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# Office of Personnel Management, Federal Employees Health Benefits, Centralized Enrollment Clearinghouse System (CLER) for Carriers Version 3.0



PUBLICATIONS CATEGORY  
Insurance Processing

PROCEDURE MANUAL  
CLER for Carriers





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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
<i>Viewing a Carrier Enrollee Record 89340.htm?updates</i>	A new column named Employee/Annuitant_Ind has been added to the Carrier Enrollees Results page.
<i>Validating a Carrier Enrollee Record 89341.htm?updates</i>	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:

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

## 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.

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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.

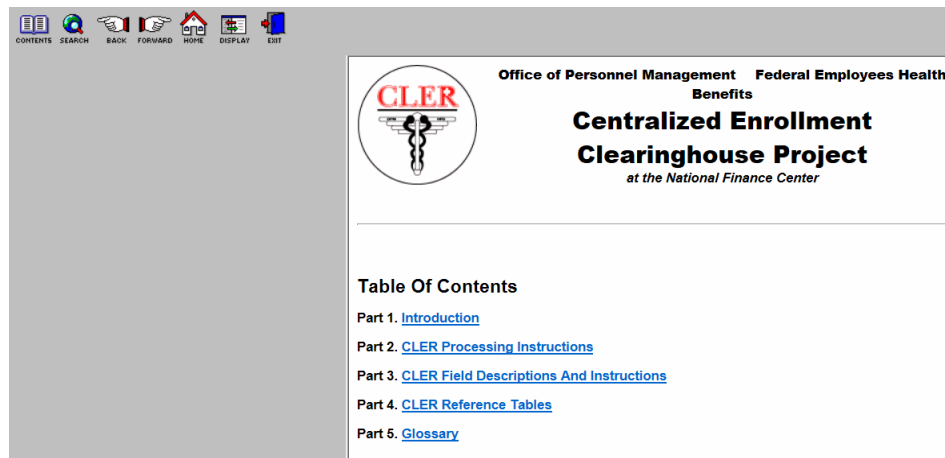


Figure 1: Online Help Table of Contents

- **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.

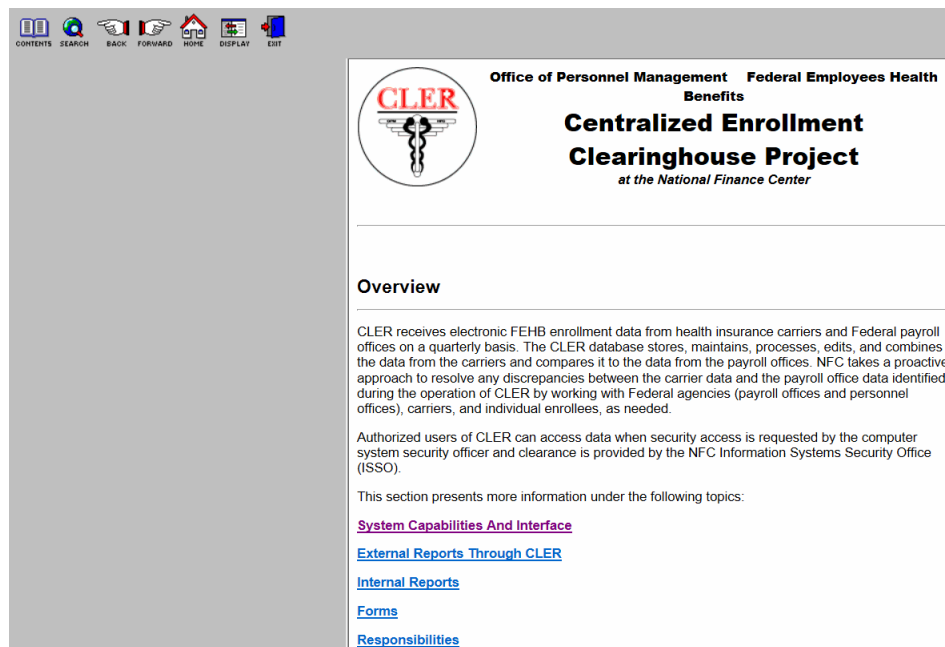


Figure 2: Expanded Online Help Table of Contents Page



## 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:

<b>Requesting Access to CLER .....</b>	<b>11</b>
<b>Security Officer Responsibilities.....</b>	<b>11</b>
<b>Log On .....</b>	<b>12</b>
<b>Log On to CLER.....</b>	<b>14</b>
<b>Log Off .....</b>	<b>17</b>

## 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](mailto: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](mailto: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.

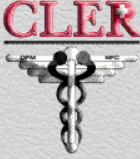
---

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

---







# Office of Personnel Management Federal Employees Health Benefits Centralized Enrollment Clearinghouse

---

User ID

Password

☐
Change Password


**Important Message: May 29, 2014**

CLER has completed processing of the third quarter data.

**If you have any questions or concerns, please contact the CLER Operations and Reconciliation Unit at [nfc.cler@usda.gov](mailto:nfc.cler@usda.gov) or you may call 504-426-6410 between the hours of 7:45 a.m. through 4:00 p.m. CST Monday through Friday.**

**Version 2.0 of the CLER for Agencies, CLER for Carriers, and CLER for OPM procedure manuals HAVE BEEN REPLACED with Version 3.0 of these procedures. They are available on the NFC Web sites Publications page. On the Publications pages right-hand menu, select Procedures by Title/Chapter and locate the manual that applies to your organization under Title 10.**

Please send questions or comments to [nfc.cler@nfc.usda.gov](mailto:nfc.cler@nfc.usda.gov)



[Accessibility](#)

[Security](#)

[Escalation Process](#)

[CLER Phase 2 - Payroll Office File Layout](#)

The National Finance Center (NFC), designed, developed, implemented, and operates this Federal Employees Health Benefits (FEHB) Centralized Enrollment Clearinghouse System, called CLER, for the Office of Personnel Management (OPM).

This system receives electronic FEHB enrollment data from health insurance carriers and Federal Government payroll offices on a quarterly basis for approximately four million health benefits enrollees.

The system provides an efficient and cost effective way for both health insurance carriers and Federal Government payroll offices to conduct their quarterly reconciliation of FEHB enrollment data records as required by OPM. The CLER database stores, maintains, processes, edits, combines, and compares the FEHB enrollment data received from the Payroll Offices and participating Carriers. NFC takes a proactive approach to resolve any discrepancies between the payroll data and the carrier enrollment data identified during the operation of CLER by working with payroll and personnel offices, health insurance carriers, and individual enrollees, as needed.

CLER was designed and developed with the potential for future improvements and expansion beyond basic reconciliation in the event OPM should desire such enhancements.

Figure 3: CLER Logon Page

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

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

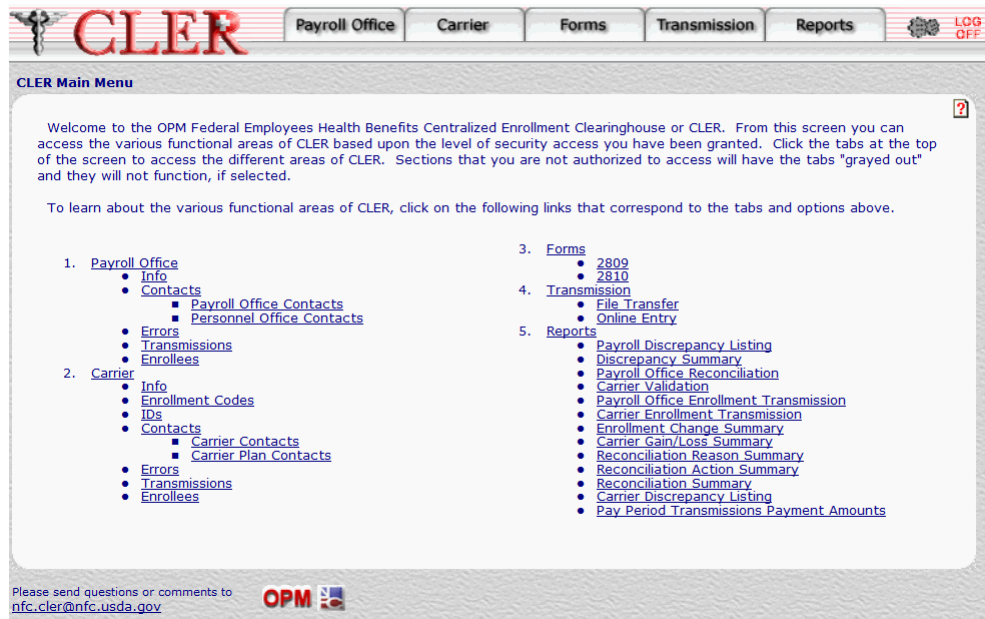


Figure 4: CLER Main Menu Page

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.

**CLER** Office of Personnel Management  
Federal Employees Health Benefits  
Centralized Enrollment  
Clearinghouse

User ID

Password

☐ Change Password

?

**Important Message: May 29, 2014**

CLER has completed processing of the third quarter data.

If you have any questions or concerns, please contact the CLER Operations and Reconciliation Unit at [nfc.cler@usda.gov](mailto:nfc.cler@usda.gov) or you may call 504-426-6410 between the hours of 7:45 a.m. through 4:00 p.m. CST Monday through Friday.

Version 2.0 of the CLER for Agencies, CLER for Carriers, and CLER for OPM procedure manuals HAVE BEEN REPLACED with Version 3.0 of these procedures. They are available on the NFC Web sites Publications page. On the Publications pages right-hand menu, select Procedures by Title/Chapter and locate the manual that applies to your organization under Title 10.

Please send questions or comments to [nfc.cler@nfc.usda.gov](mailto:nfc.cler@nfc.usda.gov)

**OPM**

[Accessibility](#)

[Security](#)

[Escalation Process](#)

[CLER Phase 2 - Payroll Office File Layout](#)

The National Finance Center (NFC), designed, developed, implemented, and operates this Federal Employees Health Benefits (FEHB) Centralized Enrollment Clearinghouse System, called CLER, for the Office of Personnel Management (OPM).

This system receives electronic FEHB enrollment data from health insurance carriers and Federal Government payroll offices on a quarterly basis for approximately four million health benefits enrollees.

The system provides an efficient and cost effective way for both health insurance carriers and Federal Government payroll offices to conduct their quarterly reconciliation of FEHB enrollment data records as required by OPM. The CLER database stores, maintains, processes, edits, combines, and compares the FEHB enrollment data received from the Payroll Offices and participating Carriers. NFC takes a proactive approach to resolve any discrepancies between the payroll data and the carrier enrollment data identified during the operation of CLER by working with payroll and personnel offices, health insurance carriers, and individual enrollees, as needed.

CLER was designed and developed with the potential for future improvements and expansion beyond basic reconciliation in the event OPM should desire such enhancements.

Figure 5: CLER Logon Page

- 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.

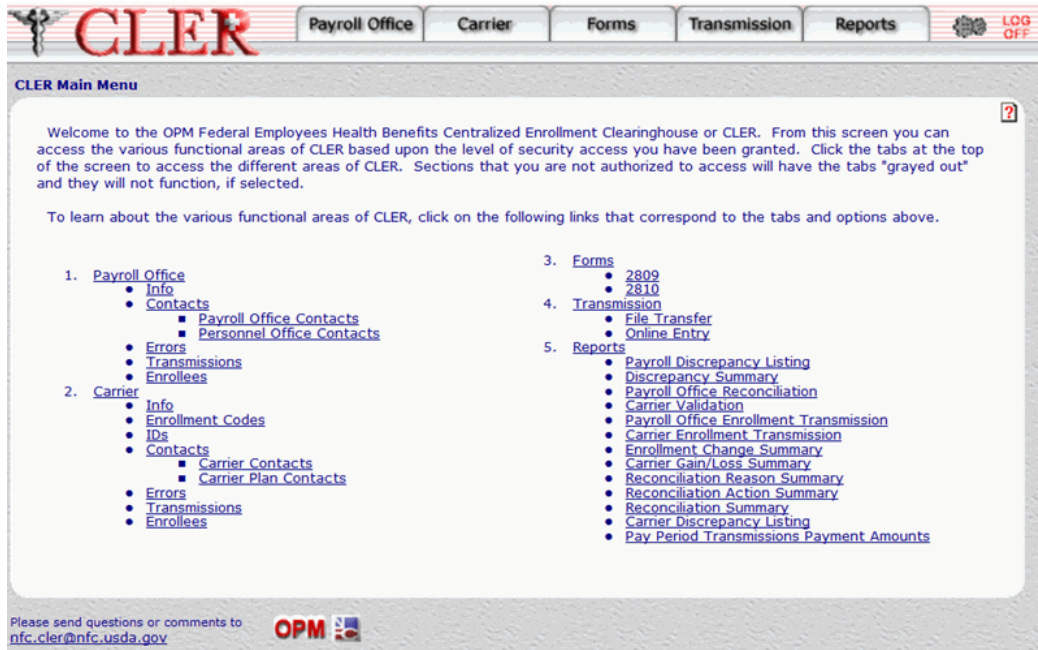


Figure 6: CLER Main Menu

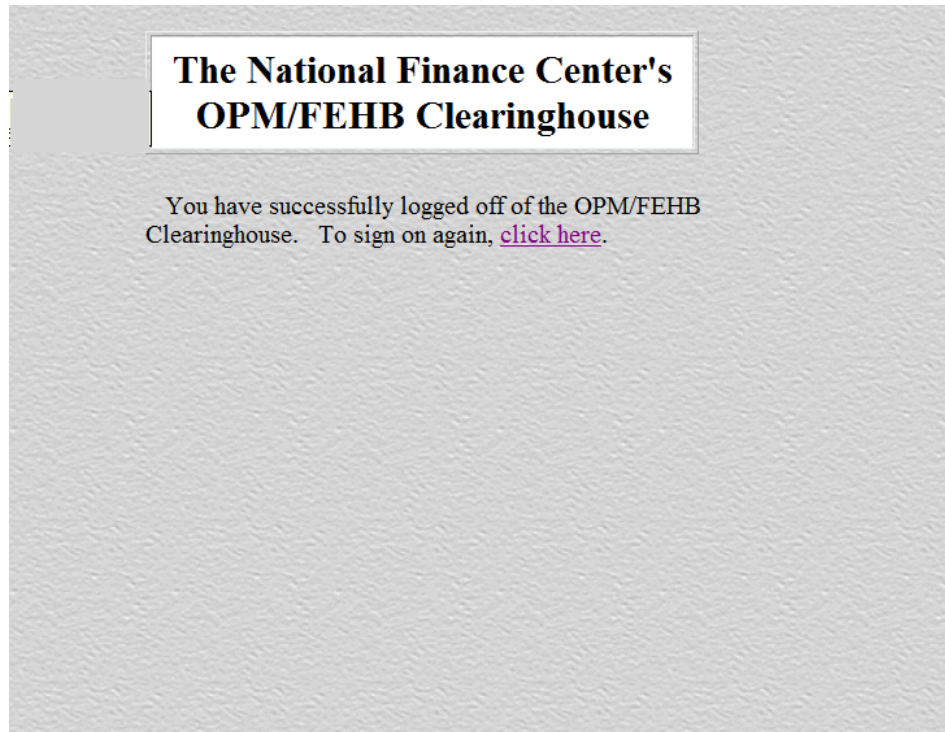
A brief description of each option displayed on the CLER Main Menu is listed as follows:

- **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:

<b>Timeline for CLER Quarterly Reconciliation .....</b>	<b>19</b>
<b>Formatting Enrollment Data Files for Transmission to CLER .....</b>	<b>22</b>

## 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	<p>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.</p> <hr/> <p>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.</p> <hr/> <p>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:</p> <ul style="list-style-type: none"> <li>• 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 <b>March 1</b>, may cause unmatched errors when compared to enrollee records submitted by carriers. Please do not report changes effective after <b>March 1</b>.</li> <li>• Payroll offices with pay cycles other than monthly, must extract data effective as of the last pay period that falls between <b>March 1</b> and <b>March 15</b>. The end of the pay period date must be reflected in the header as the as-of-date.</li> </ul> <hr/> <p>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.</p> <hr/> <ul style="list-style-type: none"> <li>• Carriers must extract data effective as of <b>March 1</b>. There are no changes to the frequency of transmissions from the Carriers.</li> </ul> <p>Carriers and payroll offices must include the correct submission date in the header record they transmit to CLER. The following are valid submission dates:</p> <ul style="list-style-type: none"> <li>• For a payroll office, the submission date is the date they send their file to NFC.</li> <li>• For a carrier, the submission date is the date they send their file to the OPM Data Hub.</li> </ul> <p>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.</p>
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. <b>Payroll office</b> transmissions must be received at NFC by <b>5:00 p.m. Central Standard Time (CST) within 7 business days after the pay period end date</b> . 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 <b>3:00 p.m. (EST)</b> .
3/15 - 3/19	The information required to produce discrepancy reports is processed and made available to Agencies and carriers through CLER, <b>provided all Agencies and carriers submit their file by the deadline</b> . 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 <b>May 1</b> .
5/1	Responses from Agencies are due by <b>8:00 a.m. (CST)</b> . <ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> </ul>
5/1	On <b>May 1</b> , after <b>8:00 a.m. (CST)</b> , 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:

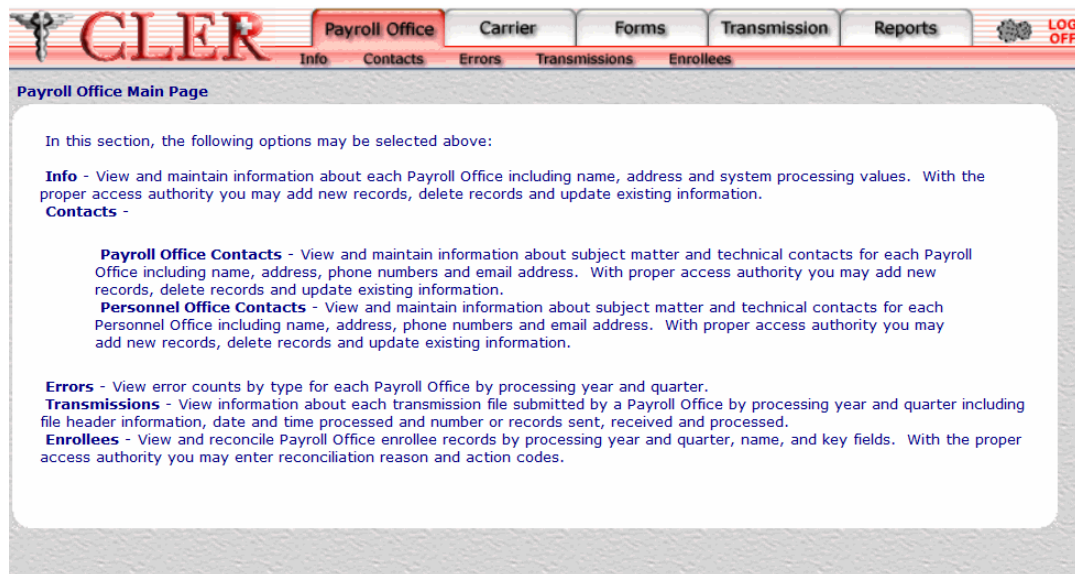
<b>Viewing Payroll Office Information Records .....</b>	<b>23</b>
<b>Viewing and Maintaining Carrier Records .....</b>	<b>66</b>
<b>Viewing Reports.....</b>	<b>151</b>

## 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.

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
<b>Payroll Office ID</b>	<i>Optional, alphanumeric, 8 position</i> Enter the payroll office identification number.
<b>Name</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the name of the payroll office.
<b>City</b>	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the payroll office's city.
<b>State</b>	<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 <b>State, U.S. Territory, and Overseas Military Abbreviations Table</b> (on page 226) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.



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

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

The screenshot shows the CLER web application interface. At the top, there's a navigation bar with tabs for 'Payroll Office', 'Carrier', 'Forms', 'Transmission', and 'Reports'. Below this, there's a sub-navigation bar with 'Info', 'Contacts', 'Errors', 'Transmissions', and 'Enrollees'. The main content area is titled 'Payroll Office Information'. It contains a search form with input fields for 'ID', 'Name', 'Address', 'City', 'State', and 'Zip'. To the right of these fields is an 'Options' section with a 'View' button. Below the search form, it indicates 'Records Found: 1'.

Figure 10: Payroll Office Information Search Results Page

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



<b>State</b>	<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 <b>State, U.S. Territory, and Overseas Military Abbreviations Table</b> (on page 226).
<b>Zip</b>	<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.

CLER Payroll Office Carrier Forms Transmission Reports LOG OFF

Info Contacts Errors Transmissions Enrollees

**Payroll Office Information View**

Use the browser Back arrow to select another record to view.

**Payroll Office ID**  
[Text Box]

**Name**  
[Text Box]

**Address**  
[Text Box]  
[Text Box]  
[Text Box]

**City** **State** **Zip** **Foreign Country**  
[Text Box] [Dropdown] [Text Box] [Dropdown]

**Start Date** **End Date**  
[Dropdown] [Dropdown] [Dropdown] [Dropdown] [Dropdown] [Dropdown]

**Error Threshold** [Text Box] **Threshold Type** (percent or number) [Dropdown]

**Transmission File Name**  
[Text Box]

**Last Changed:** **ID** **Date** **Time**  
[Text Box] [Text Box] [Text Box] [Text Box] [Text Box]

Figure 11: Payroll Office Information View Page

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



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



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

For more information see:

<b>Viewing Payroll and Personnel Office Contact Records.....</b>	<b>28</b>
<b>Maintaining Payroll Office Enrollee Records (Marked with Discrepancy Code 163) .....</b>	<b>42</b>
<b>Viewing a Payroll Office Enrollee Record (Marked with Discrepancy Code 163) .....</b>	<b>42</b>
<b>Reconciling a Payroll Office Enrollee Record (Marked With Discrepancy Code 163) .....</b>	<b>58</b>

### ***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:

<b>Viewing a Payroll Office Contact Record .....</b>	<b>29</b>
<b>Viewing a Personnel Office Contact Record .....</b>	<b>35</b>





## 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.

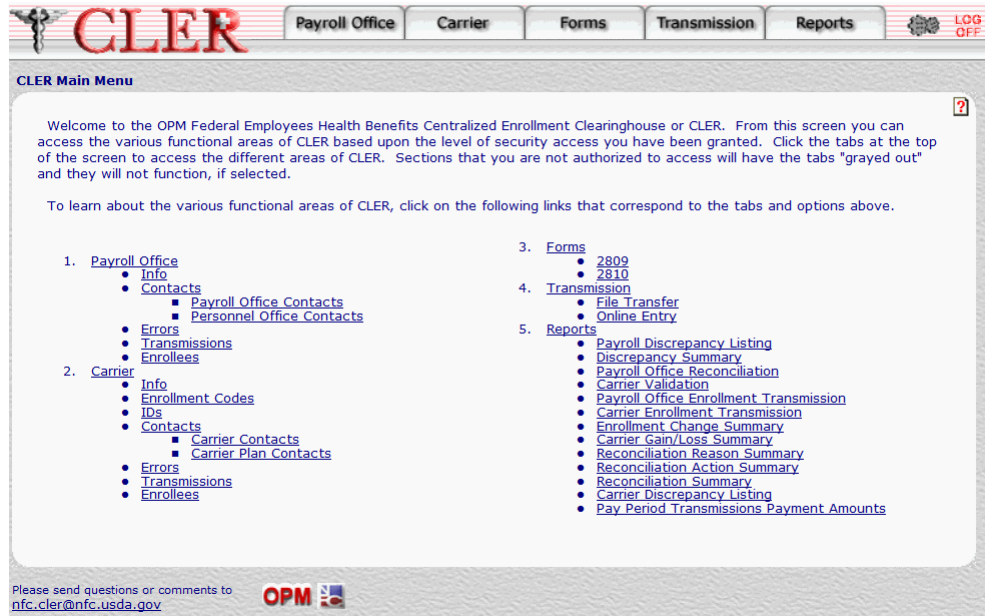


Figure 12: CLER Main Menu Page

2. The Payroll Office Main Page is displayed.

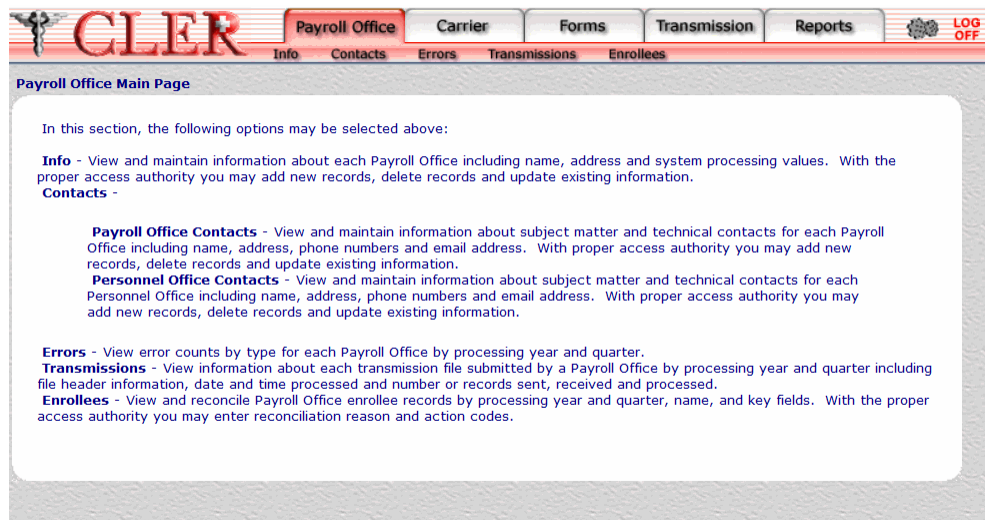


Figure 13: Contacts Main Page



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.

