wn list above and press	s the CO butto	n to enter selectio	on criteria for that ren	ort	
Select a report from the drop do	withist above and press		in to enter selectio	in chitena for chat rep	iore.	
In this section, the following opt	ions may be selected a	above:				
1. Decimelli Dia mana anno 1 intina	- Dura idan a Kasima ku					
1. Payroll Discrepancy Listing					curred in any of	bor
2. Discrepancy Summary - A					curred in any oth	her
2. Discrepancy Summary - Al quarter.	lows comparison of disc	crepancies occ	urring in one quart	ter with those that oc		
2. Discrepancy Summary - Al quarter. 3. Payroll Office Reconciliatio	lows comparison of disc n - Shows each enrolle	crepancies occ ee that has a c	urring in one quart iscrepancy and wh	ter with those that oc hether that discrepan	cy has been reco	
2. Discrepancy Summary - Al quarter.	lows comparison of disc n - Shows each enrolle each enrollee that has	crepancies occ ee that has a c a discrepancy	urring in one quart iscrepancy and wh and if that discrep	ter with those that oc hether that discrepan pancy has been valida	cy has been reco ated.	onciled.
2. Discrepancy Summary - Al quarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows	lows comparison of disc n - Shows each enrolle each enrollee that has ransmission - Shows	crepancies occ ee that has a c a discrepancy the timeliness	urring in one quart iscrepancy and wh and if that discrep of the transmission	ter with those that oc hether that discrepan pancy has been valida n of quarterly Payroll	cy has been reco ated.	onciled.
2. Discrepancy Summary - Al quarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T	lows comparison of disc <b>n</b> - Shows each enrolle each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows the tim	crepancies occ ee that has a c a discrepancy the timeliness neliness of the	urring in one quart iscrepancy and wh and if that discrep of the transmission transmission of qua	ter with those that oc hether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data.	cy has been reco ated. Office enrollment	onciled.
2. Discrepancy Summary - Al quarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transm	lows comparison of dis n - Shows each enrolle each enrollee that has ransmission - Shows ission - Shows the tim ary - Shows how enroll	crepancies occ ee that has a c a discrepancy the timeliness neliness of the lment changes	urring in one quart iscrepancy and wh and if that discrep of the transmission transmission of qu occur between on	ter with those that oc hether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. he quarter and any pri	cy has been reco ated. Office enrollment or quarter.	onciled.
2. Discrepancy Summary - Al yuarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transm 7. Enrollment Change Summa 8. Carrier Gain/Loss Summa 9. Reconciliation Reason Sum	lows comparison of disc <b>n</b> - Shows each enrolle each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows the tim <b>ary</b> - Shows how enrollm <b>y</b> - Shows how enrollm	crepancies occ a discrepancy the timeliness neliness of the Iment changes nent changes o	urring in one quart iscrepancy and wh and if that discrep of the transmission transmission of qu occur between one ccur between one	ter with those that oc hether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. In quarter and any prio quarter and any prio	cy has been reco ated. Office enrollment or quarter. r quarter.	onciled. : data.
2. Discrepancy Summary - Al quarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transm 7. Enrollment Change Summa 8. Carrier Gain/Loss Summar 9. Reconciliation Reason Sum for a single quarter.	lows comparison of disc <b>n</b> - Shows each enrolle each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows the tim <b>ary</b> - Shows how enrollm <b>y</b> - Shows how enrollm <b>imary</b> - Shows what c	crepancies occ a discrepancy the timeliness heliness of the lment changes caused the disc	urring in one quart iscrepancy and wh and if that discrep of the transmission transmission of qu occur between one ccur between one repancies that we	ter with those that oc nether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. le quarter and any prio quarter and any prio re uncovered during t	cy has been reco ated. Office enrollment or quarter. r quarter. the reconciliation	onciled. : data. process
2. Discrepancy Summary - Al quarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transm 7. Enrollment Change Summa 8. Carrier Gain/Loss Summa 9. Reconciliation Reason Sum for a single quarter. 10. Reconciliation Action Sumi	lows comparison of disc <b>n</b> - Shows each enrolle each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows the tim <b>ary</b> - Shows how enroll <b>y</b> - Shows how enroll <b>y</b> - Shows how enroll <b>mary</b> - Shows what can <b>mary</b> - Shows what can <b>mary</b> - Shows what has	crepancies occ ee that has a c a discrepancy the timeliness neliness of the lment changes caused the disc ad to be correc	urring in one quart iscrepancy and wh and if that discrep of the transmission of qu occur between on ccur between one repancies that we ted during the rec	ter with those that oc- hether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. he quarter and any prio quarter and any prio re uncovered during to onciliation process for	cy has been reco ated. Office enrollment or quarter. r quarter. the reconciliation r a single quarter	process
<ol> <li>Discrepancy Summary - Al quarter.</li> <li>Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transm 7. Enrollment Change Summ.</li> <li>Rearollment Change Summ 9. Reconciliation Reason Sum for a single quarter.</li> <li>Reconciliation Action Summary -</li> </ol>	lows comparison of disc <b>n</b> - Shows each enrolle each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows the tim <b>ary</b> - Shows how enroll <b>y</b> - Shows how enrollm <b>mary</b> - Shows what c <b>mary</b> - Shows what ha Shows the progress th	crepancies occ ee that has a c a discrepancy the timeliness neliness of the lment changes caused the disc ad to be correc nat has been m	urring in one quart iscrepancy and wi and if that discreg of the transmission fur transmission of qu occur between on ccur between on ccur between on the twe repancies that we ted during the rec ade to reconcile th	ter with those that oc- nether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. he quarter and any prio quarter and any prio re uncovered during t onciliation process for e discrepancies foun	cy has been reco ated. Office enrollment or quarter. r quarter. the reconciliation r a single quarter	process
2. Discrepancy Summary - A quarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transm 7. Enrollment Change Summa 8. Carrier Gain/Loss Summa 9. Reconciliation Reason Sum for a single quarter. 10. Reconciliation Action Sumi	lows comparison of disc <b>n</b> - Shows each enrolle each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows how enroll <b>ary</b> - Shows how enroll <b>y</b> - Shows how enroll <b>mary</b> - Shows what c <b>mary</b> - Shows what ha Shows the progress th <b>j</b> - Provides a listing by	crepancies occ a that has a c a discrepancy the timeliness nent changes caused the disc ad to be correc at has been m y Carrier Id enr	urring in one quart iscrepancy and wh and if that discrep of the transmission of qu- occur between one repancies that we ted during the rec ade to reconcile blee of each discr	ter with those that oc hether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. le quarter and any prio quarter and any prio re uncovered during t onciliation process for he discrepancies foun epancy.	cy has been reco ated. Office enrollment or quarter. r quarter. the reconciliation r a single quarter d in a single quar	prociled. data. process ter.

Figure 123: Reports Selection Page

3. Click the drop-down menu on the Reports Selection page and select **Discrepancy Summary**.



4. Click **GO** to display the Discrepancy Summary (Report 2) page.

oorts S	Selection			2. D	iscrepancy	/ Summary	✓ GC	)
Enter to disp	play the rep	riteria in the ort or send i	or text file on y	our computer		the bottom left and c may be printed by usi		
functio	on couving							

## Figure 124: Discrepancy Summary (Report 2) Page

5. Complete the fields on the Discrepancy Summary (Report 2) page.

Field	Instruction
Year* From	Required, default
	Select the year that begins the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Year* To	Required, default
	Select the year that ends the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter* From	Required, default
	Select the quarter that begins the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Quarter* To	Required, default
	Select the quarter that ends the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Payroll Office ID*	Required
	Select the payroll office identification number from the drop-down menu.
Carrier	Optional
	Select the carrier code from the drop-down menu.



Enrollment Code	<i>Optional</i> Select the enrollment code from the drop-down list.
Fail Count From	<i>Optional, numeric, 3 positions maximum.</i> Enter a specific fail count number to search for enrollee records by a specific fail count number, then proceed to the To field.
	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	Optional, numeric, 3 positions maximum
	Entered 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.

- 6. Click 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
- 7. Click **Submit** to display the Discrepancy Summary report in the selected format.

OR

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

	Year/Q	uarter	Cha	ange
	From	То	Actual	Percent
Payroll Office:				
Total Enrollee Records				
Total Matches Found				
Total Discrepancies Found				
Total Discrepancies Reconciled				
Percent Discrepancies Reconciled				

Figure 125: Discrepancy Summary Report

To return to the Discrepancy Summary (Report 2) page, close the report.



Field	Description
Payroll Office	System generated
	Displays the payroll office identification number.
Year/Quarter From	System generated
	Displays the reconciliation year/quarter that begins the range of reconciliation years/quarters.
Year/Quarter To	System generated
	Displays the reconciliation year/quarter that ends the range of reconciliation years/quarters.
Change Actual	System generated
	Displays the number that indicates the actual changes in values between prior and current reconciliation years/quarters.
Change Percent	System generated
	Displays the percent changes in values between prior and current reconciliation years/quarters.
Total Enrollee	System generated
Records	Displays the total number of enrollees that meet the criteria entered on the Discrepancy Summary page.
Total Matches Found	System generated
	Displays the total number of matched records that meet the criteria entered on the Discrepancy Summary page.
Total Discrepancies	System generated
Found	Displays the total number of records with discrepancies that meet the criteria entered on the Discrepancy Summary page.
Total Discrepancies	System generated
Reconciled	Displays the total number of reconciled records that meet the criteria entered on the Discrepancy Summary page.
Percent	System generated
Discrepancies Reconciled	Displays the percentage of records reconciled to total discrepancies that meet the criteria entered on the Discrepancy Summary page.



## Viewing Payroll Office Reconciliation (Report 3)

The Payroll Office Reconciliation (Report 3) 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 at the top of the CLER Main Menu.

ULLK	Payroll Office	Carrier	Forms	Transmission	Reports	60	C
ER Main Menu							6
Welcome to the OPM Federal Emplo access the various functional areas of the screen to access the differen and they will not function, if selecter To learn about the various function	of CLER based upon t areas of CLER. Se d.	the level of sec octions that you	urity access yo are not authori	u have been granted. zed to access will have	Click the tabs a e the tabs "gray	at the top ed out"	
1. Payroll Office Info Contacts Parsonnel Off Errors Transmissions Errollees 2. <u>Carrier</u> Info Contacts Contacts Errors Transmissions Errors Errors Errors Errors	<u>ice Contacts</u>		5. Reports Pay Diss Pay Car Pay Car Enr Car Enr Car Rec Rec Rec Car Car Car	0	ransmission ission ary y mary mary mary	ts	

Figure 126: CLER Main Menu Page

2. The Reports Selection page is displayed.

	Payroll Office	Carrier	Forms	Transmission	Reports	
Reports Selection			1. Payroll Discr	epancy Listing	~	GO
Select a report from the drop dow	n list above and press	s the GO butto	n to enter selectio	on criteria for that rep	ort.	
In this section, the following optio	ns may be selected a	bove:				
1. Payroll Discrepancy Listing	1		e of each discrena	ancy		
2. Discrepancy Summary - Allo quarter.					curred in any o	other
3. Payroll Office Reconciliation 4. Carrier Validation - Shows e						conciled.
5. Payroll Office Enrollment Tra 6. Carrier Enrollment Transmis	ansmission - Shows	the timeliness	of the transmissio	n of quarterly Payroll (		nt data.
7. Enrollment Change Summar 8. Carrier Gain/Loss Summary	<b>y</b> - Shows how enroll	lment changes	occur between on	ne quarter and any prio		110
9. Reconciliation Reason Summ						n process
for a single quarter. 10. Reconciliation Action Summ						
11. Reconciliation Summary - S 12. Carrier Discrepancy Listing	- Provides a listing by	/ Carrier Id enro	ollee of each discr	epancy.		5
13. Pay Period Transmissions Pa collected for each completed pay p		Provides inform	ation from Payroll	Offices relative to the	amount of pre	emiums
						1

Figure 127: Report Selection Page



- 3. Click the drop-down menu on the Reports Selection page and select **Payroll Office Reconciliation**.
- 4. Click **GO** to display the Payroll Office Reconciliation (Report 3) page.

	yroll Office	Carrier	Ĩ	Forms	Tran	smissio	Rep	ports	
Reports Selection			3. Pa	yroll Off	ce Recono	iliation		✓ G0	]
<ol> <li>Payroll Office Reconciliation</li> <li>Enter selection criteria in the following fit to display the report or send it to a sprea function. Fields marked with * are require selection entries in addition to the require</li> </ol>	dsheet or text file ed. Leaving an e	e on your co	mputer.	Reports	may be p	rinted by	using the t	prowser's pi	rint 🔡
Payroll Office ID* Year* Quarter*	Fail Cour	nt D	econcili ate	ation		_	SN		_
00000001 💙 2014 🗸 3 🗸	From To	From To	<ul><li>✓</li><li>✓</li></ul>	✓	~	From To			
Agency Office ID Carrier	Enrollment Code U	ser ID	Oth	er ID - F	rom	Other	ID - To		
Order By: 1st Name 4th	5th	~	4 ···			<b>&gt;</b>			
Check box to create report without totals	s: 🗌								101
Display the report V SUB	MIT RESET								

Figure 128: Payroll Office Reconciliation (Report 3) Page

5. Complete the fields on the Payroll Office Reconciliation (Report 3) page.

Field	Instruction/Description
Payroll Office ID*	<i>Required</i> Select the payroll office identification number from the drop-down menu.
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter*	<i>Required default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.



Fail Count From	Optional, numeric, 3 positions maximum.
	Enter a specific fail count number to search for enrollee records by a specific fail count number, then proceed to the To field.
	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	Optional, numeric, 3 positions maximum
	Entered 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.
Reconciliation Date	Optional
	This is the date that begins the range of reconciliation dates. To select this date, select the month from the first drop-down menu, select the day from the second drop-down menu, and select the year from the third drop-down menu.
Reconciliation Date	Optional
То	This is the date that ends the range of reconciliation dates. To select this date, select the month from the first drop-down menu, select the day from the second drop-down menu; and select the year from the third drop-down menu.
SSN - From	Optional, alphanumeric, 9 positions
	To search for a specific enrollee record by SSN, enter the SSN and skip the To field.
	To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field.
	Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.



SSN - To	Optional, alphanumeric, 9 positions						
	To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.						
	Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.						
Agency	Optional, alphanumeric, 4 positions						
	Enter the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).						
Personnel Office ID	Optional, alphanumeric, 4 positions						
	Enter the personnel office identification (POI) number.						
Carrier	Optional						
	Select the carrier code from the drop-down menu.						
Enrollment Code	Optional						
	Select the enrollment code from the drop-down list.						
User ID	Optional, alphanumeric, 8 positions maximum						
	Enter the user identification number of the person creating the report.						



Other ID - From	Optional, alphanumeric, 15 positions maximum							
	To search for a specific enrollee record by Other ID, enter the Other ID and skip the To field.							
	To search for a range of enrollee records by a range of Other IDs, type the Other ID that starts the range, then go to the To field.							
	Note for RSP: Enter the civil service annuitant (CSA) or civil service final (CSF) identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXX, and the CSF identifier is typed as FXXXXXXXX.							
	These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.							
	Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.							
Other ID - To	Optional, alphanumeric, 15 positions maximum							
	To search for a range of enrollee records by a range of Other IDs, enter the Other ID that ends the range; otherwise, leave blank.							
	Note for RSP: Enter the CSA or CSF identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXX, and the CSF identifier is typed as FXXXXXXX.							
	These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.							
	Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.							



Order By: 1st	Optional, default							
	Defaults to the <b>Name</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:							
	Agency - Search results by Agency code.							
	Carrier - Search by carrier code.							
	Enrollment Code - Search by enrollment code.							
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.							
	Name - Search by enrollee name.							
	Pers. Office ID - Search by POI number.							
	Reconciliation Date - Search by reconciliation date.							
	SSNO - Search by enrollee SSN.							
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.							
	<b>User</b> ID - Search by user ID number.							
Order By: 2nd	Optional							
	Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:							
	Agency - Search by Agency code.							
	Carrier - Search by carrier code.							
	Enrollment Code - Search by enrollment code.							
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.							
	Name - Search by enrollee name.							
	Pers. Office ID - Search by POI number.							
	<b>Reconciliation</b> Date - Search by reconciliation date.							
	SSNO - Search by enrollee SSN.							
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.							
	User ID - Search by user ID number.							



Order By: 3rd	Optional								
	Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:								
	Agency - Search by Agency code.								
	Carrier - Search by carrier code.								
	Enrollment Code - Search by enrollment code.								
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.								
	Name - Search by enrollee name.								
	Pers. Office ID - Search by POI number.								
	Reconciliation Date - Search by reconciliation date.								
	SSNO - Search by enrollee SSN.								
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.								
	User ID - Search by user ID number.								
Order By: 4th	Optional								
	Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:								
	Agency - Search by Agency code.								
	Carrier - Search by carrier code.								
	Enrollment Code - Search by enrollment code.								
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.								
	Name - Search by enrollee name.								
	Pers. Office ID - Search by POI number.								
	<b>Reconciliation Date</b> - Search by reconciliation date.								
	•								
	<b>Reconciliation Date</b> - Search by reconciliation date.								
	Reconciliation Date - Search by reconciliation date. SSNO - Search by enrollee SSN. Other ID - Search by the identifier used by RSP/OWCP to								



Order By: 5th	Optional							
	Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:							
	Agency - Search by Agency code.							
	Carrier - Search by carrier code.							
	Enrollment Code - Search by enrollment code.							
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.							
	Name - Search by enrollee name.							
	Pers. Office ID - Search by POI number.							
	Reconciliation Date - Search by reconciliation date.							
	SSNO - Search by enrollee SSN.							
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.							
	User ID - Search by user identification number.							
Order By: 6th	Optional							
	Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:							
	Agency - Search by Agency code.							
	Carrier - Search by carrier code.							
	Enrollment Code - Search by enrollment code.							
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.							
	Name - Search by enrollee name.							
	Pers. Office ID - Search by POI number.							
	Reconciliation Date - Search by reconciliation date.							
	SSNO - Search by enrollee SSN.							
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.							
Check box to create	identify the enrollee.							

- 1. Click 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
- 2. Click Submit to display the Payroll Office Reconciliation report in the selected format.

#### OR

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

Note: 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.

Payroll Office Reconciliation										
								Reconcilia	tion	
SSN	Name	Carrier	Agency	ΡΟΙ	Code	Reason	Date	User ID	Action	Fail Count
With Errors: 0 Without Errors: 0										
Total Records: 0										

Figure 129: Payroll Office Reconciliation Report Page

To return to the Payroll Office Reconciliation (Report 3) page, close the report.

Field	Description
SSN	<i>System generated</i> Displays the enrollee's SSN.
Name	<i>System generated</i> Displays the enrollee's name submitted by the payroll office/carrier.
Carrier	System generated Displays the carrier ID code.



ystem generated							
Displays the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).							
Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.							
ystem generated							
Displays the POI of the office where the enrollee's records are maintained.							
Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.							
ystem generated							
Displays the enrollment code.							
System generated							
Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see <i>Reconciliation Reason Codes Table</i> (on page 221).							
ystem generated							
Displays the reconciliation date.							
ystem generated							
Displays the user identification number of the person who entered the reconciliation reason code.							
ystem generated							
Displays the reconciliation action code. For a list and descriptions f reconciliation action codes, see <b>Reconciliation Action Codes</b>							
<b>able</b> (on page 224).							



With Errors	<i>System generated</i> Displays the sum of enrollee records with codes 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.						
Without Errors	<i>System generated</i> Displays the sum of enrollee records with no codes 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.						
Total Records	System generated Displays the the sum of enrollee records on the report.						
	Note: If the check box used to omit totals from a report is selected, this field is not displayed.						

			Payrol	l Office Re	conciliation				
							Reconcilia	ation	
OTHER ID	SSN	Name	Carrier	Code	Reason	Date	User ID	Action	Fail Count
Vith Errors: 0									
Vithout Errors: 0 otal Records: 0									
	and a second					1922		1000	

Figure 130: Payroll Office Reconciliation (Other ID) Report 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 131: 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.

CLER	Payroll Office	Carrier	Forms	Transmissi	on Reports	Single Cor
eports Selection			3. Payroll Office	Reconciliation	~	GO
<ol> <li>Payroll Office Reconciliation</li> <li>Enter selection criteria in the follow to display the report or send it to a function. Fields marked with ² are r selection entries in addition to the rr</li> </ol>	spreadsheet or text equired. Leaving an	file on your co	mputer. Reports r	nay be printed b	y using the browse	r's print 🔋 🔋
Payroll     Year*     Quart       Office ID*     Year*     Quart       00000001 V     2014 V     3 V			econciliation ate	<ul><li>✓ From</li><li>✓ To</li></ul>	55N	
Agency Office ID Carrier	Enrollment Code	User ID	Other ID - Fr	om Other	ID - To	
Order By: 1st Name 4th	<ul> <li>✓ 2nd</li> <li>✓ 5th</li> </ul>	~	3rd 6th	<b>&gt;</b>		
Check box to create report without           Display the report <td< td=""><td>SUBMIT RESET</td><td>]</td><td></td><td></td><td></td><td></td></td<>	SUBMIT RESET	]				

Figure 132: 3. Payroll Office Reconciliation Search Page



 Complete the following fields on the 3. Payroll Office Reconciliation page: Payroll Office ID

Year (see "Year - (Required) Field Instruction" on page 383) Quarter (see "Quarter - (Select) Field Instruction" on page 357) Fail Count From (see "Fail Count From - Field Instruction" on page 299) Fail Count To (see "Fail Count To - Field Instruction" on page 299) Reconciliation Date From Reconciliation Date To SSN From (see "SSN From - Field Instruction" on page 367) SSN To Agency Personnel Office ID Carrier Enrollment Code (see "Enrollment Code - (Drop-down) Field Instruction" on page 296) User ID

Other ID From

Other ID To

Order By 1st

Order By 2nd

Order By 3rd

Order By 4th

Order By 5th

Order By 6th

# Check Box to Create Report Without Totals (see "Check Box to Create Report Without Totals - Field Instruction" on page 275)

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- 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.

Payroll Office Reconciliation										
Reconciliation										
SSN	Name	Carrier	Agency	POI	Code	Reason	Date	User ID	Action	Fail Count
With Errors: 0										
Without Errors: 0										
Total Records: 0										

## Figure 133: Payroll Office Reconciliation Report Page

The data in the Payroll Office Reconciliation report is categorized into the following fields:

SSN

Name

*Carrier* (see "*Carrier - Field Description*" on page 268)

Agency

POI

Code (see "Code - Carrier Enrollment Code Field Description" on page 278)

The following fields are displayed on the Reconciliation section of the Payroll Office Reconciliation report:



*Reason* (see "*Reconciliation Reason - Field Description*" on page 362)

Date

User ID

Action (see "Reconciliation Action - Field Description" on page 360)

Fail Count (see "Fail Count - Field Description" on page 298)

With Errors

Without Errors

**Total Records** 

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.

				Payroll	Office Re	conciliation				
								Reconcilia	tion	
	OTHER ID	SSN	Name	Carrier	Code	Reason	Date	User ID	Action	Fail Count
Witho	Errors: 0 but Errors: 0 Records: 0									

Figure 134: 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

SSN

Name

Carrier (see "Carrier - Field Description" on page 268)

Code



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 362)

Date

User ID

Action (see "Reconciliation Action - Field Description" on page 360)

Fail Count (see "Fail Count - Field Description" on page 298)

With Errors

Without Errors

Total Records

7. Close the report to return to the 3. Payroll Office Reconciliation page.

# Viewing Carrier Validation (Report 4)

The Carrier Validation (Report 4) 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 at the top of the CLER Main Menu.