**CLER** Payroll Office Carrier Forms Transmission Reports LOG OFF

Info Contacts Errors Transmissions Enrollees

**Contacts Main Page**

Select from the following tables to view or update.

**Payroll Office Contacts** - View and maintain information about subject matter and technical contacts for each Payroll Office including name, address, phone number and email address.

**Personnel Office Contacts** - View and maintain information about subject matter and technical contacts for each Personnel Office including name, address, phone number and email address.

Figure 14: Contacts Main Page

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

**CLER** Payroll Office Carrier Forms Transmission Reports LOG OFF

Info Contacts Errors Transmissions Enrollees

**Payroll Office Contacts**

Click the **Add** button to add a new Payroll Office Contacts record. Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries.

Payroll Office ID Type

Display: All ☒ Active ☐ Inactive ☐

Order By: ID ☒ Type ☐

SUBMIT 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
<b>Type</b>	<i>Optional</i> 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.
<b>Display</b>	<i>Optional, default</i> 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. <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.
<b>Order By</b>	<i>Optional, default</i> Defaults to the <b>ID</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>ID</b> - Search by ID number. <b>Type</b> - Search by type code.

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

Figure 16: Payroll Office Contacts Search Results Page

Field	Description
<b>ID</b>	<i>System generated</i> Displays the payroll office identification number.



<b>Type</b>	<i>System generated</i> 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.
<b>Status</b>	<i>System generated</i> 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.
<b>Name</b>	<i>System generated</i> Displays the name of the payroll office contact.
<b>Phone</b>	<i>System generated</i> Displays the payroll office contact's telephone number.
<b>Email</b>	<i>System generated</i> 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.

CLER Payroll Office Carrier Forms Transmission Reports LOG OFF

Info Contacts Errors Transmissions Enrollees

**Payroll Office Contacts View**

Use the browser Back arrow to select another record to view.

**US DEPARTMENT OF AGRICULTURE**

Payroll Office ID: [ ] Type: [General]

Role: [PRIMARY CONTACT]

Name: [ ]

Address: [ ]  
[CENTRALIZED ENROLLMENT RECON. (CLER)]

City: [ ] State: [ ] Zip: [ ] Foreign Country: [ ]

Phone Number: [ ] Fax Number: [ ]

Email Address: [ ]

Remarks: [PRODUCTION]

Last Changed: ID [ ] Date [07/06/2012] Time [09:58:01]

Figure 17: Payroll Office Contacts View Page

Field	Instruction/Description
<b>Payroll Office ID</b>	<i>System generated</i> Displays the payroll office identification number.
<b>Type</b>	<i>System generated</i> 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.
<b>Role</b>	<i>System generated</i> Displays the title, position, etc., of the payroll office contact/personnel office contact/carrier contact/carrier plan contact.
<b>Address Line 1</b>	<i>System generated</i> Displays the first line of the payroll office contact's street or post office box address.



<b>Address Line 2</b>	<i>System generated</i> Displays the second line of the carrier's street or post office box address.
<b>Address Line 3</b>	<i>System generated</i> Displays the third line of the payroll office contact's street or post office box address.
<b>City</b>	<i>System generated</i> Displays the name of the carrier's city.  <u>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.</u>
<b>State</b>	<i>System generated</i> 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 <b>State, U.S. Territory, and Overseas Military Abbreviations Table</b> (on page 226).
<b>Zip</b>	<i>System generated</i> Displays the payroll office contact's ZIP Code.
<b>Foreign Country</b>	<i>System generated</i> Displays the carrier plan contact's country code. For a list and descriptions of country codes, see <b>Country Codes Table</b> (on page 229).
<b>Phone</b>	<i>System generated</i> Displays the payroll office contact's telephone number.
<b>Fax Number</b>	<i>System generated</i> Displays the payroll office contact's fax number.
<b>Email</b>	<i>System generated</i> Displays the payroll office contact's email address.
<b>Remarks</b>	<i>System generated</i> Displays the remarks about this record.
<b>Last Changed ID</b>	<i>System generated</i> Displays the user ID number of the individual who made the most recent change to the record.



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

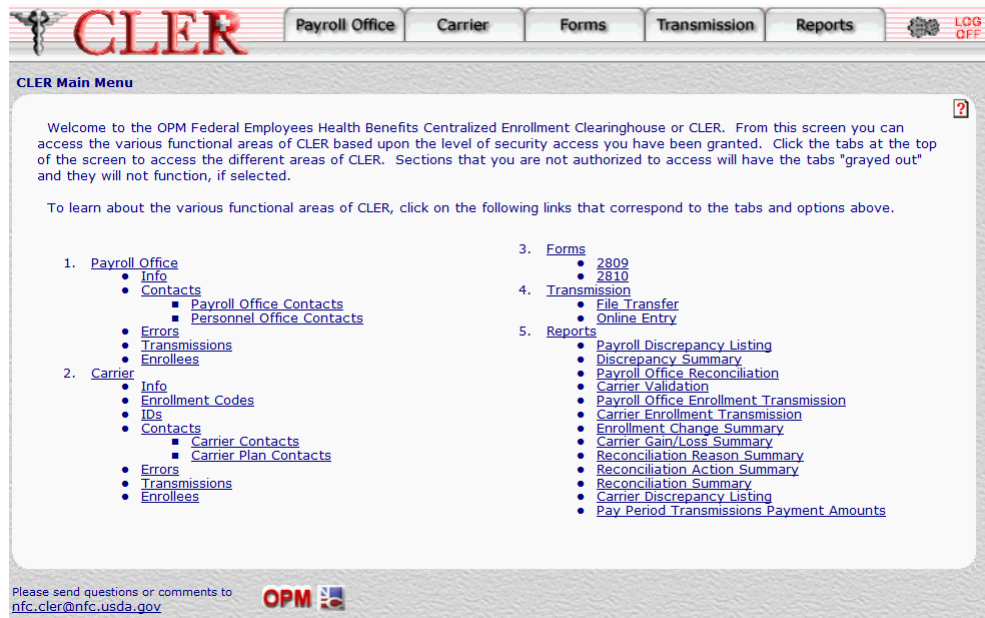


Figure 18: CLER Main Menu Page



2. The Payroll Office Main Page is displayed.

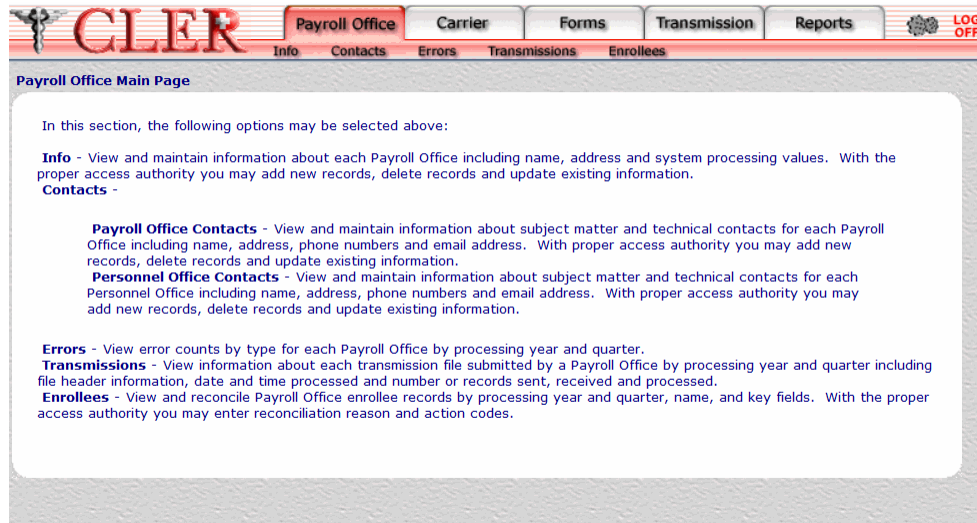


Figure 19: Payroll Office Main Page

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.

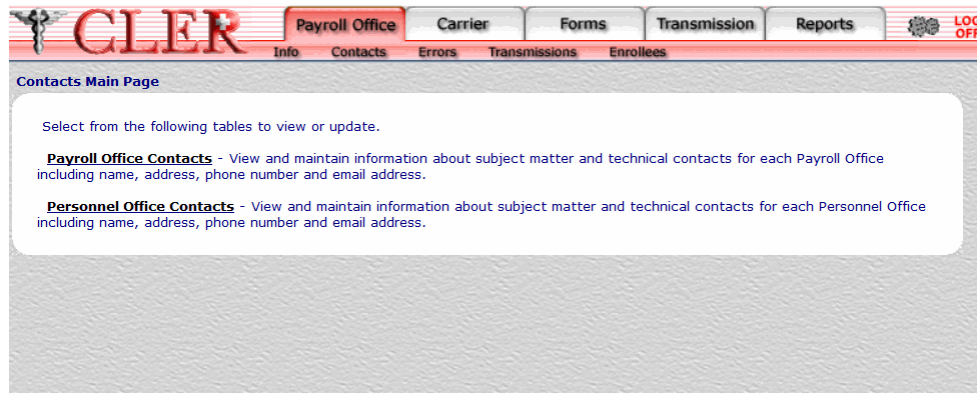


Figure 20: Contacts Main Page





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

**Figure 21: Pesonnel Office Contacts Record**

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

**OR**

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

Field	Instruction/Description
<b>Payroll Office ID</b>	<i>Optional, alphanumeric, 8 position</i> Enter the payroll office identification number.
<b>Personnel Office ID</b>	<i>Optional, alphanumeric, 4 positions</i> Enter the personnel office identification (POI) number.
<b>Type</b>	<i>Optional</i> 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.



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

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

Figure 22: Personnel Office Contacts Search Results Page

Field	Description
<b>ID</b>	<i>System generated</i>  Displays the payroll office identification number.



<b>POI</b>	<p><i>System generated</i></p> <p>Displays the POI number.</p> <hr/> <p>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.</p>
<b>Type</b>	<p><i>System generated</i></p> <p>Displays <b>General</b> type code to indicate that the payroll office contact holds an administrative position.</p> <p>Displays <b>Technical</b> type code to indicate that the payroll office contact holds a technical position.</p>
<b>Status</b>	<p><i>System generated</i></p> <p>Displays <b>active</b> to indicate that the record has been activated in CLER.</p> <p>Displays <b>inactive</b> to indicate that the record has been inactivated in CLER.</p>
<b>Name</b>	<p><i>System generated</i></p> <p>Displays the name of the personnel office contact.</p>
<b>Phone</b>	<p><i>System generated</i></p> <p>Displays the carrier contact's telephone number.</p>
<b>Email</b>	<p><i>System generated</i></p> <p>Displays the personnel office contact's email address.</p>

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.

Figure 23: Personnel Office Contacts View Page

Field	Description
Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
Personnel Office ID	<i>System generated</i> Displays the personnel office identification number.
Type	<i>System generated</i> 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.



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



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

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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).

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### ***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.



**CLER 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 based upon the level of security access you have been granted. Click the tabs at the top of the screen to access the different 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
  - Contacts
    - Payroll Office Contacts
    - Personnel Office Contacts
  - Errors
  - Transmissions
  - Enrollees
- 2. Carrier**
  - Info
  - Enrollment Codes
  - IDs
  - Contacts
    - Carrier Contacts
    - Carrier Plan Contacts
  - Errors
  - Transmissions
  - Enrollees
- 3. Forms**
  - 2809
  - 2810
- 4. Transmission**
  - File Transfer
  - Online Entry
- 5. Reports**
  - Payroll Discrepancy Listing
  - Discrepancy Summary
  - Payroll Office Reconciliation
  - Carrier Validation
  - Payroll Office Enrollment Transmission
  - Carrier Enrollment Transmission
  - Enrollment Change Summary
  - Carrier Gain/Loss Summary
  - Reconciliation Reason Summary
  - Reconciliation Action Summary
  - Reconciliation Summary
  - Carrier Discrepancy Listing
  - Pay Period Transmissions Payment Amounts

Please send questions or comments to [nfc.cler@nfc.usda.gov](mailto:nfc.cler@nfc.usda.gov)

OPM

## 2. The Payroll Office Main Page is displayed.

**Payroll Office Main Page**

In this section, the following options may be selected above:

**Info** - View and maintain information about each Payroll Office including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Contacts** -

**Payroll Office Contacts** - View and maintain information about subject matter and technical contacts for each Payroll Office including name, address, phone numbers and email address. With proper access authority you may add new records, delete records and update existing information.

**Personnel Office Contacts** - View and maintain information about subject matter and technical contacts for each Personnel Office including name, address, phone numbers and email address. With proper access authority you may add new records, delete records and update existing information.

**Errors** - View error counts by type for each Payroll Office by processing year and quarter.

**Transmissions** - View information about each transmission file submitted by a Payroll Office by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.

**Enrollees** - View and reconcile Payroll Office enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter reconciliation reason and action codes.

**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.

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
<b>Agency</b>	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>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).</p>
<b>POI</b>	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>Enter the POI of the office where the enrollee's records are maintained.</p>
<b>Carrier</b>	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>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.</p>
<b>Enrollment Code</b>	<p><i>Optional, alphanumeric, 3 positions</i></p> <p>Enter the enrollment/carrier enrollment code.</p>
<b>SSN - From</b>	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a specific enrollee record by Social Security number (SSN), enter the SSN and skip the To field.</p> <p>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.</p> <hr/> <p>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.</p>
<b>SSN - To</b>	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.</p> <hr/> <p>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.</p>



Field	Instruction/Description
<b>Other ID - From</b>	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>To search for a specific enrollee record by Other ID, enter the Other ID and skip the To field.</p> <p>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.</p> <hr/> <p>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 AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>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.</p> <hr/> <p>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 <u>this page</u>.</p> <hr/>
<b>Other ID - To</b>	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>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.</p> <hr/> <p>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 AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>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.</p> <hr/> <p>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 <u>this page</u>.</p> <hr/>



Field	Instruction/Description
<b>Last Name</b>	<p><i>Optional, alphanumeric, 25 positions maximum</i></p> <p>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.</p>
<b>First Name</b>	<p><i>Optional, alphanumeric, 12 positions maximum</i></p> <p>Enter the enrollee's first name. This must be provided with the exception of an enrollee with only one name.</p>
<b>Middle Name</b>	<p><i>Optional, alphanumeric, 12 positions maximum</i></p> <p>Enter the enrollee's middle name/initial.</p>
<b>Display (Payroll Office Enrollees)</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>All Records</b> - Displays all records related to the search criteria.</p> <p><b>Matches</b> - Displays all matched records related to the search criteria.</p> <p><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.</p> <p><b>Discrepancies</b> - Displays all records with discrepancies related to the search criteria.</p> <p><b>Warnings</b> - Displays all records with warnings related to the search criteria.</p> <p><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.</p> <p><b>Reconciled</b> - Displays all records with reconciled discrepancies related to the search criteria.</p> <p><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.</p> <p><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.</p> <p><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.</p>



Field	Instruction/Description
Order By: 1st	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
Order By: 2nd	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>



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



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



1. 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.

Enrollee SSN	Last Name	First Name	Carrier	Code	Agency	POI	Discrepancies	Fail Count	Options
000000000	Doe	John	XXXX	000	XX00	0000	163	7	View Reconcile

Figure 26: Payroll Office Enrollees Search 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.

Other ID	Enrollee SSN	Last Name	First Name	Carrier	Code	Discrepancies	Fail Count	Options
XXXXXXXXX	000000000	Doe	John	XXXX	000	163	7	View Reconcile

Figure 27: Payroll Office Enrollees 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



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

**Enrollees Search Results Page Only**

<b>Field</b>	<b>Description</b>
<b>Agency</b>	<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).  <u>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.</u>





<b>POI</b>	<p><i>System generated</i></p> <p>Displays the POI of the office where the enrollee's records are maintained.</p> <hr/> <p>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.</p>
<b>Discrepancies</b>	<p><i>System generated</i></p> <p>Displays Discrepancy Code 163. For a detailed explanation of Discrepancy Code 163, see <b>Discrepancy Codes Table</b> (on page 217).</p> <hr/> <p>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.</p>
<b>Fail Count</b>	<p><i>System generated</i></p> <p>Displays the number of times this record has failed the quarterly edit process.</p>

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.

CLER Payroll Office Enrollees View

Use the browser Back arrow to select another record to view.

Payroll Office ID: 00000000 Year: 2004 Quarter: 1 Submission: 1

Agency: XX00 POI: 0000 Carrier: XXXX Enrollment Code: 000 SSN: 000000000

Last Name: Doe First Name: John Middle Name:

Effective Date: Amount: 422.47

Deceased Annuitant SSN: Pseudo SSN: Other Payroll ID: Other Carrier ID:

Submitter Use #1: Submitter Use #2: Submitter Use #3:

Date Processed: 03/10/2004 Time Processed: 22:31:28 Source: Fail Count: 7

Select another discrepancy: 1 2

Discrepancy: 163 - Enrollee On Your Payroll Office Record, But No Carrier Explain

Reconciliation Reason: 521 - Carrier Did Not Process 2809 Or 2810 Correctly Explain

Reconciliation Action: 611 - Carrier Correction Required - Submitted By Payroll/Per Explain

Corrective Action:

Payroll Office Comments (400 character max): Carrier Comments (400 character max):

Last Payroll Update: ID: XX000 Date: 03/31/2004 Time: 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	<i>System generated</i> Displays the reconciliation year.
Quarter	<i>System generated</i> Displays the reconciliation quarter.



Field	Instruction/Description
<b>Submission</b>	<p><i>System generated</i></p> <p>Displays the transmission submission for this enrollee record.</p>
<b>Agency</b>	<p><i>System generated</i></p> <p>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).</p> <hr/> <p>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.</p>
<b>POI</b>	<p><i>System generated</i></p> <p>Displays the POI of the office where the enrollee's records are maintained.</p> <hr/> <p>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.</p>
<b>Carrier</b>	<p><i>System generated</i></p> <p>Displays the carrier code.</p>
<b>Enrollment Code</b>	<p><i>System generated</i></p> <p>Displays the enrollment code/carrier enrollment code.</p>
<b>SSN</b>	<p><i>System generated</i></p> <p>Displays the enrollee's SSN.</p>
<b>Last Name</b>	<p><i>System generated</i></p> <p>Displays the enrollee's last name.</p>
<b>First Name</b>	<p><i>System generated</i></p> <p>Displays the enrollee's first name.</p>
<b>Middle Name</b>	<p><i>System generated</i></p> <p>Displays the enrollee's middle name or initial.</p>
<b>Effective Date</b>	<p><i>System generated</i></p> <p>Displays the effective date of the enrollment.</p>



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



Field	Instruction/Description
<b>Select another discrepancy</b>	<i>Optional</i> Select each discrepancy number to view the corresponding code and message if multiple discrepancies are shown.
<b>Discrepancy</b>	<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 <b>Discrepancy Codes Table</b> (on page 217).
<b>Reconciliation Reason</b>	<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 <b>Reconciliation Reason Codes Table</b> (on page 221).
<b>Reconciliation Action</b>	<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 <b>Reconciliation Action Codes Table</b> (on page 224).
<b>Corrective Action</b>	<i>System generated</i> 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).
<b>Payroll Office Comments</b>	<i>System generated</i> Displays the payroll office's or Agency's comments.
<b>Carrier Comments</b>	<i>System generated</i> Displays the carrier's comments.
<b>Last Payroll Update ID</b>	<i>System generated</i> Displays the user ID number of the payroll office representative who made the most recent change to the record.
<b>Last Payroll Update Date</b>	<i>System generated</i> Displays the date of the most recent change.
<b>Last Payroll Update Time</b>	<i>System generated</i> Displays the time of the most recent change.



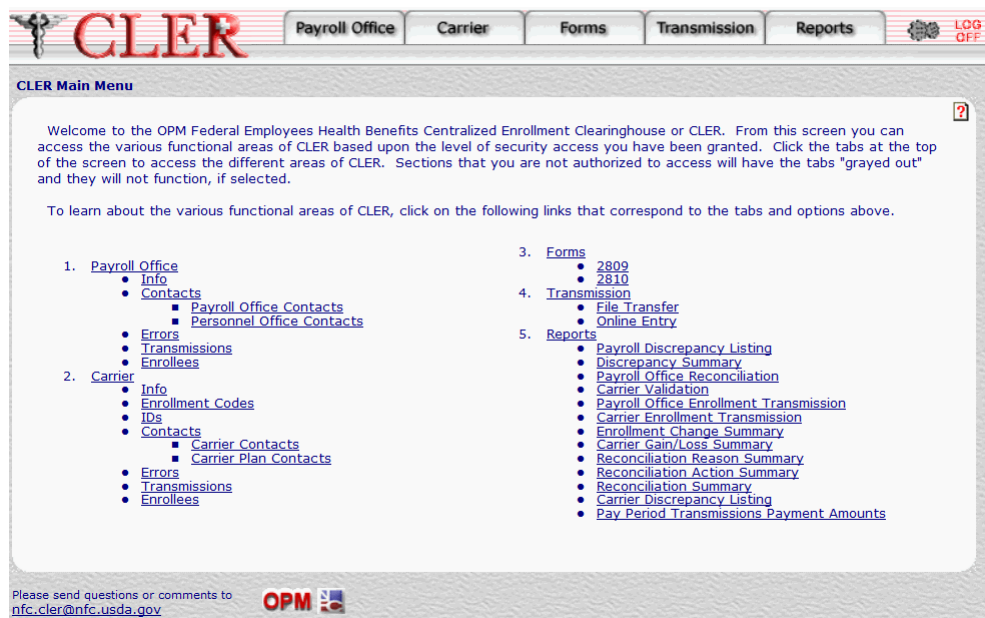
Field	Instruction/Description
Last Carrier Update ID	<i>System generated</i> Displays the user ID number of the carrier representative/individual who made the most recent change to the record.
Last Carrier Update Date	<i>System generated</i> Displays the date of the most recent change.
Last Carrier Update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



- The Payroll Office Main Page is displayed.