I GLEK	Payroll Office	Carrier	Fo	rms	Transmission	Reports	<b>490</b>	0
ER Main Menu								200
Welcome to the OPM Federal Emple access the various functional areas of the screen to access the differen and they will not function, if selecte To learn about the various function	of CLER based upon t areas of CLER. Se d.	the level of sec ctions that you	urity acc are not a	ess you authorize	have been granted. d to access will hav	Click the tabs a e the tabs "gray	t the top ed out"	?
1. <u>Payroll Office</u> Info <u>Contacts</u> <u>Payroll Office</u> <u>Personnel Off</u> <u>Errors</u> <u>Transmissions</u> <u>Enrollees</u> 2. <u>Carrier</u> <u>Info</u> <u>Enrollent Codes</u> <u>IDs</u> <u>Carrier Contacts</u> <u>Carrier Plan C</u> <u>Errors</u> <u>Transmissions</u> <u>Enrollees</u>	<u>cts</u>		5. <u>Repo</u>	2809 2810 smission Pile T Online rts Payro Carrie Payro Carrie Recor Recor Carrie Recor Carrie		ransmission ission ary y mary mary mary		

Figure 135: CLER Main Menu Page

2. The Reports Selection page is displayed.

7 ( )       <b> </b>	Payroll Office	Carrier	Forms	Transmission	Reports	-
			•	· · · ·		·
oorts Selection			1. Payroll Discr	epancy Listing	✓ G	0
Select a report from the drop down	n list above and press	s the GO butto	n to enter selectio	on criteria for that rep	ort.	
					0.01	
In this section, the following option	ns may be selected a	above:				
	· · · · · · · · · · · · · · · · · · ·					
	Browidos a listing by	( Davroll oprollo	o of oach discropa	ancy.		
1. Payroll Discrepancy Listing					curred in any of	her
1. Payroll Discrepancy Listing 2. Discrepancy Summary - Allo					curred in any ot	her
1. Payroll Discrepancy Listing 2. Discrepancy Summary - Allo quarter.	ws comparison of disc	crepancies occ	urring in one quart	ter with those that oc		
1. Payroll Discrepancy Listing - 2. Discrepancy Summary - Allo quarter. 3. Payroll Office Reconciliation	ws comparison of disc - Shows each enrolle	crepancies occ ee that has a c	urring in one quart iscrepancy and wh	ter with those that oc hether that discrepan	cy has been reco	
1. Payroll Discrepancy Listing 2. Discrepancy Summary - Allo quarter. 3. Payroll Office Reconciliation 4. Carrier Validation - Shows ea	ws comparison of disc - Shows each enrolle ach enrollee that has	crepancies occ ee that has a c a discrepancy	urring in one quart iscrepancy and wh and if that discrep	ter with those that oc hether that discrepan pancy has been valida	cy has been reco ited.	onciled.
1. Payroll Discrepancy Listing - 2. Discrepancy Summary - Allo quarter. 3. Payroll Office Reconciliation	ws comparison of disc - Shows each enrolle ach enrollee that has <b>msmission</b> - Shows	crepancies occ ee that has a c a discrepancy the timeliness	urring in one quart iscrepancy and wh and if that discrep of the transmission	ter with those that oc hether that discrepan pancy has been valida n of quarterly Payroll	cy has been reco ited.	onciled.
1. Payroll Discrepancy Listing 2. Discrepancy Summary - Allo quarter. 3. Payroll Office Reconciliation 4. Carrier Validation - Shows ea 5. Payroll Office Enrollment Tra	ws comparison of disc - Shows each enrolle ach enrollee that has ansmission - Shows sion - Shows the tim	crepancies occ ee that has a c a discrepancy the timeliness neliness of the	urring in one quart iscrepancy and wh and if that discrep of the transmission transmission of qua	ter with those that oc hether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data.	cy has been reco ated. Office enrollment	onciled.
1. Payroll Discrepancy Listing 2. Discrepancy Summary - Allo yuarter. 3. Payroll Office Reconciliation 4. Carrier Validation - Shows ea 5. Payroll Office Enrollment Tra 6. Carrier Enrollment Transmis	ws comparison of dis - Shows each enrolle ach enrollee that has <b>msmission</b> - Shows <b>sion</b> - Shows the tim <b>y</b> - Shows how enroll	crepancies occ ee that has a c a discrepancy the timeliness neliness of the lment changes	urring in one quart iscrepancy and wh and if that discrep of the transmission transmission of qu occur between on	ter with those that oc hether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. he quarter and any pri	cy has been reco ated. Office enrollment or quarter.	onciled.
1. Payroll Discrepancy Listing 2. Discrepancy Summary - Allo puarter. 3. Payroll Office Reconciliation 4. Carrier Validation - Shows ee 5. Payroll Office Enrollment Tra 6. Carrier Enrollment Transmis 7. Enrollment Change Summar	ws comparison of disc - Shows each enrolle ach enrollee that has msmission - Shows sion - Shows the tim y - Shows how enroll - Shows how enrollm	crepancies occ a discrepancy the timeliness neliness of the Iment changes nent changes o	urring in one quart iscrepancy and wh and if that discrep of the transmission transmission of quart occur between one ccur between one	ter with those that oc hether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. In quarter and any prio quarter and any prio	cy has been reco ated. Office enrollment or quarter. r quarter.	onciled. data.
I. Payroll Discrepancy Listing - 2. Discrepancy Summary - Allo yuarter.     3. Payroll Office Reconciliation 4. Carrier Validation - Shows ei 5. Payroll Office Enrollment Tra 6. Carrier Enrollment Transmis 7. Enrollment Change Summar 8. Carrier Gain/Loss Summary 9. Reconciliation Reason Summ for a single quarter.	ws comparison of disc - Shows each enrolle ach enrollee that has <b>nsmission</b> - Shows <b>sion</b> - Shows the tim <b>y</b> - Shows how enrollm - Shows how enrollm <b>hary</b> - Shows what c	crepancies occ a discrepancy the timeliness heliness of the lment changes caused the disc	urring in one quart iscrepancy and wh and if that discrep of the transmission transmission of qu occur between one ccur between one repancies that we	ter with those that oc nether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. le quarter and any prio quarter and any prio re uncovered during t	cy has been reco ated. Office enrollment or quarter. n quarter. he reconciliation	onciled. data. process
1. Payroll Discrepancy Listing - 2. Discrepancy Summary - Allo quarter.     3. Payroll Office Reconciliation     4. Carrier Validation - Shows ex 5. Payroll Office Enrollment Tra- 6. Carrier Enrollment Transmis 7. Enrollment Change Summar 8. Carrier Gain/Loss Summary 9. Reconciliation Reason Summ for a single quarter.     10. Reconciliation Action Summ.	ws comparison of disc - Shows each enrolle ach enrollee that has insmission - Shows sion - Shows the tim y - Shows how enroll - Shows how enroll - Shows how enroll mary - Shows what ca ary - Shows what ha	crepancies occ ee that has a c a discrepancy the timeliness neliness of the lment changes caused the disc ad to be correc	urring in one quart iscrepancy and wh and if that discrep of the transmission of qu occur between on ccur between one repancies that we ted during the rec	ter with those that oc- hether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. he quarter and any prio quarter and any prio re uncovered during to onciliation process for	cy has been reco lted. Office enrollment or quarter. r quarter. he reconciliation	onciled. data. process
1. Payroll Discrepancy Listing 2. Discrepancy Summary - Allo quarter. 3. Payroll Office Reconciliation 4. Carrier Validation - Shows ex 5. Payroll Office Enrollment Tra- 6. Carrier Enrollment Transmis 7. Enrollment Change Summar 8. Carrier Gain/Loss Summary 9. Reconciliation Reason Summ for a single quarter. 10. Reconciliation Action Summary - S 11. Reconciliation Summary - S 12. Reconciliation Summary - S 12. Reconciliation Summary - S 12. Reconciliation Summary - S 12. Reconciliation Summary - S 13. Reconciliation Summary - S 14. Reconciliation Summary - S 15. Reconciliation Summary - S 16. Reconciliation Summary - S 17. Reconciliation Summary - S 18. Reconciliation Su	ws comparison of disc - Shows each enrolle ach enrollee that has <b>nsmission</b> - Shows <b>sion</b> - Shows the tim <b>y</b> - Shows how enroll - Shows how enrollm <b>nary</b> - Shows what c <b>ary</b> - Shows what ha hows the progress th	crepancies occ ee that has a c a discrepancy the timeliness neliness of the lment changes caused the disc ad to be correc nat has been m	urring in one quart iscrepancy and wi and if that discreg of the transmission fur transmission of qu occur between on ccur between on ccur between on the twe repancies that we ted during the rec ade to reconcile th	ter with those that oc- nether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. he quarter and any prio quarter and any prio re uncovered during t onciliation process for e discrepancies foun	cy has been reco lted. Office enrollment or quarter. r quarter. he reconciliation	onciled. data. process
1. Payroll Discrepancy Listing - 2. Discrepancy Summary - Allo quarter.     3. Payroll Office Reconciliation     4. Carrier Validation - Shows ex 5. Payroll Office Enrollment Tra- 6. Carrier Enrollment Transmis 7. Enrollment Change Summar 8. Carrier Gain/Loss Summary 9. Reconciliation Reason Summ for a single quarter.     10. Reconciliation Action Summ.	ws comparison of disc - Shows each enrolle ach enrollee that has insmission - Shows sion - Shows het tim γ - Shows how enroll - Shows how enroll hary - Shows what c ary - Shows what c ary - Shows what ha hows the progress th - Provides a listing by	crepancies occ a that has a c a discrepancy the timeliness nent changes caused the disc ad to be correc at has been m y Carrier Id enr	urring in one quart iscrepancy and wh and if that discrep of the transmission of qu- occur between one repancies that we ted during the rec ade to reconcile blee of each discr	ter with those that oc hether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. le quarter and any prio quarter and any prio re uncovered during t onciliation process for he discrepancies foun epancy.	cy has been reco ited. Office enrollment or quarter. r quarter. he reconciliation r a single quarter d in a single quar	onciled. data. process ter.

Figure 136: Reports Selection Page

3. Click the drop-down menu on the Reports Selection page and select Carrier Validation.



4. Click **GO** to display the Carrier Validation.

CIFR	Payroll Office	Carrier	Forms	Transmis	sion Rep	orts	LO OF
eports Selection			4. Carrier Valida	tion		✓ GO	
4. Carrier Validation							?
Enter selection criteria in the follo							
to display the report or send it to a function. Fields marked with * are	required. Leaving an						
selection entries besides the requir							-
Carrier ID* Year* Quar	Fail ter* Count		lidation te		SSN		
AETN100 V 2014 V 3 V		From		✓ From			1000
	То	То	<ul><li>✓</li><li>✓</li></ul>	∨ То			
Payroll Enrollment Office ID Code Us	er ID Other	ID - From	Other ID - To				
✓ ✓							
							- 1
Order By: 1st Name 4th	<ul> <li>✓ 2nd</li> <li>✓ 5th</li> </ul>	→ 3rd → 6th		<u>~</u>			17.000
							1000
Check box to create report withou	t totals: 🗌						101000
Display the report	SUBMIT RESET	]					1000

Figure 137: Carrier Validation (Report 4) Page

5. Complete the fields on the Carrier Reconciliation (Report 4) page.

Field	Instruction/Description
Carrier ID*	<i>Required</i> Select the carrier ID number from the drop-down menu.
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter*	<i>Required default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Fail Count From	Optional, numeric, 3 positions maximum. Enter a specific fail count number to search for enrollee records by a specific fail count number, then proceed to the To field. 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	Optional, numeric, 3 positions maximum
	Entered 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.
Validation Date From	Optional
	Select the month from the first drop-down menu, select the day from the second drop-down menu; and select the year from the third drop-down menu. This is the date that begins the range of reconciliation dates.
Validation Date To	Optional
	Select the month from the first drop-down menu, select the day from the second drop-down menu; and select the year from the third drop-down menu. This is the date that ends the range of reconciliation dates.
SSN - From	Optional, alphanumeric, 9 positions
	To search for a specific enrollee record by SSN, enter the SSN and skip the To field.
	To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field.
	Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.
SSN - To	Optional, alphanumeric, 9 positions
	To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.
	Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.
Payroll Office ID	Required
	Select the payroll office identification number from the drop-down menu.
Enrollment Code	Optional
	Select the enrollment code from the drop-down list.



User ID	<i>Optional, alphanumeric, 8 positions maximum</i> Enter the user identification number of the person creating the report.
Other ID - From	Optional, alphanumeric, 15 positions maximum
	To search for a specific enrollee record by Other ID, enter the Other ID and skip the To field.
	To search for a range of enrollee records by a range of Other IDs, type the Other ID that starts the range, then go to the To field.
	Note for RSP: Enter the civil service annuitant (CSA) or civil service final (CSF) identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXX, and the CSF identifier is typed as FXXXXXXXX.
	These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.
	Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.



Other ID - To	Optional, alphanumeric, 15 positions maximum
	To search for a range of enrollee records by a range of Other IDs, enter the Other ID that ends the range; otherwise, leave blank.
	Note for RSP: Enter the CSA or CSF identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXX, and the CSF identifier is typed as FXXXXXXX.
	These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.
	Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.
Order By: 1st	Optional, default
	Defaults to the <b>Name</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:
	Enrollment Code - Search by enrollment code.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.
Order By: 2nd	Optional
	Defaults to the <b>Name</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:
	Enrollment Code - Search by enrollment code.
	Name - Search by enrollee name.
	<b>SSNO</b> - Search by enrollee SSN.



Optional
Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:
Enrollment Code - Search by enrollment code.
Name - Search by enrollee name.
SSNO - Search by enrollee SSN.
Optional
Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:
Enrollment Code - Search by enrollment code.
Name - Search by enrollee name.
SSNO - Search by enrollee SSN.
Optional
Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:
Enrollment Code - Search by enrollment code.
Name - Search by enrollee name.
SSNO - Search by enrollee SSN.
Optional
Defaults to the <b>Name</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:
Enrollment Code - Search by enrollment code.
Name - Search by enrollee name.
SSNO - Search by enrollee SSN.
Optional
Select this check box to omit totals from the report.

- 1. Click 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
- 2. Click **Submit** to display the Carrier Reconciliation report in the selected format.



# OR

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

			Carrier Valid	ation				
Carrier					Validation			
SSN	Enrollee	Enrollment Code	Payroll Office Number	Reason Code	Validation Date	User Id	Corrective Action	Fail Count
otal Records: 0								

Figure 138: Carrier Validation Report Page

To return to the Carrier Reconciliation (Report 4) page, close the report.

Field	Description
Carrier	System generated
	Displays the carrier ID code.
SSN	System generated
	Displays the enrollee's SSN.
Enrollee	System generated
	Displays the enrollee's name.
Enrollment Code	System generated
	Displays the enrollment code/carrier enrollment code.
Payroll Office Number	System generated
	Displays the payroll office number.
Reason	System generated
	Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see <i>Reconciliation Reason Codes Table</i> (on page 221).
Validation	System generated
	Displays the status of the validation.
Validation Date	System generated
	Displays the validation date.



User ID	<i>System generated</i> Displays the user identification number of the person who entered the validation reason code.	
Corrective Action	<i>System generated</i> Displays the code that identifies the carrier's response to the validation action code displayed in the Validation Action field.	
Fail Count	<i>System generated</i> Displays the number of times this record has failed the quarterly edit process.	
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.	

# Viewing Payroll Office Enrollment Transmission (Report 5)

The Payroll Office Enrollment Transmission option on the Reports Selection page allows authorized 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.

Note: Carriers are not authorized to produce this report.

## Viewing Carrier Enrollment Transmission (Report 6)

The Carrier Enrollment Transmission (Report 6) 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 at the top of the CLER Main Menu.

CLER	Payroll Office	Carrier	Form	s Transmission	Reports	490
ER Main Menu						
Welcome to the OPM Federal Empl access the various functional areas of the screen to access the differer and they will not function, if selecte To learn about the various function	of CLER based upon at areas of CLER. Se ed.	the level of sec octions that you	urity access are not auti	you have been grante horized to access will h	d. Click the tabs a ave the tabs "gray	at the top ed out"
1. <u>Payroll Office</u> Info <u>Contacts</u> <u>Payroll Office</u> <u>Payroll Office</u> <u>Payroll Office</u> <u>Payroll Office</u> <u>Transmissions</u> <u>Errollees</u> <u>Info</u> <u>Info</u> <u>Errollment Codes</u> <u>IDs</u> <u>Carrier Contacts</u> <u>Carrier Plan C</u> <u>Errors</u> <u>Errors</u> <u>Errors</u>	fice Contacts		4. <u>Transm</u> i 5. <u>Reports</u>	<u>File Transfer</u> Online Entry	ition t Transmission mission mary ary ummary ummary	

Figure 139: CLER Main Menu Page

2. The Reports Selection page is displayed.

r ( ) k k	Payroll Office	Carrier	Forms	Transmission	Reports	-
			· · · · · · · · · · · · · · · · · · ·			
ports Selection		1. Payroll Discrepancy Listing V GO				
				안 안 많이 많는 것		
Select a report from the drop do	wn liet above and press	s the CO butto	n to enter selectio	n criteria for that ren	ort	
Select a report nom the drop do	withist above and press		in to enter selectio	in criteria for triat rep	ort.	
In this section, the following opt	ions may be selected al	above:				
	·					
1. Payroll Discrepancy Listing	, - Provides a listing by	/ Payroll enrolle				
1. Payroll Discrepancy Listing 2. Discrepancy Summary - A	, - Provides a listing by	/ Payroll enrolle			curred in any ot	her
1. Payroll Discrepancy Listing 2. Discrepancy Summary - Al quarter.	; - Provides a listing by lows comparison of disc	/ Payroll enrolle crepancies occ	urring in one quart	ter with those that oc		
1. Payroll Discrepancy Listing 2. Discrepancy Summary - Al Juarter. 3. Payroll Office Reconciliatio	y - Provides a listing by lows comparison of disc n - Shows each enrolle	/ Payroll enrolle crepancies occ ee that has a c	urring in one quart liscrepancy and wh	ter with those that oc nether that discrepan	cy has been reco	
1. Payroll Discrepancy Listing 2. Discrepancy Summary - Al quarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows	, Provides a listing by lows comparison of disc n - Shows each enrolle each enrollee that has	/ Payroll enrolle crepancies occ ee that has a c a discrepancy	urring in one quart liscrepancy and wh and if that discrep	ter with those that oc nether that discrepan pancy has been valida	cy has been reco ited.	onciled.
1. Payroll Discrepancy Listing 2. Discrepancy Summary - Al quarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T	<ul> <li>Provides a listing by lows comparison of disc</li> <li>Shows each enrolle each enrollee that has</li> <li>ransmission - Shows</li> </ul>	/ Payroll enrolle crepancies occ ee that has a c a discrepancy the timeliness	urring in one quart liscrepancy and wh and if that discrep of the transmission	ter with those that oc nether that discrepan pancy has been valida n of quarterly Payroll	cy has been reco ited.	onciled.
1. Payroll Discrepancy Listin 2. Discrepancy Summary - Al Juarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transm	<ul> <li>provides a listing by lows comparison of disc</li> <li>n - Shows each enrolle each enrollee that has ransmission - Shows</li> <li>the tim</li> </ul>	/ Payroll enrolle crepancies occ ee that has a c a discrepancy the timeliness neliness of the	urring in one quart liscrepancy and wh and if that discrep of the transmission transmission of qua	ter with those that oc nether that discrepan bancy has been valida n of quarterly Payroll arterly Carrier data.	cy has been reco ated. Office enrollment	onciled.
1. Payroll Discrepancy Listing     2. Discrepancy Summary - Al quarter.     3. Payroll Office Reconciliatio 4. Carrier Validation - Shows     5. Payroll Office Enrollment T 6. Carrier Enrollment Transm     7. Enrollment Change Summary	<ul> <li>Provides a listing by lows comparison of disc</li> <li>n - Shows each enrolle each enrollee that has ransmission - Shows ission - Shows the tim ary - Shows how enroll</li> </ul>	/ Payroll enrolle crepancies occ ee that has a c a discrepancy the timeliness neliness of the lment changes	urring in one quart liscrepancy and wh and if that discrep of the transmission transmission of qu occur between on	ter with those that oc nether that discrepan bancy has been valida n of quarterly Payroll arterly Carrier data. le quarter and any pri	cy has been reco ated. Office enrollment or quarter.	onciled.
1. Payroll Discrepancy Listin 2. Discrepancy Summary - Al Juarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transm	<ul> <li>Provides a listing by lows comparison of disc</li> <li>n - Shows each enrolle each enrollee that has ransmission - Shows</li> <li>the tim ary - Shows how enroll</li> <li>y - Shows how enroll</li> </ul>	/ Payroll enrolle crepancies occ ee that has a c a discrepancy the timeliness neliness of the liment changes nent changes c	surring in one quart liscrepancy and wh and if that discrep of the transmission transmission of quart occur between one ccur between one	ter with those that oc nether that discrepan bancy has been valida n of quarterly Payroll arterly Carrier data. le quarter and any prio quarter and any prio	cy has been reco ated. Office enrollment or quarter. r quarter.	onciled. : data.
1. Payroll Discrepancy Listing     2. Discrepancy Summary - Al quarter.     3. Payroll Office Reconciliatio     4. Carrier Validation - Shows     5. Payroll Office Enrollment T     6. Carrier Enrollment Transm     7. Enrollment Change Summa     8. Carrier Gain/Loss Summa     9. Reconciliation Reason Sum	<ul> <li>Provides a listing by lows comparison of disc</li> <li>n - Shows each enrolle each enrollee that has ransmission - Shows</li> <li>the tim ary - Shows how enroll</li> <li>y - Shows how enroll</li> </ul>	/ Payroll enrolle crepancies occ ee that has a c a discrepancy the timeliness neliness of the liment changes nent changes c	surring in one quart liscrepancy and wh and if that discrep of the transmission transmission of quart occur between one ccur between one	ter with those that oc nether that discrepan bancy has been valida n of quarterly Payroll arterly Carrier data. le quarter and any prio quarter and any prio	cy has been reco ated. Office enrollment or quarter. r quarter.	onciled. : data.
1. Payroll Discrepancy Listing     2. Discrepancy Summary - Al quarter.     3. Payroll Office Reconciliatio     4. Carrier Validation - Shows     5. Payroll Office Enrollment T     6. Carrier Enrollment Transm     7. Enrollment Change Summa     8. Carrier Gain/Loss Summar     9. Reconciliation Reason Sum     for a single quarter.     10. Reconciliation Action Summar	Provides a listing by lows comparison of disc n - Shows each enrolle each enrollee that has ransmission - Shows the tim ission - Shows the tim ary - Shows how enroll y - Shows how enroll y - Shows how enroll mary - Shows what compary - Shows what compary mary - Shows what has	/ Payroll enrolle crepancies occ ee that has a o a discrepancy the timeliness neliness of the lment changes caused the disc ad to be correct ad to be correct	urring in one quart liscrepancy and wh and if that discrep of the transmission of qu occur between on ccur between one repancies that we ted during the rec	ter with those that oc- nether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. le quarter and any prio quarter and any prio re uncovered during t onciliation process foi	cy has been reco lted. Office enrollment or quarter. r quarter. he reconciliation	process
I. Payroll Discrepancy Listing     Z. Discrepancy Summary - Al quarter.     S. Payroll Office Reconciliatio     A. Carrier Validation - Shows     S. Payroll Office Enrollment T     G. Carrier Enrollment Transm     R. Carrier Gain/Loss Summar     S. Reconciliation Reason Sum     for a single quarter.	Provides a listing by lows comparison of disc n - Shows each enrolle each enrollee that has ransmission - Shows the tim ission - Shows the tim ary - Shows how enroll y - Shows how enroll y - Shows how enroll mary - Shows what compary - Shows what compary mary - Shows what has	/ Payroll enrolle crepancies occ ee that has a o a discrepancy the timeliness neliness of the lment changes caused the disc ad to be correct ad to be correct	urring in one quart liscrepancy and wh and if that discrep of the transmission of qu occur between on ccur between one repancies that we ted during the rec	ter with those that oc- nether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. le quarter and any prio quarter and any prio re uncovered during t onciliation process foi	cy has been reco lted. Office enrollment or quarter. r quarter. he reconciliation	process
1. Payroll Discrepancy Listing     2. Discrepancy Summary - Al quarter.     3. Payroll Office Reconciliatio     4. Carrier Validation - Shows     5. Payroll Office Enrollment Transm     7. Enrollment Change Summar     8. Carrier Gain/Loss Summar     9. Reconciliation Reason Sum     for a single quarter.     10. Reconciliation Suminar	Provides a listing by lows comparison of disc n - Shows each enrollee each enrollee that has ransmission - Shows ission - Shows the tim ary - Shows how enroll y - Shows how enroll mary - Shows what compare mary - Shows what ha Shows the progress th j - Provides a listing by	r Payroll enrolle crepancies occ ee that has a d discrepancy the timeliness neliness of the liment changes caused the disc ad to be correc ad to be correc y Carrier I d enr	urring in one quart liscrepancy and wh and if that discrep of the transmission of qu- occur between one repancies that we ted during the rec ade to reconcile blee of each discr	ter with those that oc- nether that discrepan bancy has been valida no of quarterly Payroll arterly Carrier data. I quarter and any prio quarter and any prio quarter and any prio quarter and any prio re uncovered during to onciliation process foun e discrepancies foun epancy.	cy has been reco ited. Office enrollment or quarter. r quarter. he reconciliation r a single quarter d in a single quar	process ter.