**CLER** Payroll Office Carrier Forms Transmission Reports LOG OFF

Info Contacts Errors Transmissions Enrollees

**Payroll Office Main Page**

In this section, the following options may be selected above:

**Info** - View and maintain information about each Payroll Office including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Contacts** -

**Payroll Office Contacts** - View and maintain information about subject matter and technical contacts for each Payroll Office including name, address, phone numbers and email address. With proper access authority you may add new records, delete records and update existing information.

**Personnel Office Contacts** - View and maintain information about subject matter and technical contacts for each Personnel Office including name, address, phone numbers and email address. With proper access authority you may add new records, delete records and update existing information.

**Errors** - View error counts by type for each Payroll Office by processing year and quarter.

**Transmissions** - View information about each transmission file submitted by a Payroll Office by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.

**Enrollees** - View and reconcile Payroll Office enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter reconciliation reason and action codes.

**Figure 30: Payroll Office Main Page**

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

**CLER** Payroll Office Carrier Forms Transmission Reports LOG OFF

Info Contacts Errors Transmissions Enrollees

**Payroll Office Enrollees**

Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries. Fields marked with \* are required.

**Payroll Office ID#**  **Year\***  **Quarter\***

**Agency**  **POI**  **Carrier**  **Enrollment Code**  **SSN - from**  **SSN - to**  **Other ID From**  **Other ID To**

**Last Name**  **First Name**  **Middle Name**

**Display:** All Records ☒ Matches ☐ No Matches ☐ Discrepancies ☐ Warnings ☐  
Unreconciled ☐ Reconciled ☐ Confirmed ☐ Disputed ☐ Not Validated ☐

**Order By:** 1st  2nd  3rd   
4th  5th  6th

**Figure 31: Payroll Office Enrollees Page**

- 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.

CLER Payroll Office Enrollees

Payroll Office ID: 00000000: Payroll Office [Refresh]

Year/Quarter: 2004/1

Enrollee SSN	Last Name	First Name	Carrier	Code	Agency	POI	Discrepancies	Fail Count	Options
00000000	Doe	John	XXXX	000	XX00	0000	163 ✓	7	View Reconcile

Figure 32: Payroll Office Enrollees Search Results Page

Field	Description
Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
Year	<i>System generated</i> Displays the reconciliation year.
Quarter	<i>System generated</i> 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	<i>System generated</i> Displays the carrier code.
Code	<i>System generated</i> Displays the enrollment code submitted by the payroll office/carrier.





<b>Agency</b>	<p><i>System generated</i></p> <p>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).</p> <hr/> <p>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 <u>page</u>.</p>
<b>POI</b>	<p><i>System generated</i></p> <p>Displays the POI of the office where the enrollee's records are maintained.</p> <hr/> <p>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 <u>page</u>.</p>
<b>Discrepancies</b>	<p><i>System generated</i></p> <p>Displays Discrepancy Code 163. For a detailed explanation of Discrepancy Code 163, see <b>Discrepancy Codes Table</b> (on page 217).</p> <hr/> <p>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 <u>page</u>.</p>
<b>Fail Count</b>	<p><i>System generated</i></p> <p>Displays the number of times this record has failed the quarterly edit process.</p>



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

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	<i>System generated</i> Displays the reconciliation year.



<b>Quarter</b>	<i>System generated</i> Displays the reconciliation quarter.
<b>Submission</b>	<i>System generated</i> Displays the transmission submission for this enrollee record.
<b>Agency</b>	<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). <hr/> 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.
<b>POI</b>	<i>System generated</i> Displays the POI of the office where the enrollee's records are maintained. <hr/> 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.
<b>Carrier</b>	<i>System generated</i> Displays the carrier code.
<b>Enrollment Code</b>	<i>System generated</i> Displays the enrollment code/carrier enrollment code.
<b>SSN</b>	<i>System generated</i> Displays the enrollee's SSN.
<b>Last Name</b>	<i>System generated</i> Displays the enrollee's last name.
<b>First Name</b>	<i>System generated</i> Displays the enrollee's first name.
<b>Middle Name</b>	<i>System generated</i> Displays the enrollee's middle name or initial.
<b>Effective Date</b>	<i>System generated</i> Displays the effective date of the enrollment.



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



<b>Select another discrepancy</b>	<p><i>Optional</i></p> <p>Select each discrepancy number to view the corresponding code and message if multiple discrepancies are shown.</p>
<b>Discrepancy</b>	<p><i>System generated</i></p> <p>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 <b>Discrepancy Codes Table</b> (on page 217).</p>
<b>Reconciliation Reason</b>	<p><i>System generated</i></p> <p>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 Table</b> (on page 221).</p>
<b>Reconciliation Action</b>	<p><i>System generated</i></p> <p>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).</p>
<b>Corrective Action*</b>	<p><i>System generated</i></p> <p>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 <b>Carrier Corrective Action Response Codes Table</b> (on page 225).</p>
<b>Payroll Office Comments</b>	<p><i>System generated</i></p> <p>Displays the payroll office's or Agency's comments.</p>
<b>Carrier Comments</b>	<p><i>Conditional, alphanumeric, 400 positions maximum</i></p> <p>Enter comments about this record.</p> <hr/> <p>Note: If <b>724</b> was selected in the Corrective Action field, comments explaining the corrective action must be entered in this field.</p> <hr/>
<b>Last Payroll Update ID</b>	<p><i>System generated</i></p> <p>Displays the user ID number of the payroll office representative who made the most recent change to the record.</p>
<b>Last Payroll Update Date</b>	<p><i>System generated</i></p> <p>Displays the date of the most recent change.</p>



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

<b>Viewing Carrier Information Records .....</b>	<b>66</b>
<b>Maintaining Carrier and Carrier Plan Contact Records.....</b>	<b>77</b>
<b>Maintaining Carrier Transmission Records .....</b>	<b>122</b>
<b>Maintaining Carrier Enrollee Records.....</b>	<b>131</b>

### ***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.

**Carrier Main Page**

In this section, the following options may be selected above:

**Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.

**IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Contacts** -

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Errors** - View error counts by type for each Carrier by processing year and quarter.

**Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.

**Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 34: Carrier Main Page

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

**Carrier Information**

Click the **Add** button to add a new Carrier Information record. Enter selection criteria in the following fields and click the **SUBMIT** button to search for records based on your entries.

**Carrier**

**Name** **City** **State**

**Order By:** ☒ Carrier ☐ Name ☐ City ☐ State

**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.

Carrier	Name	Address	City	State	Zip	Options
						<a href="#">View</a> <a href="#">Update</a> <a href="#">Delete</a>

Records Found: 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.

**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 Records ..... 70

Viewing Carrier Enrollment Code Records ..... 72

## Viewing Carrier ID Records

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

### To View a Carrier ID Record:

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

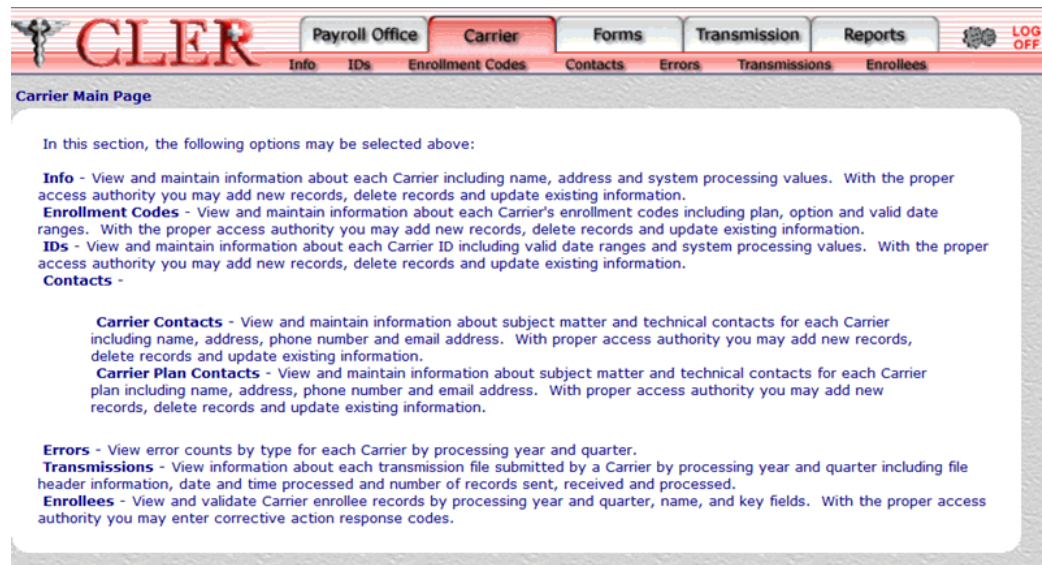


Figure 38: Carrier Main Page



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.

Carrier ID	Name	Start Date	End Date	Options
		01/02/2001	12/31/9999	View Update Delete

Records Found: 1

**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.

**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.

**Carrier Main Page**

In this section, the following options may be selected above:

**Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.

**IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Contacts** -

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Errors** - View error counts by type for each Carrier by processing year and quarter.

**Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.

**Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

**Figure 42: Carrier Main Page**

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

**Carrier Enrollment Codes**

Click the **Add** button to add a new Carrier Enrollment Codes record. Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries.

Carrier

Enrollment Code

Order By: Carrier ☒ Code ☐

**SUBMIT** **RESET**

**Figure 43: Carrier Enrollment Codes Search Page**

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.

Carrier	Region Code	Name	Start Date	End Date	Options
			01/01/2001	12/31/9999	View Update Delete
			01/01/2001	12/31/9999	View Update Delete
			01/01/2016	12/31/9999	View Update Delete
			01/01/2002	12/31/9999	View Update Delete
			01/01/2002	12/31/9999	View Update Delete
			01/01/2016	12/31/9999	View Update Delete
			01/01/2008	12/31/2009	View Update Delete
			01/01/2008	12/31/2009	View Update Delete

Records Found: 8

**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:

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

### ***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.

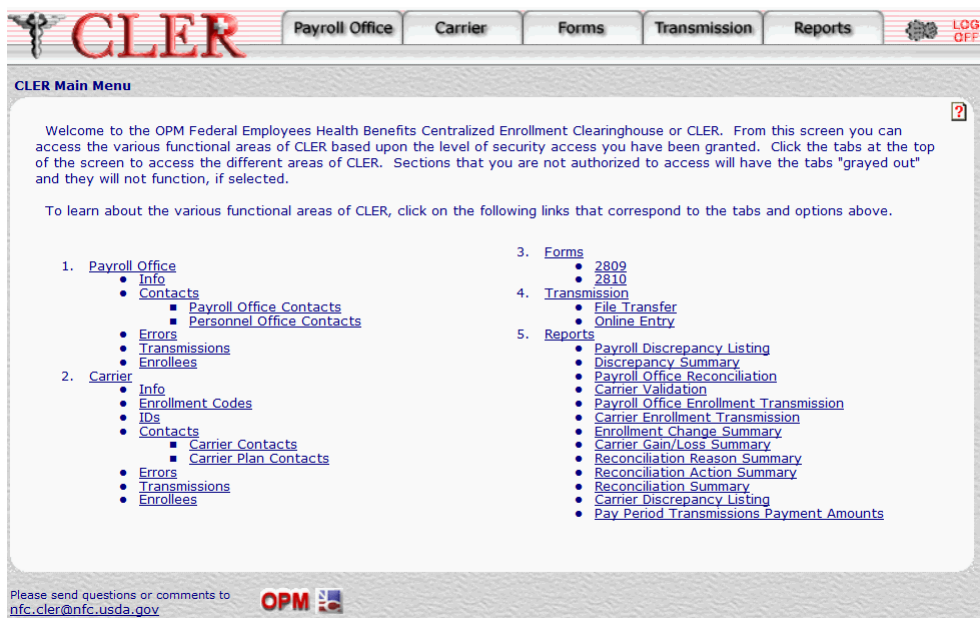


Figure 46: CLER Main Menu Page

2. The Carrier Main Page is displayed.

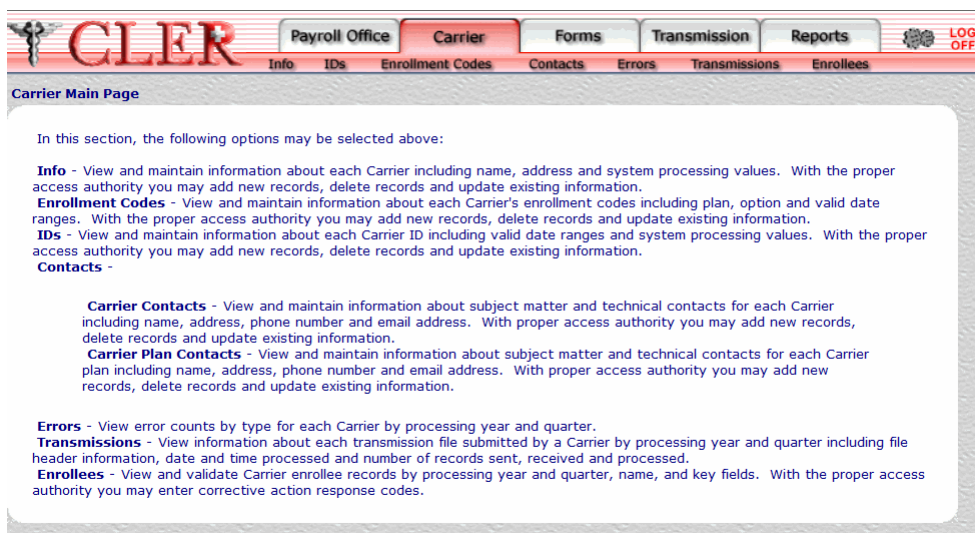


Figure 47: Carrier Main Page



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.

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**Contacts Main Page**

Select from the following tables to view or update.

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

**Figure 48: Contacts Main Page**

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

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**Carrier Contacts**

Click the **Add** button to add a new Carrier Contacts record. Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries.

**Carrier ID** **Type**

**Display:** All ☒ Active ☐ Inactive ☐

**Order By:** ID ☒ Type ☐

**SUBMIT** **RESET**

**Figure 49: Carrier Contacts Page**



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

Figure 50: Carrier Contacts Add Page

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

Field	Instruction/Description
<b>Carrier ID*</b>	<i>Required</i> Select the carrier ID number from the drop-down menu.
<b>Type*</b>	<i>Required</i> 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.
<b>Role</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the title, position, etc., of the carrier contact/carrier plan contact.
<b>Name</b>	<i>Optional, alphanumeric, 30 positions maximum</i> Enter the name of the carrier contact.



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

- 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.

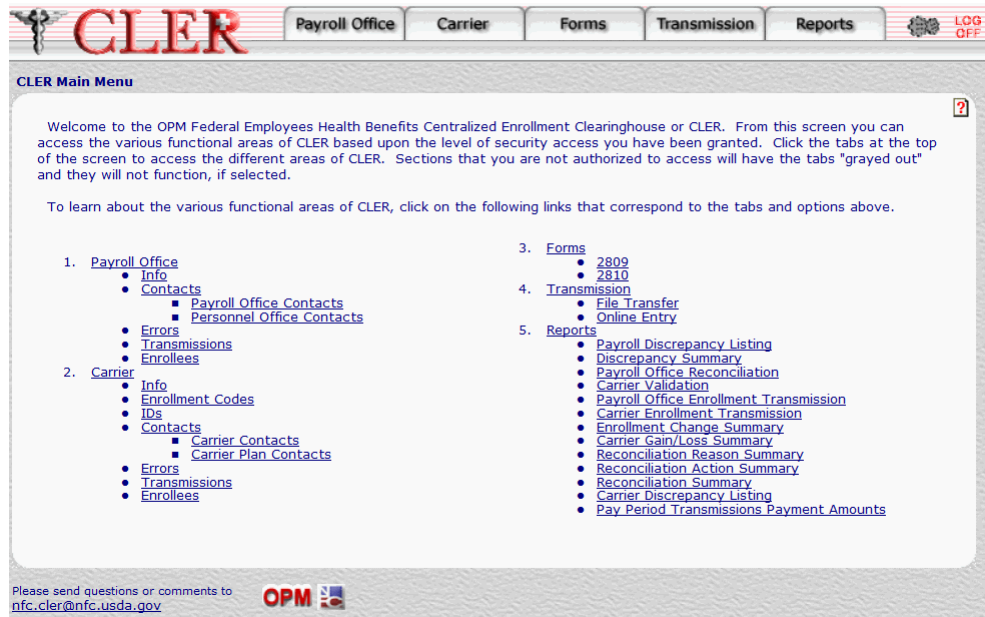


Figure 51: CLER Main Menu Page



- The Carrier Main Page is displayed.

**Carrier Main Page**

In this section, the following options may be selected above:

**Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.

**IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Contacts** -

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Errors** - View error counts by type for each Carrier by processing year and quarter.

**Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.

**Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 52: Carrier Main Page

- 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.

**Contacts Main Page**

Select from the following tables to view or update.

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

Figure 53: Contacts Main Page

- Click the **Carrier Plan Contacts** link to display the Carrier Plan Contacts page.

**Carrier Plan Contacts**

Click the **Add** button to add a new Carrier Plan Contacts record. Enter selection criteria in the following fields and click the **SUBMIT** button to search for records based on your entries.

Carrier  Plan  Type

Display: All ☒ Active ☐ Inactive ☐

Order By: Carrier ☒ Plan ☐ Type ☐

**SUBMIT** **RESET**

Figure 54: Carrier Plan Contacts Page



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

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.
Type*	<i>Required</i> 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.





<b>Name</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the name of the carrier plan contact.
<b>Address Line 1</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the first line of the carrier contact's street or post office box address.
<b>Address Line 2</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the second line of the carrier contact's street or post office box address.
<b>Address Line 3</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the third line of the carrier contact's street or post office box address.
<b>City</b>	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier plan contact's city.
<b>State</b>	<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 <b>State, U.S. Territory, and Overseas Military Abbreviations Table</b> (on page 226) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.
<b>Zip</b>	<i>System generated</i> Displays the carrier plan contact's ZIP Code.
<b>Foreign Country</b>	<i>Optional</i> 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).
<b>Phone Number</b>	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier plan contact's telephone number.
<b>Fax Number</b>	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier plan contact's fax number.
<b>Email Address</b>	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier plan contact's email address.
<b>Remarks</b>	<i>Optional, alphanumeric, 80 positions</i> 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 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:

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

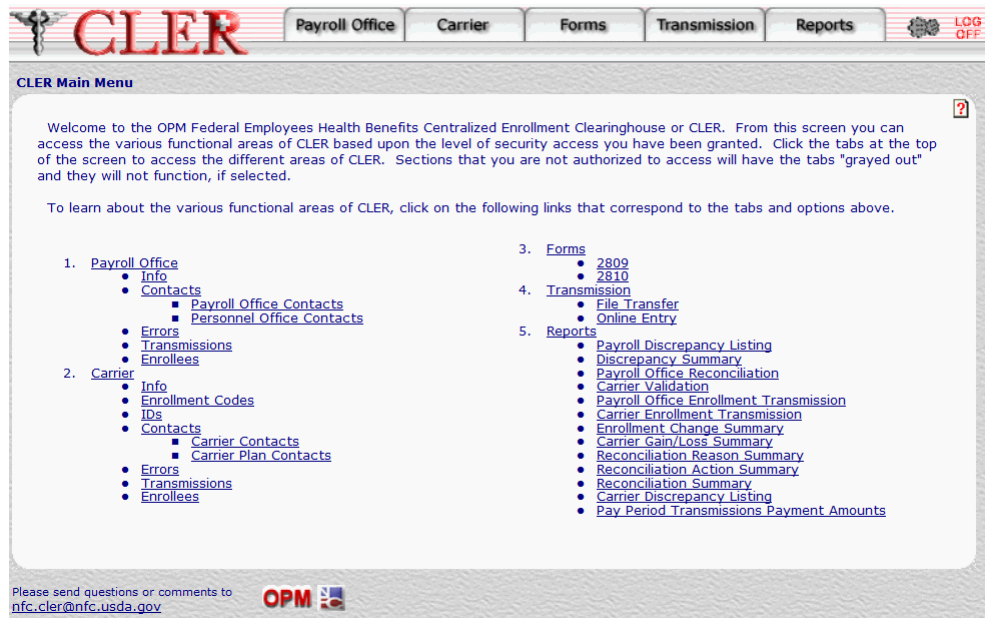


Figure 56: CLER Main Menu Page



- The Carrier Main Page is displayed.

**Carrier Main Page**

In this section, the following options may be selected above:

**Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.

**IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Contacts** -

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Errors** - View error counts by type for each Carrier by processing year and quarter.

**Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.

**Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 57: Carrier Main Page

- 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.

**Contacts Main Page**

Select from the following tables to view or update.

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

Figure 58: Contacts Main Page

- Click the **Carrier Contacts** link to display the Carrier Contacts page.

**Carrier Contacts**

Click the **Add** button to add a new Carrier Contacts record. Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries.

Carrier ID:  Type:

Display: ☒ All ☐ Active ☐ Inactive

Order By: ☒ ID ☐ Type

**SUBMIT** **RESET**

Figure 59: Carrier Contacts Page

- Complete the fields on the Carrier Contacts page and click **Submit**.



OR

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

Field	Instruction/Description
<b>Carrier ID</b>	<i>Required, alphanumeric, 7 positions</i> Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
<b>Type</b>	<i>Optional</i> 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.
<b>Display</b>	<i>Optional, default</i> 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. <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.
<b>Order By</b>	<i>Optional, default</i> Defaults to the <b>ID</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>ID</b> - Search by ID number. <b>Type</b> - Search by type code.

6. The Carrier Contacts Search Results page is displayed.

Figure 60: Carrier Contacts Search Results Page



Field	Description
<b>Carrier ID</b>	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
<b>Type</b>	<i>System generated</i> 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.
<b>Status</b>	<i>System generated</i> 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.
<b>Name</b>	<i>System generated</i> Displays the name of the carrier contact.
<b>Phone</b>	<i>System generated</i> Displays the carrier contact's telephone number.
<b>Email</b>	<i>System generated</i> 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.

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Carrier Contacts View

Use the browser Back arrow to select another record to view.

**BLUE CROSS AND BLUE SHIELD**

Carrier ID  Type

Role

Name

Address

City  State  Zip  Foreign Country

Phone Number  Fax Number

Email Address

Remarks

Last Changed: ID  Date    Time

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.
Type	<i>System generated</i> 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.



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



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

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

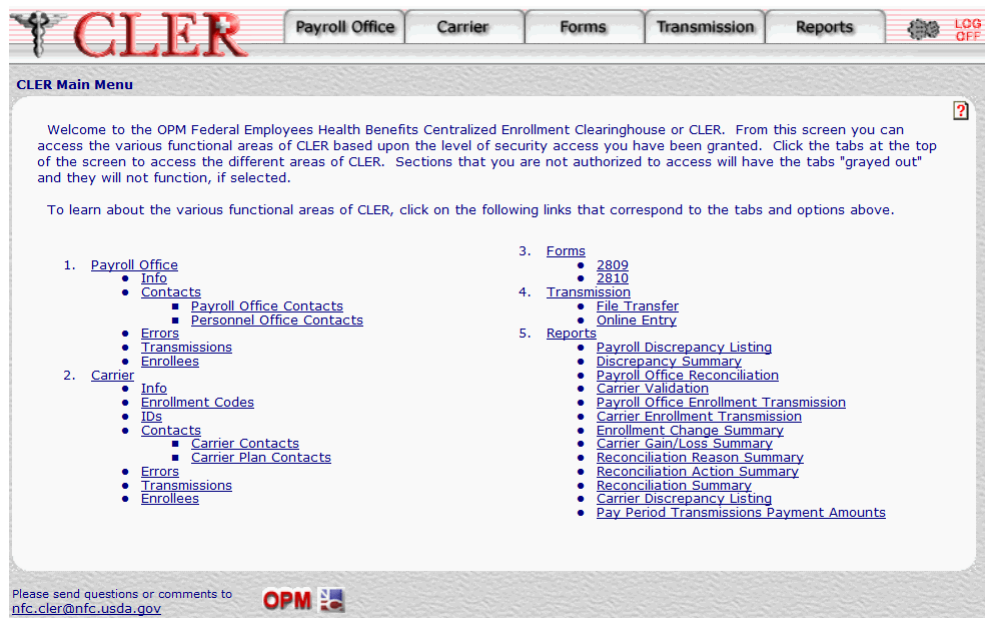


Figure 62: CLER Main Menu Page





- The Carrier Main Page is displayed.

**Carrier Main Page**

In this section, the following options may be selected above:

**Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.

**IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Contacts** -

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Errors** - View error counts by type for each Carrier by processing year and quarter.

**Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.

**Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 63: Carrier Main Page

- 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.

**Contacts Main Page**

Select from the following tables to view or update.

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

Figure 64: Contacts Main Page

- Click the **Carrier Plan Contacts** link to display the Carrier Plan Contacts page.

**Carrier Plan Contacts**

Click the **Add** button to add a new Carrier Plan Contacts record. Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries.

Carrier  Plan  Type

Display: All ☒ Active ☐ Inactive ☐

Order By: Carrier ☒ Plan ☐ Type ☐

**SUBMIT** **RESET**

Figure 65: Carrier Plan Contacts Page

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



**OR**

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

Field	Instruction/Description
<b>Carrier</b>	<i>Optional, alphanumeric, 7 positions</i> Enter the carrier ID code.
<b>Plan</b>	<i>Optional, alphanumeric, 2 positions</i> Enter the first two positions of the carrier enrollment code.
<b>Type</b>	<i>Optional</i> 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.
<b>Display</b>	<i>Optional, default</i> 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.  <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.
<b>Order By</b>	<i>Optional, default</i> 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.

Figure 66: Carrier Plan Contacts Search Results Page

Field	Description
<b>Carrier</b>	<i>System generated</i> Displays the carrier ID code.
<b>Plan</b>	<i>System generated</i> Displays the first two positions of the carrier enrollment code.
<b>Type</b>	<i>System generated</i> 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.
<b>Status</b>	<i>System generated</i> 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.
<b>Name</b>	<i>System generated</i> Displays the name of the carrier plan contact.
<b>Phone</b>	<i>System generated</i> Displays the carrier plan contact's telephone number.
<b>Email</b>	<i>System generated</i> 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.

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Carrier Plan Contacts View

Use the browser Back arrow to select another record to view.

Carrier Plan Type

Role

Name

Address

City State Zip Foreign Country

Phone Number Fax Number

Email Address

Remarks

Last Changed: ID Date Time

10 29 2002 10:31:16

Figure 67: Carrier Plan Contacts View Page

Field	Description
Carrier	<i>System generated</i> Displays the carrier code.
Plan	<i>System generated</i> Displays the first two positions of the carrier enrollment code.
Type	<i>System generated</i> 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.



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



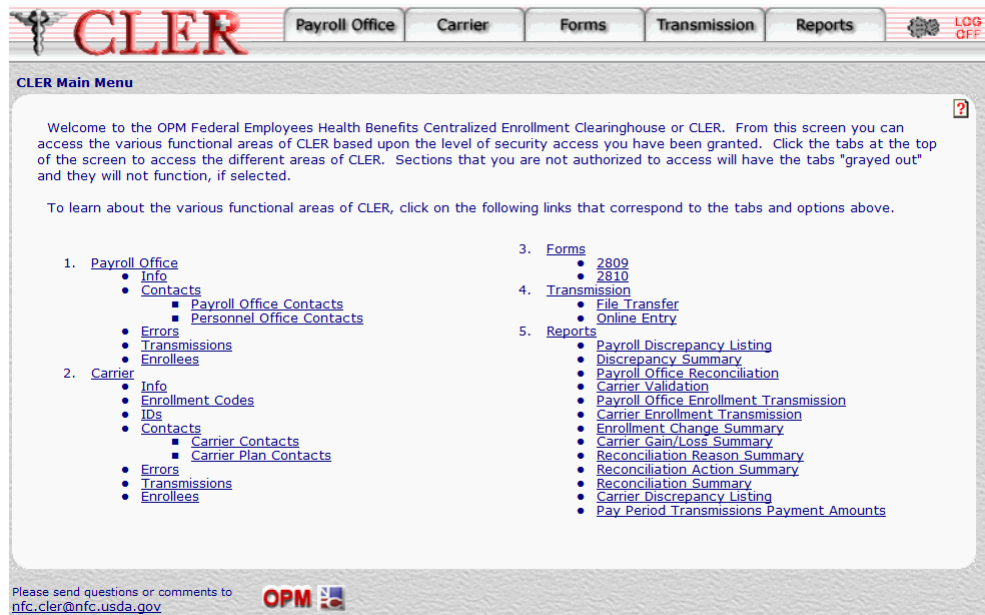
<b>Remarks</b>	<i>System generated</i> Displays the remarks about this record.
<b>Last Changed ID</b>	<i>System generated</i> Displays the user ID number of the individual who made the most recent change to the record.
<b>Last Changed Date</b>	<i>System generated</i> Displays the date of the most recent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

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



**Figure 68: CLER Main Menu Page**



- The Carrier Main Page is displayed.

**Carrier Main Page**

In this section, the following options may be selected above:

**Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.

**IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Contacts** -

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Errors** - View error counts by type for each Carrier by processing year and quarter.

**Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.

**Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

**Figure 69: Carrier Main Page**

- 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.

**Contacts Main Page**

Select from the following tables to view or update.

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

**Figure 70: Contacts Main Page**

- Click the **Carrier Contacts** link to display the Carrier Contacts page.

**Carrier Contacts**

Click the **Add** button to add a new Carrier Contacts record. Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries.

Carrier ID:  Type:

Display: ☒ All ☐ Active ☐ Inactive

Order By: ☒ ID ☐ Type

**SUBMIT** **RESET**

**Figure 71: Carrier Contacts Page**

- Complete the fields on the Carrier Contacts page and click **Submit**.



**OR**

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

Field	Instruction/Description
<b>Carrier ID</b>	<i>Required, alphanumeric, 7 positions</i> Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
<b>Type</b>	<i>Optional</i> 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.
<b>Display</b>	<i>Optional, default</i> 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. <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.
<b>Order By</b>	<i>Optional, default</i> Defaults to the <b>ID</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>ID</b> - 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.

Figure 72: Carrier Contacts Search Results Page

Field	Instruction/Description
<b>Carrier ID</b>	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
<b>Type</b>	<i>System generated</i> 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.
<b>Status</b>	<i>System generated</i> 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.
<b>Name</b>	<i>Optional, alphanumeric, 30 positions maximum</i> Enter the name of the carrier contact.
<b>Phone</b>	<i>System generated</i> Displays the carrier contact's telephone number.
<b>Email</b>	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier contact's email address.

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



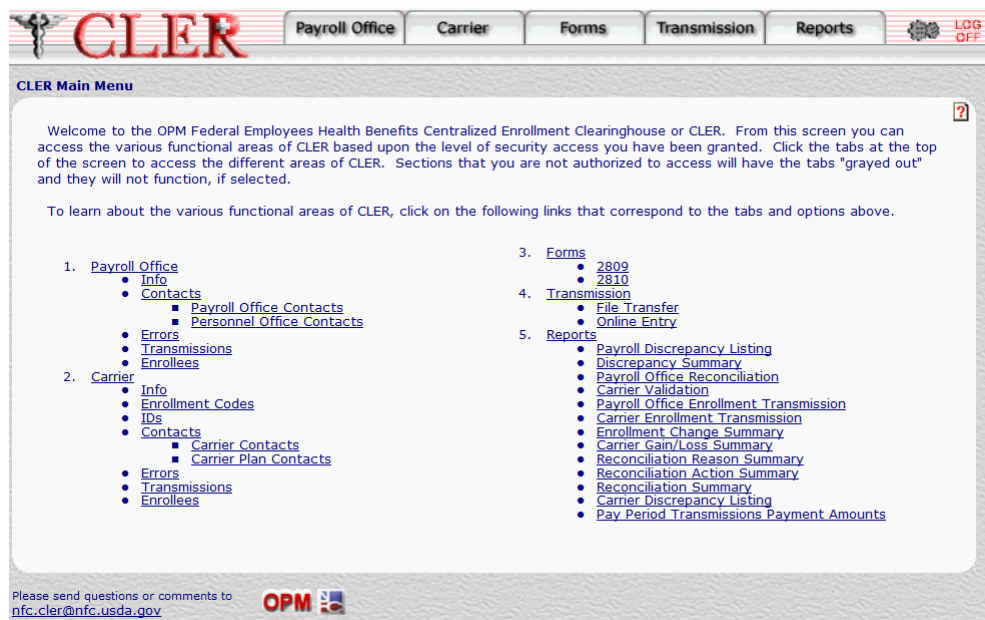
9. Click **Inactivate** to inactivate an activated record. A pop-up message is displayed to confirm the record has been inactivated.
10. Click **OK** to close the pop-up.

### ***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:**

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



**Figure 73: CLER Main Menu Page**



- The Carrier Main Page is displayed.

**Carrier Main Page**

In this section, the following options may be selected above:

**Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.

**IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Contacts** -

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Errors** - View error counts by type for each Carrier by processing year and quarter.

**Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.

**Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 74: Carrier Main Page

- 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.

**Contacts Main Page**

Select from the following tables to view or update.

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

Figure 75: Contacts Main Page

- Click the **Carrier Plan Contacts** link to display the Carrier Plan Contacts page.

**Carrier Plan Contacts**

Click the **Add** button to add a new Carrier Plan Contacts record. Enter selection criteria in the following fields and click the **SUBMIT** button to search for records based on your entries.

Carrier  Plan  Type

Display: All ☒ Active ☐ Inactive ☐

Order By: Carrier ☒ Plan ☐ Type ☐

**SUBMIT** **RESET**

Figure 76: Carrier Plan Contacts Page

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



**OR**

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

Field	Instruction/Description
<b>Carrier</b>	<i>Optional, alphanumeric, 7 positions</i> Enter the carrier ID code.
<b>Plan</b>	<i>Required, alphanumeric, 2 positions</i> Enter the first two positions of the carrier enrollment code.
<b>Type</b>	<i>Optional</i> 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.
<b>Display</b>	<i>Optional, default</i> 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.  <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.
<b>Order By</b>	<i>Optional, default</i> 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.

The screenshot shows the CLER web interface. At the top, there's a navigation bar with tabs: Payroll Office, Carrier (selected), Forms, Transmission, Reports, and a LCG OFF button. Below this is a sub-navigation bar with links: Info, IDs, Enrollment Codes, Contacts, Errors, Transmissions, and Enrollees. The main content area is titled 'Carrier Plan Contacts'. It contains a table with the following columns: Carrier, Plan, Type, Status, Name, Phone, Email, and Options. The 'Type' column has a dropdown menu with 'General' and 'Active' selected. The 'Status' column has a dropdown menu with 'Active' selected. The 'Options' column has three buttons: 'View', 'Inactivate', and 'Update'.

Figure 77: Carrier Plan Contacts Search Results Page

Field	Description
<b>Carrier</b>	<i>System generated</i> Displays the carrier code.
<b>Plan</b>	<i>System generated</i> Displays the first two positions of the carrier enrollment code.
<b>Type</b>	<i>System generated</i> 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.
<b>Status</b>	<i>System generated</i> 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.
<b>Name</b>	<i>System generated</i> Displays the name of the carrier plan contact.
<b>Phone</b>	<i>System generated</i> Displays the carrier plan contact's telephone number.
<b>Email</b>	<i>System generated</i> Displays the carrier plan contact's email address.

- 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:

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

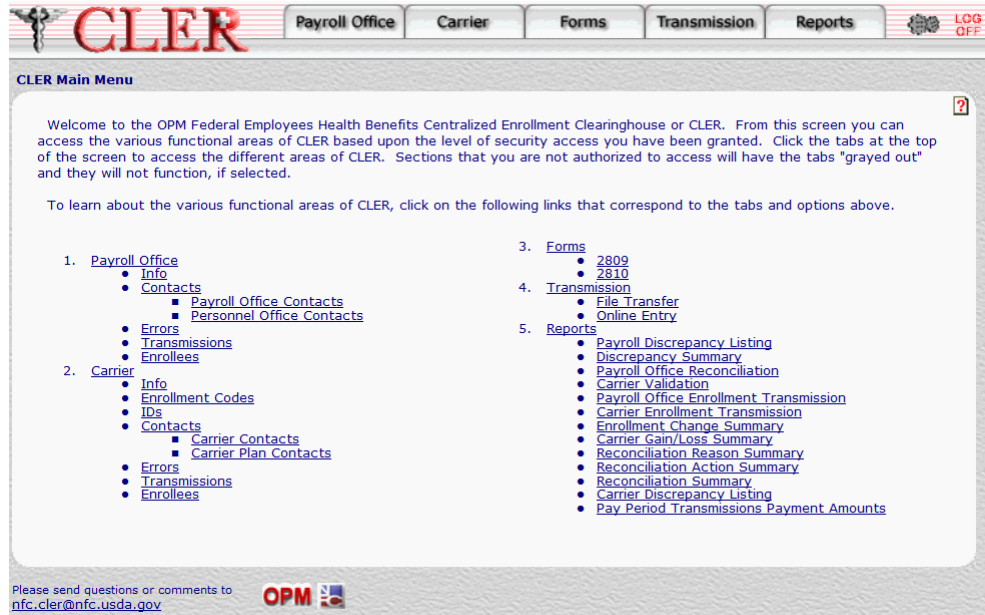


Figure 78: CLER Main Menu Page



- The Carrier Main Page is displayed.

**Carrier Main Page**

In this section, the following options may be selected above:

**Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.

**IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Contacts** -

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Errors** - View error counts by type for each Carrier by processing year and quarter.

**Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.

**Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

**Figure 79: Carrier Main Page**

- 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.

**Contacts Main Page**

Select from the following tables to view or update.

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

**Figure 80: Contacts Main Page**

- Click the **Carrier Contacts** link to display the Carrier Contacts page.

**Carrier Contacts**

Click the **Add** button to add a new Carrier Contacts record. Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries.

Carrier ID:  Type:

Display: ☒ All ☐ Active ☐ Inactive

Order By: ☒ ID ☐ Type

**SUBMIT** **RESET**

**Figure 81: Carrier Contacts Page**

- Complete the fields on the Carrier Contacts page and click **Submit**.



OR

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

Field	Instruction/Description
<b>Carrier ID</b>	<i>Required, alphanumeric, 7 positions</i> Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
<b>Type</b>	<i>Optional</i> 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.
<b>Display</b>	<i>Optional, default</i> 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. <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.
<b>Order By</b>	<i>Optional, default</i> Defaults to the <b>ID</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>ID</b> - Search by ID number. <b>Type</b> - Search by type code.

6. The Carrier Contacts Search Results page is displayed.

Carrier ID	Type	Status	Name	Phone	Email	Options
	General	Inactive				<a href="#">View</a> <a href="#">Activate</a> <a href="#">Update</a>
	General	Inactive				<a href="#">View</a> <a href="#">Activate</a> <a href="#">Update</a>
	General	Inactive				<a href="#">View</a> <a href="#">Activate</a> <a href="#">Update</a>
	General	Inactive				<a href="#">View</a> <a href="#">Activate</a> <a href="#">Update</a>

Figure 82: Carrier Contacts Search Results Page





Field	Instruction/Description
<b>Carrier ID</b>	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
<b>Type</b>	<i>System generated</i> 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.
<b>Status</b>	<i>System generated</i> 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.
<b>Name</b>	<i>Optional, alphanumeric, 30 positions maximum</i> Enter the name of the carrier contact.
<b>Phone</b>	<i>System generated</i> Displays the carrier contact's telephone number.
<b>Email</b>	<i>System generated</i> Displays the carrier contact's email address.



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

Figure 83: Carrier Contacts Update Page

- 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*	<i>Required</i> 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
<b>Address Line 1</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the first line of the carrier contact's street or post office box address.
<b>Address Line 2</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the second line of the carrier contact's street or post office box address.
<b>Address Line 3</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the third line of the carrier contact's street or post office box address.
<b>City</b>	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier contact's city.
<b>State</b>	<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 <b>State, U.S. Territory, and Overseas Military Abbreviations Table</b> (on page 226) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.
<b>Zip</b>	<i>Optional, alphanumeric, 11 positions maximum</i> Enter the carrier contact's ZIP Code.
<b>Foreign Country</b>	<i>Optional</i> Select the carrier 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).
<b>Phone Number</b>	<i>System generated</i> Displays the carrier contact's telephone number.
<b>Fax Number</b>	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier contact's fax number.
<b>Email Address</b>	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier contact's email address.
<b>Remarks</b>	<i>Optional, alphanumeric, 80 positions</i> Enter remarks about this record.

- 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:

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

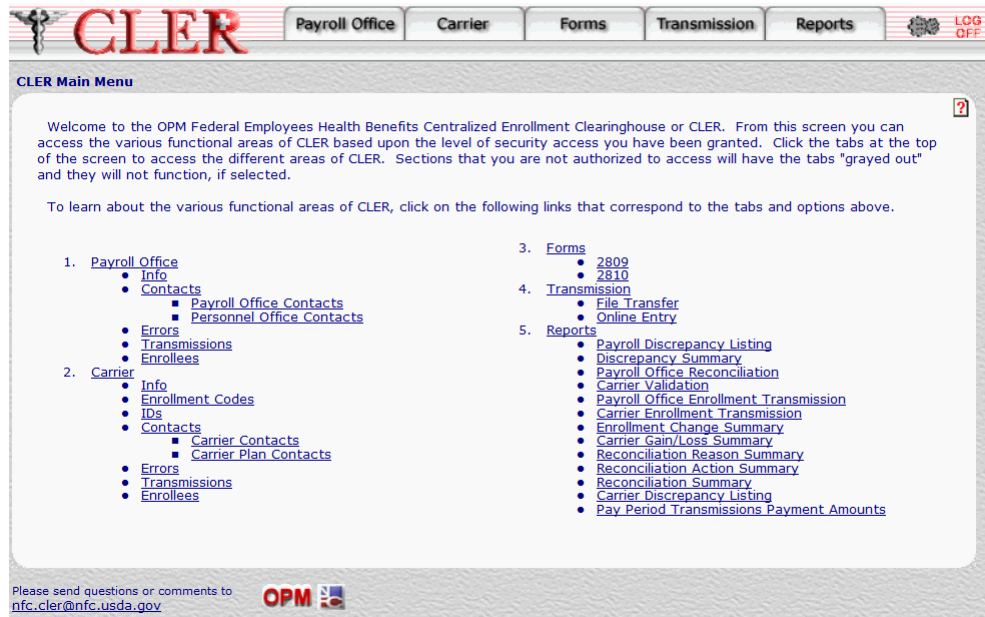


Figure 84: CLER Main Menu Page



- The Carrier Main Page is displayed.

**Carrier Main Page**

In this section, the following options may be selected above:

**Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.

**IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Contacts** -

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Errors** - View error counts by type for each Carrier by processing year and quarter.

**Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.

**Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 85: Carrier Main Page

- 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.

**Contacts Main Page**

Select from the following tables to view or update.

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

Figure 86: Contacts Main Page

- Click the **Carrier Plan Contacts** link to display the Carrier Plan Contacts page.

**Carrier Plan Contacts**

Click the **Add** button to add a new Carrier Plan Contacts record. Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries.

Carrier  Plan  Type

Display: All ☒ Active ☐ Inactive ☐

Order By: Carrier ☒ Plan ☐ Type ☐

**SUBMIT** **RESET**

Figure 87: Carrier Plan Contacts Page

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



**OR**

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

Field	Instruction/Description
<b>Carrier</b>	<i>Optional, alphanumeric, 7 positions</i> Enter the carrier ID code.
<b>Plan</b>	<i>Required, alphanumeric, 2 positions</i> Enter the first two positions of the carrier enrollment code.
<b>Type</b>	<i>Optional</i> 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.
<b>Display</b>	<i>Optional, default</i> 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. <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.
<b>Order By</b>	<i>Optional, default</i> 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.

Carrier	Plan	Type	Status	Name	Phone	Email	Options
		General	Active				View Inactivate Update

Figure 88: Carrier Plan Contacts Page

Field	Description
<b>Carrier</b>	<i>System generated</i> Displays the carrier ID code.
<b>Plan</b>	<i>System generated</i> Displays the first two positions of the carrier enrollment code.
<b>Type</b>	<i>System generated</i> 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.
<b>Status</b>	<i>System generated</i> 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.
<b>Name</b>	<i>System generated</i> Displays the name of the carrier plan contact.
<b>Phone</b>	<i>System generated</i> Displays the carrier plan contact's telephone number.
<b>Email</b>	<i>System generated</i> Displays the carrier plan contact's email address.



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

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*	<i>Required</i> 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.