Figure 140: Reports Selection Page

3. Click the drop-down menu on the Reports Selection page and select Carrier Enrollment Transmission.



4. Click **GO** to display the Carrier Enrollment Transmission (Report 6) page.

orts Selection	6. Carrier Enrollment Transmission	✓ GO
6. Carrier Enrollment Transmission		3
	e output option from the box at the bottom left and c file on your computer. Reports may be printed by usi	
unction. Fields marked with * are required. Leaving		
Year*Quarter*Carrier IdFrom20143		
Γο 2014 🗸 3 🗸		
Transmissions: All  Accepted  Rejected	Not Received 🔿	
Order By: 1st Carrier ID ✓ 2nd	✓ 3rd ✓	
Check box to create report without totals:		

Figure 141: Carrier Enrollment Transmission (Report 6) Page

5. Complete the fields on the Carrier Enrollment Transmission (Report 6) page.

Field	Instruction/Description
Year* From	Required, default
	Select the year that begins the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Year* To	Required, default
	Select the year that ends the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter* From	Required, default
	Select the quarter that begins the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Quarter* To	Required, default
	Select the quarter that ends the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Carrier Id	Required
	Select the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit from the drop-down menu.



<b></b>	
Transmissions	Optional, default
	Displays search results by the options listed below. If no display option is selected, this field automatically defaults to the <b>All</b> display option. To choose a display option, select the radio button next to one of the following values:
	All - Search by all transmissions.
	Accepted - Search by accepted transmissions.
	Rejected - Search by rejected transmissions.
	Not Received - Search by not received transmissions.
Order By: 1st	Optional, default
	Defaults to the <b>Name</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:
	Carrier ID - Search by carrier ID number.
	Name - Search by enrollee name.
	Year/Quarter - Search by reconciliation year and reconciliation quarter.
	Submission Date - Search by submission date.
	Status - Search by transmission status.
Order By: 2nd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:
	Carrier ID - Search by carrier ID number.
	Name - Search by enrollee name.
	<b>Year/Quarter</b> - Search by reconciliation year and reconciliation quarter.
	Submission Date - Search by submission date.
	Status - Search by transmission status.
Order By: 3rd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:
	Carrier ID - Search by carrier ID number.
	Name - Search by enrollee name.
	<b>Year/Quarter</b> - Search by reconciliation year and reconciliation quarter.
	Submission Date - Search by submission date.
	Status - Search by transmission status.



report without totals	Optional Select this check box to omit totals from the report.

- 6. Click the drop-down menu at the bottom of the page and select one of the following format options:
  - Display report
  - Save report as a spreadsheet
  - Save report as a text file
- 7. Click Submit to display the Carrier Enrollment Transmission report in the selected format.

#### OR

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

		Carr	ier Enrollment	Transmission		
Carrier						
Accepted: 0	Name	Year	Quarter	Date Due	Submission Date	Status
Rejected: 0						
Not Received: 0						
Total: 0						

Figure 142: Carrier Enrollment Transmission Report

To return to the Carrier Enrollment Transmission (Report 6) page, close the report.

Field	Description
Carrier	System generated Displays the carrier ID code.
Name	System generated Displays the name of the carrier.
Year	System generated Displays the reconciliation year.
Quarter	System generated Displays the reconciliation quarter.



Date Due	System generated
	Displays the transmission due date (MMDDYYYY) for the reconciliation quarter.
Submission Date	System generated
	Displays the date (MMDDYYYY) the carrier enrollment data file was submitted for processing.
Status	System generated
	Displays <b>000</b> 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 <i>Carrier System Codes Table</i> (on page 219).
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.
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.
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.
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.



# 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.

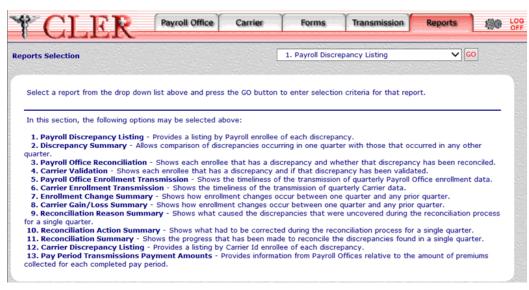


Figure 143: Reports Selection Page

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.

orts Selection	7. Enrollment Change Summary			
7. Enrollment Change Summary Enter selection criteria in the following fields, select the output optic to display the report or send it to a spreadsheet or text file on your c function. Fields marked with * are required. Leaving an entry blank v Payroll Year* Quarter* Payroll Office ID* Carrier Cod From 2014 3 3	computer. Reports may be printed by using the browser's print will return all values for that field.			

Figure 144: 7. Enrollment Change Summary Report Search Page

4. Complete the following fields on the 7. Enrollment Change Summary page:

Year From

Year To

Quarter From

Quarter To

Payroll Office ID

Carrier

*Enrollment Code* (see "*Enrollment Code - (Drop-down) Field Instruction*" on page 296)

Check Box to Create Report Without Totals (see "Check Box to Create Report Without Totals - Field Instruction" on page 275)

- 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.

		From To	Ch	ange	Enrollees		
Carrier	Code	Qtr 3 2014	Qtr 3 2014	#	%	New/Add	Left/Drop
		0	0	0	0.0%	0	0
tal Records: 0							

#### Figure 145: 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 268)

Code

From (Quarter/Year)

To (Quarter/Year)

Change #

Change %

Enrollees (New/Add)

Enrollees (Left/Drop)

Total Records

7. Close the report to return to the 7. Enrollment Change Summary page.



## Viewing Carrier Gain/Loss Summary (Report 8)

The Carrier Gain/Loss Summary (Report 8) 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 one quarter to any prior quarter.

#### To View a Carrier Gain/Loss Summary Report:

1. Select the **Reports** tab at the top of the CLER Main Menu.

E CLER	Payroll Office	Carrier	Forms	Transmission	Reports	490	C
ER Main Menu							202
Welcome to the OPM Federal Emp access the various functional areas of the screen to access the differer and they will not function, if select To learn about the various function	of CLER based upon nt areas of CLER. Se ed.	the level of sec ctions that you	urity access yo are not authori	u have been granted. zed to access will have	Click the tabs a a the tabs "graye	t the top ed out"	
1. Payroll Office Info Contacts Payroll Office Errors Transmissions Errolees 2. Carrier Info Errollment Codes IDs Contacts Carrier Plan Errors Transmissions Errors Transmissions Errolees	ifice Contacts		5. <u>Reports</u> Pay Pay Car Pay Car Pay Car Enr Car Rec Rec Rec Car Car Car Car Car Car Car Car	0	r <u>n</u> <u>(ransmission</u> <u>ssion</u> Iry L L J Imary <u>mary</u>		

Figure 146: CLER Main Menu Page

2. The Reports Selection page is displayed.

Payroll Office	Carrier	Forms	Transmission	Reports	
Reports Selection	[	1. Payroll Discr	epancy Listing	✓ [	<b>10</b>
Select a report from the drop down list above and press th	ne GO button	to enter selectio	on criteria for that rep	ort.	
In this section, the following options may be selected above					
<ol> <li>Payroll Discrepancy Listing - Provides a listing by Pa</li> <li>Discrepancy Summary - Allows comparison of discre quarter.</li> </ol>	pancies occur	rring in one quart	ter with those that oc	· · · · ·	
3. Payroll Office Reconciliation - Shows each enrollee 4. Carrier Validation - Shows each enrollee that has a o 5. Payroll Office Enrollment Transmission - Shows the	discrepancy a e timeliness of	ind if that discrep f the transmission	pancy has been valida n of quarterly Payroll (	ted.	
<ol> <li>Carrier Enrollment Transmission - Shows the timelin</li> <li>T. Enrollment Change Summary - Shows how enrollmen</li> <li>Carrier Gain/Loss Summary - Shows how enrollmen</li> </ol>	ent changes o	ccur between on	ne quarter and any prio		
9. Reconciliation Reason Summary - Shows what cause for a single quarter.					
<ol> <li>Reconciliation Action Summary - Shows what had t</li> <li>Reconciliation Summary - Shows the progress that</li> <li>Carrier Bicconcept Licture - Devide a licture by C</li> </ol>	has been mad	de to reconcile th	ne discrepancies found		
<ol> <li>Carrier Discrepancy Listing - Provides a listing by Ca</li> <li>Pay Period Transmissions Payment Amounts - Pro collected for each completed pay period.</li> </ol>				amount of prer	1

Figure 147: Reports Selection Page



- 3. Click the drop-down menu on the Reports Selection page and select Carrier Gain/Loss Summary.
- 4. Click **GO** to display the Carrier Gain/Loss Summary (Report 8) page.

orts Selection	8. Carrie	er Gain/Lo	ss Summary	✓ G(	<b>o</b>
8. Carrier Gain/Loss Summary					?
Enter selection criteria in the following fields, select the output					
o display the report or send it to a spreadsheet or text file on yo unction. Fields marked with * are required. Leaving an entry bla				ng the browser's	print
Enrollment Payr Year* Quarter* Carrier* Code Offic	roll ce ID				
Year*     Quarter*     Carrier*     Code     Offic       rom     2014     3          2014     3					
Year*     Quarter*     Carrier*     Code     Offic       From     2014     3					
Year*     Quarter*     Carrier*     Code     Offic       rom     2014     3          2014     3					

#### Figure 148: Carrier Gain/Loss Summary (Report 8) Page

5. Complete the fields on the Carrier Gain/Loss Summary (Report 8) page.

Field	Instruction/Description
Year* From	Required, default
	Select the year that begins the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Year* To	Required, default
	Select the year that ends the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter* From	Required, default
	Select the quarter that begins the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Quarter* To	Required, default
	Select the quarter that ends the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Carrier*	Required
	Select the carrier code from the drop-down menu.



Enrollment Code	<i>Optional</i> Select the enrollment code from the drop-down list.
Payroll Office ID	<i>Required</i> Select the payroll office identification number from the drop-down menu.
Check box to create report without totals	<i>Optional</i> Select this check box to omit totals from the report.

- 6. Click 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
- 7. Click **Submit** to display the Carrier Gain/Loss Summary report in the selected format.

#### OR

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

		Carrier	Gain/Loss Sur	nmary			
From: Qtr 3 2014		To: Qtr 3 2014			Enrollmen	t Changes	
Carrier	Code	Carrier	Code	Added	%	Dropped	%
			-	0	0.00%	0	100.00%
otal Records: 0							



To return to the Carrier Gain/Loss Summary (Report 8) page, close the report.

Field	Description
From: Quarter/Year Carrier	System generated Displays the carrier code.
From: Quarter/Year Code	<i>System generated</i> Displays the enrollment code.



h	
To: Quarter/Year Carrier	<i>System generated</i> Displays the carrier code.
To: Quarter/Year Code	System generated Displays the enrollment code.
Enrollment Changes Added	System generated Displays the number of enrollment changes that were added.
Enrollment Changes %	System generated Displays the percent of enrollment changes that were added.
Enrollment Changes Dropped	System generated Displays the number of enrollment changes that were dropped.
Enrollment Changes %	System generated Displays percent of enrollment changes that were dropped.
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.

## 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.

ports Selection	1. Payroll Discr	epancy Listing	✓ GO	
Select a report from the drop down list above and press the GO but	ton to enter selectio	n criteria for that rep	ort.	
In this section, the following options may be selected above:				
1. Payroll Discrepancy Listing - Provides a listing by Payroll enrol 2. Discrepancy Summary - Allows comparison of discrepancies of			curred in any oth	er
2. Discrepancy Summary - Allows comparison of discrepancies of uarter.	ccurring in one quart	er with those that oc		
<ol> <li>Discrepancy Summary - Allows comparison of discrepancies or yuarter.</li> <li>Payroll Office Reconciliation - Shows each enrollee that has a 4. Carrier Validation - Shows each enrollee that has a discrepance</li> </ol>	curring in one quart discrepancy and why y and if that discrep	er with those that oc nether that discrepan bancy has been valida	cy has been recon	nciled.
<ol> <li>Discrepancy Summary - Allows comparison of discrepancies or puarter.</li> <li>Payroll Office Reconciliation - Shows each enrollee that has a 4. Carrier Validation - Shows each enrollee that has a discrepanci 5. Payroll Office Enrollment Transmission - Shows the timelines</li> </ol>	courring in one quart discrepancy and wh y and if that discrep s of the transmission	er with those that oc nether that discrepan pancy has been valida n of quarterly Payroll (	cy has been recon	nciled.
<ol> <li>Discrepancy Summary - Allows comparison of discrepancies or yuarter.</li> <li>Payroll Office Reconciliation - Shows each enrollee that has a 4. Carrier Validation - Shows each enrollee that has a discrepance 5. Payroll Office Enrollment Transmission - Shows the timelines 6. Carrier Enrollment Transmission - Shows the timeliness of the 7. Enrollment Change Summary - Shows how enrollment change</li> </ol>	discrepancy and wh y and if that discrep s of the transmission e transmission of qu s occur between on	er with those that oc bether that discrepan- bancy has been valida of quarterly Payroll of arterly Carrier data. e quarter and any pri	cy has been recon ited. Office enrollment o or quarter.	nciled.
<ol> <li>Discrepancy Summary - Allows comparison of discrepancies or quarter.</li> <li>Payroll Office Reconciliation - Shows each enrollee that has a 4. Carrier Validation - Shows each enrollee that has a discrepanc 5. Payroll Office Enrollment Transmission - Shows the timelines 6. Carrier Enrollment Transmission - Shows the timelines of th 7. Enrollment Change Summary - Shows how enrollment change 8. Carrier Gain/Loss Summary - Shows how enrollment change</li> </ol>	courring in one quart discrepancy and wh y and if that discrep s of the transmission e transmission of qu s occur between one occur between one	er with those that oc nether that discrepan- bancy has been valida of quarterly Payroll arterly Carrier data. e quarter and any prior quarter and any prior	cy has been recon ited. Office enrollment o or quarter.	nciled. data.
<ol> <li>Discrepancy Summary - Allows comparison of discrepancies or juarter.</li> <li>Payroll Office Reconciliation - Shows each enrollee that has a 4. Carrier Validation - Shows each enrollee that has a discrepance 5. Payroll Office Enrollment Transmission - Shows the timelines 6. Carrier Enrollment Transmission - Shows the timeliness of th 7. Enrollment Change Summary - Shows how enrollment change 8. Carrier Gain/Loss Summary - Shows what caused the di 9. Reconciliation Reason Summary - Shows what caused the discrepance of the standard s</li></ol>	courring in one quart discrepancy and wh y and if that discrep s of the transmission e transmission of qu s occur between one occur between one	er with those that oc nether that discrepan- bancy has been valida of quarterly Payroll arterly Carrier data. e quarter and any prior quarter and any prior	cy has been recon ited. Office enrollment o or quarter.	nciled. data.
<ol> <li>Discrepancy Summary - Allows comparison of discrepancies or quarter.</li> <li>Payroll Office Reconciliation - Shows each enrollee that has a 4. Carrier Validation - Shows each enrollee that has a discrepanc 5. Payroll Office Enrollment Transmission - Shows the timelines 6. Carrier Enrollment Transmission - Shows the timelines of th 7. Enrollment Change Summary - Shows how enrollment change 8. Carrier Gain/Loss Summary - Shows how enrollment change</li> </ol>	courring in one quart discrepancy and wi y and if that discrep s of the transmission e transmission of qu s occur between one occur between one screpancies that we	er with those that oc- nether that discrepan- bancy has been valida of quarterly Payroll arterly Carrier data. e quarter and any prior quarter and any prior re uncovered during t	cy has been recon ited. Office enrollment o or quarter. quarter. he reconciliation p	data. brocess
<ol> <li>Discrepancy Summary - Allows comparison of discrepancies or yuarter.</li> <li>Payroll Office Reconciliation - Shows each enrollee that has a 4. Carrier Validation - Shows each enrollee that has a discrepance 5. Payroll Office Enrollment Transmission - Shows the timelines 6. Carrier Enrollment Transmission - Shows the timeliness of th 7. Enrollment Change Summary - Shows how enrollment changes 8. Carrier Gain/Loss Summary - Shows how enrollment changes 9. Reconciliation Reason Summary - Shows what caused the dis for a single quarter.</li> </ol>	discrepancy and wi y and if that discrep s of the transmission s occur between one occur between one occur between one occur between one eccrepancies that we ecced during the reco-	er with those that oc- hether that discrepan- bancy has been valida o of quarterly Payroll arterly Carrier data. e quarter and any prior quarter and any prior re uncovered during t onciliation process for the discrepancies form	cy has been recon ited. Office enrollment o or quarter. quarter. he reconciliation p	data. process

Figure 150: 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.

Payroll Office	Carrier	Forms	Transmission	Reports	180
ount					
oorts Selection		9. Reconciliatio	n Reason Summary	~	GO
9. Reconciliation Reason Summary					
Enter selection criteria in the following fields, select the o display the report or send it to a spreadsheet or text fi					
unction. Fields marked with * are required. Leaving an e				<u> </u>	
Enrollment Payr					
Year*     Quarter*     Carrier     Code     Office       2014     3	e ID				
	-				
Personnel Agency Office ID Reason Code					
ex. AG90					
Order By: 1st Carrier V 2nd	~	3rd	$\checkmark$		
4th 💙 5th	~	6th	$\sim$		
Check box to create report without totals: 📃					
Display the report V SUBMIT RESET					

Figure 151: 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 383)

Quarter (see "Quarter - (Select) Field Instruction" on page 357)

Carrier

*Enrollment Code* (see "*Enrollment Code - (Drop-down) Field Instruction*" on page 296)

**Payroll Office ID** (see "**Payroll Office ID** - (Select - Optional) Field Instruction" on page 352)

Agency

Personnel Office ID

Reason Code

Order By 1st

Order By 2nd

Order By 3rd

Order By 4th (see "Order By 4th - (Carrier) Field Instruction" on page 333)

Order By 5th (see "Order By 5th - (Carrier) Field Instruction" on page 339)

Order By 6th (see "Order By 6th - (Carrier) Field Instruction" on page 343)

Check Box to Create Report Without Totals (see "Check Box to Create Report Without Totals - Field Instruction" on page 275)

- 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.

Reconc	iliation Reason	Summary			
Carrier	Code	Agency	POI	Reason	Total
	Carrier				

Figure 152: 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 351)

Carrier (see "Carrier - Field Description" on page 268)

Code

Agency

POI

Reason

Total

Total Errors

Total Records (see "Total Records - (Records) Field Description" on page 376)

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.

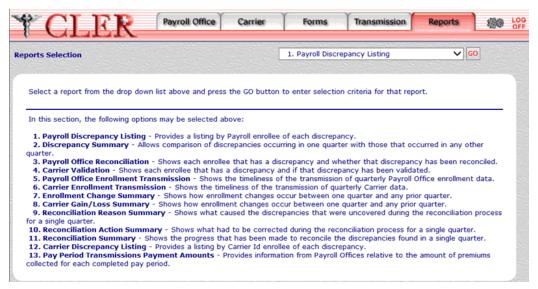


Figure 153: Reports Selection Page

- 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.

Y CLFR	Payroll Office	Carrier	Forms	Transmission	Reports	
( CHILIC						
Reports Selection			10. Reconciliation	n Action Summary	~	30
						?
10. Reconciliation Action Summa						
Enter selection criteria in the follow to display the report or send it to a	spreadsheet or text	file on your co	omputer. Reports r	nay be printed by usir		
function. Fields marked with * are r	required. Leaving an	entry blank w	ill return all values	for that field.		
Year* Quarter* Carrier	Enrollment Pay Code Offi	roll ce ID				
		V				
Personnel						
Agency Office ID Action Co	de					1998
ex. AG90						
	≥ 2nd			~		
Order By: 1st Carrier 4th	✓ 2nd ✓ 5th			~		
				_		
Check box to create report without	totals:					
Display the report	SUBMIT RESET					
onput dividport						

Figure 154: 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 383)

Quarter (see "Quarter - (Select) Field Instruction" on page 357)

Carrier

*Enrollment Code* (see "*Enrollment Code - (Drop-down) Field Instruction*" on page 296)

**Payroll Office ID** (see "**Payroll Office ID - (Select - Optional) Field Instruction**" on page 352)

Agency

Personnel Office ID

Action Code

Order By 1st (see "Order By 1st - (Carrier - Action Code) Field Instruction" on page 316)

Order By 2nd (see "Order By 2nd - (Carrier - Action Code) Field Instruction" on page 322)

Order By 3rd (see "Order By 3rd - (Carrier - Action Code) Field Instruction" on page 328)

Order By 4th (see "Order By 4th - (Carrier - Action Code) Field Instruction" on page 333)

Order By 5th (see "Order By 5th - (Carrier - Action Code) Field Instruction" on page 340)

Order By 6th

Check Box to Create Report Without Totals (see "Check Box to Create Report Without Totals - Field Instruction" on page 275)

- 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.

Reconciliation Action Summary									
Payroll Office									
Payroll Office	Carrier	Code	Agency	POI	Action	Total			
Total Errors: 0 Total Records: 0									

Figure 155: 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 351)

Carrier (see "Carrier - Field Description" on page 268)

Code Agency

POI

Action

Total

Total Errors

Total Records (see "Total Records - (Records) Field Description" on page 376)

7. Close the report to return to the 10. Reconciliation Action Summary page.

# Viewing Reconciliation Summary (Report 11)

The Reconciliation Summary (Report 11) 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 at the top of the CLER Main Menu.

CLER	Payroll Office	Carrier	Form	ns	Transmission	Reports		0
LER Main Menu								
Welcome to the OPM Federal E access the various functional ar of the screen to access the diffe and they will not function, if sele	eas of CLER based upon erent areas of CLER. Se acted.	the level of sec octions that you	urity acces are not au	s you hav thorized t	ve been granted. o access will hav	Click the tabs a e the tabs "gray	at the top ed out"	?
To learn about the various fund	ctional areas of CLER, cli	ick on the follow	ing links th	at corresp	oond to the tabs	and options abo	ve.	
1. Payroll Office			3. Forms	2809				
Info     Contacts			4. Transm					
	fice Contacts Office Contacts			File Tran Online Er				
<u>Errors</u> Transmissions			5. Report	s	iscrepancy Listing			
Enrollees			•	Discrepa	ncy Summary	·		
2. <u>Carrier</u> • <u>Info</u>				Carrier V	ffice Reconciliation	_		
<ul> <li><u>Enrollment Codes</u></li> <li>IDs</li> </ul>			:	Payroll O Carrier E	ffice Enrollment 7 nrollment Transm	<u>ransmission</u> ssion		
Contacts     Carrier Co	ontacts		:	Enrollmer	nt Change Summa ain/Loss Summar	iry		
<ul> <li>Carrier Pla</li> </ul>				Reconcili	ation Reason Sun	imary		
<u>Errors</u> <u>Transmissions</u>			•	Reconcili	ation Action Sum ation Summary			
Enrollees			:	Carrier D Pay Perio	iscrepancy Listing of Transmissions	] Pavment Amoun	ts	
							_	
se send questions or comments to	OPM							

Figure 156: CLER Main Menu Page

2. The Reports Selection page is displayed.

r ( ) k k	Payroll Office	Carrier	Forms	Transmission	Reports	190
			*			
ports Selection			1. Payroll Discr	epancy Listing	<b>V</b> G	0
Select a report from the drop do	wn list above and press	s the CO butto	n to enter selectio	on criteria for that ren	ort	
Select a report from the drop do	withist above and press		in to enter selectio	in chitena for chat rep	iore.	
In this section, the following opt	ions may be selected a	above:				
1. Decimelli Dia mana anno 1 intina	- Dura idan a Kasima ku					
1. Payroll Discrepancy Listing					curred in any of	bor
2. Discrepancy Summary - A					curred in any oth	her
2. Discrepancy Summary - Al quarter.	lows comparison of disc	crepancies occ	urring in one quart	ter with those that oc		
2. Discrepancy Summary - Al quarter. 3. Payroll Office Reconciliatio	lows comparison of disc n - Shows each enrolle	crepancies occ ee that has a c	urring in one quart iscrepancy and wh	ter with those that oc hether that discrepan	cy has been reco	
2. Discrepancy Summary - Al quarter.	lows comparison of disc n - Shows each enrolle each enrollee that has	crepancies occ ee that has a c a discrepancy	urring in one quart iscrepancy and wh and if that discrep	ter with those that oc hether that discrepan pancy has been valida	cy has been reco ated.	onciled.
2. Discrepancy Summary - Al quarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows	lows comparison of disc n - Shows each enrolle each enrollee that has ransmission - Shows	crepancies occ ee that has a c a discrepancy the timeliness	urring in one quart iscrepancy and wh and if that discrep of the transmission	ter with those that oc hether that discrepan pancy has been valida n of quarterly Payroll	cy has been reco ated.	onciled.
2. Discrepancy Summary - Al quarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T	lows comparison of disc <b>n</b> - Shows each enrolle each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows the tim	crepancies occ ee that has a c a discrepancy the timeliness neliness of the	urring in one quart iscrepancy and wh and if that discrep of the transmission transmission of qua	ter with those that oc hether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data.	cy has been reco ated. Office enrollment	onciled.
2. Discrepancy Summary - Al quarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transm	lows comparison of dis n - Shows each enrolle each enrollee that has ransmission - Shows ission - Shows the tim ary - Shows how enroll	crepancies occ ee that has a c a discrepancy the timeliness neliness of the lment changes	urring in one quart iscrepancy and wh and if that discrep of the transmission transmission of qu occur between on	ter with those that oc hether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. he quarter and any pri	cy has been reco ated. Office enrollment or quarter.	onciled.
2. Discrepancy Summary - Al yuarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transm 7. Enrollment Change Summa 8. Carrier Gain/Loss Summa 9. Reconciliation Reason Sum	lows comparison of disc <b>n</b> - Shows each enrolle each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows the tim <b>ary</b> - Shows how enrollm <b>y</b> - Shows how enrollm	crepancies occ a discrepancy the timeliness neliness of the Iment changes nent changes o	urring in one quart iscrepancy and wh and if that discrep of the transmission transmission of quart occur between one ccur between one	ter with those that oc hether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. In quarter and any prio quarter and any prio	cy has been reco ated. Office enrollment or quarter. r quarter.	onciled. : data.
2. Discrepancy Summary - Al quarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transm 7. Enrollment Change Summa 8. Carrier Gain/Loss Summar 9. Reconciliation Reason Sum for a single quarter.	lows comparison of disc <b>n</b> - Shows each enrolle each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows the tim <b>ary</b> - Shows how enrollm <b>y</b> - Shows how enrollm <b>imary</b> - Shows what c	crepancies occ ee that has a c a discrepancy the timeliness heliness of the lment changes caused the disc	urring in one quart iscrepancy and wh and if that discrep of the transmission transmission of qu occur between one ccur between one repancies that we	ter with those that oc nether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. le quarter and any prio quarter and any prio re uncovered during t	cy has been reco ated. Office enrollment or quarter. r quarter. the reconciliation	onciled. : data. process
2. Discrepancy Summary - Al quarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transm 7. Enrollment Change Summa 8. Carrier Gain/Loss Summa 9. Reconciliation Reason Sum for a single quarter. 10. Reconciliation Action Sumi	lows comparison of disc <b>n</b> - Shows each enrolle each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows the tim <b>ary</b> - Shows how enroll <b>y</b> - Shows how enroll <b>y</b> - Shows how enroll <b>mary</b> - Shows what can <b>mary</b> - Shows what can <b>mary</b> - Shows what has	crepancies occ ee that has a c a discrepancy the timeliness neliness of the lment changes caused the disc ad to be correc	urring in one quart iscrepancy and wh and if that discrep of the transmission of qu occur between on ccur between one repancies that we ted during the rec	ter with those that oc- hether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. he quarter and any prio quarter and any prio re uncovered during to onciliation process for	cy has been reco ated. Office enrollment or quarter. r quarter. the reconciliation r a single quarter	process
<ol> <li>Discrepancy Summary - Al quarter.</li> <li>Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transm 7. Enrollment Change Summ.</li> <li>Rearollment Change Summ 9. Reconciliation Reason Sum for a single quarter.</li> <li>Reconciliation Action Summary -</li> </ol>	lows comparison of disc <b>n</b> - Shows each enrolle each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows the tim <b>ary</b> - Shows how enroll <b>y</b> - Shows how enrollm <b>mary</b> - Shows what c <b>mary</b> - Shows what ha Shows the progress th	crepancies occ ee that has a c a discrepancy the timeliness neliness of the lment changes caused the disc ad to be correc nat has been m	urring in one quart iscrepancy and wi and if that discreg of the transmission fur transmission of qu occur between on ccur between on ccur between on the twe repancies that we ted during the rec ade to reconcile th	ter with those that oc- nether that discrepan pancy has been valida n of quarterly Payroll arterly Carrier data. he quarter and any prio quarter and any prio re uncovered during t onciliation process for e discrepancies foun	cy has been reco ated. Office enrollment or quarter. r quarter. the reconciliation r a single quarter	process
2. Discrepancy Summary - A quarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transm 7. Enrollment Change Summa 8. Carrier Gain/Loss Summa 9. Reconciliation Reason Sum for a single quarter. 10. Reconciliation Action Sumi	lows comparison of disc <b>n</b> - Shows each enrolle each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows how enroll <b>ary</b> - Shows how enroll <b>y</b> - Shows how enroll <b>mary</b> - Shows what c <b>mary</b> - Shows what ha Shows the progress th <b>j</b> - Provides a listing by	crepancies occ a that has a c a discrepancy the timeliness nent changes caused the disc ad to be correc at has been m y Carrier Id enr	urring in one quart iscrepancy and wh and if that discrep of the transmission of qu- occur between one repancies that we ted during the rec ade to reconcile blee of each discr	ter with those that och hether that discrepan pancy has been valida no of quarterly Payroll arterly Carrier data. In quarter and any prio quarter and any prio re uncovered during to onciliation process for he discrepancies foun epancy.	cy has been reco ated. Office enrollment or quarter. r quarter. the reconciliation r a single quarter d in a single quar	prociled. data. process ter.

Figure 157: Reports Selection Page

3. Click the drop-down menu on the Reports Selection page and select **Reconciliation Summary**.



4. Click **GO** to display the Reconciliation Summary (Report 11) page.

CI	RR	Payroll Office	e Carrier	Forms	Transmission	Reports	- 19 B
							_
orts Selection				11. Reconciliatio	n Summary	✓ G	0
1. 1. 1. 1. 1.				1		and the set of the	?
11. Reconcilia	tion Summar	r <b>y</b>					
		e following fields, selec it to a spreadsheet or t					
		<ul> <li>are required. Leaving</li> </ul>				ig the browser's	print
Payroll		Rec	conciliation				
Office ID*	Year*	Quarter* Dat					
00000001 🗸	2014 🗸	3 V From		<u>~</u>			
		10	•	•			
	sonnel ce ID Carrie	Enrollment er Code					
		× ×					
ex. AG90							
Order By: 1	st Carrier	✓ 2nd	✓ 3rd		~		
- 4	th	✓					
Check box to c	reate report w	vithout totals:					
Display the re	oort	✓ SUBMIT RES	FT				

### Figure 158: Reconciliation Summary (Report 11) Page

5. Complete the fields on the Reconciliation Summary (Report 11) page.

Field	Instruction/Description
Payroll Office ID*	<i>Required</i> Select the payroll office identification number from the drop-down menu.
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter*	<i>Required default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Reconciliation Date	<i>Optional</i>
From	This is the date that begins the range of reconciliation dates. To select this date, select the month from the first drop-down menu, select the day from the second drop-down menu, and select the year from the third drop-down menu.



Reconciliation Date To	<i>Optional</i> This is the date that ends the range of reconciliation dates. To select this date, select the month from the first drop-down menu, select the day from the second drop-down menu; and select the year from the third drop-down menu.
Agency	<i>Optional, alphanumeric, 4 positions</i> Enter the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).
Personnel Office ID	<i>Optional, alphanumeric, 4 positions</i> Enter the POI number.
Carrier	<i>Optional</i> Select the carrier code from the drop-down menu.
Enrollment Code	<i>Optional</i> Select the enrollment code from the drop-down list.
Order By: 1st	Optional, default Defaults to the <b>Carrier</b> option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order: <b>Agency</b> - Search by Agency code. <b>Carrier</b> - Search by carrier code. <b>Enrollment Code</b> - Search by enrollment code. <b>Personnel Office ID</b> - Search by POI number.
Order By: 2nd	OptionalSelect one of the following options from the drop-down menu to display the selected criteria in second sort search order:Agency - Search by Agency code.Carrier - Search by carrier code.Enrollment Code - Search by enrollment code.Pers. Office ID - Search by POI number.



Order By: 3rd	Optional				
	Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:				
	Agency - Search by Agency code.				
	Carrier - Search by carrier code.				
	Enrollment Code - Search by enrollment code.				
	Pers. Office ID - Search by POI number.				
Order By: 4th	Optional				
	Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:				
	Agency - Search by Agency code.				
	Carrier - Search by carrier code.				
	Enrollment Code - Search by enrollment code.				
	<b>Pers. Office ID</b> - Search by POI number.				
Check box to create	Optional				
report without totals	Select this check box to omit totals from the report.				

- 6. Click 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
- 7. Click **Submit** to display the Reconciliation Summary report in the selected format.

### OR

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

Reconciliation Summary														
									Discr	epai	icies	Corre	ctive	Actions
Pay Ofc	Carr	Code	Agcy	POI	Enrollees	Match	%	#	Recon	%	Unrecon	Validated	%	Unvalidated

Figure 159: Reconciliation Summary Report Page



To return to the Reconciliation Summary (Report 11) page, close the report.

Field	Description
Pay Ofc	Displays the payroll office identification number.
Carr	System generated Displays the carrier code.
Code	System generated Displays the enrollment code.
Agcy	System generated Displays the Agency ID code. This code consists of the Department code and Agency code.
POI	System generated         Displays the POI of the office where the enrollee's records are maintained.         Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.
Enrollees	System generated Displays the number of enrollee records that meet the criteria entered on the Reconciliation Summary page.
Match	System generated Displays the number of matching records that meet the criteria entered on the Reconciliation Summary page.
%	<i>System generated</i> Displays the percentage of matching records to enrollee records.
#	System generated Displays the number of discrepancies.
Recon	Displays the number of reconciled discrepancies.
%	System generated Displays the percentage of reconciled discrepancies to reported discrepancies.
Unrecon	System generated Displays the number of unreconciled discrepancies.



System generated					
Displays the number of discrepancies/reconciliation actions that were validated by the carrier.					
System generated					
Displays the percentage of discrepancies/reconciliation actions validated to total corrective actions.					
System generated					
Displays the number of discrepancies/reconciliation actions that were not validated by the carrier.					
System generated					
Displays the sum of records by enrollment code.					
Note: If the check box used to omit totals from a report is selected, this field is not displayed.					
System generated					
Displays the sum of records by carrier.					
Note: If the check box used to omit totals from a report is selected, this field is not displayed.					
System generated					
Displays the sum of records by enrollment code and carrier.					
Note: If the check box used to omit totals from a report is selected, this field is not displayed.					

# Viewing Carrier Discrepancy Listing (Report 12)

This topic has been updated to add the Employee/Annuitant_Ind field description and screen captures have been updated to reflect updates.

The *Carrier Discrepancy Listing* option on the Reports Selection page allows users to view the Carrier Discrepancy Listing report. This report provides a list of carrier and payroll office enrollee records that match, as well as records marked with carrier warning and discrepancy codes, by the carrier ID code.



### To View a Carrier Discrepancy Listing Report:

1. Select the **Reports** tab on the CLER Main Menu.

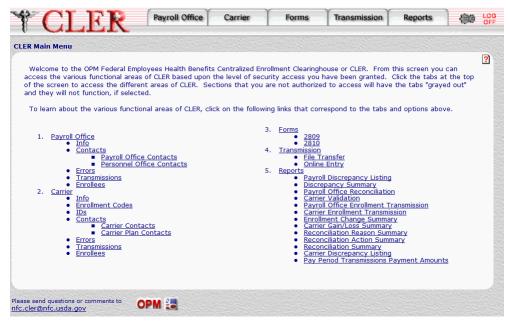


Figure 160: CLER Main Menu Page

The Reports Selection page is displayed.

Payroll Office	Carrier	Forms	Transmission	Reports	-	LOG OFF
Reports Selection		1. Payroll Discr	epancy Listing		30	
Select a report from the drop down list above and press	s the GO buttor	n to enter selectio	n criteria for that rep	oort.		
In this section, the following options may be selected al	bove:					
1. Payroll Discrepancy Listing - Provides a listing by 2. Discrepancy Summary - Allows comparison of disc				ccurred in any o	ther	
quarter. <b>3. Payroll Office Reconciliation</b> - Shows each enrolle	In that has a di	agropoport and wh	ather that discrepan	ov bas boop ros	opoiled	
4. Carrier Validation - Shows each enrollee that has	a discrepancy	and if that discrep	oancy has been valida	ated.		
5. Payroll Office Enrollment Transmission - Shows 6. Carrier Enrollment Transmission - Shows the tim				Office enrollmen	t data.	
7. Enrollment Change Summary - Shows how enroll				ior quarter.		-
8. Carrier Gain/Loss Summary - Shows how enrollm						
<ol> <li>9. Reconciliation Reason Summary - Shows what ca for a single quarter.</li> </ol>	aused the discr	epancies that we	re uncovered during t	the reconciliation	n process	
10. Reconciliation Action Summary - Shows what ha	d to be correct	ted during the rec	onciliation process fo	r a single quarte	er.	
11. Reconciliation Summary - Shows the progress the				d in a single qua	rter.	
<ol> <li>Carrier Discrepancy Listing - Provides a listing by</li> <li>Pay Period Transmissions Payment Amounts - F</li> <li>collected for each completed pay period.</li> </ol>				e amount of pre	miums	

Figure 161: Reports Selection Page

2. Select the drop-down menu on the Reports Selection page and select **12**. Carrier Discrepancy Listing.



3. Select the **GO** button to display the 12. Carrier Discrepancy Listing page.

CLKR_	Payroll Office	Carrier	Forms	Transmission	Reports	
ports Selection			12. Carrier Discre	epancy Listing	~ [	30
12. Carrier Discrepancy Listing Enter selection criteria in the follo to display the report or send it to a function. Fields marked with " are selection entries in addition to the	spreadsheet or text required. Leaving an	file on your cor	nputer. Reports r	nay be printed by usir	ng the browser's	s print
	rter* Fail Co	unt SS From To	5N			
Payroll     Code     Code       Office ID     V     V	ror Warning ode Code					
Display: All  Unreconciled ( Order By: 1st Name 4th	Errors Warn      2nd SSNO      5th	ings () Reco	nciled () Matc	hes Not Validate		
Check box to create report withou	t totals: 🗌					

#### Figure 162: 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 272)

Year (see "Year - (Required) Field Instruction" on page 383)

Quarter (see "Quarter - (Select) Field Instruction" on page 357)

Fail Count From (see "Fail Count From - Field Instruction" on page 299)

Fail Count To (see "Fail Count To - Field Instruction" on page 299)

SSN - From (see "SSN From - Field Instruction" on page 367)

SSN - To (see "SSN To - Field Instruction" on page 368)

*Payroll Office ID* (see "*Payroll Office ID - (Select - Optional) Field Instruction*" on page 352)

*Enrollment Code* (see "*Enrollment Code - (Drop-down) Field Instruction*" on page 296)

*Error Code* (see "*Error Code - Field Instruction*" on page 297)

*Warning Code* (see "*Warning Code - Field Instruction*" on page 380)



*Display* (see "*Carrier - (Required) Field Instruction*" on page 269)

Order By: 1st (see "Order By 1st - (Carrier ID) Field Instruction" on page 316)

Order By: 2nd (see "Order By 2nd - (Carrier ID) Field Instruction" on page 322)

*Order By: 3rd* (see "*Order By: 3rd Carrier Discrepancy Field Instructions*" on page 329)

Order By: 4th (see "Order By 4th - (Carrier) Field Instruction" on page 333)

Order By: 5th (see "Name (System Generated) Carrier Field Instructions" on page 312)

Order By: 6th (see "Order By 6th - (Carrier) Field Instruction" on page 343)

Check Box to Create Report Without Totals (see "Check Box to Create Report Without Totals - Field Instruction" on page 275)

- 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.

### OR

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

Carrie	*Controlled Unclassified Information* Carrier Discrepancy Listing Carrier Id = GEHA100 and Year = 2021 and Quarter = 1 and SSNO from = 000000000 and SSNO to = 111111111 and Payroll Office = 24900002 and Enrollment Code = 311				
Carrier			Payroll Office		
SSN	Name	Code Eff. Date Payroll Id	Name	Employee/ Code Eff. Date Payroll Id Amount Discrepancy F Annuitant Ind	Fail Count
				· · · · · · · · · · · · · · · · · · ·	
			and the second second		

#### Figure 163: Carrier Discrepancy Listing (Report 12)

The following fields are displayed on the Carrier Discrepancy Listing page:

*Carrier* (see "*Carrier - (Carrier Enrollment Codes Search Results) Field Description*" on page 269)

Payroll Office (see "Payroll Office ID - Field Description" on page 352)



SSN (see "SSN - Field Description" on page 366)

Name (see "Name - Carrier Field Description" on page 313)

Code (see "Code - Carrier Enrollment Code Field Description" on page 278)

*Eff. Date* (see "*Eff. Date - (Carrier) Field Description*" on page 290)

*Payroll ID* (see "*Payroll Office ID* - *Field Description*" on page 352)

Name (see "Name - Carrier Field Description" on page 313)

Employee/Annuitant_Ind (see "Employee/Annuitant Indicator - Field Description" on page 292)

Code (see "Code - Carrier Enrollment Code Field Description" on page 278)

Eff. Date (see "Eff. Date - (Carrier) Field Description" on page 290)

Amount (see "Activating or Inactivating a Carrier Contact Record" on page 98)

*Discrepancy* (see "*Discrepancy - (Carrier Enrollees View) Field Description*" on page 283)

Fail Count (see "Fail Count - Field Description" on page 298)

*Errors* (see "*Errors - Field Description*" on page 297)

*Warnings* (see "*Warnings - Field Description*" on page 381)

Total Records (see "Total Records - (Records) Field Description" on page 376)

7. To return to the Carrier Discrepancy Listing page, close the report.

## Viewing Pay Period Transmissions Payment Amounts (Report 13)

This topic has been updated to add the Employee/Annuitant_Ind field description and screen captures have been updated to reflect updates.

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 payment amounts 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.

		1				-
orts Selection			1. Payroll Discre	epancy Listing		<u>ס</u>
elect a report from the drop dow	wn list above and pres	s the GO buttor	to enter selectio	n criteria for that rep	ort.	
this section, the following opti	ons may be selected a	above:				
					curred in any oth	her
2. Discrepancy Summary - All Jarter.	lows comparison of dis	crepancies occ	irring in one quart	er with those that oc		
2. Discrepancy Summary - All Jarter. 3. Payroll Office Reconciliation	lows comparison of dis n - Shows each enroll	screpancies occi	irring in one quart screpancy and wh	er with those that oc	cy has been reco	
2. Discrepancy Summary - All Jarter. 3. Payroll Office Reconciliation 4. Carrier Validation - Shows	lows comparison of dis n - Shows each enrolle each enrollee that has	crepancies occ ee that has a di a discrepancy	irring in one quart screpancy and wh and if that discrep	er with those that oc ether that discrepan eancy has been valida	cy has been reco ited.	nciled.
2. Discrepancy Summary - All Jarter. 3. Payroll Office Reconciliation 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transmi	lows comparison of dis n - Shows each enroll each enrollee that has ransmission - Shows ission - Shows the tin	ee that has a di a discrepancy the timeliness of meliness of the t	irring in one quart screpancy and wh and if that discrep if the transmissior ransmission of qua	er with those that oc nether that discrepand ancy has been valida n of quarterly Payroll ( arterly Carrier data.	cy has been reco Ited. Office enrollment	nciled.
2. Discrepancy Summary - Al Jarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment Ti 6. Carrier Enrollment Transmi 7. Enrollment Change Summa	lows comparison of dis <b>n</b> - Shows each enroll each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows the tin <b>ary</b> - Shows how enrol	ee that has a di a discrepancy the timeliness of neliness of the t llment changes	irring in one quart screpancy and wh and if that discrep of the transmission ransmission of qua occur between on	er with those that oc bether that discrepance ancy has been valida of quarterly Payroll ( arterly Carrier data. e quarter and any prio	cy has been reco ited. Office enrollment or quarter.	nciled.
2. Discrepancy Summary - Al Jarter. 3. Payroll Office Reconciliation 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transmi 7. Enrollment Change Summar 8. Carrier Gain/Loss Summar	lows comparison of dis <b>n</b> - Shows each enroll- each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows the tin <b>iry</b> - Shows how enrolln <b>y</b> - Shows how enrolln	ee that has a di s a discrepancy the timeliness of meliness of the t llment changes of	irring in one quart screpancy and wh and if that discrep if the transmission ransmission of qua sccur between one scur between one	er with those that oc mether that discrepand ancy has been valida of quarterly Payroll ( arterly Carrier data. e quarter and any prior quarter and any prior	cy has been reco ited. Office enrollment or quarter.	nciled. data.
2. Discrepancy Summary - Al Jarter. 3. Payroll Office Reconciliatio 4. Carrier Validation - Shows 5. Payroll Office Enrollment Ti 6. Carrier Enrollment Transmi 7. Enrollment Change Summar 8. Carrier Gain/Loss Summar 9. Reconciliation Reason Sum or a single quarter.	lows comparison of dis <b>n</b> - Shows each enroll each enrollee that has <b>ransmission</b> - Shows <b>ission</b> - Shows the tin <b>iry</b> - Shows how enroll <b>mary</b> - Shows how enroll <b>mary</b> - Shows what c	crepancies occi ee that has a di a discrepancy the timeliness of meliness of the t llment changes of caused the discr	irring in one quart screpancy and wh and if that discrep if the transmission ransmission of qua sccur between one epancies that we	er with those that oc- bether that discrepan- bancy has been valida of quarterly Payroll ( arterly Carrier data, e quarter and any prior re uncovered during t	cy has been reco lted. Office enrollment or quarter. duarter. he reconciliation	data.
3. Payroll Office Reconciliation 4. Carrier Validation - Shows - 5. Payroll Office Enrollment T 6. Carrier Enrollment Transmi 7. Enrollment Change Summa 8. Carrier Gain/Loss Summar 9. Reconciliation Reason Sum or a single quarter. 10. Reconciliation Action Summ	lows comparison of dis n - Shows each enrolle each enrollee that has ransmission - Shows ission - Shows the tin rry - Shows how enrolly y - Shows how enroll mary - Shows what on mary - Shows what on mary - Shows what him	crepancies occi ee that has a di s a discrepancy the timeliness neliness of the t liment changes ment changes of caused the discr ad to be correct	irring in one quart screpancy and wh and if that discrep if the transmission ransmission of qua occur between one cour between one epancies that were ed during the reco	er with those that oc- bether that discrepan- nancy has been valida of quarterly Payroll ( arterly Carrier data. e quarter and any prio quarter and any prio re uncovered during ti onciliation process for	cy has been reco ted. Office enrollment or quarter. quarter. he reconciliation a single quarter.	data. process
2. Discrepancy Summary - Al uarter. 3. Payroll Office Reconciliation 4. Carrier Validation - Shows 5. Payroll Office Enrollment T 6. Carrier Enrollment Transmi 7. Enrollment Change Summar 8. Carrier Gain/Loss Summar	lows comparison of dis n - Shows each enroll each enrollee that has ransmission - Shows the tin iny - Shows how enroll mary - Shows how enroll mary - Shows what c mary - Shows what his Shows the progress t	crepancies occi ee that has a di s a discrepancy the timeliness of neliness of the t llment changes nent changes or caused the discr ad to be correct nat has been ma	irring in one quart screpancy and wh and if that discrep if the transmission f the transmission of qua- sccur between one ccur between one ccur between one epancies that were de during the rect de to reconcile th	er with those that oc- bether that discrepan- ancy has been valida of quarterly Payroll arterly Carrier data. e quarter and any prior quarter and any prior te uncovered during to ponciliation process for e discrepancies four	cy has been reco ted. Office enrollment or quarter. quarter. he reconciliation a single quarter.	data. process

Figure 164: 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.