<b>Address Line 1</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the first line of the carrier contact's street or post office box address.
<b>Address Line 2</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the second line of the carrier contact's street or post office box address.
<b>Address Line 3</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the third line of the carrier contact's street or post office box address.
<b>City</b>	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier contact's city.
<b>State</b>	<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 <b>State, U.S. Territory, and Overseas Military Abbreviations Table</b> (on page 226) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.
<b>Zip</b>	<i>Optional, alphanumeric, 11 positions maximum</i> Enter the carrier contact's ZIP Code.
<b>Foreign Country</b>	<i>Optional</i> Select the carrier 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).
<b>Phone Number</b>	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier contact's telephone number.
<b>Fax Number</b>	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier contact's fax number.
<b>Email Address</b>	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier contact's email address.
<b>Remarks</b>	<i>Optional, alphanumeric, 80 positions</i> 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 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:

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

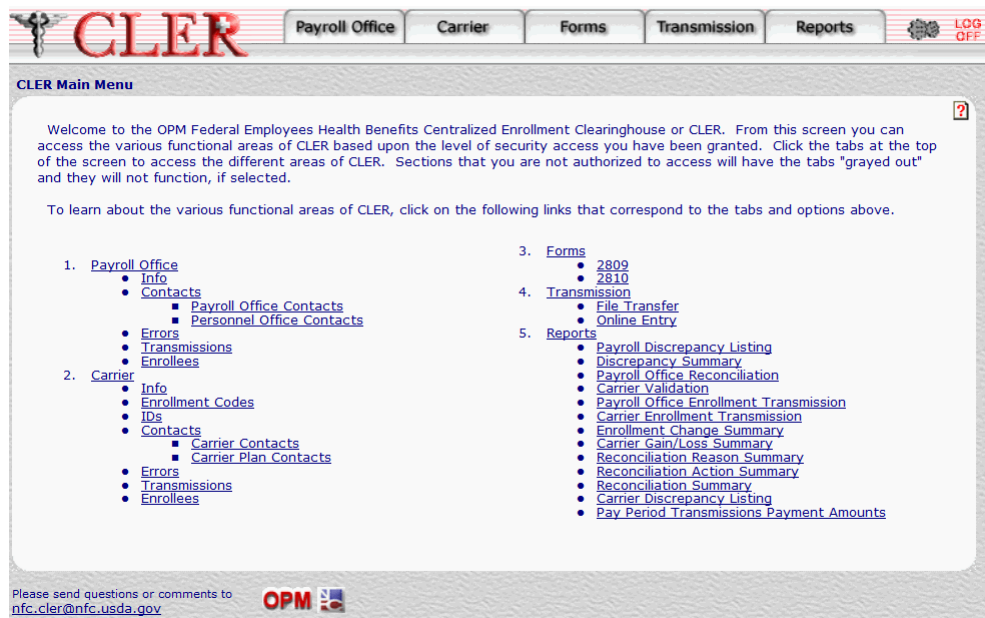


Figure 90: CLER Main Menu Page



- The Carrier Main Page is displayed.

**Carrier Main Page**

In this section, the following options may be selected above:

**Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.

**IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.

**Contacts** -

**Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

**Errors** - View error counts by type for each Carrier by processing year and quarter.

**Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.

**Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

**Figure 91: Carrier Main Page**

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

**Carrier Errors**

Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries.

Carrier ID:  Year:  Quarter:

Order By: Carrier ID ☒ Year/Quarter ☐

**Figure 92: Carrier Errors Page**

- Complete the fields on the Carrier Errors page and click **Submit**.

**OR**

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

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



<b>Quarter</b>	<i>Optional, alphanumeric, 1 position</i> Enter the reconciliation quarter for the requested error statistics.
<b>Order By</b>	<i>Optional, default</i> 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.

Carrier Errors

Carrier ID	Year	Quarter	Records with Errors	Records with Warnings	Total Errors	Total Warnings	Options
1	2014	2	0	0	0	0	<a href="#">View</a>

Records Found: 1

Figure 93: Carrier Errors Search Results Page

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



<b>Total Warnings</b>	<i>System generated</i> 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.

Figure 94: Carrier Errors View Page

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



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

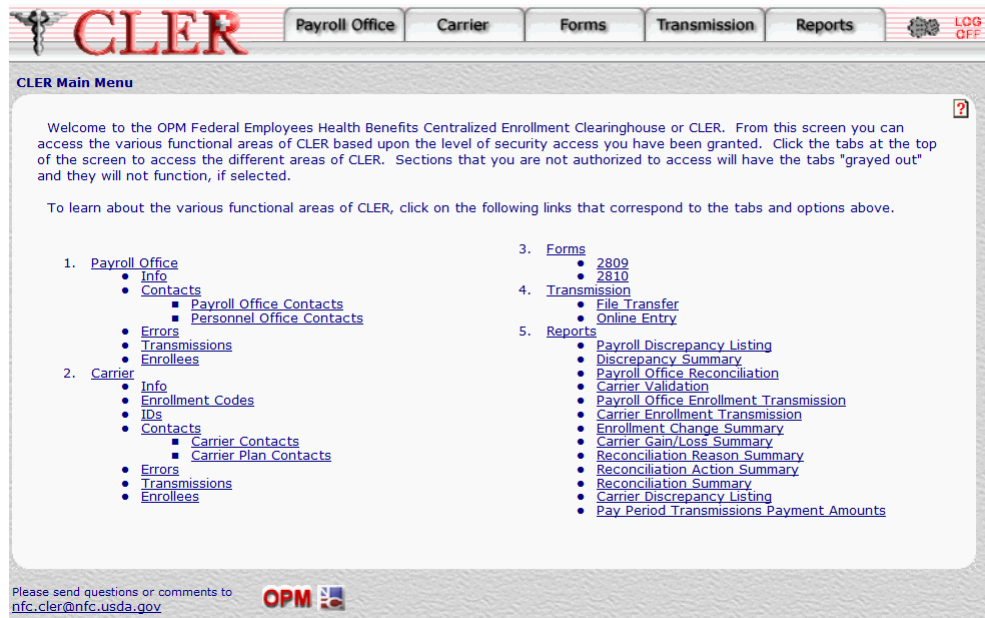


Figure 95: CLER Main Menu Page

2. The Carrier Main Page is displayed.

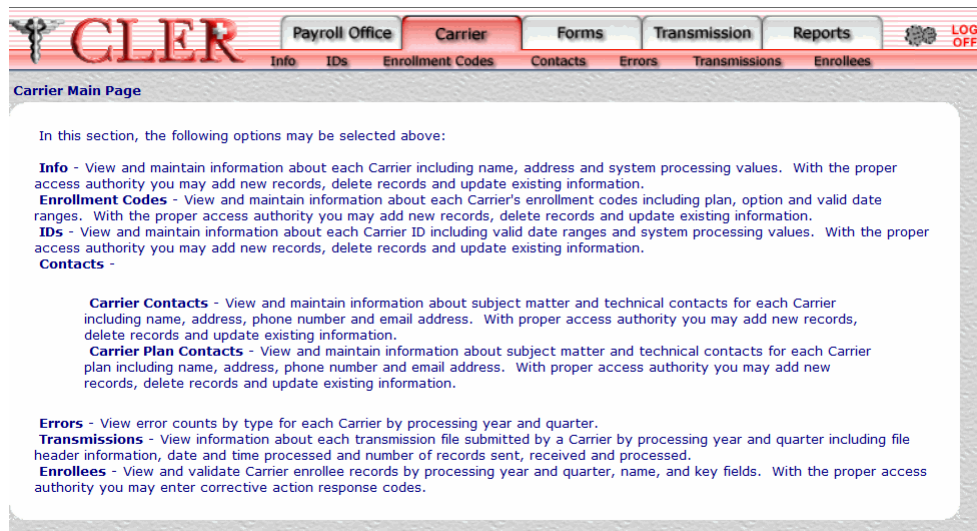


Figure 96: Carrier Main Page



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

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





- The Carrier Transmissions Search Results page is displayed.

**Figure 98: Carrier Transmission Search Results Page**

- 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.

**Figure 99: Carrier Transmissions View Page**

Field	Description
Carrier ID	<i>System generated</i> 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 transmission record.



<b>Quarter</b>	<i>System generated</i> Displays the reconciliation quarter for the requested transmission record.
<b>Submission</b>	<i>System generated</i> Displays the number of transmissions submitted for the reconciliation quarter selected.
<b>Submission Date</b>	<i>System generated</i> Displays the date the transmission was submitted.
<b>As of Date</b>	<i>System generated</i> Displays the date the transmitted enrollment data was extracted.
<b>Records Sent</b>	<i>System generated</i> Displays the number of records sent in the transmission.
<b>Records Received</b>	<i>System generated</i> Displays the number of records found in the transmission file during processing.
<b>Records Processed</b>	<i>System generated</i> Displays the number of records accepted to store in the CLER tables.
<b>Date Processed</b>	<i>System generated</i> Displays the current system date when the process was run.
<b>Time Processed</b>	<i>System generated</i> Displays the current application time when the process was run.
<b>Code</b>	<i>System generated</i> 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.
<b>Status</b>	<i>System generated</i> 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 <b>Carrier System Codes Table</b> (on page 219).



<b>Source</b>	<i>System generated</i> Displays the source of transmission data indicator. The value in the first position equals <b>M</b> for mainframe or <b>S</b> for server. The value in the second position equals <b>T</b> for transmission or <b>M</b> for manual entry.
<b>Email Date</b>	<i>System generated</i> Displays the date the last email was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter.
<b>Email Time</b>	<i>System generated</i> Displays the time the last email was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter.
<b>Last Validate Date</b>	<i>System generated</i> Displays the date the transmission was last validated.
<b>Last Validate Time</b>	<i>System generated</i> Displays the time the transmission was last validated.
<b>Last Validate ID</b>	<i>System generated</i> Displays the user ID number of the person who last validated the transmission.
<b>Indicator</b>	<i>System generated</i> Displays if the transmission has been validated by the carrier. <b>Y</b> indicates the transmission has been validated, <b>C</b> 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.

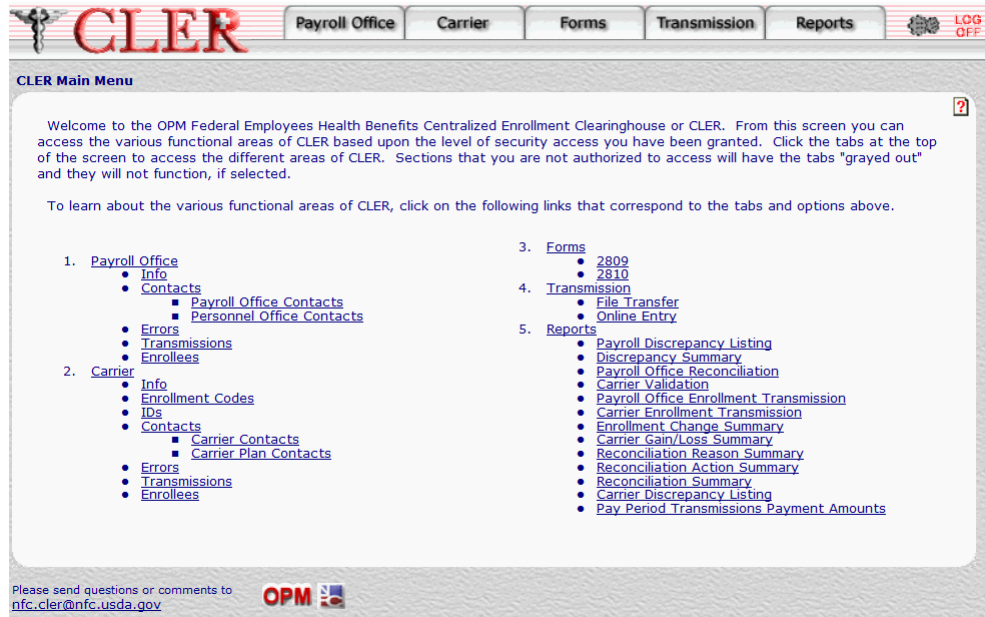


Figure 100: CLER Main Menu Page

2. The Carrier Main Page is displayed.

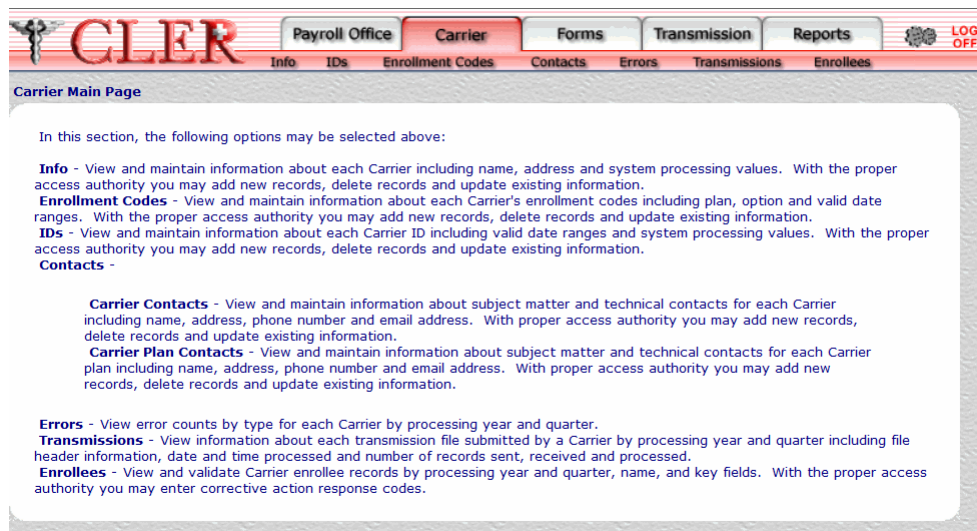


Figure 101: Carrier Main Page



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

**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
<b>Carrier ID</b>	<i>Required, alphanumeric, 7 positions</i> Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
<b>Year</b>	<i>Optional, alphanumeric, 4 positions</i> Enter the reconciliation year for the requested transmission record.
<b>Quarter</b>	<i>Optional, alphanumeric, 1 position</i> Enter the reconciliation quarter for the requested transmission record.
<b>Order By</b>	<i>Optional, default</i> 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 **Clr Valid** button is displayed next to transmission files that have been validated.

Carrier Transmissions

Carrier ID	Year	Quarter	Submission	Submission Date	Code	Status	Validation	Options
E								<a href="#">View</a> <a href="#">Validate</a>

Records Found: 1

Figure 103: Carrier Transmissions Search Results Page

Field	Description
Carrier ID	<i>System generated</i> 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 transmission record.
Quarter	<i>System generated</i> Displays the reconciliation quarter for the requested transmission record.
Submission	<i>System generated</i> Displays the number of transmissions submitted for the reconciliation quarter selected.
Submission Date	<i>System generated</i> Displays the date the transmission was submitted.
Code	<i>System generated</i> 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.
Status	<i>System generated</i> 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 <b>Carrier System Codes Table</b> (on page 219).



<b>Validation</b>	<i>System generated</i>  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 **Clr 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 Record .....	131
Viewing a Matching Carrier Enrollee Record or Duplicate Payroll Office Enrollee Record .....	137
Validating a Carrier Enrollee Record .....	145

### ***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.

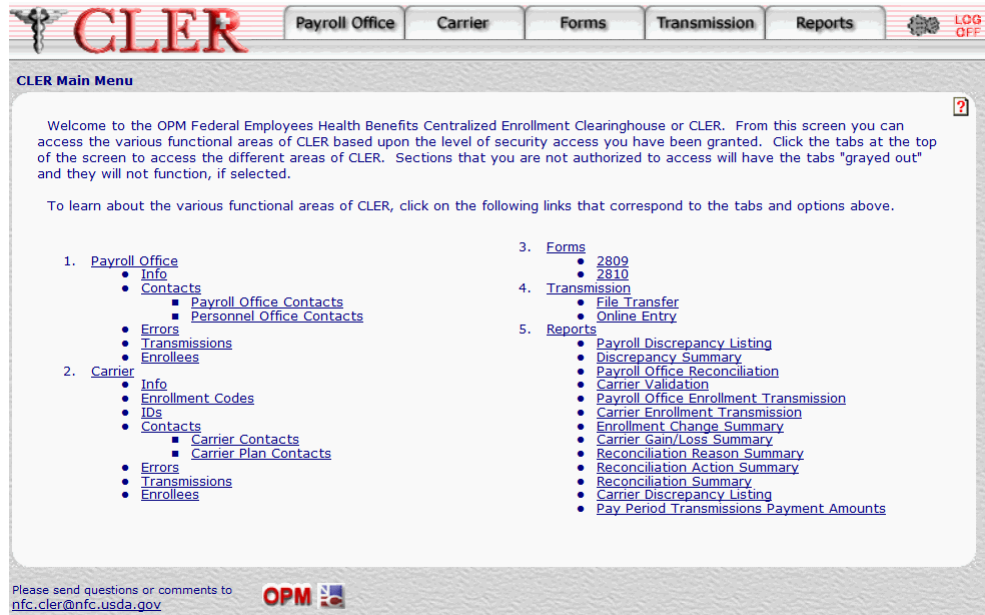


Figure 104: CLER Main Menu Page

The Carrier Main Page is displayed.

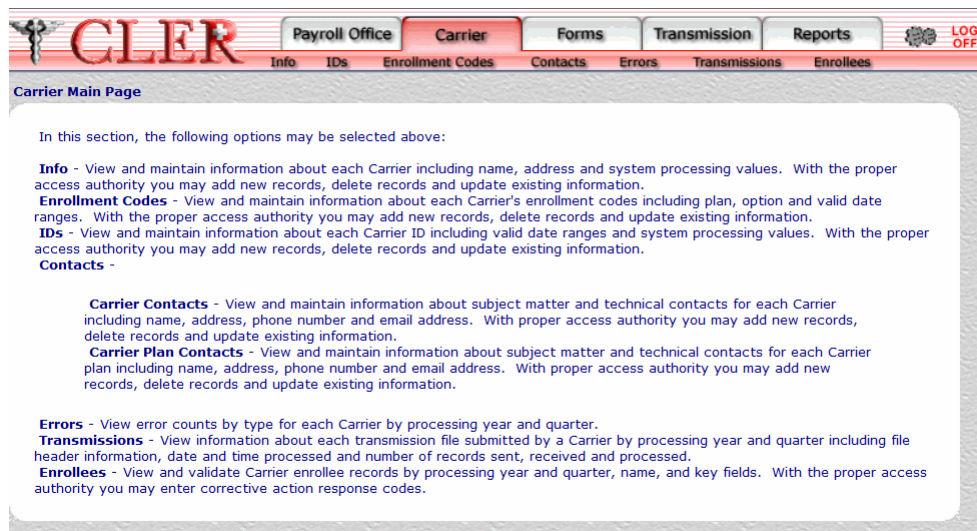


Figure 105: Carrier Main Page





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

**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)

The Carrier Enrollees Search Results page is displayed.



Payroll Office

Carrier

Forms

Transmission

Reports

Info

IDs

Enrollment Codes

Contacts

Errors

Transmissions

Enrollees

LOG OFF

Carrier Enrollees

Carrier ID

BCBS100: BLUE CROSS AND BLUE SHIELD

Refresh

Year/Quarter

2021/1

Enrollee SSN	Last Name	First Name	Payroll Office	Code	Discrepancies	Employee/ Annuitant	Ind	Fail Count	Options
XXXXXXXXXX	DOE	JANE	24777777	111	202	R		0	<div>View</div> <div>Validate</div>
XXXXXXXXXX	DOE	JANE	24777777	111		R		0	<div>View</div>

Records Found: 2

**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.

**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.

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)

***First Name*** (see "***First Name - Enrollee Field Instruction***" 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 Enrollees search results page is displayed.



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

	Payroll Office	Carrier	Forms	Transmission	Reports	LOG OFF
	<a href="#">Info</a>	<a href="#">Contacts</a>	<a href="#">Errors</a>	<a href="#">Transmissions</a>	<a href="#">Enrollees</a>	

**Payroll Office Enrollees Pay Period Transmissions**

Payroll Office ID: [Refresh](#)

Pay Period Transmissions from As of Date 01/01/2013 to As Of Date 03/01/2013

Enrollee SSN Last Name	First Name	Carrier Code Agency	POI	Employee Annuitant As of Indicator Date	Amount	Warning	Fail Count	Options
[REDACTED]	[REDACTED]	BCBS 111	9999 R	3/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	3/1/2013	\$511.98	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$511.98	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	3/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	3/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$511.98	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	3/1/2013	\$511.98	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	3/1/2013	\$511.98	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$511.98	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	3/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	3/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	3/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	3/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	3/1/2013	\$522.22	0	0	<a href="#">View</a>
[REDACTED]	[REDACTED]	BCBS 111	9999 R	2/1/2013	\$522.22	0	0	<a href="#">View</a>

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

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.

CLER Payroll Office Enrollees View

Use the browser Back arrow to select another record to view. To see matching Carrier records for this Enrollee record, click on the following button(s): #1. **Matching**

Payroll Office ID: [ ] Year: 2018 Quarter: 1 Submission: 1

Transmission Type: R Employee Annuitant Indicator: R As of Date: 3/1/2018

Agency: [ ] POI: [ ] Carrier: AETN Enrollment Code: JN4 SSN: [ ]

Last Name: [ ] First Name: [ ] Middle Name: [ ]

Effective Date of Coverage: 10/19/2016 Amount: 676.11

Deceased Annuitant SSN: [ ] Pseudo SSN: [ ] Other Payroll ID: [ ] Other Carrier ID: [ ]

Submitter Use #1: [ ] Submitter Use #2: [ ] Submitter Use #3: [ ]

Date Processed: 03/07/2018 Time Processed: 10:59:19 Source: M Fail Count: 0

Select another discrepancy:

Discrepancy: [ ]

Reconciliation Reason: [ ]

Reconciliation Action: [ ]

Corrective Action: [ ]

Payroll Office Comments (400 character max): [ ]

Carrier Comments (400 character max): [ ]

Last Payroll Update: ID: [ ] Date: [ ] Time: [ ]

Last Carrier Update: ID: [ ] 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.

CLER

Payroll Office Enrollees View

Use the browser Back arrow to select another record to view.

Payroll Office ID: [ ] Year: 2018 Quarter: 1 Submission: 1

Transmission Type: R Employee Annuitant Indicator: R As of Date: 3/1/2018

Agency: [ ] POI: [ ] Carrier: AETN Enrollment Code: JN4 SSN: [ ]

Last Name: [ ] First Name: [ ] Middle Name: [ ]

Effective Date of Coverage: 10/19/2016 Amount: 676.11

Deceased Annuitant SSN: [ ] Pseudo SSN: [ ] Other Payroll ID: [ ] Other Carrier ID: [ ]

Submitter Use #1: [ ] Submitter Use #2: [ ] Submitter Use #3: [ ]

Date Processed: 03/07/2018 Time Processed: 10:59:19 Source: M Fail Count: 0

Select another discrepancy:

Discrepancy: [ ]

Reconciliation Reason: [ ]

Reconciliation Action: [ ]

Corrective Action: [ ]

Payroll Office Comments (400 character max): [ ]

Carrier Comments (400 character max): [ ]

Last Payroll Update: ID: [ ] Date: [ ] Time: [ ]

Last Carrier Update: ID: [ ] Date: [ ] Time: [ ]

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.

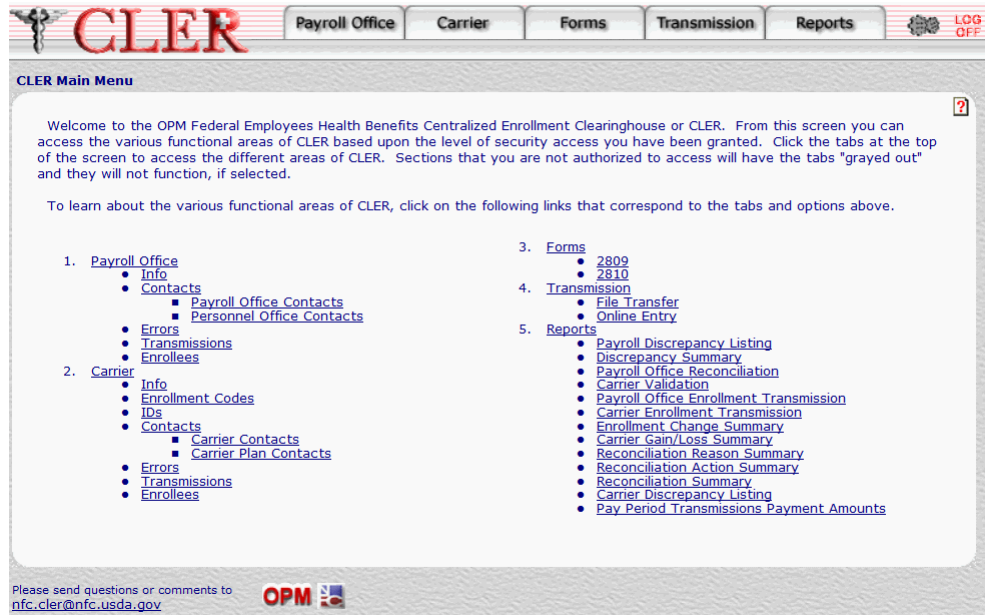


Figure 113: CLER Main Menu Page

The Carrier Main Page is displayed.