Solution	eports Selection			13. Pay Period Tr	ansmissions Payment Ar	mounts 🗸 🖸 GO	
Enter selection criteria in the following fields, select the output option from the box at the bottom left and click the SUBMIT button to display the report or send it to a spreadsheet or text file on your computer. Reports may be printed by using the browser's print function. Fields marked with * are required. Payroll Office ID* Carrier To: Cycle* Code To: Cycle* Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code Code C						1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1	?
Payroll Office 1D* Carrier TD* From: V V V To: V V V Order By: 1st Carrier 4th Sth V O Display Total Payment Amounts Display Payment Amounts for Enrollees	Enter selection criteria in the following	fields, select the output op	tion from the box at	the bottom left and	click the SUBMIT buttor	to display the repo	ort or send
Office ID* Carrier Date* Code From: V V V V To: V V V Order By: 1st Carrier 2nd 3rd V 4th Sth V Oisplay Total Payment Amounts Oisplay Payment Amounts for Enrollees		omputer. Reports may be p	printed by using the	browser's print funct	tion. Fields marked with	n * are required.	
To:     V     V       Order By:     1st     Carrier     2nd       4th     Sth     V       © Display Total Payment Amounts       O Display Payment Amounts for Enrollees	Office ID* Carrier				ent		
Order By:     1st     Carrier     2nd     3rd       4th     5th     Image: Constraint of the state of the s	, <u> </u>			× ×			
4th     5th       O Display Total Payment Amounts       Display Payment Amounts for Enrollees							
Display Total Payment Amounts     Display Payment Amounts for Enrollees			=	~			
O Display Payment Amounts for Enrollees	4th 🗸 🗸	5th	<u>~</u>				
O Display Payment Amounts for Enrollees	Display Total Payment Amounts						
Display the report SUBMIT RESET	~	lees					
Display the report V SUBMIT RESET							
	Display the report	SUBMIT RESET					

Figure 165: 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 - (Required) Field Instruction" on page 352)

Carrier ID (see "Carrier ID - (Select - Required) Field Instruction" on page 272)



As of Date From (see "As of Date From - (Required) Field Instruction" on page 268)

As of Date To (see "As of Date To - (Required) Field Instruction" on page 268)

Pay Cycle (see "Pay Cycle - (Optional) Field Instruction" on page 350)

*Enrollment Code* (see "*Enrollment Code - (Drop-down) Field Instruction*" on page 296)

Order By 1st (see "Order By 1st - (Report 13) Field Instruction" on page 317)

Order By 2nd (see "Order By 2nd - (Report 13) Field Instruction" on page 322)

Order By 3rd (see "Order By 3rd - (Report 13) Field Instruction" on page 329)

Order By 4th (see "Order By 4th - (Report 13) Field Instruction" on page 334)

Order By 5th (see "Order By 5th - (Report 13) Field Instruction" on page 340)

5. Select one of the following radio buttons:

Display Total Payment Amounts (see "Display Total Payment Amounts - (Report 13) Field Instruction" on page 289)

### OR

Display Payment Amounts for Enrollees (see "Display Total Payment Amounts - (Report 13) Field Instruction" on page 289)

- 6. 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.
- 7. Select the **Submit** button to display the Pay Period Transmissions Payment Amounts report in the selected format.



### OR

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

Enrollee Enrollee Carrier Enrollment As of Amount Employee/ Transmi ddle Name SSN Carrier Code Date Paid Annuitant_Ind Type
B X0000000X GEHA 316 3/1/2021 \$1,167.70 R P
B X0000000X GEHA 316 3/1/2021 \$1,167.70 R P

#### Figure 166: Pay Period Transmissions Enrollee Payment Amounts (Report 13)

The following fields are displayed on the Report 13 - Pay Period Transmissions Enrollee Payment Amounts page:

*Enrollee Last Name* (see "*Enrollee Last Name (System Generated) Field Description*" on page 294)

*Enrollee First Name* (see "*Enrollee First Name (System Generated) Field Description*" on page 293)

*Enrollee Middle Name* (see "*Enrollee Middle Name (System Generated) Field Description*" on page 294)

*Enrollee SSN Carrier* (see "*Enrollee SSN - Field Description*" on page 294)

Enrollment Code (see "Enrollment Code - Field Description" on page 296)

As of Date (see "As of Date - Carrier Transmissions Field Description" on page 267)

Amount Paid (see "Adding a Carrier Plan Contact Record" on page 82)

Employee/Annuitant_Ind (see "Employee/Annuitant Indicator - Field Description" on page 292)

*Transmission Type* (see "*Transmission Type - (Required) Field Instruction*" on page 377)

8. To return to the 13. Pay Period Transmissions Payment Amount page, close the report.



# **CLER Reference Tables**

This section includes the following topics:

Discrepancy Codes Table	217
Warning Codes Table	218
Carrier System Codes Table	219
Reconciliation Reason Codes Table	221
Reconciliation Action Codes Table	224
Carrier Corrective Action Response Codes Table	225
State, U.S. Territory, and Overseas Military Abbreviations Table	226
Country Codes Table	229

# 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
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.



Code	Description	Explanation
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.
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.
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.

# **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 $\mathbf{R}$ (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 <b>R</b> (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.



Code	Description	Explanation
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 <b>R</b> (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 <b>R</b> (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 <b>R</b> (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 <b>I</b> or <b>space</b> (for Initial transmission) when the transmission is resubmitted.
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 <b>I</b> or <b>space</b> (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 <b>I</b> or <b>space</b> (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.



Code	Description	Explanation
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 $\mathbf{R}$ (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.
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.





Code	Description	Explanation
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.
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.



Code	Description	Explanation
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.
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.



Code	Description	Explanation
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.



Code	Description	Explanation
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.



Code	Description	Explanation
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
АР	Armed Forces Pacific
AR	Arkansas
AS	American Samoa
AZ	Arizona
CA	California
со	Colorado
СТ	Connecticut
DC	District of Columbia



Abbreviation	Description
DE	Delaware
FL	Florida
FM	Federated States of Micronesia
GA	Georgia
GU	Guam
н	Hawaii
IA	Iowa
ID	Idaho
IL	Illinois
IN	Indiana
KS	Kansas
КҮ	Kentucky
LA	Louisiana
МА	Massachusetts
MD	Maryland
ME	Maine
МН	Marshall Islands
МІ	Michigan
MN	Minnesota
МО	Missouri
MP	Northern Mariana Islands
MS	Mississippi
MT	Montana
NC	North Carolina
ND	North Dakota
NE	Nebraska



Abbreviation	Description
NH	New Hampshire
NJ	New Jersey
NM	New Mexico
NV	Nevada
NY	New York
ОН	Ohio
ок	Oklahoma
OR	Oregon
РА	Pennsylvania
PR	Puerto Rico
PW	Palau
RI	Rhode Island
SC	South Carolina
SD	South Dakota
TN	Tennessee
ТХ	Texas
UT	Utah
VA	Virginia
VI	Virgin Islands
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	АМ
Aruba	AA
Ashmore and Cartier Islands	AT
Australia	AS
Austria	AU
Azerbaijan	AJ
Bahamas, The	BF
Bahrain	ВА
Baker Island	FQ
Bangladesh	BG
Barbados	BB
Bassas da India	BS
Belarus	во
Belgium	BE



Country	Code
Belize	ВН
Benin	BN
Bermuda	BD
Bhutan	вт
Bolivia	BL
Bosnia and Herzegovina	ВК
Botswana	BC
Bouvet Island	BV
Brazil	BR
British Indian Ocean Territory	IO
British Virgin Islands	VI
Brunei	вх
Bulgaria	BU
Burkina Faso	UV
Burma	ВМ
Burundi	BY
Cambodia	СВ
Cameroon	СМ
Canada	CA
Cape Verde	CV
Cayman Islands	CJ
Central African Republic	СТ
Chad	CD
Chile	CI
China	СН
Christmas Island	КТ



Country	Code
Clipperton Island	IP
Cocos (Keeling) Islands	СК
Colombia	со
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
East Timor	тт
Ecuador	EC
Egypt	EG
El Salvador	ES
Equatorial Guinea	EK
Eritrea	ER
Estonia	EN
Ethiopia	ET



Country	Code
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
Greece	GR
Greenland	GL
Grenada	GJ
Guadeloupe	GP
Guatemala	GT
Guernsey	GK
Guinea	GV
Guinea-Bissau	PU
Guyana	GY



Country	Code
Haiti	НА
Heard Island and McDonald Islands	НМ
Honduras	НО
Hong Kong	НК
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
Jarvis Island	DQ
Jersey	JE
Johnston Atoll	JQ
Jordan	JO
Juan de Nova Island	JU
Kazakhstan	кz
Kenya	КЕ
Kingman Reef	КQ
Kiribati	KR



Country	Code
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
Масаи	MC
Macedonia, The Republic of	МК
Madagascar	MA
Malawi	MI
Malaysia	MY
Maldives	MV
Mali	ML
Malta	MT
Man, Isle of IM	IM
Marshall Islands	RM
Martinique	МВ
Mauritania	MR
Mauritius	MP



Country	Code
Mayotte	ME
Mexico	MX
Micronesia, Federated States of	FM
Midway Islands	MQ
Moldova	MD
Monaco	MN
Mongolia	MG
Montserrat	МН
Могоссо	МО
Mozambique	MZ
Namibia	WA
Nauru	NR
Navassa Island	BQ
Nepal	NP
Netherlands	NL
Netherlands Antilles	NT
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



Country	Code
Pakistan	РК
Palau	PS
Palmyra Atoll	LQ
Panama	РМ
Papua New Guinea	PP
Paracel Islands	PF
Paraguay	РА
Peru	PE
Philippines	RP
Pitcairn Islands	PC
Poland	PL
Portugal	PO
Qatar	QA
Reunion	RE
Romania	RO
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	ТР
Saudi Arabia	SA



Country	Code
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
Suriname	NS
Svalbard	SV
Swaziland	WZ
Sweden	SW
Switzerland	SZ
Syria	SY
Taiwan	TW
Tajikistan	TI
Tanzania	TZ
Thailand	ТН
Тодо	то



Country	Code
Tokelau	TL
Tonga	TN
Trinidad and Tobago	TD
Tromelin Island	TE
Tunisia	TS
Turkey	TU
Turkmenistan	ТХ
Turks and Caicos Islands	тк
Tuvalu	TV
Uganda	UG
Ukraine	UP
United Arab Emirates	AE
United Kingdom	UK
United States	US
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



Country	Code
Zimbabwe	ZI



# Exhibits

This section includes the following topics:

Form SF 2809, Health Benefits Election Form	242
Form SF 2810, Notice of Change in Health Benefits Enrollment	243
Form CLERC, CLER Security Access Form, Health Benefit Carrier Personnel .	244



## Form SF 2809, Health Benefits Election Form

	Health Ber Federal Employ yees, Former Spous	vees Healti ses Under th	h Benefits Pro le Spouse Equity	gram Law, and Ind	ividuals		
Complete Parts A and G, and Parts B, C, D, E, and F as applicable. Do not separate the cop	Eligible for Temp ies. Your employing off	orary Conti ice will certify	inuation of Cove the completed form	rage and return your co	opy to you.	• Ty • Sig	pe or print firmly gn and date in Part
Part A - Fill in this part.							
. Name (last, first, middle initial)			2. Social Secu	urity Number		3. Date of birth (m	m/dd/yyyy)
. Your home mailing address (include ZIP code)			5. Sex			6. Are you now m	arried?
			Male	Female		Yes	No
			7. Daytime te	lephone number (	inciuae area co	<i>ae)</i>	
Part B - Fill in this part if you wish to enroll or cl	hange your enrolli	ment in the	Federal Emplo	oyees Health	Benefits (F)	EHB) Program	
. I elect to enroll in a health benefits plan as shown below Name of plan	. (Copy the informat	ion requested	d below from fror	it cover of broc	hure of the p	an you select.)	
Ivane of plan						code	
2a. Names of family members (last, first, middle initial)	2b.	ZIP de	2c. Date of birt (mm/dd/yyyy)		2e.Relatio ship "code		Security Number instructions)
							***
<ul> <li>Do you, your spouse or any other eligible family members have than the FEHB plan in which you are now enrolling or enrolled</li> </ul>	e any group health insur i? No	ance coverage			of policyholde	(last, first, middle i	nitial)
		(	(Including CHAMPU	JS)			
	2. Present Plan enrollment		Par 1. Ev	t D - Event ent code that mits change		2. Date of eve change (mn	
Part C - Fill in this part, as well as PART B, to ch Present Plan name	ange enrollment. 2. Present Plan		Par 1. Eve (se Per	t D - <i>Event</i> ent code that	v		
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Figure 167: Form SF 2809, Health Benefits Election Form



### Form SF 2810, Notice of Change in Health Benefits Enrollment

	ying Information +
ame (Last, first, middle initial)	
lome address (including ZIP Code)	5. Payroll office number 6. Enrollment code num
	7. SF 2811 Report number 8. Date this action becc effective
	Read that item carefully and follow any pertinent instructions. for your records.
A second	ermination
Your enrollment terminates on the date in Part A, item 8, above.	
Important Notice: You have the right to convert to an individual (n the right to temporarily continue your group coverage. See Part B about 31-day extension of coverage, conversion, and temporary c	
If termination is due to death of enrollee enter date of death	Date of death (mo, dy, yr)
Part C - Transfer In	Part D - Reinstatement
The new Payroll Office (or Retirement System) shown in Part H below has accepted transfer of this enrollment and will continue it.	Your enrollment has been reinstated effective on the date in Part A, item 8, above.
Part E - Change in Name of Enrollee	Part F - Change In Enrollment-Survivor Annuita
The name under which this enrollment is carried has been	Your enrollment has been changed from family coverage to s only. Your plan will send you a new identification card.
changed to: TheDate of Birth	Your new enrollment code number is shown below. (Note: This item is completed by Retirement Systems only.)
ress (including ZIP Code) if different from Part A, item 4, above.	Note. This term is completed by neurenient systems only.
	New Enrollment Code Number
Part G -	Remarks
n daarlaan oo daa ay ah	
Part H - Da	te of Notice
	are on the back of Copy 4 of this form.
e and address of agency (including ZIP Code)	Personnel contact and telephone number ( )
	Payroll contact and telephone number

Figure 168: Form SF 2810, Notice of Change in Health Benefits Enrollment Form



# Form CLERC, CLER Security Access Form, Health Benefit Carrier Personnel

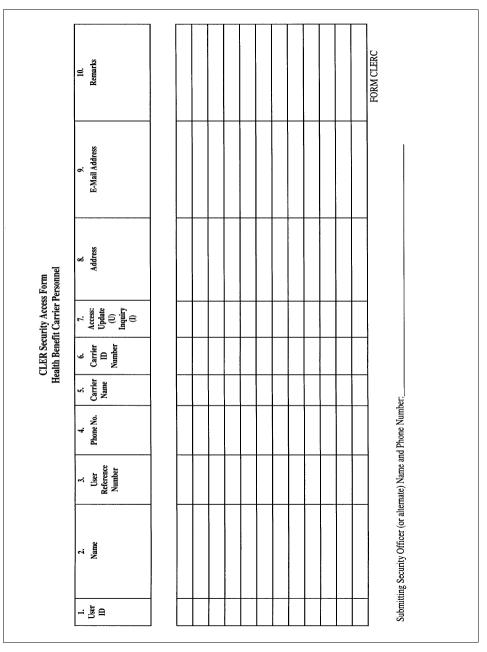


Figure 169: Form CLERC, CLER Security Access Form, Health Benefits Carrier Personnel



# **CLER Field Descriptions and Instructions**

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### # (System Generated) Field Instructions

#	System generated	
	Displays the number of discrepancies.	

# % (System Generated) Percentage of Discrepancies/Reconciliation Field Instructions

%	System generated
	Displays the percentage of discrepancies/reconciliation actions validated to total corrective actions.

### % (System Generated) Percentage of Matching Records Field Instructions

%	System generated
	Displays the percentage of matching records to enrollee records.

# % (System Generated) Percentage of Reconciled Discrepancies Field Instructions

%	System generated
	Displays the percentage of reconciled discrepancies to reported discrepancies.



### Accepted (System Generated) Field Instructions

Accepted	<i>System generated</i> 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 (System Generated) Field Instructions

Action	System generated
	Displays the reconciliation action code. For a list and descriptions of reconciliation action codes, see <i>Reconciliation Action Codes Table</i> (on page 224).

#### **Action Code Field Instructions**

Action Code	Optional
	Select the reconciliation action code from the drop-down menu. For a list and descriptions of these codes, see <b>Reconciliation</b> <b>Action Codes Table</b> (on page 224).

### Address (System Generated) Carrier Field Instructions

Address	System generated
	Displays the carrier's street or post office box address.

### Address (System Generated) Payroll Office Field Instructions

Address	System generated
	Displays the payroll office's street or post office box address.



### Address 1 (System Generated) Personnel Office Field Instructions

Address Line 1	System generated
	Displays the first line of the personnel office contact's street or post office box address.

#### **Address Line 1 Field Instructions**

Address Line 1	Optional, alphanumeric, 40 positions maximum
	Enter the first line of the carrier contact's street or post office box address.

### Address Line 1 (System Generated) Carrier Contact Field Instructions

Address Line 1	System generated
	Displays the first line of the carrier contact's street or post office box address.

#### Address Line 1 (System Generated) Carrier Field Instructions

Address Line 1	System generated
	Displays the first line of the carrier's street or post office box address.

# Address Line 1 (System Generated) Carrier Plan Contact Field Instructions

Address Line 1	System generated
	Displays the first line of the carrier plan contact's street or post office box address.



# Address Line 1 (System Generated) Payroll Office Contact Field Instructions

Address Line 1	System generated	
	Displays the first line of the payroll office contact's street or post office box address.	

### Address Line 1 (System Generated) Payroll Office Field Instructions

Address Line 1	System generated
	Displays the first line payroll office's street or post office box address.

#### **Address Line 2 Field Instructions**

Address Line 2	Optional, alphanumeric, 40 positions maximum
	Enter the second line of the carrier contact's street or post office box address.

### Address Line 2 (System Generated) Carrier Contact Field Instructions

Address Line 2	System generated
	Displays the second line of the carrier contact's street or post office box address.

### Address Line 2 (System Generated) Carrier Field Instructions

Address Line 2	System generated
	Displays the second line of the carrier's street or post office box address.



# Address Line 2 (System Generated) Carrier Plan Contact Field Instructions

Address Line 2	System generated
	Displays the second line of the carrier plan contact's street or post office box address.

# Address Line 2 (System Generated) Payroll Office Contact Field Instructions

Address Line 2	System generated
	Displays the second line of the payroll office contact's street or post office box address.

### Address Line 2 (System Generated) Payroll Office Field Instructions

Address Line 2	System generated
	Displays the second line payroll office's street or post office box address.

# Address Line 2 (System Generated) Personnel Office Contact Field Instructions

Address Line 2	System generated
	Displays the second line of the personnel office contact's street or post office box address.

#### **Address Line 3 Field Instructions**

Address Line 3	Optional, alphanumeric, 40 positions maximum
	Enter the third line of the carrier contact's street or post office box address.



### Address Line 3 (System Generated) Carrier Contact Field Instructions

Address Line 3	System generated
	Displays the third line of the carrier contact's street or post office box address.

### Address Line 3 (System Generated) Carrier Field Instructions

Address Line 3	System generated
	Displays the third line of the carrier's street or post office box address.

# Address Line 3 (System Generated) Carrier Plan Contact Field Instructions

Address Line 3	System generated
	Displays the third line of the carrier plan contact's street or post office box address.

# Address Line 3 (System Generated) Payroll Office Contact Field Instructions

Address Line 3	System generated
	Displays the third line of the payroll office contact's street or post office box address.

## Address Line 3 (System Generated) Payroll Office Field Instructions

Address Line 3	System generated
	Displays the third line payroll office's street or post office box address.



# Address Line 3 (System Generated) Personnel Office Contact Field Instructions

Address Line 3	System generated
	Displays the third line of the personnel office contact's street or post office box address.

# Affects (System Generated) Field Instructions

Affects	System generated
	The values listed below indicate the following:
	<b>Payroll Office</b> - indicates the code affects the payroll office only.
	Carrier - indicates the code affects the carrier only.
	Both - indicates the code affects the payroll office and carrier.
	<b>Not Applicable</b> - indicates the code affects neither the payroll office nor carrier.

# **Affects Carrier Field Instructions**

Affects Carrier	System generated
	Valid values are <b>Yes</b> or <b>No</b> . Indicates whether or not the code affects the carrier.

# **Affects Payroll Field Instructions**

Affects Payroll	System generated
	Valid Values are <b>Yes</b> or <b>No</b> . Indicates whether or not the code affects the payroll office.

# Agcy (System Generated) Field Instructions

Agcy	System generated
	Displays the Agency ID code. This code consists of the Department code and Agency code.



# Agency (System Generated) Field Instructions

Agency	System generated Displays the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).
	Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

# Agency (System Generated) Report Field Instructions

Agency	System generated Displays the Agency ID code. This code consists of the
	Department code and Agency code. Note: The Other ID field is displayed in lieu of this field when <b>24900002</b> , <b>24900003</b> , or <b>160099xx</b> is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.

### **Agency ID Field Instructions**

Agency	Optional, alphanumeric, 4 positions
	Enter the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

# **Amount Paid Field Description**

#### Amount Paid

System generated

Displays the payment amounts for enrollees



# **Amount - Field Description**

#### Amount

*System generated* Displays the enrollee's withholding/premium amounts received.

# **Amount (System Generated) Field Instructions**

Amount	System generated
	Displays the enrollee's withholding/premium.

# As of Date - Carrier Transmissions Field Description

As of Date System generated Displays the date the transmitted enrollment data was extracted.

# As of Date (System Generated) Field Instructions

As of Date	System generated	
	Displays the date the transmitted enrollment data was extracted.	

# As of Date* (Drop-Down) Field Instructions

As of Date*	Required
	Select the from/to pay period from the drop-down menu.

# As of Date* (Drop-Down) Req. From Field Instructions

As of Date* From	Required
	Select the from pay period from the drop-down menu.



### As of Date* (Drop-Down) Req. To Field Instructions

As of Date* To	Required
	Select the to pay period from the drop-down menu.

# 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 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.

### **Carr (System Generated) Field Instruction**

Carr	System generated
	Displays the carrier code.

### **Carrier - Field Description**

**Carrier** System generated Displays the carrier code.

# **Carrier Field Instructions**

Carrier	System generated
	Displays the carrier code.



# **Carrier - (Carrier Enrollment Codes Search Results) Field Description**

**Carrier** System generated Displays the carrier identification code.

# **Carrier - (Required) Field Instruction**

#### Carrier

*Required, alphanumeric, four positions* Enter the carrier code.

# **Carrier (Drop-Down) ID Field Instructions**

Carrier	Required
	Select the carrier ID code from the drop-down menu.

# **Carrier (Drop-Down) Organization Carrier Code Field Instructions**

Carrier	Optional default
	Select your organization's carrier code from the drop-down menu. If no code is selected, this field automatically defaults to your organization's carrier code.

# **Carrier (Optional) Field Instructions**

Carrier	Optional, alphanumeric, 7 positions
	Enter the carrier ID code.

### **Carrier (Optional) Identification Code Field Instructions**

Carrier	Optional, alphanumeric, 7 positions
	Enter the carrier ID code.



### **Carrier (System Generated) Code Field Instructions**

Carrier	Optional
	Select the carrier code from the drop-down menu.

# **Carrier (System Generated) Identification Code Field Instructions**

Carrier	System generated
	Displays the carrier ID code.

# **Carrier* (Drop-Down) Field Instructions**

Carrier*	Required
	Select the carrier code from the drop-down menu.

# **Carrier Comments - Field Description**

#### **Carrier Comments**

*System generated* Displays the carrier's comments.

# **Carrier Comments (Conditional) 724 Field Instructions**

Carrier Comments	<i>Conditional, alphanumeric, 400 positions maximum</i> Enter comments about this record.
	Note: If <b>724</b> was selected in the Corrective Action field, comments explaining the corrective action must be entered in this field.

# **Carrier Comments (Conditional) Field Instructions**

Carrier Comments	Conditional, alphanumeric, 400 positions maximum
	Enter comments about this record.



# **Carrier Comments (System Generated) Field Instructions**

Carrier Comments	System generated	
	Displays the carrier's comments.	

### **Carrier Discrepancy (System Generated) Field Instructions**

Discrepancy	System generated
	Displays the error or warning code generated by CLER. For lists and descriptions of error and warning codes, see <b>Discrepancy</b> <b>Codes Table</b> (on page 217) and <b>Warning Codes Table</b> (on page 218).

# **Carrier EFF. Date (System Generated) Field Instructions**

Eff. Date	System generated
	Displays the enrollment effective date (MM/DD/YYYY) submitted by the carrier.

# **Carrier Errors (System Generated) Field Instructions**

Carrier Errors	System generated
	Displays the count of errors that have a reconciliation reason and action entered that indicates that the carrier is at fault.

# **Carrier Fail Count (System Generated) Field Instructions**

Fail Count	System generated
	Displays the number of times the initial discrepancy has been identified and reported.