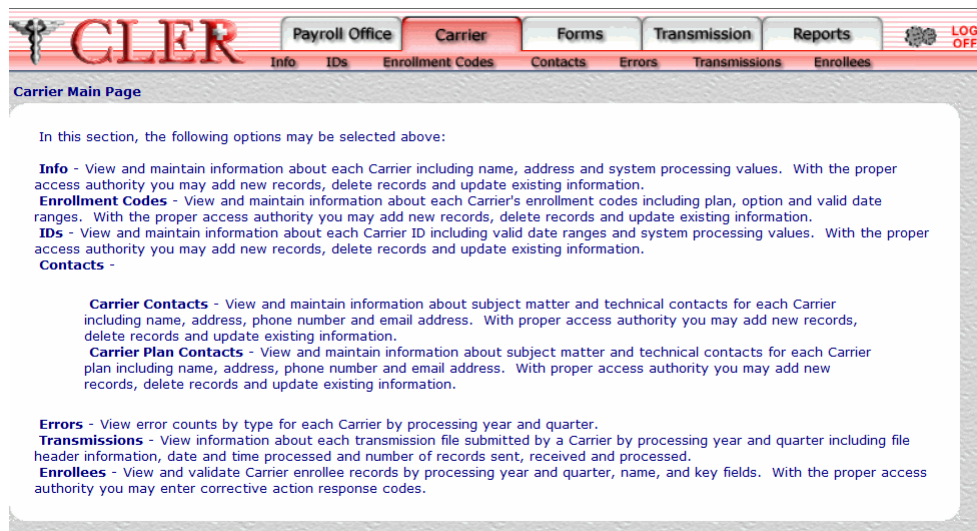


Figure 114: Carrier Main Page





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

**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.

Carrier ID	Year/Quarter	Refresh						
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.

**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
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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.

**CLER** Payroll Office Carrier Forms Transmission **Reports** LOG OFF

Reports Selection 1. Payroll Discrepancy Listing GO

Select a report from the drop down list above and press the GO button to enter selection criteria for that report.

In this section, the following options may be selected above:

1. **Payroll Discrepancy Listing** - Provides a listing by Payroll enrollee of each discrepancy.
2. **Discrepancy Summary** - Allows comparison of discrepancies occurring in one quarter with those that occurred in any other quarter.
3. **Payroll Office Reconciliation** - Shows each enrollee that has a discrepancy and whether that discrepancy has been reconciled.
4. **Carrier Validation** - Shows each enrollee that has a discrepancy and if that discrepancy has been validated.
5. **Payroll Office Enrollment Transmission** - Shows the timeliness of the transmission of quarterly Payroll Office enrollment data.
6. **Carrier Enrollment Transmission** - Shows the timeliness of the transmission of quarterly Carrier data.
7. **Enrollment Change Summary** - Shows how enrollment changes occur between one quarter and any prior quarter.
8. **Carrier Gain/Loss Summary** - Shows how enrollment changes occur between one quarter and any prior quarter.
9. **Reconciliation Reason Summary** - Shows what caused the discrepancies that were uncovered during the reconciliation process for a single quarter.
10. **Reconciliation Action Summary** - Shows what had to be corrected during the reconciliation process for a single quarter.
11. **Reconciliation Summary** - Shows the progress that has been made to reconcile the discrepancies found in a single quarter.
12. **Carrier Discrepancy Listing** - Provides a listing by Carrier Id enrollee of each discrepancy.
13. **Pay Period Transmissions Payment Amounts** - Provides information from Payroll Offices relative to the amount of premiums collected for each completed pay period.

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.

**CLER** Payroll Office Carrier Forms Transmission **Reports** LOG OFF

Reports Selection 1. Payroll Discrepancy Listing GO

**1. Payroll Discrepancy Listing**

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. Leaving an entry blank will return all values for that field. You must make at least two selection entries in addition to the required items.

**Payroll Office ID\*** 00000001 **Year\*** 2014 **Quarter\*** 3 **Fail Count** From To **SSN** From To **Other ID** From To

**Agency** **Personnel Office ID** **Carrier** **Enrollment Code** **Error Code** **Warning Code**

ex. AG90

**Display:** All ☒ Unreconciled ☐ Errors ☐ Warnings ☐ Reconciled ☐ Matches ☐ Not Validated ☐

**Order By:** 1st Name 2nd SSNO 3rd 4th 5th 6th

Check box to create report without totals: ☐

Display the report SUBMIT RESET

Figure 119: 1. Payroll Discrepancy Listing Report Search Page



4. 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 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)



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**

<b>Payroll Office</b>							<b>Carrier</b>				
SSN	Name	Code	Eff. Date	Whld Amt	Agency	POI	Name	Code	Eff. Date	Discrepancy	Fail Count
<b>Errors:</b>											
<b>Warnings:</b>											
<b>Total Records:</b>											

---

**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	Whld 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.

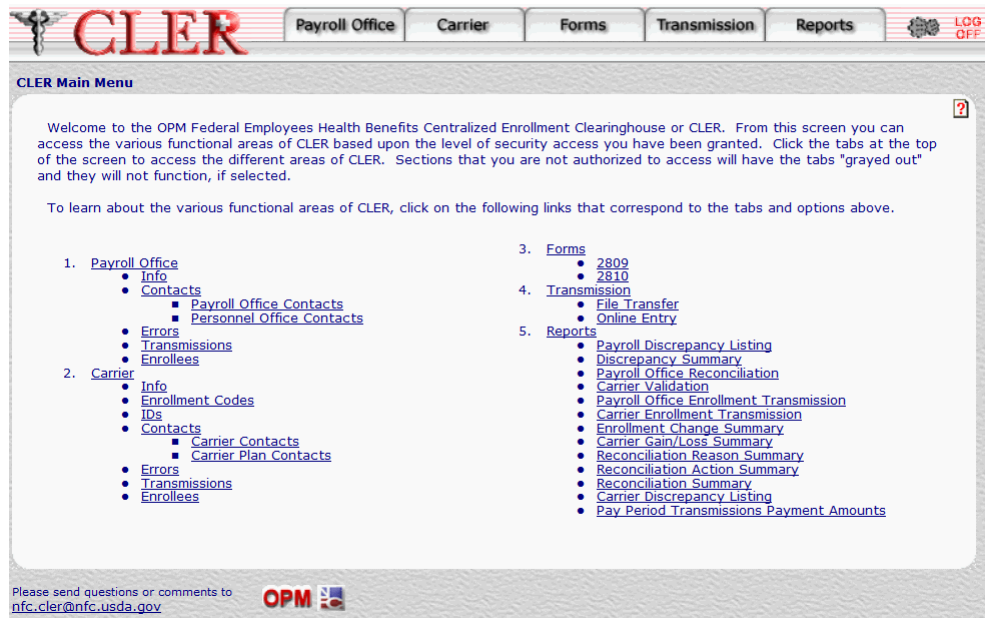


Figure 122: CLER Main Menu Page

2. The Reports Selection page is displayed.

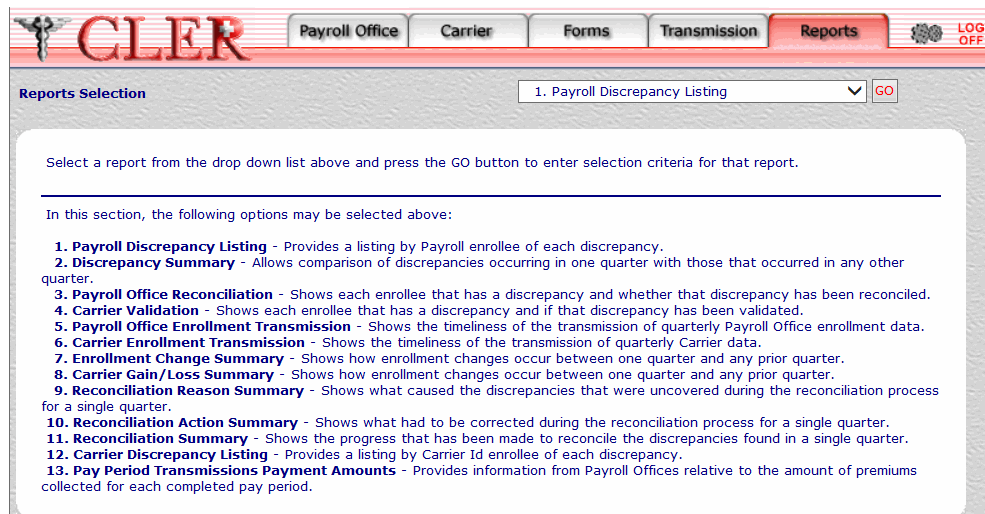


Figure 123: Reports Selection Page

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



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

The screenshot shows the CLER web interface. At the top, there are navigation tabs: Payroll Office, Carrier, Forms, Transmission, and Reports. The Reports tab is selected. Below the tabs, there is a 'Reports Selection' section with a dropdown menu set to '2. Discrepancy Summary' and a 'GO' button. The main content area is titled '2. Discrepancy Summary' and contains instructions: '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. Leaving an entry blank will return all values for that field.' Below the instructions are several input fields: 'Year\*' with 'From' and 'To' dropdowns (both set to 2014), 'Quarter\*' with 'From' and 'To' dropdowns (both set to 3), 'Payroll Office ID\*' with a dropdown set to '00000001', 'Carrier' with a dropdown, 'Enrollment Code' with a dropdown, and 'Fail Count' with 'From' and 'To' input boxes. At the bottom, there is a 'Display the report' dropdown, a 'SUBMIT' button, and a 'RESET' button.

Figure 124: Discrepancy Summary (Report 2) Page

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

Field	Instruction
Year* From	<i>Required, default</i> 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	<i>Required, default</i> 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	<i>Required, default</i> 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	<i>Required, default</i> 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*	<i>Required</i> Select the payroll office identification number from the drop-down menu.
Carrier	<i>Optional</i> Select the carrier code from the drop-down menu.



<b>Enrollment Code</b>	<i>Optional</i> Select the enrollment code from the drop-down list.
<b>Fail Count From</b>	<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.  <p style="text-align: center;"><b>OR</b></p> 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.
<b>Fail Count To</b>	<i>Optional, numeric, 3 positions maximum</i> Entered the number that was entered in the From field to search enrollee records by a specific fail count number.  <p style="text-align: center;"><b>OR</b></p> 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/Quarter		Change	
		From	To	Actual	Percent
<b>Payroll Office:</b>					
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
<b>Payroll Office</b>	<i>System generated</i> Displays the payroll office identification number.
<b>Year/Quarter From</b>	<i>System generated</i> Displays the reconciliation year/quarter that begins the range of reconciliation years/quarters.
<b>Year/Quarter To</b>	<i>System generated</i> Displays the reconciliation year/quarter that ends the range of reconciliation years/quarters.
<b>Change Actual</b>	<i>System generated</i> Displays the number that indicates the actual changes in values between prior and current reconciliation years/quarters.
<b>Change Percent</b>	<i>System generated</i> Displays the percent changes in values between prior and current reconciliation years/quarters.
<b>Total Enrollee Records</b>	<i>System generated</i> Displays the total number of enrollees that meet the criteria entered on the Discrepancy Summary page.
<b>Total Matches Found</b>	<i>System generated</i> Displays the total number of matched records that meet the criteria entered on the Discrepancy Summary page.
<b>Total Discrepancies Found</b>	<i>System generated</i> Displays the total number of records with discrepancies that meet the criteria entered on the Discrepancy Summary page.
<b>Total Discrepancies Reconciled</b>	<i>System generated</i> Displays the total number of reconciled records that meet the criteria entered on the Discrepancy Summary page.
<b>Percent Discrepancies Reconciled</b>	<i>System generated</i> 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.

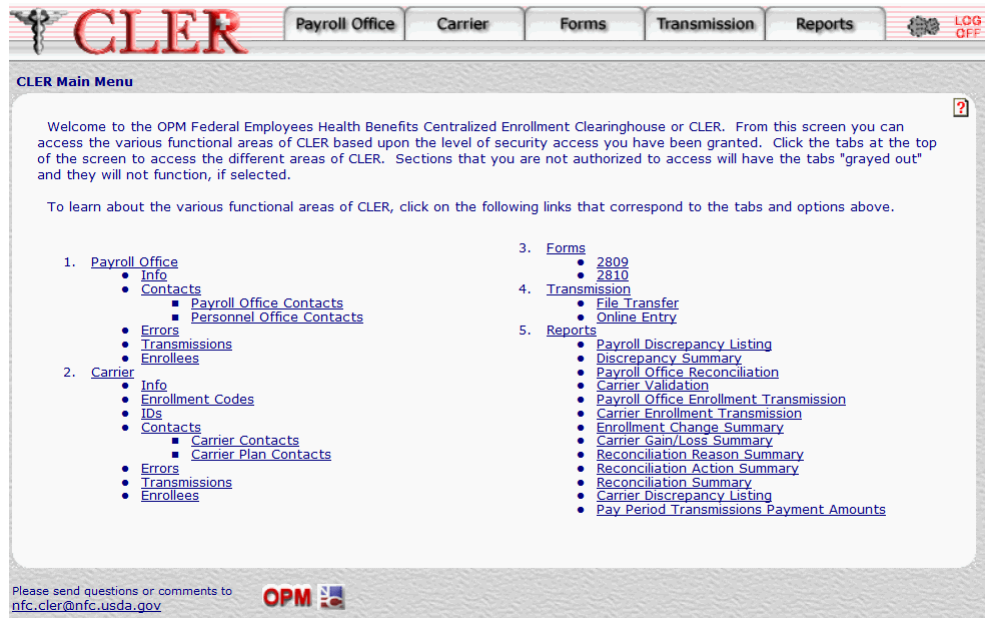


Figure 126: CLER Main Menu Page

2. The Reports Selection page is displayed.

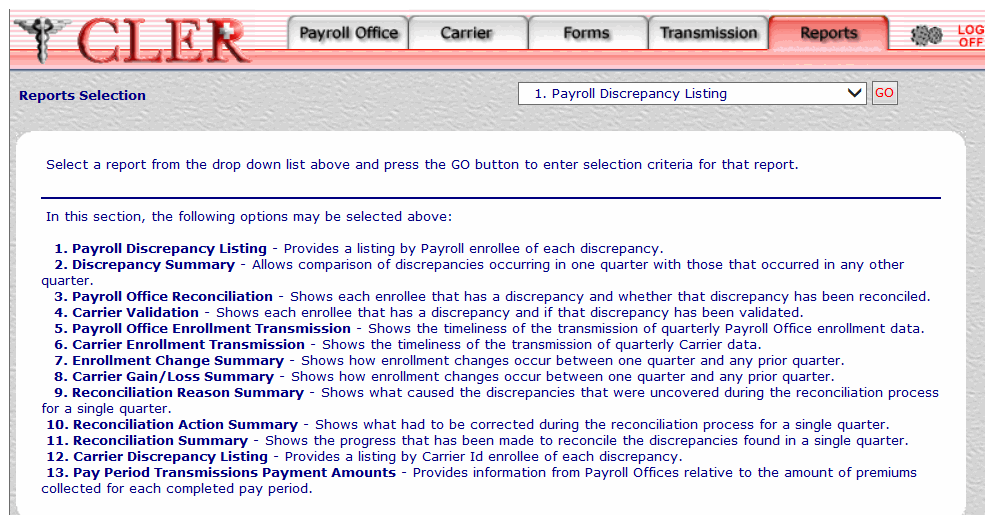


Figure 127: Report Selection Page



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

**Figure 128: Payroll Office Reconciliation (Report 3) Page**

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

Field	Instruction/Description
<b>Payroll Office ID*</b>	<i>Required</i> Select the payroll office identification number from the drop-down menu.
<b>Year*</b>	<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.
<b>Quarter*</b>	<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.



<b>Fail Count From</b>	<p><i>Optional, numeric, 3 positions maximum.</i></p> <p>Enter a specific fail count number to search for enrollee records by a specific fail count number, then proceed to the To field.</p> <p style="text-align: center;"><b>OR</b></p> <p>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.</p>
<b>Fail Count To</b>	<p><i>Optional, numeric, 3 positions maximum</i></p> <p>Entered the number that was entered in the From field to search enrollee records by a specific fail count number.</p> <p style="text-align: center;"><b>OR</b></p> <p>Enter the number that ends the range of fail count numbers to search for enrollee records by a range of fail count numbers.</p>
<b>Reconciliation Date From</b>	<p><i>Optional</i></p> <p>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.</p>
<b>Reconciliation Date To</b>	<p><i>Optional</i></p> <p>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.</p>
<b>SSN - From</b>	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a specific enrollee record by SSN, enter the SSN and skip the To field.</p> <p>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.</p> <hr/> <p>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.</p>



<b>SSN - To</b>	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.</p> <hr/> <p>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.</p> <hr/>
<b>Agency</b>	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>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).</p>
<b>Personnel Office ID</b>	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>Enter the personnel office identification (POI) number.</p>
<b>Carrier</b>	<p><i>Optional</i></p> <p>Select the carrier code from the drop-down menu.</p>
<b>Enrollment Code</b>	<p><i>Optional</i></p> <p>Select the enrollment code from the drop-down list.</p>
<b>User ID</b>	<p><i>Optional, alphanumeric, 8 positions maximum</i></p> <p>Enter the user identification number of the person creating the report.</p>





<b>Other ID - From</b>	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>To search for a specific enrollee record by Other ID, enter the Other ID and skip the To field.</p> <p>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.</p> <hr/> <p>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 AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>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.</p> <hr/> <p>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.</p> <hr/>
<b>Other ID - To</b>	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>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.</p> <hr/> <p>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 AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>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.</p> <hr/> <p>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.</p> <hr/>



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



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



<b>Order By: 5th</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>Reconciliation Date</b> - Search by reconciliation date.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p><b>User ID</b> - Search by user identification number.</p>
<b>Order By: 6th</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>Reconciliation Date</b> - Search by reconciliation date.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p><b>User ID</b> - Search by user identification number.</p>
<b>Check box to create report without totals</b>	<p><i>Optional</i></p> <p>Select this check box to omit totals from the report.</p>

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.

---

**Figure 129: Payroll Office Reconciliation Report Page**

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

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



<b>Agency</b>	<p><i>System generated</i></p> <p>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).</p> <hr/> <p>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.</p>
<b>POI</b>	<p><i>System generated</i></p> <p>Displays the POI of the office where the enrollee's records are maintained.</p> <hr/> <p>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.</p>
<b>Code</b>	<p><i>System generated</i></p> <p>Displays the enrollment code.</p>
<b>Reconciliation Reason</b>	<p><i>System generated</i></p> <p>Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see <b>Reconciliation Reason Codes Table</b> (on page 221).</p>
<b>Reconciliation Date</b>	<p><i>System generated</i></p> <p>Displays the reconciliation date.</p>
<b>Reconciliation User ID</b>	<p><i>System generated</i></p> <p>Displays the user identification number of the person who entered the reconciliation reason code.</p>
<b>Reconciliation Action</b>	<p><i>System generated</i></p> <p>Displays the reconciliation action code. For a list and descriptions of reconciliation action codes, see <b>Reconciliation Action Codes Table</b> (on page 224).</p>
<b>Reconciliation Fail Count</b>	<p><i>System generated</i></p> <p>Displays the number of times the initial discrepancy has been identified.</p>



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

Payroll Office Reconciliation										
					Reconciliation					
OTHER ID	SSN	Name	Carrier	Code	Reason	Date	User ID	Action	Fail Count	
<p>With Errors: 0</p> <p>Without Errors: 0</p> <p>Total Records: 0</p>										

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.

**CLER** Payroll Office Carrier Forms Transmission **Reports** LOG OFF

Reports Selection 1. Payroll Discrepancy Listing GO

Select a report from the drop down list above and press the GO button to enter selection criteria for that report.

In this section, the following options may be selected above:

1. **Payroll Discrepancy Listing** - Provides a listing by Payroll enrollee of each discrepancy.
2. **Discrepancy Summary** - Allows comparison of discrepancies occurring in one quarter with those that occurred in any other quarter.
3. **Payroll Office Reconciliation** - Shows each enrollee that has a discrepancy and whether that discrepancy has been reconciled.
4. **Carrier Validation** - Shows each enrollee that has a discrepancy and if that discrepancy has been validated.
5. **Payroll Office Enrollment Transmission** - Shows the timeliness of the transmission of quarterly Payroll Office enrollment data.
6. **Carrier Enrollment Transmission** - Shows the timeliness of the transmission of quarterly Carrier data.
7. **Enrollment Change Summary** - Shows how enrollment changes occur between one quarter and any prior quarter.
8. **Carrier Gain/Loss Summary** - Shows how enrollment changes occur between one quarter and any prior quarter.
9. **Reconciliation Reason Summary** - Shows what caused the discrepancies that were uncovered during the reconciliation process for a single quarter.
10. **Reconciliation Action Summary** - Shows what had to be corrected during the reconciliation process for a single quarter.
11. **Reconciliation Summary** - Shows the progress that has been made to reconcile the discrepancies found in a single quarter.
12. **Carrier Discrepancy Listing** - Provides a listing by Carrier Id enrollee of each discrepancy.
13. **Pay Period Transmissions Payment Amounts** - Provides information from Payroll Offices relative to the amount of premiums collected for each completed pay period.

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 Transmission **Reports** LOG OFF

Reports Selection 3. Payroll Office Reconciliation GO

**3. Payroll Office Reconciliation**

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. Leaving an entry blank will return all values for that field. You must make at least two selection entries in addition to the required items.

<b>Payroll Office ID*</b>	<b>Year*</b>	<b>Quarter*</b>	<b>Fail Count</b>	<b>Reconciliation Date</b>	<b>SSN</b>
00000001	2014	3	From To	From To	From To

<b>Agency</b>	<b>Personnel Office ID</b>	<b>Carrier</b>	<b>Enrollment Code</b>	<b>User ID</b>	<b>Other ID - From</b>	<b>Other ID - To</b>

ex. AG90

**Order By:** 1st Name 2nd 3rd 4th 5th 6th

Check box to create report without totals: ☐

Display the report SUBMIT RESET

Figure 132: 3. Payroll Office Reconciliation Search Page





4. 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)



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.

						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 Reconciliation									
OTHER ID					Reconciliation				
OTHER ID	SSN	Name	Carrier	Code	Reason	Date	User ID	Action	Fail Count
With Errors: 0									
Without Errors: 0									
Total 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.