### **Carrier Field Instructions**

Carrier	Optional, alphanumeric, 4 positions
	Enter your company's carrier code. Only the carrier code for your company should be entered in this field. If the carrier code is not entered, this field defaults to your company's carrier code.



# Carrier From: (System Generated) Gain/Loss Rpt 8 Field Instruction

Carrier	System generated	
	Displays the carrier code.	

# **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 - (Carrier Identifiers Search Results) Field Description**

#### **Carrier ID**

System generated

Displays the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

### **Carrier ID (Drop-Down) Field Instructions**

Carrier Id	Required
	Select the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit from the drop-down menu.

# **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 (System Generated) Field Instructions**

Carrier ID	System generated
	Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.

# **Carrier ID Field Instructions**

Carrier ID	Required, alphanumeric, 7 positions
	Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.

### **Carrier ID* Field Instructions**

Carrier ID*	Required, default
	Select your organization's carrier ID code from the drop-down menu. If no code is selected, this field automatically defaults to your organization's carrier ID code.

# **Carrier ID* Carrier Discrepancy Field Instructions**

Carrier ID*	Optional, default
	Select your organization's carrier ID code from the drop-down menu. If no code is selected, this field automatically defaults to your organization's carrier ID code.

### **Carrier ID* Carrier Validation Field Instructions**

Carrier ID*	Required
	Select the carrier ID number from the drop-down menu.

### **Carrier Name (System Generated) Field Instructions**

Name	System generated
	Displays the enrollee's name submitted by the carrier.



# Carrier To: (System Generated) Sys. Gen. Gain/Loss Rpt 8 Field Instruction

To: Quarter/Year	System generated
Carrier	Displays the carrier code.

# **Carrier-Total Field Instructions**

Carrier-Total	System generated Displays the sum of records by carrier.
	Note: If the check box used to omit totals from a report is selected, this field is not displayed.

# Change (#) (System Generated) Field Instructions

Change (#)	System generated
	Displays the change in the number of enrollment code changes from the prior quarter to the current quarter.

# Change (%) (System Generated) Field Instructions

Change (%)	System generated
	Displays the change in percent of enrollment code changes from the prior quarter to the current quarter.

### **Change Actual (System Generated) Field Instructions**

Change Actual	System generated	
	Displays the number that indicates the actual changes in values between prior and current reconciliation years/quarters.	



# **Change Password Field Instructions**

Change Password	To change the password, click 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 click <b>Submit</b> .
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# Change Percentage (System Generated) Field Instructions

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.

### **Check Box to Create Report Without Totals Field Instructions**

Check box to create report without totals	Optional
	Select this check box to omit totals from the report.

# **City (System Generated) Carrier Contact Field Instructions**

City	<i>System generated</i> Displays the name of the carrier contact's city.
	Note: If the address is an overseas military address, this field displays <b>FPO</b> for fleet post office or <b>APO</b> for army post office in lieu of the city.



# **City (System Generated) Carrier Field Instructions**

City	<i>System generated</i> Displays the name of the carrier's city.
	Note: If the address is an overseas military address, this field displays <b>FPO</b> for fleet post office or <b>APO</b> for army post office in lieu of the city.

# **City (System Generated) Carrier Plan Field Instructions**

City	<i>System generated</i> Displays the name of the carrier plan contact's city.
	Note: If the address is an overseas military address, this field displays <b>FPO</b> for fleet post office or <b>APO</b> for army post office in lieu of the city.

# **City (System Generated) Payroll Office Contact Field Instructions**

City	<i>System generated</i> Displays the name of the payroll office contact's city.
	Note: If the address is an overseas military address, this field displays <b>FPO</b> for fleet post office or <b>APO</b> for army post office in lieu of the city.

# **City (System Generated) Payroll Office Field Instructions**

City	<i>System generated</i> Displays the name of the payroll office's city.
	Note: If the address is an overseas military address, this field displays <b>FPO</b> for fleet post office or <b>APO</b> for army post office in lieu of the city.



# **City (System Generated) Personnel Office Contact Field Instructions**

City	<i>System generated</i> Displays the name of the personnel office contact's city.
	Note: If the address is an overseas military address, this field displays <b>FPO</b> for fleet post office or <b>APO</b> for army post office in lieu of the city.

# **City Carrier Contact Fields Instructions**

City	Optional, alphanumeric, 25 positions maximum
	Enter the name of the carrier contact's city.

# **City Carrier Field Instructions**

City	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier's city.
	Note: If the address is an overseas military address, type <b>FPO</b> for fleet post office or <b>APO</b> for army post office in lieu of the city.

# **City Carrier Plan Contact Field Instructions**

City	Optional, alphanumeric, 25 positions maximum	
	Enter the name of the carrier plan contact's city.	

### **City Payroll Office Field Instructions**

City	Optional, alphanumeric, 25 positions maximum
	Enter the name of the payroll office's city.



# **Code - Carrier Enrollment Code Field Description**

#### Code

System generated

Displays the enrollment code submitted by the carrier.

# Code (System Generated) Submitted by Carrier Field Instructions

Code	System generated
	Displays the enrollment code submitted by the carrier.

# Code (System Generated) Enrollment Code Field Instructions

Code	System generated
	Displays the enrollment code.

# Code (System Generated) Submitted by Payroll Office/Carrier Field Instructions

Code	System generated
	Displays the enrollment code submitted by the payroll office/carrier.

### Code (System Generated) Code Number Field Instructions

Code	System generated
	Displays the code number. For lists and descriptions of valid codes, see <i>CLER Reference Tables</i> (on page 217).



# Code (System Generated) Transmissions Processing Code Field Instructions

Code	System generated
	Displays the transmission processing code. The code <b>I</b> (Initial) or <b>blank</b> indicates an initial file, code <b>A</b> (Add) indicates an additional file, and code <b>R</b> (Replace) indicates replace all previous files.

### Code From: (System Generated) Gain/Loss Rpt. 8 Field Instruction

From: Quarter/Year Code	System generated	
	Displays the enrollment code.	

### Code To: (System Generated) Gain/Loss Rpt. 8 Field Instruction

To: Quarter/Year Code	System generated	
	Displays the enrollment code.	

# **Code-Total (System Generated) Field Instructions**

Code-Total	System generated Displays the sum of records by enrollment code.
	Note: If the check box used to omit totals from a report is selected, this field is not displayed.

# **Confirmed Errors (System Generated) Field Instructions**

Confirmed Errors	System generated
	Displays the count of errors that have a reconciliation reason and action entered that indicate that the carrier is at fault and that the carrier accepts.



### **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 Corre* 

To view a detailed explanation of the carrier's corrective action response, see *Carrier Corrective Action Response Codes Table* (on page 225).

### **Corrective Action (System Generated) Carrier Validation Field** Instructions

Corrective Action	System generated
	Displays the code that identifies the carrier's response to the validation action code displayed in the Validation Action field.

# **Corrective Action (System Generated) Field Instructions**

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. Select <b>Explain</b> to view a detailed explanation of the reconciliation reason code or see <i>Carrier Corrective Action Response Codes Table</i> (on page 225).

# **Corrective Action* Field Instructions**

Corrective Action*	System generated
	Click from the drop-down menu and select. 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. Select <b>Explain</b> to view a detailed explanation of the reconciliation reason code or see <i>Carrier Corrective Action Response Codes Table</i> (on page 225).



# **Cut Off Date (System Generated) Field Instructions**

Cut Off Date	System generated
	Displays the date that CLER accepts no quarterly enrollment data from carriers or payroll offices.

# Date Due (System Generated) Field Instructions

Date Due	System generated
	Displays the transmission due date (MMDDYYYY) for the reconciliation quarter.

# Date Processed - (Record Processed) Field Description

#### **Date Processed**

*System generated* Displays the date the record was processed.

### **Date Processed (System Generated) Field Instructions**

Date Processed	System generated
	Displays the date the record was processed.

# **Date Processed (System Generated) Transmissions Field Instructions**

Date Processed	System generated	
	Displays the current system date when the process was run.	

### **Deceased Annuitant SSN - Field Description**

#### Deceased Annuitant SSN

*System generated* Displays the deceased annuitant enrollee's SSN.



# **Deceased Annuitant SSN (System Generated) Field Instructions**

Deceased Annuitant SSN	System generated	
	Displays the deceased annuitant enrollee's SSN.	

# **Description (System Generated) Enrollment Field Instructions**

Description	System generated
	Displays the descriptive text that corresponds the enrollment record.

# **Description (System Generated) Field Instructions**

Description	System generated
	Displays the descriptive text that corresponds to the code.

# **Discrepancies (System Generated) 163 Search Field Instructions**

Discrepancies	<i>System generated</i> Displays Discrepancy Code 163. For a detailed explanation of Discrepancy Code 163, see <i>Discrepancy Codes Table</i> (on page 217).
	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 have been addressed by Agencies. Green check marks are displayed next to discrepancies that have been addressed by carriers. To display the most current check marks, select <b>Refresh</b> at the top of the Payroll Office Enrollees Search Results page.



# **Discrepancies (System Generated) Search Field Instructions**

Discrepancies	<i>System generated</i> Displays an error or warning. For lists and descriptions of error and warning codes, see <i>Discrepancy Codes Table</i> (on page 217) and <i>Warning Codes Table</i> (on page 218).
	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 have been addressed by Agencies. Green check marks are displayed next to discrepancies that have been addressed by carriers. To display the most current check marks, select <b>Refresh</b> at the top of the Carrier Enrollees Search Results page.

### **Discrepancy - Field Description**

#### Discrepancy

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 217) and *Warning Codes Table* (on page 218). If the code is **165** or **167** is displayed in the discrepancy field, select **Duplicate** to display the duplicate payroll office enrollee record for this enrollee record.

### **Discrepancy - (Carrier Enrollees View) Field Description**

#### Discrepancy

System generated

Displays Discrepancy Code 160.

A short description is displayed next to the code. For a detailed explanation of the discrepancy code, see *Discrepancy Codes Table* (on page 217).

# Discrepancy - (Explain/Duplicate - Code 165 or 167) 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 217). If Discrepancy Code 165 or 167 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 (System Generated) 163 View Field Instructions**

Discrepancy	System generated
	Displays Discrepancy Code 163. A short description is displayed next to the code. To view a detailed explanation of this code, click <b>Explain</b> or see <i>Discrepancy Codes Table</i> (on page 217).

# **Discrepancy (System Generated) Discrepancy Listing Field Instructions**

Discrepancy	System generated
	Displays the error or warning code generated by CLER. For lists and descriptions of error and warning codes, see <i>Discrepancy</i> <i>Codes Table</i> (on page 217) and <i>Warning Codes Table</i> (on page 218).

### **Discrepancy (System Generated) View Field Instructions**

Discrepancy	System generated
	Displays an error or warning. A short description is displayed next to the code. For a detailed explanation of the discrepancy code, click <b>Explain</b> or see <b>Discrepancy Codes Table</b> (on page 217). If Discrepancy Code 166 is displayed in the Discrepancy field, the <b>Duplicate</b> button is also displayed. Click <b>Duplicate</b> to display the duplicate carrier enrollee record for this enrollee record.

### **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 - (Carrier ID) 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 ID and type code entered. *Active* - Displays active contacts for the carrier ID and type code entered. *Inactive* - Displays inactive contacts for the carrier ID and type code entered.

# **Display - (System Codes) Field Instruction**

#### Display

Optional, default
Defaults to All display.
This field 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 values:
All - Displays all codes.
Discrepancy - Displays all discrepancy codes.
Warning - Displays all warning codes.
Reconciliation Reason - Displays all reconciliation reason codes.
Reconciliation Action - Displays all reconciliation action codes.
Corrective Action - Displays all corrective action response codes.
System - Displays all system codes.



# **Display Carrier Enrollees Field Instructions**

Display	Optional, default
	Defaults to <b>All</b> display. This field 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 values:
	All Records - Displays all records related to the search criteria.
	<b>Matches</b> - Displays all matched records related to the search criteria.
	<b>No Matches</b> - Displays all unmatched records related to the search criteria.
	<b>Discrepancies</b> - Displays all records with discrepancies related to the search criteria.
	<b>Warnings</b> - Displays all records with warnings related to the search criteria.
	<b>Unreconciled</b> - Displays all records with unreconciled discrepancies related to the search criteria.
	<b>Reconciled</b> - Displays all records with reconciled discrepancies related to the search criteria.
	<b>Confirmed</b> - 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.
	<b>Disputed</b> - 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.
	<b>Not Validated</b> - Displays all records that have not been validated.



# **Display Field Instructions**

Display	Optional, default
	Defaults to <b>A11</b> 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 values:
	<b>All</b> - Displays all contacts for the payroll office ID and type code entered.
	<b>Active</b> - Displays active contacts for the payroll office ID and type code entered.
	<b>Inactive</b> - Displays inactive contacts for the payroll office ID and type code entered.

# **Display Payroll Discrepancy Listing Field Instructions**

Display	Optional, default
	Allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the <b>All</b> option. To choose a display option, select the radio button next to one of the following values:
	All - Displays all records related to the search criteria.
	<b>Unreconciled</b> - Displays all records with unreconciled discrepancies related to the search criteria.
	<b>Errors</b> - Displays all records with errors related to the search criteria.
	<b>Warnings</b> - Displays all records with warnings related to the search criteria.
	<b>Reconciled</b> - Displays all records with reconciled discrepancies related to the search criteria.
	<b>Matches</b> - Displays all records with matches related to the search criteria.
	<b>Not Validated</b> - Displays records related to the search criteria that have not been validated.



# **Display Payroll Office Enrollees Field Instructions**

h	
Display (Payroll Office Enrollees)	Optional, default
	Defaults to <b>All</b> display. This field 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 values:
	<b>All Records</b> - Displays all records related to the search criteria.
	<b>Matches</b> - Displays all matched records related to the search criteria.
	<b>No Matches</b> - Displays records with no matches related to the search criteria. No Matches are discrepancies where the carrier record is not found.
	<b>Discrepancies</b> - Displays all records with discrepancies related to the search criteria.
	<b>Warnings</b> - Displays all records with warnings related to the search criteria.
	<b>Unreconciled</b> - 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.
	<b>Reconciled</b> - Displays all records with reconciled discrepancies related to the search criteria.
	<b>Confirmed</b> - 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.
	<b>Disputed</b> - 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.
	<b>Not Validated</b> - 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 System Codes Field Instructions**

Display	Optional, default
	Defaults to <b>All</b> display. This field 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 values:
	All - Displays all codes.
	Discrepancy - Displays all discrepancy codes.
	Warning - Displays all warning codes.
	<b>Reconciliation Reason</b> - Displays all reconciliation reason codes.
	<b>Reconciliation Action</b> - Displays all reconciliation action codes.
	<b>Corrective Action</b> - Displays all corrective action response codes.
	System - Displays all system codes.

# **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*.

### **Display Total Payment Amounts Field Instructions**

Display Total Payment Amounts	Optional, default
Amounts	Defaults to the <b>Display Total Payment Amounts</b> menu option, which displays the total payment amounts. To display the payment amounts for enrollees, select the radio button next to the menu option <b>Display Payment Amounts for Enrollees</b> .



### **Disputed Errors (System-Generated) Field Instructions**

Disputed Errors	System generated
	Displays the count of errors that have a reconciliation reason and action entered that indicate that the carrier is at fault and that the carrier disputes.

# Eff. Date - (Carrier) Field Description

#### Eff. Date

*System generated* Displays the enrollment effective date (MMDDYYYY) submitted by the carrier.

### Eff. Date (System Generated) Report Field Instructions

Eff. Date	System generated
	Displays the effective date (MM/DD/YYYY) submitted by the payroll office/carrier.

### **Effective Date (System Generated) Field Instructions**

Effective Date	System generated
	Displays the effective date of the enrollment.

### **Email (Optional) Carrier Contact Field Instructions**

Email	Optional, alphanumeric, 60 positions
	Enter the carrier contact's email address.

### **Email (System Generated) Carrier Contact Field Instruction**

Email	System generated
	Displays the carrier contact's email address.



# **Email (System Generated) Carrier Plan Contact Field Instruction**

Email	System generated	
	Displays the carrier plan contact's email address.	

### Email (System Generated) Payroll Office Field Instructions

Email	System generated
	Displays the payroll office contact's email address.

# **Email (System Generated) Personnel Office Field Instructions**

Email	System generated
	Displays the personnel office contact's email address.

# **Email Address Carrier Contact Field Instructions**

Email Address	Optional, alphanumeric, 60 positions
	Enter the carrier contact's email address.

### **Email Address Carrier Plan Contact Field Instructions**

Email Address	Optional, alphanumeric, 60 positions
	Enter the carrier plan contact's email address.

### **Email Address (System Generated) Carrier Contact Field Instructions**

Email Address	System generated
	Displays the carrier contact's email address.



### Email Address (System Generated) Carrier Plan Contact Field Instructions

Email Address	System generated
	Displays the carrier plan contact's email address.

### Email Address (System Generated) Personnel Office Contact Field Instructions

Email Address	System generated
	Displays the personnel office contact's email address.

# **Email Date (System Generated) Transmissions Field Instructions**

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/Email Address (System Generated) Personnel Office Field Instructions

Email/Email Address	System generated
	Displays the personnel office contact's email address.

### **Email Time (System Generated) Transmissions Field Instructions**

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. Valid values are:

- Interim
- Regular
- Suspend

# End Date (System Generated) Carrier Enrollment Code Field Instructions

End Date	System generated
	Displays the the last date the carrier enrollment code will be valid.

# End Date (System Generated) Carrier Field Instructions

End Date	System generated
	Displays the last date (MMDDYYYY) the carrier plan will be valid. If the date is not known, <b>12/31/9999</b> is displayed.

### End Date (System Generated) Field Instructions

End Date	System generated
	Displays the last date the payroll office will be valid.

# **Enrollee (System Generated) Field Instructions**

Enrollee	System generated
	Displays the enrollee's name.

### Enrollee First Name (System Generated) Field Description

#### Enrollee First Name

System generated

Displays the enrollee's last name.



# **Enrollee Last Name (System Generated) Field Description**

#### Enrollee Last Name

System generated Displays the enrollee's last name.

# Enrollee Middle Name (System Generated) Field Description

Enrollee Middle Name System generated Displays the enrollee's last name.

### **Enrollee SSN - Field Description**

**Enrollee SSN** System generated Displays the SSN or pseudo SSN of the enrollee.

### **Enrollee SSN - Field Description**

**Enrollee SSN** System generated Displays the SSN or pseudo SSN of the enrollee.

### **Enrollee SSN (System Generated) Field Instructions**

Enrollee SSN	System generated
	Displays the enrollee's SSN.

### Enrollees (Left/Drop) (System Generated) Field Instructions

Enrollees (Left/Drop)	System generated
	Displays the number of dropped enrollees.



# Enrollees (New/Add (System Generated) Field Instructions

Enrollees (New/Add)	System generated
	Displays the number of new or added enrollees.

# Enrollees (System Generated) Reconciliation Summary Field Instructions

Enrollees	System generated
	Displays the number of enrollee records that meet the criteria entered on the Reconciliation Summary page.

### **Enrollment Changes % (System Generated) Added Field Instructions**

Enrollment Changes	System generated
	Displays the percent of enrollment changes that were added.

### **Enrollment Changes % (System Generated) Dropped Field Instructions**

Enrollment Changes	System generated	
%	Displays percent of enrollment changes that were dropped.	

### **Enrollment Changes Added (System Generated) Field Instructions**

Enrollment Changes Added	System generated
Added	Displays the number of enrollment changes that were added.

### **Enrollment Changes Dropped (System Generated) Field Instructions**

Enrollment Changes Dropped	System generated
	Displays the number of enrollment changes that were dropped.



# **Enrollment Code Field Instructions**

Enrollment Code	Optional, alphanumeric, 3 positions	
	Enter the enrollment/carrier enrollment code.	

# **Enrollment Code - Field Description**

**Enrollment Code** *System generated* Displays the enrollment code/carrier enrollment code.

# Enrollment Code - (Drop-down) Field Instruction

**Enrollment Code** *Optional* Select the drop-down menu and select the enrollment code.

# **Enrollment Code (Drop-Down) Field Instructions**

Enrollment Code	Optional
	Select the enrollment code from the drop-down list.

### **Enrollment Code (System Generated) Field Instructions**

Enrollment Code	System generated	
	Displays the enrollment code/carrier enrollment code.	

### Error Code (Drop-Down) Field Instructions

Error Code	Optional
	Select the applicable error code from the drop-down menu. For a list and descriptions of error codes, see <i>Discrepancy Codes Table</i> (on page 217).



### **Error Codes Field Instructions**

Error Code	Optional
	Click the arrows to locate the applicable error code from the list of error codes and select this code. For a list and descriptions of error codes, see <i>Discrepancy Codes Table</i> (on page 217).

### **Error Code - Field Instruction**

#### **Error Code**

Optional

Select the arrows to locate the applicable error code on the list and select the code. For a list and descriptions of error codes, see *Discrepancy Codes Table* (on page 217).

### **Error Code - Field Instruction**

#### **Error Code**

Optional

Select the applicable error code from the list. For a list and descriptions of error codes, see *Discrepancy Codes Table* (on page 217).

### **Error Threshold (System Generated) Field Instructions**

Error Threshold	System generated
	Displays the number of percentage of errors permitted for the payroll office/carrier 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 (System Generated) Field Instructions

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 (System Generated) Field Instructions**

Errors Reconciled	System generated
	Displays the count of errors that have a reconciliation reason and action entered.

# **Explanation (System Generated) Field Instructions**

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 (System Generated) Field Instructions

Fail Count	System generated
	Displays the number of times this record has failed the quarterly edit process.

# Fail Count Discrepancy and Reconciliation Reports Field Instructions

Fail Count	System generated
	Displays the number of times the initial discrepancy has been identified and reported.



### 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 From Field Instructions**

Fail Count From	Optional, numeric, 3 positions maximum.
	Enter a specific fail count number to search for enrollee records by a specific fail count number, then proceed to the To field.
	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.

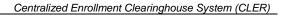
# Fail Count To - Field Instruction

#### 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.





# **Fail Count To Field Instructions**

Fail Count To	Optional, numeric, 3 positions maximum
	Entered 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

# **Fax Number Carrier Contact Field Instructions**

Fax Number	Optional, alphanumeric, 25 positions
	Enter the carrier contact's fax number.

# **Fax Number Carrier Plan Contact Field Instructions**

Fax Number	Optional, alphanumeric, 25 positions
	Enter the carrier plan contact's fax number.

# Fax Number (System Generated) Carrier Contact Field Instructions

Fax Number	System generated
	Displays the carrier contact's fax number.

# Fax Number (System Generated) Carrier Plan Contact Field Instructions

Fax Number	System generated
	Displays the carrier plan contact's fax number.



# Fax Number (System Generated) Payroll Office Contact Field Instructions

Fax Number	System generated	
	Displays the payroll office contact's fax number.	

# Fax Number (System Generated) Personnel Office Contact Field Instructions

Fax Number	System generated
	Displays the personnel office contact's fax number.

## 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 Field Instructions**

First Name	Optional, alphanumeric, 12 positions maximum
	Enter the enrollee's first name. This must be provided with the exception of an enrollee with only one name.

# First Name (System Generated) Field Instructions

First Name	System generated
	Displays the enrollee's first name.



# Foreign Country (Drop-Down) Carrier Contact Field Instructions

Foreign Country	Optional
	Select the carrier contact's country code from the drop-down menu. For a list and descriptions of country codes, see <i>Country Codes Table</i> (on page 229).

# Foreign Country (Drop-Down) Carrier Plan Contact Field Instructions

Foreign Country	Optional
	Select the carrier plan contact's country code from the drop-down menu. For a list and descriptions of country codes, see <i>Country Codes Table</i> (on page 229).

## Foreign Country (System Generated) Carrier Contact Field Instructions

Foreign Country	System generated
	Displays the carrier contact's country code. For a list and descriptions of country codes, see <i>Country Codes Table</i> (on page 229).

# Foreign Country (System Generated) Carrier Field Instructions

Foreign Country	System generated
	Displays the carrier's country code. For a list and descriptions of country codes, see <b>Country Codes Table</b> (on page 229).

# Foreign Country (System Generated) Carrier Plan Contact Field Instructions

Foreign Country	System generated
	Displays the carrier plan contact's country code. For a list and descriptions of country codes, see <i>Country Codes Table</i> (on page 229).



### Foreign Country (System Generated) Payroll Office Contact Field Instructions

Foreign Country	System generated
	Displays the payroll office contact's country code. For a list and descriptions of country codes, see <i>Country Codes Table</i> (on page 229).

## Foreign Country (System Generated) Payroll Office Field Instructions

Foreign Country	System generated
	Displays the payroll office's country code. For a list and descriptions of country codes, see <i>Country Codes Table</i> (on page 229).

# Foreign Country (System Generated) Personnel Office Contact Field Instructions

Foreign Country	System generated
	Displays the personnel office contact's country code. For a list and descriptions of country codes, see <i>Country Codes Table</i> (on page 229).

# From (Quarter/Year) (System Generated) Field Instructions

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.

# **Grand-Total (System Generated) Field Instructions**

Grand-Total	System generated Displays the sum of records by enrollment code and carrier.
	Note: If the check box used to omit totals from a report is selected, this field is not displayed.



# ID (System Generated) Field Instructions

ID	System generated
	Displays the payroll office identification number.

# Indicator (System Generated) Field Instructions

Indicator	System generated
	Displays if the transmission has been validated by the carrier. $\mathbf{Y}$ indicates the transmission has been validated, $\mathbf{C}$ indicates the transmission has been cancelled, and an empty field indicates the transmission has not been validated.

# Last Carrier Update Date - Field Description

#### Last Carrier Update Date

*System generated* Displays the date of the most recent change.

# Last Carrier Update Date (System Generated) Field Instructions

	System generated
Date	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 ID (System Generated) Field Instructions

Last Carrier Update ID	System generated
	Displays the user ID number of the carrier representative/individual 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 Carrier Update Time (System Generated) Field Instructions

### Last Changed Date (System Generated) Field Instructions

Last Changed Date	System generated	
	Displays the date of the most recent change.	

# Last Changed ID (System Generated) Field Instructions

Last Changed ID	System generated
	Displays the user ID number of the individual who made the most recent change to the record.

### Last Changed Time (System Generated) Field Instructions

Last Changed Time	System generated
	Displays the time of the most recent change.

### Last CL10 Date (System Generated) Field Instructions

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 (System Generated) Field Instructions

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 (System Generated) Field Instructions

Last CL20 Date	System generated
	Displays the last date of the initial editing and processing of the carrier enrollment file transmission.

## Last CL20 Time (System Generated) Field Instructions

Last CL20 Time	System generated
	Displays the last time of the initial editing and processing of the carrier enrollment file transmission.

# Last CL30 Date (System Generated) Field Instructions

Last CL30 Date	System generated
	Displays the last date the payroll office enrollment record fields were edited and matched.

### Last CL30 Time (System Generated) Field Instructions

Last CL30 Time	System generated
	Displays the last time 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 (System Generated) Field Instructions

Last CL40 Time	System generated
	Displays the last time the carrier enrollment record fields were edited and matched.

## Last CL50 Date Field Instructions

Last CL50 Date	Reserved for future use.
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## Last CL50 Time Field Instructions

Last CL50 Time	Reserved for future use.
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#### Last CL60 Date (System Generated) Field Instructions

Last CL60 Date	System generated
	Displays the last date the error statistics record fields were updated.

### Last CL60 Time (System Generated) Field Instructions

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 Instructions

Last CL70 Time	Reserved for future use.	



### Last CL80 Date (System Generated) Field Instructions

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 (System Generated) Field Instructions

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 (System Generated) Field Instructions

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 (System Generated) Field Instructions

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 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 Field Instructions

Last Name	Optional, alphanumeric, 25 positions maximum
	Enter the enrollee's last name. If the enrollee has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III). If there is a case of an enrollee having only one name, enter that one name in this field.

#### Last Name (System Generated) Field Instructions

Last Name	System generated
	Displays the enrollee's last name.

### Last Payroll Update Date - Field Description

#### Last Payroll Update Date

*System generated* Displays the date of the most recent change.

### Last Payroll Update Date (System Generated) Field Instructions

Last Payroll Update Date	System generated
Dale	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 ID (System Generated) Field Instructions

Last Payroll Update ID	System generated
	Displays the user ID 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 Payroll Update Time (System Generated) Field Instructions

Last Payroll Update Time	System generated Displays the time of the most recent change.	
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### Last Validate Date (System Generated) Field Instructions

Last Validate Date	System generated
	Displays the date the transmission was last validated.

### Last Validate ID (System Generated) Field Instructions

Last Validate ID	System generated
	Displays the user ID number of the person who last validated the transmission.

### Last Validate Time (System Generated) Field Instructions

Last Validate Time	System generated
	Displays the time the transmission was last validated.



#### Match (System Generated) Field Instructions

Match	System generated
	Displays the number of matching records that meet the criteria entered on the Reconciliation Summary page.

#### Middle Name - Enrollee Field Description

#### Middle Name

*System generated* Displays the middle name or initial of the enrollee.

#### **Middle Name Field Instructions**

Middle Name	Optional, alphanumeric, 12 positions maximum
	Enter the enrollee's middle name/initial.

#### Middle Name - Field Instruction

#### Middle Name

*Optional, alphanumeric, 12 positions maximum* Enter the middle name of the enrollee.

### Middle Name (System Generated) Field Instructions

Middle Name	System generated
	Displays the enrollee's middle name or initial.

#### Name (Optional) Carrier Contact Field Instructions

Name	Optional, alphanumeric, 30 positions maximum	
	Enter the name of the carrier contact.	



### Name (System Generated) Carrier Contact Field Instructions

Name	System generated	
	Displays the name of the carrier contact.	

### Name (System Generated) Carrier Field Instructions

Name	System generated
	Displays the name of the carrier.

### Name (System Generated) Carrier Plan Contact Field Instructions

Name	System generated
	Displays the name of the carrier plan contact.

# Name (System Generated) Payroll Office Contact Field Instructions

Name	System generated
	Displays the name of the payroll office contact.

# Name (System Generated) Payroll Office Field Instructions

Name	System generated
	Displays the name of the payroll office.

### Name (System Generated) Personnel Office Field Instructions

Name	System generated
	Displays the name of the personnel office contact.



# Name (System Generated) Report Field Instructions

Name	System generated
	Displays the enrollee's name submitted by the payroll office/carrier.

### Name (System Generated) Rpt.1, Carrier Field Instructions

Name	System generated
	Displays the enrollee's name submitted by the carrier.

## **Name Carrier Field Instructions**

Name	Optional, alphanumeric, 40 positions maximum
	Enter the name of the carrier.

### Name - Carrier Field Description

**Name** *System generated* Displays the name of the carrier.

# Name Carrier Plan Contact Field Instructions

Name	Optional, alphanumeric, 40 positions maximum	
	Enter the name of the carrier plan contact.	

# Name Payroll Office Field Instructions

Name	Optional, alphanumeric, 40 positions maximum
	Enter the name of the payroll office.



### Not Received (System Generated) Field Instructions

Not Received	<i>System generated</i> 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.

## **Note Field Instructions**

Enter <b>FPO</b> for fleet post office or <b>APO</b> for army post office in lieu of the city if the address is an overseas military address.

# **Order By Carrier Field Instructions**

Order By	Optional, default
	Defaults to the <i>Carrier</i> 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 values:
	Carrier - Search by carrier code.
	Name - Search by name.
	City - Search by city.
	State - Search by State.
1	

# **Order By Carrier Code Field Instructions**

Order By	Optional, default
	Defaults to the <i>Carrier</i> 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 values:
	Carrier - Search by carrier code.
	Code - Search by carrier enrollment code.



# Order By Carrier Contacts Field Instructions

Order By	Optional, default
	Defaults to the <i>Carrier</i> 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 values:
	Carrier ID - Search by Carrier ID.
	Year/Quarter - Search by reconciliation year and reconciliation quarter.

# **Order By Carrier Errors Page Field Instructions**

Order By	Optional, default
	Defaults to the <i>Carrier</i> 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 values:
	Carrier ID - Search by carrier ID.
	Year/Quarter - Search by reconciliation year and reconciliation quarter.

# **Order By Carrier Plan Contacts Field Instructions**

Order By	Optional, default
	Defaults to the <i>Carrier</i> 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 values:
	Carrier - Search by carrier code.
	Plan - Search by plan code.
	<b>Type</b> - Search by type code.

# **Order By Contacts Page Field Instructions**

Order By	Optional, default
	Defaults to the <i>ID</i> 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 values:
	ID - Search by ID number.
	<b>Type</b> - Search by type code.



# **Order By Payroll Office Information Page Field Instructions**

Order By	Optional, default
	Defaults to the <i>ID</i> 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 values:
	<b>ID</b> - Search by payroll office identification number.
	Pay Cycle - Search by pay cycle.
	Name - Search by payroll office name.
	City - Search by payroll office city.

# **Order By Personnel Office Contacts Page Field Instructions**

Order By	Optional, default
	Defaults to the <i>ID</i> 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 values:
	<b>ID</b> - Search by payroll office identification number.
	POI - Search by personnel office identification number.
	<b>Type</b> - Search by type code.

# 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 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 - (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: 1st Field Instructions**

Order By: 1st	Optional, default
	Defaults to the <b>Name</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.



# **Order By: 1st Carrier Discrepancy Field Instructions**

Order By: 1st	<i>Optional, default</i> Defaults to the <b>Name</b> option. This field allows users to sort search
	results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.
	Payroll ID - Search by payroll office identification number.

# **Order By: 1st Carrier Enrollees Field Instructions**

Order By: 1st	Optional, default
	Defaults to the <b>Name</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:
	<b>Payroll Office</b> - Search by payroll office identification number.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.



## **Order By: 1st Carrier Enrollment Transmission Field Instructions**

Order By: 1st	<i>Optional, default</i> Defaults to the <b>Name</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:
	Carrier ID - Search by carrier ID number.
	Name - Search by enrollee name.
	Year/Quarter - Search by reconciliation year and reconciliation quarter.
	Submission Date - Search by submission date.
	Status - Search by transmission status.

## **Order By: 1st Carrier Validation Field Instructions**

Order By: 1st	Optional, default
	Defaults to the <b>Name</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:
	Enrollment Code - Search by enrollment code.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.

# Order By: 1st Pay Period Transmissions Payment Amounts Report Field Instructions

Order By: 1st	Optional, default
	Defaults to the <b>Carrier</b> option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:
	Carrier - Search by carrier.
	Pay Cycle - Search by pay cycle.
	Enrollment Code - Search by enrollment code.
	As of Date - Search by as of date.



# **Order By: 1st Payroll Discrepancy Listing Field Instructions**

Order By: 1st	Optional, default
	Defaults to the <b>Name</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:
	Agency - Search by Agency code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by the RSP/OWCP to identify the enrollee.

# **Order By: 1st Reconciliation Action Field Instructions**

Order By: 1st	<i>Optional, default</i> Defaults to the <b>Carrier</b> option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:
	Action Code - Search by reconciliation action code.
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Payroll Office</b> - Search by payroll office identification number.
	Personnel Office ID - Search by POI number.



# **Order By: 1st Reconciliation Reason Field Instructions**

Order By: 1st	Optional, default
	Defaults to the <b>Carrier</b> option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order.
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Payroll Office</b> - Search by payroll office identification number.
	Pers. Office ID - Search by POI number.
	Reason Code - Search by reconciliation reason code.

# **Order By: 1st Reconciliation Report Field Instructions**

Order By: 1st	<i>Optional, default</i> Defaults to the <b>Name</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down
	menu to display the selected criteria in first sort search order: Agency - Search results by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	Reconciliation Date - Search by reconciliation date.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.
	User ID - Search by user ID number.



# **Order By: 1st Reconciliation Summary Field Instructions**

Order By: 1st	Optional, default
	Defaults to the <b>Carrier</b> option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Personnel Office ID</b> - Search by POI 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 - 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 - (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 Instructions**

Order By: 2nd	Optional, default
	Defaults to the <b>SSNO</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.

### **Order By: 2nd Carrier Discrepancy Field Instructions**

Order By: 2nd	<i>Optional, default</i> Defaults to the <b>SSNO</b> option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.
	<b>Payroll ID</b> - Search by payroll office identification number.



# **Order By: 2nd Carrier Enrollees Field Instructions**

Order By: 2nd	<i>Optional, default</i> Defaults to the <b>SSNO</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:
	<b>Payroll Office</b> - Search by payroll office identification number.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.

# **Order By: 2nd Carrier Enrollment Transmission Field Instructions**

Order By: 2nd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:
	Carrier ID - Search by carrier ID number.
	Name - Search by enrollee name.
	<b>Year/Quarter</b> - Search by reconciliation year and reconciliation quarter.
	Submission Date - Search by submission date.
	Status - Search by transmission status.

## **Order By: 2nd Carrier Validation Field Instructions**

Order By: 2nd	Optional
	Defaults to the <b>Name</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:
	Enrollment Code - Search by enrollment code.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.



# Order By: 2nd Pay Period Transmission Payment Amounts Report Field Instructions

Optional, default
This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:
Carrier - Search by carrier.
Pay Cycle - Search by pay cycle.
Enrollment Code - Search by enrollment code.
As of Date - Search by as of date.

# **Order By: 2nd Payroll Discrepancy Listing Field Instructions**

Order By: 2nd	Optional, default
	Defaults to the <b>SSNO</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:
	Agency - Sorts search results by Agency code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/ OWCP to identify the enrollee.



# **Order By: 2nd Reconciliation Action Field Instructions**

Order By: 2nd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:
	Action Code - Search by reconciliation action code.
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Payroll Office</b> - Search by payroll office identification number.
	<b>Personnel Office ID</b> - Search by POI number.

# **Order By: 2nd Reconciliation Reason Field Instructions**

Optional
Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:
Agency - Search by Agency code.
Carrier - Search by carrier code.
Enrollment Code - Search by enrollment code.
<b>Payroll Office</b> - Search by payroll office identification number.
Pers. Office ID - Search by POI number.
Reason Code - Search by reconciliation reason code.



# **Order By: 2nd Reconciliation Report Field Instructions**

Order By: 2nd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	Reconciliation Date - Search by reconciliation date.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.
	User ID - Search by user ID number.

# **Order By: 2nd Reconciliation Summary Field Instructions**

Order By: 2nd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Pers. Office ID</b> - Search by POI number.



#### **Order By: 3rd Field Instructions**

Order By: 3rd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.

#### 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 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 - (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 Carrier Discrepancy Field Instructions**

Order By: 3rd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.
	<b>Payroll ID</b> - Search by payroll office identification number.

# **Order By: 3rd Carrier Enrollees Field Instructions**

Order By: 3rd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:
	<b>Payroll Office</b> - Search by payroll office identification number.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.



# **Order By: 3rd Carrier Enrollment Transmission Field Instructions**

Order By: 3rd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:
	Carrier ID - Search by carrier ID number.
	Name - Search by enrollee name.
	<b>Year/Quarter</b> - Search by reconciliation year and reconciliation quarter.
	Submission Date - Search by submission date.
	Status - Search by transmission status.

### **Order By: 3rd Carrier Validation Field Instructions**

Order By: 3rd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:
	Enrollment Code - Search by enrollment code.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.

# Order By: 3rd Pay Period Transmissions Payment Amounts Report Field Instructions

Order By: 3rd	Optional, default
	This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in third sort search order:
	Carrier - Search by carrier.
	Pay Cycle - Search by pay cycle.
	Enrollment Code - Search by enrollment code.
	As of Date - Search by as of date.



# Order By: 3rd Payroll Discrepancy Listing Field Instructions

Order By: 3rd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:
	Agency - Search by Agency code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.

# **Order By: 3rd Reconciliation Action Field Instructions**

Order By: 3rd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:
	Action Code - Search by reconciliation action code.
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Payroll Office</b> - Search by payroll office identification number.
	<b>Personnel Office ID</b> - Search by POI number.



# **Order By: 3rd Reconciliation Reason Field Instructions**

Order By: 3rd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Payroll Office</b> - Search by payroll office identification number.
	Pers. Office ID - Search by POI number.
	Reason Code - Search by reconciliation reason code.

# **Order By: 3rd Reconciliation Report Field Instructions**

Order By: 3rd	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	Reconciliation Date - Search by reconciliation date.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.
	User ID - Search by user ID number.



### **Order By: 3rd Reconciliation Summary Field Instructions**

Optional
Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:
Agency - Search by Agency code.
Carrier - Search by carrier code.
Enrollment Code - Search by enrollment code.
Pers. Office ID - Search by POI 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 - (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 - (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:

Payroll Office - Search by payroll office identification number.

*Enrollment Code* - Sorts search results by enrollment code.

Fail Count - Search 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.

## 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 Instructions**

Order By: 4th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.



## **Order By: 4th Carrier Discrepancy Field Instructions**

Order By: 4th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.
	<b>Payroll ID</b> - Search by payroll office identification number.

# **Order By: 4th Carrier Enrollees Field Instructions**

Order By: 4th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:
	<b>Payroll Office</b> - Search by payroll office identification number.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.

# **Order By: 4th Carrier Validation Field Instructions**

Order By: 4th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:
	Enrollment Code - Search by enrollment code.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.



# Order By: 4th Pay Period Transmisssions Payment Amounts Report Field Instructions

Order By: 4th	Optional, default
	This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in fourth search order:
	Carrier - Search by carrier.
	Pay Cycle - Search by pay cycle.
	Enrollment Code - Search by enrollment code.
	As of Date - Search by as of date.

# **Order By: 4th Payroll Discrepancy Listing Field Instructions**

Order By: 4th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:
	Agency - Search by Agency code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.



# **Order By: 4th Reconciliation Action Field Instructions**

Order By: 4th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:
	Action Code - Search by reconciliation action code.
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Payroll Office</b> - Search by payroll office identification number.
	Personnel Office ID - Search by POI number.

# **Order By: 4th Reconciliation Reason Field Instructions**

Order By: 4th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Payroll Office</b> - Search by payroll office identification number.
	<b>Pers. Office ID</b> - Search by POI number.
	Reason Code - Search by reconciliation reason code.



# **Order By: 4th Reconciliation Report Field Instructions**

Order By: 4th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	Reconciliation Date - Search by reconciliation date.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.
	User ID - Search by user ID number.

# **Order By: 4th Reconciliation Summary Field Instructions**

Order By: 4th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Pers. Office ID</b> - Search by POI number.



### **Order By: 5th Field Instructions**

Order By: 5th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.

#### 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:

*Payroll Office* - Search by payroll office identification number.

Enrollment Code - Sorts search results by enrollment code.

Fail Count - Search 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.

# 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 - (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 - (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 Carrier Discrepancy Field Instructions**

Order By: 5th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.
	<b>Payroll ID</b> - Search by payroll office identification number.



## **Order By: 5th Carrier Enrollees Field Instructions**

Order By: 5th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:
	<b>Payroll Office</b> - Search by payroll office identification number.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.

# **Order By: 5th Carrier Validation Field Instructions**

Order By: 5th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:
	Enrollment Code - Search by enrollment code.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.

# Order By: 5th Pay Period Transmissions Payment Amounts Report Field Instructions

Order By: 5th	Optional, default
	This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in fifth search order:
	Carrier - Search by carrier.
	Pay Cycle - Search by pay cycle.
	Enrollment Code - Search by enrollment code.
	As of Date - Search by as of date.



# **Order By: 5th Payroll Discrepancy Listing Field Instructions**

Order By: 5th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:
	Agency - Search by Agency code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.

# **Order By: 5th Reconciliation Action Field Instructions**

Order By: 5th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:
	Action Code - Search by reconciliation action code.
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Payroll Office</b> - Search by payroll office identification number.
	<b>Personnel Office ID</b> - Search by POI number.



## **Order By: 5th Reconciliation Reason Field Instructions**

Order By: 5th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Payroll Office</b> - Search by payroll office identification number.
	Pers. Office ID - Search by POI number.
	Reason Code - Search by reconciliation reason code.

## **Order By: 5th Reconciliation Report Field Instructions**

Order By: 5th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	Reconciliation Date - Search by reconciliation date.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.
	<b>User ID</b> - Search by user 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 Field Instructions**

Order By: 6th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.

#### **Order By: 6th Carrier Discrepancy Field Instructions**

Order By: 6th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.
	Payroll ID - Search by payroll office identification number.



# **Order By: 6th Carrier Validation Field Instructions**

Order By: 6th	Optional
	Defaults to the <b>Name</b> sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:
	Enrollment Code - Search by enrollment code.
	Name - Search by enrollee name.
	SSNO - Search by enrollee SSN.

# **Order By: 6th Payroll Discrepancy Listing Field Instructions**

Order By: 6th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:
	Agency - Search by Agency code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.

## **Order By: 6th Reconciliation Action Field Instructions**

Order By: 6th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:
	Action Code - Search by reconciliation action code.
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	Payroll Office - Search by POI number.
	<b>Personnel Office ID</b> - Search by POI number.



## **Order By: 6th Reconciliation Reason Field Instructions**

Order By: 6th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Payroll Office</b> - Search by payroll office identification number.
	Pers. Office ID - Search by POI number.
	Reason Code - Search by reconciliation reason code.

# **Order By: 6th Reconciliation Report Field Instructions**

Order By: 6th	Optional
	Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:
	Agency - Search by Agency code.
	Carrier - Search by carrier code.
	Enrollment Code - Search by enrollment code.
	<b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.
	Name - Search by enrollee name.
	Pers. Office ID - Search by POI number.
	Reconciliation Date - Search by reconciliation date.
	SSNO - Search by enrollee SSN.
	<b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.
	<b>User ID</b> - Search by user identification number.

#### **Other Carrier ID - Field Description**

#### **Other Carrier ID**

*System generated* Displays the identifier used by the carrier to identify the enrollee.



# Other Carrier ID (System Generated) Field Instructions

Other Carrier ID	System generated
	Displays an identifier used by the carrier to identify the enrollee.

# Other ID (System Generated) Field Instructions

Other ID	<i>System generated</i> Used by the RSP and 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 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 Instructions**

Other ID - From	Optional, alphanumeric, 15 positions maximum
	To search for a specific enrollee record by Other ID, enter the Other ID and skip the To field.
	To search for a range of enrollee records by a range of Other IDs, type the Other ID that starts the range, then go to the To field.
	Note for RSP: Enter the civil service annuitant (CSA) or civil service final (CSF) identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXX, and the CSF identifier is typed as FXXXXXXXX.
	These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.
	Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.



#### **Other ID - To Field Instructions**

Other ID - To	<i>Optional, alphanumeric, 15 positions maximum</i> To search for a range of enrollee records by a range of Other IDs, enter the Other ID that ends the range; otherwise, leave blank.
	Note for RSP: Enter the CSA or CSF identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXX, and the CSF identifier is typed as FXXXXXXXX.
	These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.
	Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.

# **Other Payroll ID - Field Description**

#### **Other Payroll ID**

System generated

Displays the identifier used by the Agency to identify the enrollee.

#### **Other Payroll ID (System Generated) Field Instructions**

Other Payroll ID	System generated
	Displays an identifier used by the Agency to identify the enrollee.

#### **Password Field Instructions**

Password	Required
	Enter the password. If unsuccessful, a message will appear stating that the user ID or password entered is invalid.



#### Pay Cycle (Drop-Down) Field Instructions

Pay Cycle	<i>Required</i> Select the payroll office pay cycle from the drop-down menu.
	B - Biweekly
	M - Monthly
	O - 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

#### **Payroll ID (System Generated) Field Instructions**

Payroll ID	System generated
	Displays the payroll office identification number.

#### Payroll Office - Carrier Enrollees Search Results Field Description

#### **Payroll Office**

*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 (Optional) Field Instructions**

Payroll Office	Optional, alphanumeric, 8 position
	Enter the payroll office identification number.

## **Payroll Office (System Generated) Field Instructions**

Payroll Office	System generated
	Displays the payroll office identification number.

# Payroll Office* (Drop-Down) Field Instructions

Payroll Office*	Required
	Select the payroll office identification number from the drop-down menu.

#### **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 (System Generated) Field Instructions**

Payroll Office Comments	System generated	
	Displays the payroll office's or Agency's comments.	

## Payroll Office Contact Field Instructions

Payroll Office Contact Displays the	e name of the payroll office contact.
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# Payroll Office ID - Field Description

#### **Payroll Office ID**

*System generated* Displays the payroll office identification number.

#### **Payroll Office ID Field Instructions**

Payroll Office ID	Optional, alphanumeric, 8 position
	Enter the payroll office identification number.

#### Payroll Office ID (Drop-Down) Field Instructions

Payroll Office ID	Required
	Select the payroll office identification number from the drop-down menu.

# Payroll Office ID - (Required) Field Instruction

#### **Payroll Office ID**

*Required, 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 (System Generated) Field Instructions

Payroll Office ID	System generated
	Displays the payroll office identification number.

# Payroll Office ID* (Drop-Down) Field Instructions

Payroll Office ID*	Required
	Select the payroll office identification number from the drop-down menu.

#### Payroll Office Number (System Generated) Field Instructions

Payroll Office Number	System generated
	Displays the payroll office number.