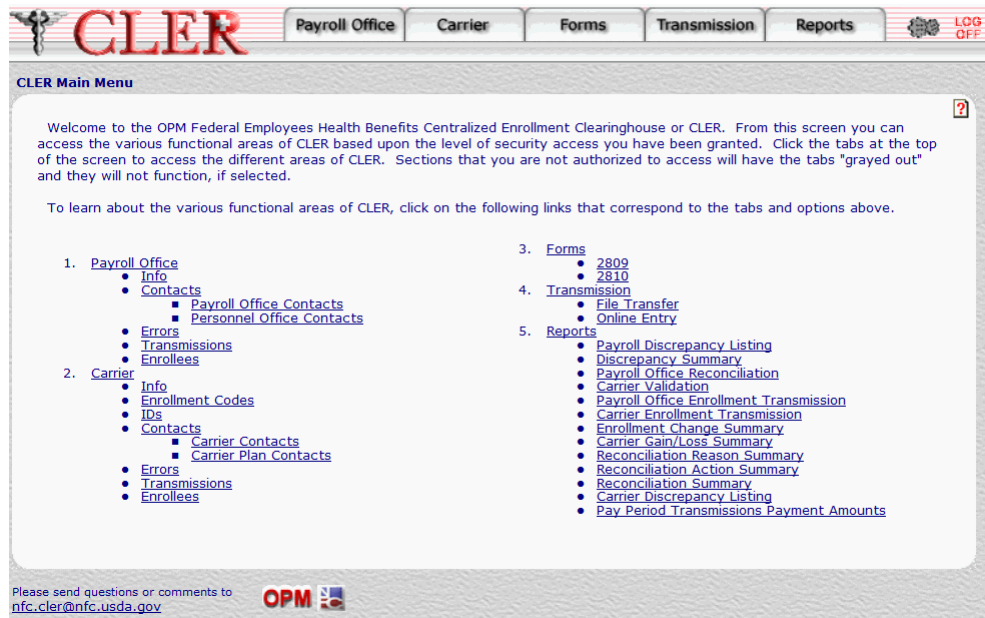


Figure 135: CLER Main Menu Page

2. The Reports Selection page is displayed.

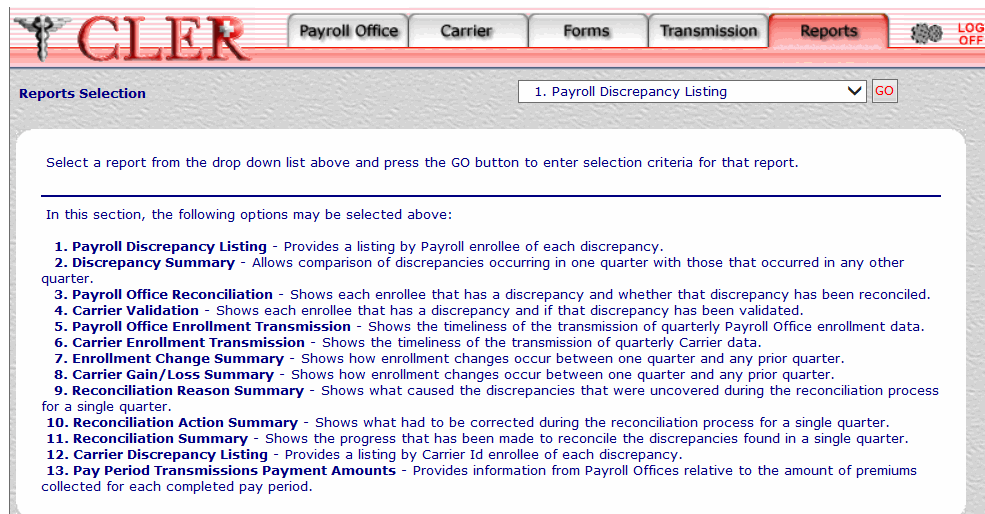


Figure 136: Reports Selection Page

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



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

The screenshot shows the CLER Reports Selection page. At the top, there are tabs for Payroll Office, Carrier, Forms, Transmission, and Reports. The Reports tab is selected. Below the tabs, there is a dropdown menu for '4. Carrier Validation' and a 'GO' button. The main content area is titled '4. Carrier Validation' and contains instructions: '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. Leaving an entry blank will return all values for that field. You must make at least two selection entries besides the required items.'

The form includes the following fields:

- Carrier ID\***: AETN100 (dropdown)
- Year\***: 2014 (dropdown)
- Quarter\***: 3 (dropdown)
- Fail Count**: From (text input) To (text input)
- Validation Date**: From (dropdown) To (dropdown)
- SSN**: From (text input) To (text input)
- Payroll Office ID**: (dropdown)
- Enrollment Code**: (dropdown)
- User ID**: (text input)
- Other ID - From**: (text input)
- Other ID - To**: (text input)

Below the form, there is an 'Order By' section with a grid of dropdowns for 1st, 2nd, 3rd, 4th, 5th, and 6th. A checkbox for 'Check box to create report without totals:' is present. At the bottom, there is a 'Display the report' dropdown, a 'SUBMIT' button, and a 'RESET' button.

Figure 137: Carrier Validation (Report 4) Page

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

Field	Instruction/Description
<b>Carrier ID*</b>	<i>Required</i> Select the carrier ID number from the drop-down menu.
<b>Year*</b>	<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.
<b>Quarter*</b>	<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.
<b>Fail Count From</b>	<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.  <b>OR</b>  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.



<b>Fail Count To</b>	<p><i>Optional, numeric, 3 positions maximum</i></p> <p>Entered the number that was entered in the From field to search enrollee records by a specific fail count number.</p> <p style="text-align: center;"><b>OR</b></p> <p>Enter the number that ends the range of fail count numbers to search for enrollee records by a range of fail count numbers.</p>
<b>Validation Date From</b>	<p><i>Optional</i></p> <p>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.</p>
<b>Validation Date To</b>	<p><i>Optional</i></p> <p>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.</p>
<b>SSN - From</b>	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a specific enrollee record by SSN, enter the SSN and skip the To field.</p> <p>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.</p> <hr/> <p>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.</p>
<b>SSN - To</b>	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.</p> <hr/> <p>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.</p>
<b>Payroll Office ID</b>	<p><i>Required</i></p> <p>Select the payroll office identification number from the drop-down menu.</p>
<b>Enrollment Code</b>	<p><i>Optional</i></p> <p>Select the enrollment code from the drop-down list.</p>



<b>User ID</b>	<p><i>Optional, alphanumeric, 8 positions maximum</i></p> <p>Enter the user identification number of the person creating the report.</p>
<b>Other ID - From</b>	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>To search for a specific enrollee record by Other ID, enter the Other ID and skip the To field.</p> <p>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.</p> <hr/> <p>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 AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>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.</p> <hr/> <p>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.</p> <hr/>





<b>Other ID - To</b>	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>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.</p> <hr/> <p>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 AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>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.</p> <hr/> <p>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.</p> <hr/>
<b>Order By: 1st</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p>
<b>Order By: 2nd</b>	<p><i>Optional</i></p> <p>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:</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p>



<b>Order By: 3rd</b>	<i>Optional</i> Select one of the following options from the drop-down menu to display the selected criteria in third sort search order: <b>Enrollment Code</b> - Search by enrollment code. <b>Name</b> - Search by enrollee name. <b>SSNO</b> - Search by enrollee SSN.
<b>Order By: 4th</b>	<i>Optional</i> Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order: <b>Enrollment Code</b> - Search by enrollment code. <b>Name</b> - Search by enrollee name. <b>SSNO</b> - Search by enrollee SSN.
<b>Order By: 5th</b>	<i>Optional</i> Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order: <b>Enrollment Code</b> - Search by enrollment code. <b>Name</b> - Search by enrollee name. <b>SSNO</b> - Search by enrollee SSN.
<b>Order By: 6th</b>	<i>Optional</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 sixth sort search order: <b>Enrollment Code</b> - Search by enrollment code. <b>Name</b> - Search by enrollee name. <b>SSNO</b> - Search by enrollee SSN.
<b>Check box to create report without totals</b>	<i>Optional</i> 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 Validation									
Carrier					Validation				
SSN	Enrollee	Enrollment Code	Payroll Office Number	Reason Code	Validation Date	User Id	Corrective Action	Fail Count	
Total Records: 0									

Figure 138: Carrier Validation Report Page

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

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



<b>User ID</b>	<i>System generated</i> Displays the user identification number of the person who entered the validation reason code.
<b>Corrective Action</b>	<i>System generated</i> Displays the code that identifies the carrier's response to the validation action code displayed in the Validation Action field.
<b>Fail Count</b>	<i>System generated</i> Displays the number of times this record has failed the quarterly edit process.
<b>Total Records</b>	<i>System generated</i> Displays the total number of enrollee records displayed on the report. <hr/> <div>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</div> <hr/>

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### ***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.

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Note: Carriers are not authorized to produce this report.

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### ***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.

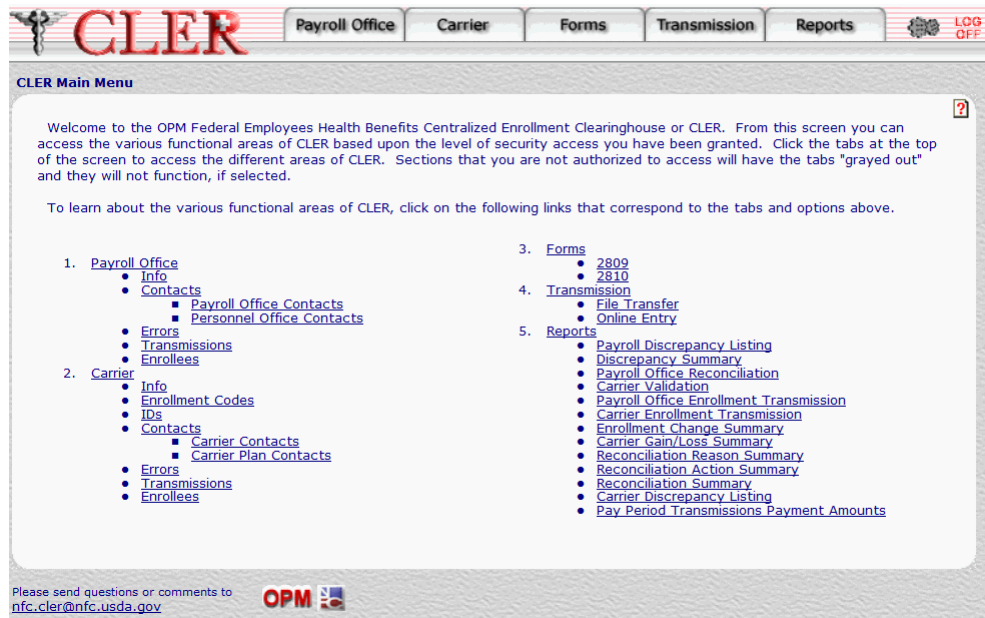


Figure 139: CLER Main Menu Page

2. The Reports Selection page is displayed.

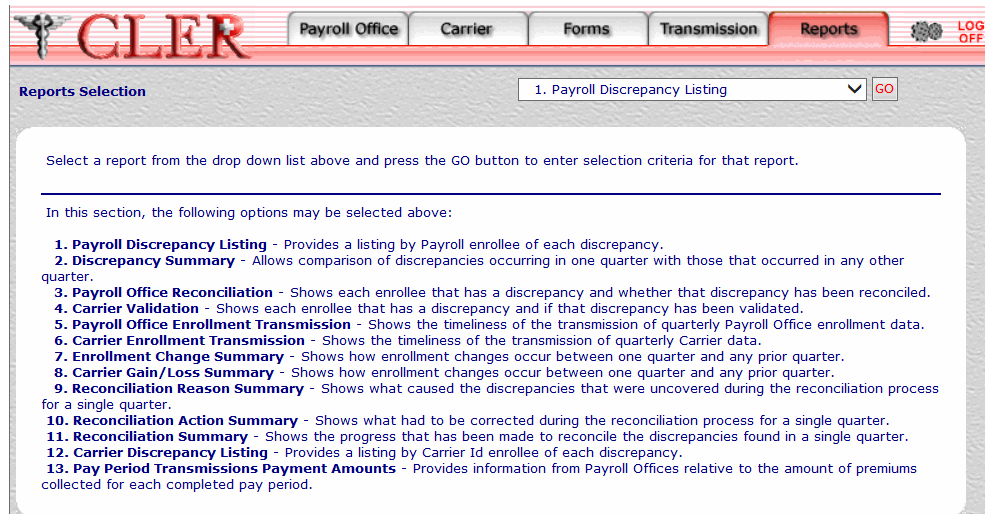


Figure 140: Reports Selection Page

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



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

Figure 141: Carrier Enrollment Transmission (Report 6) Page

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

Field	Instruction/Description
Year* From	<i>Required, default</i> 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	<i>Required, default</i> 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	<i>Required, default</i> 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	<i>Required, default</i> 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	<i>Required</i> Select the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit from the drop-down menu.



<b>Transmissions</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>All</b> - Search by all transmissions.</p> <p><b>Accepted</b> - Search by accepted transmissions.</p> <p><b>Rejected</b> - Search by rejected transmissions.</p> <p><b>Not Received</b> - Search by not received transmissions.</p>
<b>Order By: 1st</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Carrier ID</b> - Search by carrier ID number.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Year/Quarter</b> - Search by reconciliation year and reconciliation quarter.</p> <p><b>Submission Date</b> - Search by submission date.</p> <p><b>Status</b> - Search by transmission status.</p>
<b>Order By: 2nd</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p><b>Carrier ID</b> - Search by carrier ID number.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Year/Quarter</b> - Search by reconciliation year and reconciliation quarter.</p> <p><b>Submission Date</b> - Search by submission date.</p> <p><b>Status</b> - Search by transmission status.</p>
<b>Order By: 3rd</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p><b>Carrier ID</b> - Search by carrier ID number.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Year/Quarter</b> - Search by reconciliation year and reconciliation quarter.</p> <p><b>Submission Date</b> - Search by submission date.</p> <p><b>Status</b> - Search by transmission status.</p>



<b>Check box to create report without totals</b>	<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 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.

**Figure 142: Carrier Enrollment Transmission Report**

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

Field	Description
<b>Carrier</b>	<i>System generated</i> Displays the carrier ID code.
<b>Name</b>	<i>System generated</i> Displays the name of the carrier.
<b>Year</b>	<i>System generated</i> Displays the reconciliation year.
<b>Quarter</b>	<i>System generated</i> Displays the reconciliation quarter.





<b>Date Due</b>	<p><i>System generated</i></p> <p>Displays the transmission due date (MMDDYYYY) for the reconciliation quarter.</p>
<b>Submission Date</b>	<p><i>System generated</i></p> <p>Displays the date (MMDDYYYY) the carrier enrollment data file was submitted for processing.</p>
<b>Status</b>	<p><i>System generated</i></p> <p>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 <b>Carrier System Codes Table</b> (on page 219).</p>
<b>Accepted</b>	<p><i>System generated</i></p> <p>Displays the number of transmissions that passed front-end edits and were accepted for processing.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>
<b>Rejected</b>	<p><i>System generated</i></p> <p>Displays the number of transmissions that did not pass front-end edits and were rejected.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>
<b>Not Received</b>	<p><i>System generated</i></p> <p>Displays the number of transmissions that were expected but not received.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>
<b>Total</b>	<p><i>System generated</i></p> <p>Displays the sum of transmission records displayed on the report.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>



## 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.

**CLER** Payroll Office Carrier Forms Transmission **Reports** LOG OFF

Reports Selection 1. Payroll Discrepancy Listing GO

Select a report from the drop down list above and press the GO button to enter selection criteria for that report.

In this section, the following options may be selected above:

1. **Payroll Discrepancy Listing** - Provides a listing by Payroll enrollee of each discrepancy.
2. **Discrepancy Summary** - Allows comparison of discrepancies occurring in one quarter with those that occurred in any other quarter.
3. **Payroll Office Reconciliation** - Shows each enrollee that has a discrepancy and whether that discrepancy has been reconciled.
4. **Carrier Validation** - Shows each enrollee that has a discrepancy and if that discrepancy has been validated.
5. **Payroll Office Enrollment Transmission** - Shows the timeliness of the transmission of quarterly Payroll Office enrollment data.
6. **Carrier Enrollment Transmission** - Shows the timeliness of the transmission of quarterly Carrier data.
7. **Enrollment Change Summary** - Shows how enrollment changes occur between one quarter and any prior quarter.
8. **Carrier Gain/Loss Summary** - Shows how enrollment changes occur between one quarter and any prior quarter.
9. **Reconciliation Reason Summary** - Shows what caused the discrepancies that were uncovered during the reconciliation process for a single quarter.
10. **Reconciliation Action Summary** - Shows what had to be corrected during the reconciliation process for a single quarter.
11. **Reconciliation Summary** - Shows the progress that has been made to reconcile the discrepancies found in a single quarter.
12. **Carrier Discrepancy Listing** - Provides a listing by Carrier Id enrollee of each discrepancy.
13. **Pay Period Transmissions Payment Amounts** - Provides information from Payroll Offices relative to the amount of premiums collected for each completed pay period.

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.

**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.

Enrollment Change Summary							
Carrier	Code	From	To	Change		Enrollees	
		Qtr 3 2014	Qtr 3 2014	#	%	New/Add	Left/Drop
		0	0	0	0.0%	0	0
Total 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.

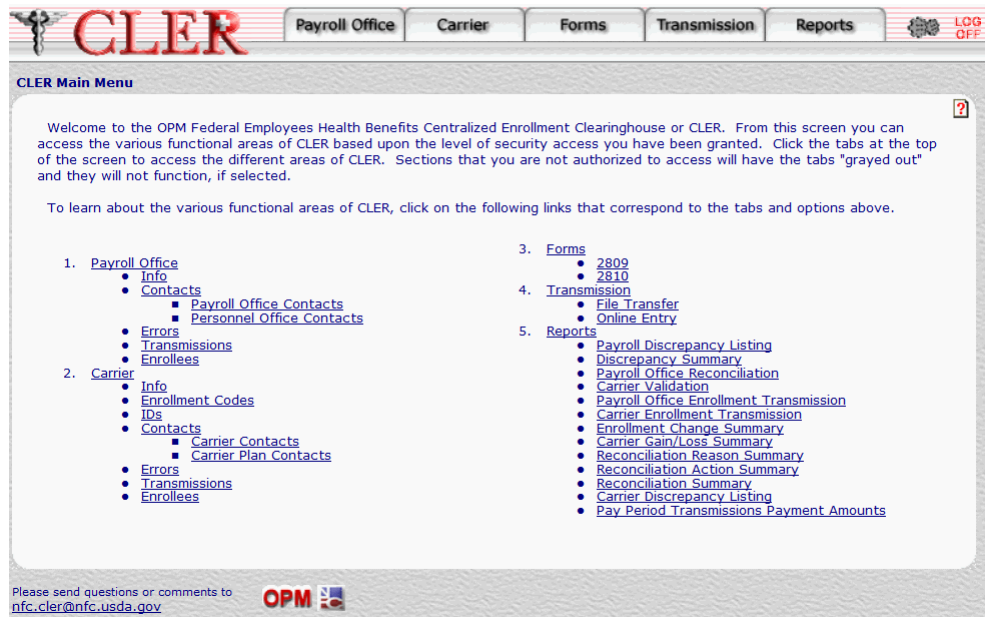


Figure 146: CLER Main Menu Page

2. The Reports Selection page is displayed.

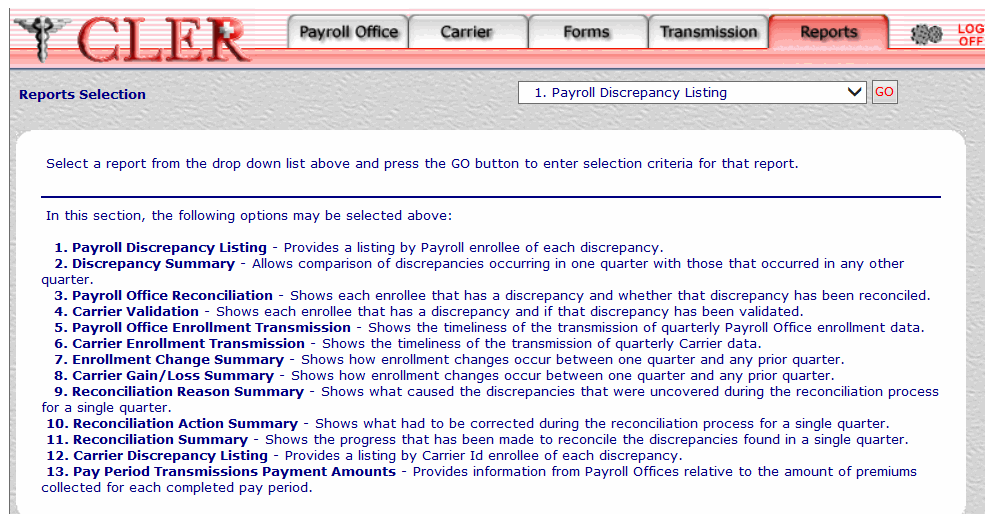


Figure 147: Reports Selection Page



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

The screenshot shows the CLER Reports Selection page. At the top, there is a navigation bar with tabs: Payroll Office, Carrier, Forms, Transmission, and Reports. The Reports tab is selected. Below the navigation bar, there is a dropdown menu showing '8. Carrier Gain/Loss Summary' and a 'GO' button. The main content area is titled '8. Carrier Gain/Loss Summary' and contains instructions: '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. Leaving an entry blank will return all values for that field.' Below the instructions, there are five dropdown menus: 'Year\*' (From 2014, To 2014), 'Quarter\*' (From 3, To 3), 'Carrier\*', 'Enrollment Code', and 'Payroll Office ID'. There is a checkbox labeled 'Check box to create report without totals:' which is unchecked. At the bottom, there is a dropdown menu labeled 'Display the report' and two buttons: 'SUBMIT' and 'RESET'.

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

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

Field	Instruction/Description
Year* From	<i>Required, default</i> 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	<i>Required, default</i> 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	<i>Required, default</i> 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	<i>Required, default</i> 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*	<i>Required</i> Select the carrier code from the drop-down menu.



<b>Enrollment Code</b>	<i>Optional</i> Select the enrollment code from the drop-down list.
<b>Payroll Office ID</b>	<i>Required</i> Select the payroll office identification number from the drop-down menu.
<b>Check box to create report without totals</b>	<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 Summary							
<i>From: Qtr 3 2014</i>		<i>To: Qtr 3 2014</i>		<i>Enrollment Changes</i>			
Carrier	Code	Carrier	Code	Added	%	Dropped	%
Total Records: 0				0	0.00%	0	100.00%

**Figure 149: Carrier Gain/Loss Summary Report Page**

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

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



<b>To: Quarter/Year Carrier</b>	<i>System generated</i> Displays the carrier code.
<b>To: Quarter/Year Code</b>	<i>System generated</i> Displays the enrollment code.
<b>Enrollment Changes Added</b>	<i>System generated</i> Displays the number of enrollment changes that were added.
<b>Enrollment Changes %</b>	<i>System generated</i> Displays the percent of enrollment changes that were added.
<b>Enrollment Changes Dropped</b>	<i>System generated</i> Displays the number of enrollment changes that were dropped.
<b>Enrollment Changes %</b>	<i>System generated</i> Displays percent of enrollment changes that were dropped.
<b>Total Records</b>	<i>System generated</i> Displays the total number of enrollee records displayed on the report.  <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>

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### ***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.

**CLER** Payroll Office Carrier Forms Transmission **Reports** LOG OFF

Reports Selection 1. Payroll Discrepancy Listing GO

Select a report from the drop down list above and press the GO button to enter selection criteria for that report.