# **Payroll Office POI Number Field Instruction**

Payroll Office	System generated
	Displays the payroll office identification number.

#### Percent Discrepancies Reconciled (System Generated) Field Instructions

Percent Discrepancies Reconciled	System generated Displays the percentage of records reconciled to total discrepancies that meet the criteria entered on the Discrepancy Summary page.
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# **Personnel Office ID Field Instructions**

Personnel Office ID	Optional, alphanumeric, 4 positions
	Enter the personnel office identification (POI) number.



## Personnel Office ID (POI Acronym) Field Instructions

Personnel Office ID	Optional, alphanumeric, 4 positions	
	Enter the POI number.	

### Personnel Office ID (System Generated) Field Instructions

Personnel Office ID	System generated
	Displays the personnel office identification number.

## Phone (System Generated) Carrier Contact Field Instructions

Phone	System generated
	Displays the carrier contact's telephone number.

## Phone (System Generated) Carrier Plan Contact Field Instruction

Phone	System generated
	Displays the carrier plan contact's telephone number.

# Phone (System Generated) Payroll Office Contact Field Instructions

Phone	System generated
	Displays the payroll office contact's telephone number.

## **Phone Number Carrier Contact Field Instructions**

Phone Number	Optional, alphanumeric, 25 positions
	Enter the carrier contact's telephone number.



## Phone Number Carrier Plan Contact Record Field Instructions

Phone Number	Optional, alphanumeric, 25 positions	
	Enter the carrier plan contact's telephone number.	

### Phone Number (System Generated) Carrier Contact Field Instruction

Phone Number	System generated
	Displays the carrier contact's telephone number.

## Phone Number (System Generated) Carrier Plan Field Instructions

Phone Number	System generated
	Displays the carrier plan contact's telephone number.

# Phone Number (System Generated) Personnel Office Contact Field Instructions

Phone Number	System generated
	Displays the personnel Office contact's telephone number.

#### Phone/Phone Number (System Generated) Carrier Plan Contact Field Instructions

Phone/Phone Number	System generated
	Displays the carrier plan contact's telephone number.

#### Plan (Required) Field Instructions

Plan	Required, alphanumeric, 2 positions
	Enter the first two positions of the carrier enrollment code.



## Plan (System Generated) Field Instructions

Plan	System generated
	Displays the first two positions of the carrier enrollment code.

### **Plan* Field Instructions**

Plan*	Required, alphanumeric, 2 positions
	Enter the first two positions of the carrier enrollment code.

## **POI Field Instructions**

POI	Optional, alphanumeric, 4 positions
	Enter the POI of the office where the enrollee's records are maintained.

# POI (System Generated) Field Instructions

POI	<i>System generated</i> Displays the POI of the office where the enrollee's records are maintained.
	Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

# **POI (System Generated) Report Field Instructions**

POI	System generated Displays the POI number.
	Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.



#### **Pseudo SSN - Field Description**

#### Pseudo SSN

*System generated* Displays the pseudo SSN used by the Agency and carrier to identify the enrollee.

# **Pseudo SSN (System Generated) Field Instructions**

Pseudo SSN	System generated
	Displays the pseudo SSN used by the Agency and carrier to identify the enrollee.

## **Quarter (Drop-Down) Field Instructions**

Quarter*	Optional default
	Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

#### **Quarter - Field Description**

Quarter

*System generated* Displays the reconciliation quarter.

# **Quarter - (Reconciliation Quarter) Field Description**

#### Quarter

*System generated* Displays the 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 - (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 (System Generated) Error Statistics Field Instructions**

Quarter	System generated
	Displays the reconciliation quarter for the requested error statistics.

## **Quarter (System Generated) Field Instructions**

Quarter	System generated
	Displays the reconciliation quarter.

# **Quarter (System Generated) Transmission Record Field Instructions**

Quarter	System generated
	Displays the reconciliation quarter for the requested transmission record.

#### **Quarter Error Statistics Field Instructions**

Quarter	Optional, alphanumeric, 1 position	
	Enter the reconciliation quarter for the requested error statistics.	

#### **Quarter Transmission Record Field Instructions**

Quarter	Optional, alphanumeric, 1 position
	Enter the reconciliation quarter for the requested transmission record.



# Quarter* (Drop-Down) Field Instructions

Quarter*	Required default
	Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

## **Quarter* (Optional) Field Instructions**

Quarter*	Optional, alphanumeric, 1 position
	Enter the reconciliation quarter for the requested error statistics.

## **Quarter* (Required) Field Instructions**

Quarter*	Required, alphanumeric, 1 position
	Enter the reconciliation quarter for the requested error statistics.

# **Quarter* From (Optional) Field Instructions**

Quarter* From	Optional, default
	Select the quarter that begins the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

# **Quarter* From (Required) Field Instructions**

Quarter* From	Required, default
	Select the quarter that begins the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

# **Quarter* To (Optional) Field Instructions**

Quarter* To	Optional, default
	Select the quarter that ends the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.



## Quarter* To (Required) Field Instruction

Quarter* To	Required, default
	Select the quarter that ends the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

#### **Reason (System Generated) Field Instructions**

Reason	System generated
	Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see <i>Reconciliation Reason Codes Table</i> (on page 221).

#### **Reason Code (Drop-Down) Field Instructions**

Reason Code	Optional
	Select the reconciliation reason code from the drop-down menu. For a list and descriptions of these codes, see <i>Reconciliation</i> <i>Reason Codes Table</i> (on page 221).

#### **Reason/Reason Code (System Generated) Field Instructions**

Reason/Reason Code	System generated
	Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see <i>Reconciliation Reason Codes Table</i> (on page 221).

#### **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 224).



## **Reconciliation Action (System Generated) Field Instructions**

Reconciliation Action	System generated
	Displays the code that identifies the action requested by the Agency to resolve a discrepancy. A short description is displayed next to the code. Select <b>Explain</b> to view a detailed explanation of the reconciliation reason code or see <b>Reconciliation Action Codes Table</b> (on page 224).

# Reconciliation Action (System Generated) Reconciliation Report Field Instructions

<b>Reconciliation Action</b>	System generated
	Displays the reconciliation action code. For a list and descriptions of reconciliation action codes, see <i>Reconciliation Action Codes Table</i> (on page 224).

## **Reconciliation Date From Field Instructions**

select the day from the second drop-down menu, and select the year from the third drop-down menu.
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# Reconciliation Date (System Generated) Reconciliation Report Field Instructions

Reconciliation Date	System generated	
	Displays the reconciliation date.	

# **Reconciliation Date To Field Instructions**

Reconciliation Date To	<i>Optional</i> This is the date that ends the range of reconciliation dates. To
	select this date, select the month from the first drop-down menu, select the day from the second drop-down menu; and select the year from the third drop-down menu.



#### Reconciliation Fail Count (System Generated) Reconciliation Report Field Instructions

Reconciliation Fail	System generated
Count	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 221).

## **Reconciliation Reason (System Generated) Field Instructions**

Reconciliation Reason	System generated Displays the code that identifies the cause of a discrepancy as reported by the Agency. A short description is displayed next to the code. Select <b>Explain</b> to view a detailed explanation of the reconciliation reason code or see <b>Reconciliation Reason Codes</b>
	<i>Table</i> (on page 221).

# Reconciliation Reason (System Generated) Reconciliation Report Field Instructions

Reason	<i>System generated</i> Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see <i>Reconciliation Reason</i>
	Codes Table (on page 221).

# Reconciliation User ID (System Generated) Reconciliation Report Field Instructions

Reconciliation User ID	System generated
	Displays the user identification number of the person who entered the reconciliation reason code.



### **Records Processed (System Generated) Field Instructions**

Records Processed	System generated
	Displays the number of records accepted to store in the CLER tables.

## **Records Received (System Generated) Field Instructions**

Records Received	System generated
	Displays the number of records found in the transmission file during processing.

# **Records Reconciled (System Generated) Field Instructions**

Records Reconciled	System generated
	Displays the count of records that have a reconciliation reason and action entered for every error on the record.

# **Records Sent (System Generated) Field Instructions**

Records Sent	System generated
	Displays the number of records sent in the transmission.

# **Records With Errors (System Generated) Field Instructions**

Records with Errors	System generated
	Displays the total number of carrier enrollee records with errors. Records with warnings are not included.

# **Records With Warnings (System Generated) Field Instructions**

Records with Warnings	System generated
warnings	Displays the total number of carrier records with warnings. Records with errors are not included.



## **Region (System Generated) Carrier Enrollment Field Instructions**

Region	System generated
	Displays the carrier's enrollment data transmission location code assigned by NFC's CLER Operations and Reconciliation Unit.

# **Rejected (System Generated) Field Instructions**

Rejected	<i>System generated</i> 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.

# **Remarks (System Generated) Field Instructions**

Remarks	System generated
	Displays the remarks about this record.

#### **Remarks Field Instructions**

Remarks	Optional, alphanumeric, 80 positions
	Enter remarks about this record.

#### **Rencon Field Instructions**

Recon	Displays the number of reconciled discrepancies.
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# **Report (Drop-Down) Field Instructions**

Report	Optional, default
	Select the report from the drop-down menu.



## **Response Reminder Date (System Generated) Field Instructions**

Response Reminder Date	System generated
Date	Displays the date a reminder regarding the lack of response to discrepancy reasons and action codes will be sent to carriers.

#### **Role Field Instructions**

Role	Optional, alphanumeric, 40 positions maximum
	Enter the title, position, etc., of the carrier contact/carrier plan contact.

## **Role (System Generated) Field Instructions**

Role	System generated
	Displays the title, position, etc., of the payroll office contact/personnel office contact/carrier contact/carrier plan contact.

#### **Select Another Discrepancy - Field Instruction**

#### Select Another Discrepancy

**Optional** 

Select each discrepancy number shown to view the corresponding code and message.

#### **Select Another Discrepancy Field Instructions**

Select another	Optional
discrepancy	Select each discrepancy number to view the corresponding code and message if multiple discrepancies are shown.

#### **Source - Field Description**

#### Source

System generated

Displays the source of transmission data indicator.

The value in the first position equals  $\mathbf{M}$  for Mainframe or  $\mathbf{S}$  for Server. The value in the second position equals  $\mathbf{T}$  for Transmission or  $\mathbf{M}$  for Manual entry.



## Source (System Generated) Field Instructions

Source	System generated
	Displays the source of transmission data indicator. The value in the first position equals $\mathbf{M}$ for mainframe or $\mathbf{S}$ for server. The value in the second position equals $\mathbf{T}$ for transmission or $\mathbf{M}$ for manual entry.

# **SSN - Field Description**

SSN

System generated

Displays the enrollee's Social Security number.

# **SSN (System Generated) Field Instructions**

SSN	System generated
	Displays the enrollee's SSN.

# SSN (System Generated) Reports Field Instructions

SSN	System generated
	Displays the enrollee's SSN submitted by the payroll office.

# **SSN - From Field Instructions**

SSN - From	Optional, alphanumeric, 9 positions
	To search for a specific enrollee record by Social Security number (SSN), enter the SSN and skip the To field.
	To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field.
	Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.



# SSN - From (SSN Acronym) Field Instructions

SSN - From	Optional, alphanumeric, 9 positions
	To search for a specific enrollee record by SSN, enter the SSN and skip the To field.
	To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field.
	Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.

#### **SSN From - Field Instruction**

#### SSN From

*Optional, numeric, nine positions* To search for a specific enrollee record by the Social Security number (SSN), enter the SSN in the **SSN From** field.

#### OR

To search for range of enrollee records by a range of SSNs, enter the SSN that starts the range, then go to the **SSN To** field.

#### **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 Instructions**

SSN - To	<i>Optional, alphanumeric, 9 positions</i> To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.
	Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.



#### Start Date (System Generated) Field Instructions

Start Date	System generated	
	Displays the first date the payroll office will be valid.	

#### **SSN To - Field Instruction**

#### SSN To

Optional, numeric, nine positions

Enter the SSN that ends the range to search for a range of enrollee records; otherwise, leave blank.

#### **SSN To - Field Instruction**

#### SSN To

Optional, numeric, nine positions

When searching for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.

# Start Date (System Generated) Carrier Enrollment Code Field Instructions

Start Date	System generated
	Displays the first date the carrier enrollment code will be valid.

# Start Date (System Generated) Carrier Field Instructions

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 (System Generated) Schedules Field Instructions

Start Date	System generated
	Displays the date the input from carriers and payroll offices is processed.



#### **State Field Instructions**

State	Optional, alphanumeric, 2 positions maximum
	Select the payroll office's, carrier's, carrier contact's, or carrier plan contact's State, U.S. territory, or overseas military abbreviation from the drop-down menu. Refer to the <i>State, U.S. Territory, and</i> <i>Overseas Military Abbreviations Table</i> (on page 226) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.

# State (System Generated) Carrier Contact Field Instructions

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 <i>State, U.S. Territory, and Overseas Military Abbreviations Table</i> (on page 226).

# State (System Generated) Carrier Field Instructions

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 <i>State, U.S. Territory, and Overseas Military Abbreviations Table</i> (on page 226).

# State (System Generated) Carrier Plan Contact Field Instructions

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 <b>State, U.S.</b> <b>Territory, and Overseas Military Abbreviations Table</b> (on page 226).

# State (System Generated) Payroll Office Contact Field Instructions

State	System generated
	Displays the payroll 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 <i>State, U.S.</i> <i>Territory, and Overseas Military Abbreviations Table</i> (on page 226).

# State (System Generated) Payroll Office Field Instructions

State	System generated
	Displays the payroll 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 <i>State, U.S. Territory, and Overseas Military Abbreviations Table</i> (on page 226).

#### State (System Generated) Personnel Office Contact Field Instructions

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, <i>State, U.S. Territory, and Overseas Military Abbreviations Table</i> (on page 226).

# Status (System Generated) Carrier Enrollment Transmission Field Instructions

Status	System generated
	Displays <b>000</b> 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 <i>Carrier System Codes Table</i> (on page 219).



# Status (System Generated) Field Instructions

Status	System generated
	Displays <b>active</b> to indicate that the record has been activated in CLER.
	Displays <b>inactive</b> to indicate that the record has been inactivated in CLER.

# Status (System Generated) Transmissions Field Instructions

Status	System generated
	Displays <b>000</b> 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 <i>Carrier System Codes Table</i> (on page 219).

# Submission - (Number) Field Description

#### Submission

*System generated* Displays the transmission submission number for this record.

# Submission (System Generated) Field Instructions

Submission	System generated
	Displays the transmission submission for this enrollee record.

#### Submission (System Generated) Transmission Date Field Instructions

Submission	System generated
	Displays the number of transmissions submitted for the reconciliation quarter selected.



# Submission Date (System Generated) Carrier Enrollment Transmission Field Instructions

Submission Date	System generated	
	Displays the date (MMDDYYYY) the carrier enrollment data file was submitted for processing.	

#### Submission Date (System Generated) Field Instructions

Submission Date	System generated
	Displays the date the transmission was submitted.

#### Submission Reminder Date (System Generated) Field Instructions

Submission Reminder Date	<i>System generated</i> Displays the date the submission reminder is sent.
	Displays the date the submission reminder is sent.

#### Submitter Use #1 (System Generated) Field Instructions

Submitter Use #1	System generated
	Displays remarks that were entered by the organization that created the record/enrollment record.

#### 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 #2 - Field Description

#### Submitter Use #2

System generated Displays the remarks that were entered by the organization that created 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 #2 (System Generated) Field Instructions

Submitter Use #2	System generated
	Displays remarks that were entered by the organization that created the record/enrollment record.

#### Submitter Use #3 (System Generated) Field Instructions

Submitter Use #3	System generated
	Displays remarks that were entered by the organization that created the record/enrollment record.

#### **Threshold Type (System Generated) Field Instructions**

Threshold Type	System generated
	Displays the number measure of the error threshold. ${\bf P}$ represents percent and ${\bf N}$ represents number.

#### Time Processed - (Record Processed) Field Description

#### Time Processed

*System generated* Displays the time the record was processed.

#### **Time Processed (System Generated) Field Instructions**

Time Processed	System generated
	Displays the time the record was processed (using military time).

#### **Time Processed (System Generated) Transmissions Field Instructions**

Time Processed	System generated	
	Displays the current application time when the process was run.	

#### To (Quarter/Year) (System Generated) Field Instructions

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 (System Generated) Field Instructions

Total	<i>System generated</i> 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 (System Generated) Reconciliation Action Field Instructions**

Total	System generated
	Displays the number of specified reconciliation action codes that meet the criteria entered on the Reconciliation Action Summary page.

#### **Total (System Generated) Reconciliation Reason Field Instructions**

Total	System generated
	Displays the number of specified reconciliation reason codes that meet the criteria entered on the Reconciliation Reason Summary page.



#### **Total Discrepancies Found (System Generated) Field Instructions**

Total Discrepancies Found	System generated
lound	Displays the total number of records with discrepancies that meet the criteria entered on the Discrepancy Summary page.

#### **Total Discrepancies Reconciled (System Generated) Field Instructions**

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 (System Generated) Field Instructions**

Total Enrollee Records	System generated
Records	Displays the total number of enrollees that meet the criteria entered on the Discrepancy Summary page.

#### **Total Errors (System Generated) Field Instructions**

Total Errors	System generated	
	Displays the total number of errors identified.	

#### **Total Errors (System Generated) Reconciliation Field Instructions**

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 Matches Found (System Generated) Field Instructions**

Total Matches Found	System generated
	Displays the total number of matched records that meet the criteria entered on the Discrepancy Summary page.

#### 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 Records (System Generated) Field Instructions**

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 (System Generated) Reconciliation Field Instructions**

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 Records (System Generated) Reconciliation Report Field Instructions

Total Records	System generated Displays the the sum of enrollee records on the report.
	Note: If the check box used to omit totals from a report is selected, this field is not displayed.

## **Total Warnings (System Generated) Field Instructions**

Total Warnings	System generated
	Displays the total number of warnings identified.

#### **Transmission File Name (System Generated) Field Instructions**

<i>System generated</i> Displays the name of the quarterly transmission file sent by the payroll office.
payroll office.

## **Transmission Type - Field Description**

#### **Transmission Type**

System generated Displays the transmission type: P - Pay Period T - Transmission

#### 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*.



### **Transmissions Field Instructions**

Transmissions	Optional, default
	Displays search results by the options listed below. If no display option is selected, this field automatically defaults to the <b>All</b> display option. To choose a display option, select the radio button next to one of the following values:
	All - Search by all transmissions.
	Accepted - Search by accepted transmissions.
	Rejected - Search by rejected transmissions.
	Not Received - Search by not received transmissions.

### **Type Field Instructions**

Туре	Optional
	Select either <b>General</b> for an administrative contact or <b>Technical</b> for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.

#### Type (System Generated) Field Instructions

Туре	System generated	
	Displays <b>General</b> type code to indicate that the payroll office contact holds an administrative position.	
	Displays <b>Technical</b> type code to indicate that the payroll office contact holds a technical position.	

### **Type* Field Instructions**

Туре*	Required
	Select either <b>General</b> for an administrative contact or <b>Technical</b> for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.



#### **Unrecon (System Generated) Field Instructions**

Unrecon	System generated
	Displays the number of unreconciled discrepancies.

#### **Unvalidated (System Generated) Field Instructions**

Unvalidated	System generated
	Displays the number of discrepancies/reconciliation actions that were not validated by the carrier.

## User ID (Optional) Field Instructions

User ID	Optional, alphanumeric, 8 positions maximum
	Enter the user identification number of the person creating the report.

#### **User ID (Required) Field Instructions**

User ID	Required, alphanumeric, 8 positions maximum
	Enter the assigned National Finance Center user ID.

#### User ID (System Generated) Field Instructions

User ID	System generated
	Displays the user identification number of the person who entered the validation reason code.

#### Validated (System Generated) Field Instructions

Validated	System generated	
	Displays the number of discrepancies/reconciliation actions that were validated by the carrier.	l



#### Validation (System Generated) Field Instruction

Validation	System generated
	Displays the status of the validation.

#### Validation (System Generated) Transmission Field Instructions

Validation	System generated
	Displays the status of the validation. The <b>Validated</b> code is displayed when the transmission is validated. The <b>Cleared</b> code is displayed when the transmission validation is cleared.

#### Validation Date (System Generated) Field Instructions

Validation Date	System generated	
	Displays the validation date.	

#### **Validation Date From Field Instructions**

Validation Date From	Optional
	Select the month from the first drop-down menu, select the day from the second drop-down menu; and select the year from the third drop-down menu. This is the date that begins the range of reconciliation dates.

#### **Validation Date To Field Instructions**

Validation Date To	Optional
	Select the month from the first drop-down menu, select the day from the second drop-down menu; and select the year from the third drop-down menu. This is the date that ends the range of reconciliation dates.

#### Warning Code - Field Instruction

Warning Code
Optional



Select the applicable warning code from the list. For a list and descriptions of warning codes, see *Warning Codes Table* (on page 218).

#### Warning Code (Drop-Down) Field Instructions

Warning Code	Optional
	Select the warning code from the drop-down menu. Refer to the <i>Warning Codes Table</i> (on page 218) for a list and descriptions of these codes.

#### Warning Code (Optional) Field Instructions

Warning Code	Optional
	Select the applicable warning code from the list of warning codes. Refer to the <i>Warning Codes Table</i> (on page 218) for a list and descriptions of warning codes.

#### 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.

## Warnings (System Generated) Field Instructions

Warnings	<i>System generated</i> 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.



#### Whild Amt (System Generated) Report Field Instructions

Whid Amt	System generated
	Displays the enrollee's withholding amount submitted by the payroll office.

#### With Errors (System Generated) Reconciliation Report Field Instructions

With Errors	<i>System generated</i> Displays the sum of enrollee records with codes 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.

# Without Errors (System Generated) Reconciliation Report Field Instructions

Without Errors	<i>System generated</i> Displays the sum of enrollee records with no codes 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.

#### Year (Drop-Down) Field Instructions

Year*	Required, default
	Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.

#### Year (Error Statistics) Field Instructions

Year	Optional, alphanumeric, 4 positions
	Enter the reconciliation year for the requested error statistics.



#### Year (Optional) Transmission Record Field Instructions

Year	Optional, alphanumeric, 4 positions
	Enter the reconciliation year for the requested transmission record.

#### Year - (Payroll Office Enrollees) Search Results Field Description

**Year** *System generated* Displays the reconciliation year.

#### Year - (Reconciliation Year) Field Description

**Year** *System generated* Displays the reconciliation year.

#### 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 - (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 (Required) Schedules Field Instructions

Year	Required, alphanumeric, 4 positions	
	Enter the reconciliation year.	



#### Year (System Generated) Carrier Errors Field Instructions

Year	System generated
	Displays the reconciliation year for the requested error statistics.

#### Year (System Generated) Field Instructions

Year	System generated
	Displays the reconciliation year.

#### Year (System Generated) Transmission Record Field Instructions

Year	System generated
	Displays the reconciliation year for the requested transmission record.

### Year* From (Optional) Field Instructions

Year* From	Optional, default
	Select the year that begins the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.

#### Year* From (Required) Field Instructions

Year* From	Required, default
	Select the year that begins the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.

#### Year* To (Optional) Field Instructions

Year* To	Optional, default
	Select the year that ends the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.



#### Year* To (Required) Field Instructions

Year* To	Required, default
	Select the year that ends the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.

### Year/Quarter From (System Generated) Field Instructions

Year/Quarter From	System generated
	Displays the reconciliation year/quarter that begins the range of reconciliation years/quarters.

#### Year/Quarter To (System Generated) Field Instructions

Year/Quarter To	System generated
	Displays the reconciliation year/quarter that ends the range of reconciliation years/quarters.

#### Zip (Optional) Carrier Contact Field Instructions

Zip	Optional, alphanumeric, 11 positions maximum	
	Enter the carrier contact's ZIP Code.	

#### Zip (System Generated) Carrier Contact Field Instructions

Zip	System generated
	Displays the carrier contact's ZIP Code.



#### Zip (System Generated) Carrier Field Instructions

Zip	System generated
	Displays the carrier's ZIP Code.

#### Zip (System Generated) Carrier Plan Contact Field Instructions

Zip	System generated
	Displays the carrier plan contact's ZIP Code.

#### ZIP (System Generated) Payroll Office Contact Field Instructions

Zip	System generated
	Displays the payroll office contact's ZIP Code.

#### ZIP (System Generated) Payroll Office Field Instructions

Zip	System generated
	Displays the payroll office's ZIP Code.

#### **ZIP (System Generated) Personnel Office Contact Field Instructions**

Zip	System generated
	Displays the personnel office contact's ZIP Code.



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