In this section, the following options may be selected above:

1. **Payroll Discrepancy Listing** - Provides a listing by Payroll enrollee of each discrepancy.
2. **Discrepancy Summary** - Allows comparison of discrepancies occurring in one quarter with those that occurred in any other quarter.
3. **Payroll Office Reconciliation** - Shows each enrollee that has a discrepancy and whether that discrepancy has been reconciled.
4. **Carrier Validation** - Shows each enrollee that has a discrepancy and if that discrepancy has been validated.
5. **Payroll Office Enrollment Transmission** - Shows the timeliness of the transmission of quarterly Payroll Office enrollment data.
6. **Carrier Enrollment Transmission** - Shows the timeliness of the transmission of quarterly Carrier data.
7. **Enrollment Change Summary** - Shows how enrollment changes occur between one quarter and any prior quarter.
8. **Carrier Gain/Loss Summary** - Shows how enrollment changes occur between one quarter and any prior quarter.
9. **Reconciliation Reason Summary** - Shows what caused the discrepancies that were uncovered during the reconciliation process for a single quarter.
10. **Reconciliation Action Summary** - Shows what had to be corrected during the reconciliation process for a single quarter.
11. **Reconciliation Summary** - Shows the progress that has been made to reconcile the discrepancies found in a single quarter.
12. **Carrier Discrepancy Listing** - Provides a listing by Carrier Id enrollee of each discrepancy.
13. **Pay Period Transmissions Payment Amounts** - Provides information from Payroll Offices relative to the amount of premiums collected for each completed pay period.

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.

**CLER** Payroll Office Carrier Forms Transmission **Reports** LOG OFF

Reports Selection 9. Reconciliation Reason Summary GO

**9. Reconciliation Reason Summary**

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. Leaving an entry blank will return all values for that field.

Year\* 2014 Quarter\* 3 Carrier Enrollment Code Payroll Office ID

Agency Personnel Office ID Reason Code

ex. AG90

Order By: 1st Carrier 2nd 3rd 4th 5th 6th

Check box to create report without totals: ☐

Display the report 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.

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

**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.

**CLER** Payroll Office Carrier Forms Transmission **Reports** LOG OFF

Reports Selection 1. Payroll Discrepancy Listing GO

Select a report from the drop down list above and press the GO button to enter selection criteria for that report.

In this section, the following options may be selected above:

1. **Payroll Discrepancy Listing** - Provides a listing by Payroll enrollee of each discrepancy.
2. **Discrepancy Summary** - Allows comparison of discrepancies occurring in one quarter with those that occurred in any other quarter.
3. **Payroll Office Reconciliation** - Shows each enrollee that has a discrepancy and whether that discrepancy has been reconciled.
4. **Carrier Validation** - Shows each enrollee that has a discrepancy and if that discrepancy has been validated.
5. **Payroll Office Enrollment Transmission** - Shows the timeliness of the transmission of quarterly Payroll Office enrollment data.
6. **Carrier Enrollment Transmission** - Shows the timeliness of the transmission of quarterly Carrier data.
7. **Enrollment Change Summary** - Shows how enrollment changes occur between one quarter and any prior quarter.
8. **Carrier Gain/Loss Summary** - Shows how enrollment changes occur between one quarter and any prior quarter.
9. **Reconciliation Reason Summary** - Shows what caused the discrepancies that were uncovered during the reconciliation process for a single quarter.
10. **Reconciliation Action Summary** - Shows what had to be corrected during the reconciliation process for a single quarter.
11. **Reconciliation Summary** - Shows the progress that has been made to reconcile the discrepancies found in a single quarter.
12. **Carrier Discrepancy Listing** - Provides a listing by Carrier Id enrollee of each discrepancy.
13. **Pay Period Transmissions Payment Amounts** - Provides information from Payroll Offices relative to the amount of premiums collected for each completed pay period.

**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.

**CLER** Payroll Office Carrier Forms Transmission **Reports** LOG OFF

10. Reconciliation Action Summary

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. Leaving an entry blank will return all values for that field.

Year\* 2014 Quarter\* 3 Carrier Enrollment Code Payroll Office ID

Agency Personnel Office ID Action Code

ex. AG90

Order By: 1st Carrier 2nd 3rd 4th 5th 6th

Check box to create report without totals: ☐

Display the report SUBMIT RESET

**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.



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

[illegible]

**Figure 155: Reconciliation Action Summary Report Page**

***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.

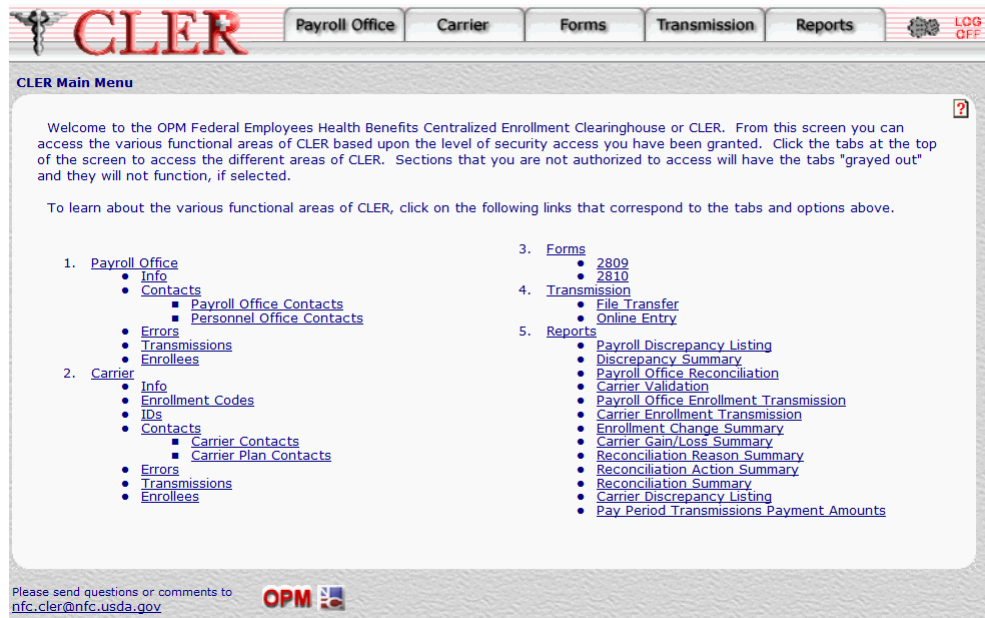


Figure 156: CLER Main Menu Page

2. The Reports Selection page is displayed.

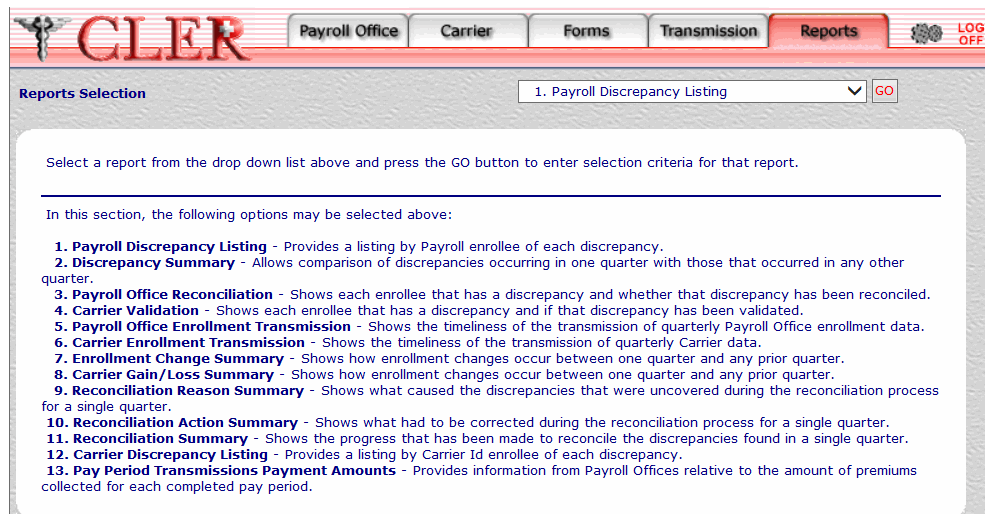


Figure 157: Reports Selection Page

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.

**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 From	<i>Optional</i> 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.





<b>Reconciliation Date To</b>	<p><i>Optional</i></p> <p>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.</p>
<b>Agency</b>	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>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).</p>
<b>Personnel Office ID</b>	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>Enter the POI number.</p>
<b>Carrier</b>	<p><i>Optional</i></p> <p>Select the carrier code from the drop-down menu.</p>
<b>Enrollment Code</b>	<p><i>Optional</i></p> <p>Select the enrollment code from the drop-down list.</p>
<b>Order By: 1st</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Personnel Office ID</b> - Search by POI number.</p>
<b>Order By: 2nd</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p>



<b>Order By: 3rd</b>	<i>Optional</i> Select one of the following options from the drop-down menu to display the selected criteria in third 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>Pers. Office ID</b> - Search by POI number.
<b>Order By: 4th</b>	<i>Optional</i> Select one of the following options from the drop-down menu to display the selected criteria in fourth 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>Pers. Office ID</b> - Search by POI number.
<b>Check box to create report without totals</b>	<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 Reconciliation Summary report in the selected format.

**OR**

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

Reconciliation Summary														
								Discrepancies			Corrective 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
<b>Pay Ofc</b>	Displays the payroll office identification number.
<b>Carr</b>	<i>System generated</i> Displays the carrier code.
<b>Code</b>	<i>System generated</i> Displays the enrollment code.
<b>Agcy</b>	<i>System generated</i> Displays the Agency ID code. This code consists of the Department code and Agency code.
<b>POI</b>	<i>System generated</i> Displays the POI of the office where the enrollee's records are maintained.  <u>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.</u>
<b>Enrollees</b>	<i>System generated</i> Displays the number of enrollee records that meet the criteria entered on the Reconciliation Summary page.
<b>Match</b>	<i>System generated</i> Displays the number of matching records that meet the criteria entered on the Reconciliation Summary page.
<b>%</b>	<i>System generated</i> Displays the percentage of matching records to enrollee records.
<b>#</b>	<i>System generated</i> Displays the number of discrepancies.
<b>Recon</b>	Displays the number of reconciled discrepancies.
<b>%</b>	<i>System generated</i> Displays the percentage of reconciled discrepancies to reported discrepancies.
<b>Unrecon</b>	<i>System generated</i> Displays the number of unreconciled discrepancies.



<b>Validated</b>	<i>System generated</i> Displays the number of discrepancies/reconciliation actions that were validated by the carrier.
<b>%</b>	<i>System generated</i> Displays the percentage of discrepancies/reconciliation actions validated to total corrective actions.
<b>Unvalidated</b>	<i>System generated</i> Displays the number of discrepancies/reconciliation actions that were not validated by the carrier.
<b>Code-Total</b>	<i>System generated</i> Displays the sum of records by enrollment code. <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed.
<b>Carrier-Total</b>	<i>System generated</i> Displays the sum of records by carrier. <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed.
<b>Grand-Total</b>	<i>System generated</i> Displays the sum of records by enrollment code and carrier. <hr/> 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.

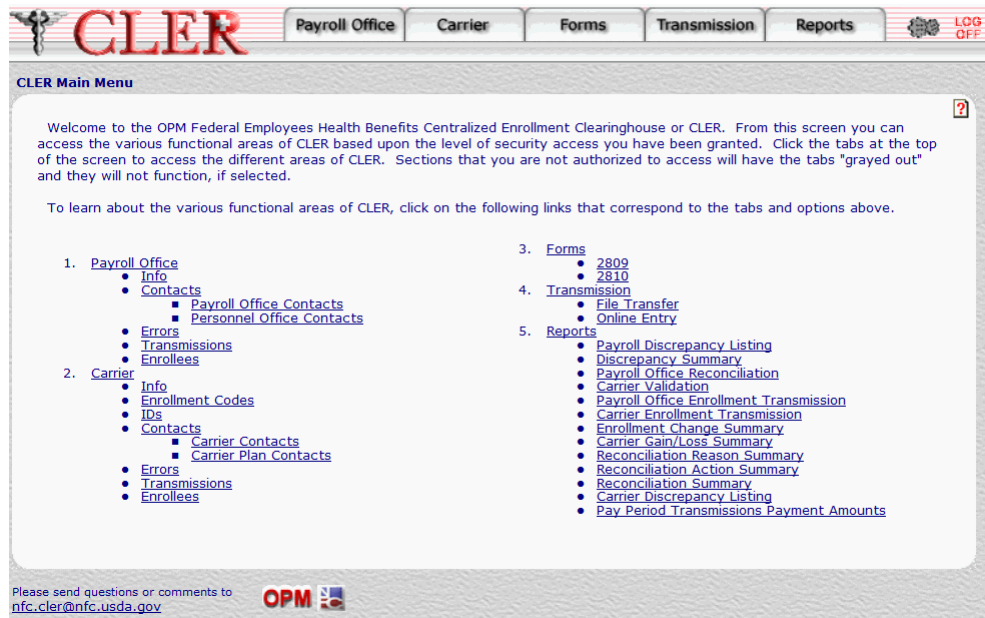


Figure 160: CLER Main Menu Page

The Reports Selection page is displayed.

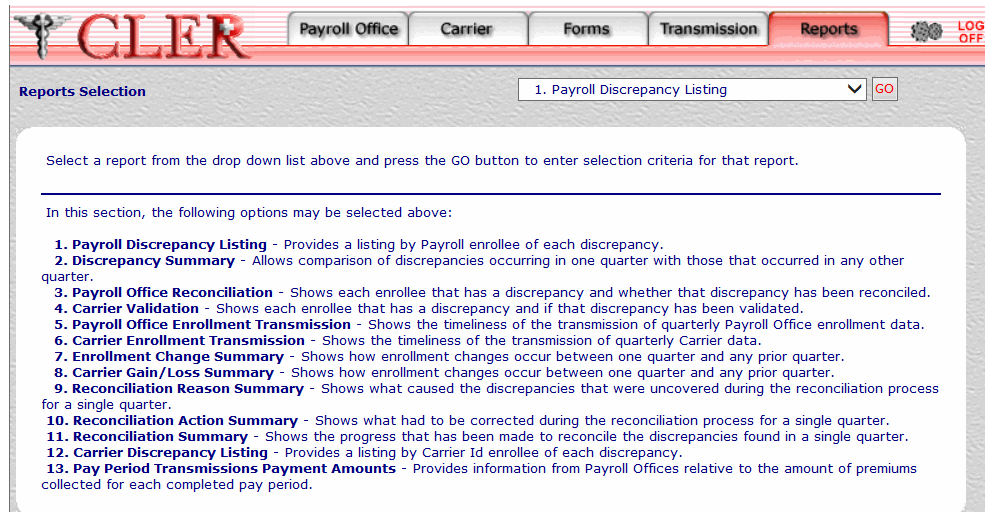


Figure 161: Reports Selection Page

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.

**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.

\*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/ Annuitant_Ind	Code	Eff. Date	Payroll Id	Amount	Discrepancy	Fail Count

**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.

**CLER** Payroll Office Carrier Forms Transmission **Reports** LOG OFF

Reports Selection 1. Payroll Discrepancy Listing GO

Select a report from the drop down list above and press the GO button to enter selection criteria for that report.

In this section, the following options may be selected above:

1. **Payroll Discrepancy Listing** - Provides a listing by Payroll enrollee of each discrepancy.
2. **Discrepancy Summary** - Allows comparison of discrepancies occurring in one quarter with those that occurred in any other quarter.
3. **Payroll Office Reconciliation** - Shows each enrollee that has a discrepancy and whether that discrepancy has been reconciled.
4. **Carrier Validation** - Shows each enrollee that has a discrepancy and if that discrepancy has been validated.
5. **Payroll Office Enrollment Transmission** - Shows the timeliness of the transmission of quarterly Payroll Office enrollment data.
6. **Carrier Enrollment Transmission** - Shows the timeliness of the transmission of quarterly Carrier data.
7. **Enrollment Change Summary** - Shows how enrollment changes occur between one quarter and any prior quarter.
8. **Carrier Gain/Loss Summary** - Shows how enrollment changes occur between one quarter and any prior quarter.
9. **Reconciliation Reason Summary** - Shows what caused the discrepancies that were uncovered during the reconciliation process for a single quarter.
10. **Reconciliation Action Summary** - Shows what had to be corrected during the reconciliation process for a single quarter.
11. **Reconciliation Summary** - Shows the progress that has been made to reconcile the discrepancies found in a single quarter.
12. **Carrier Discrepancy Listing** - Provides a listing by Carrier Id enrollee of each discrepancy.
13. **Pay Period Transmissions Payment Amounts** - Provides information from Payroll Offices relative to the amount of premiums collected for each completed pay period.

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.

**CLER** Payroll Office Carrier Forms Transmission **Reports** LOG OFF

Reports Selection 13. Pay Period Transmissions Payment Amounts GO

**13. Pay Period Transmissions Payment Amounts**

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 ID\* As of Date\* Pay Cycle\* Enrollment Code

From: To:

Order By: 1st Carrier 2nd 3rd 4th 5th

☒ Display Total Payment Amounts  
☐ Display Payment Amounts for Enrollees

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.

\*Controlled Unclassified Information\*

Report 13 - Pay Period Transmissions Enrollee Payment Amounts for Payroll Office 24900002  
from 03/01/2021 to 03/31/2021

Enrollee Last Name	Enrollee First Name	Enrollee Middle Name	Enrollee SSN	Carrier	Enrollment Code	As of Date	Amount Paid	Employee/Annuitant_Ind	Transmission Type
DOE	JANE	B	XXXXXXXXXX	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:

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### 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.

<b>Code</b>	<b>Description</b>	<b>Explanation</b>
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	<p>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.</p> <p>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.</p>
202	Withholdings/Contribution Amount Missing Or Incorrect	<p>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:</p> <p>Enrollee transferred from one payroll office to another within a single pay period.</p> <p>Enrollee did not contribute any money that particular pay period.</p> <p>Enrollee record shows an adjustment of previously reported premium amounts.</p>
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 <b>R</b> (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 <b>R</b> (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
AP	Armed Forces Pacific
AR	Arkansas
AS	American Samoa
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia



Abbreviation	Description
DE	Delaware
FL	Florida
FM	Federated States of Micronesia
GA	Georgia
GU	Guam
HI	Hawaii
IA	Iowa
ID	Idaho
IL	Illinois
IN	Indiana
KS	Kansas
KY	Kentucky
LA	Louisiana
MA	Massachusetts
MD	Maryland
ME	Maine
MH	Marshall Islands
MI	Michigan
MN	Minnesota
MO	Missouri
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
OH	Ohio
OK	Oklahoma
OR	Oregon
PA	Pennsylvania
PR	Puerto Rico
PW	Palau
RI	Rhode Island
SC	South Carolina
SD	South Dakota
TN	Tennessee
TX	Texas
UT	Utah
VA	Virginia
VI	Virgin Islands
VT	Vermont
WA	Washington
WI	Wisconsin
WV	West Virginia
WY	Wyoming





## Country Codes Table

The following table lists valid country codes for CLER.

Country	Code
Afghanistan	AF
Albania	AL
Algeria	AG
American Samoa	AQ
Andorra	AN
Angola	AO
Anguilla	AV
Antarctica	AY
Antigua and Barbuda	AC
Argentina	AR
Armenia	AM
Aruba	AA
Ashmore and Cartier Islands	AT
Australia	AS
Austria	AU
Azerbaijan	AJ
Bahamas, The	BF
Bahrain	BA
Baker Island	FQ
Bangladesh	BG
Barbados	BB
Bassas da India	BS
Belarus	BO
Belgium	BE



Country	Code
Belize	BH
Benin	BN
Bermuda	BD
Bhutan	BT
Bolivia	BL
Bosnia and Herzegovina	BK
Botswana	BC
Bouvet Island	BV
Brazil	BR
British Indian Ocean Territory	IO
British Virgin Islands	VI
Brunei	BX
Bulgaria	BU
Burkina Faso	UV
Burma	BM
Burundi	BY
Cambodia	CB
Cameroon	CM
Canada	CA
Cape Verde	CV
Cayman Islands	CJ
Central African Republic	CT
Chad	CD
Chile	CI
China	CH
Christmas Island	KT



Country	Code
Clipperton Island	IP
Cocos (Keeling) Islands	CK
Colombia	CO
Comoros	CN
Congo, Democratic Republic of the	CG
Congo, Republic of the	CF
Cook Islands	CW
Coral Sea Islands	CR
Costa Rica	CS
Cote d'Ivoire	IV
Croatia	HR
Cuba	CU
Cyprus	CY
Czech Republic	EZ
Denmark	DA
Djibouti	DJ
Dominica	DO
Dominican Republic	DR
East Timor	TT
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	HA
Heard Island and McDonald Islands	HM
Honduras	HO
Hong Kong	HK
Howland Island	HQ
Hungary	HU
Iceland	IC
India	IN
Indonesia	ID
Iran	IR
Iraq	IZ
Ireland	EI
Israel	IL
Italy	IT
Jamaica	JM
Jan Mayen	JN
Japan	JA
Jarvis Island	DQ
Jersey	JE
Johnston Atoll	JQ
Jordan	JO
Juan de Nova Island	JU
Kazakhstan	KZ
Kenya	KE
Kingman Reef	KQ
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
Macau	MC
Macedonia, The Republic of	MK
Madagascar	MA
Malawi	MI
Malaysia	MY
Maldives	MV
Mali	ML
Malta	MT
Man, Isle of IM	IM
Marshall Islands	RM
Martinique	MB
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	MH
Morocco	MO
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	PK
Palau	PS
Palmyra Atoll	LQ
Panama	PM
Papua New Guinea	PP
Paracel Islands	PF
Paraguay	PA
Peru	PE
Philippines	RP
Pitcairn Islands	PC
Poland	PL
Portugal	PO
Qatar	QA
Reunion	RE
Romania	RO
Russia	RS
Rwanda	RW
Saint Helena	SH
Saint Kitts and Nevis	SC
Saint Lucia	ST
Saint Pierre and Miquelon	SB
Saint Vincent and the Grenadines	VC
Samoa	WS
San Marino	SM
Sao Tome and Principe	TP
Saudi Arabia	SA





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	TH
Togo	TO



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

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



# Form SF 2809, Health Benefits Election Form


 <b>Health Benefits Election Form</b> <i>Federal Employees Health Benefits Program</i>		Form Approved: OMB No. 3206-0160	
For Employees, Former Spouses Under the Spouse Equity Law, and Individuals Eligible for Temporary Continuation of Coverage			
* Complete Parts A and G, and Parts B, C, D, E, and F as applicable.		Do not separate the copies. Your employing office will certify the completed form and return your copy to you.	
• Type or print firmly		• Sign and date in Part	
<b>Part A - Fill in this part.</b>			
1. Name (last, first, middle initial)	2. Social Security Number	3. Date of birth (mm/dd/yyyy)	
4. Your home mailing address (include ZIP code)	5. Sex <input type="checkbox"/> Male <input type="checkbox"/> Female	6. Are you now married? <input type="checkbox"/> Yes <input type="checkbox"/> No	
7. Daytime telephone number (include area code)			
<b>Part B - Fill in this part if you wish to enroll or change your enrollment in the Federal Employees Health Benefits (FEHB) Program.</b>			
1. I elect to enroll in a health benefits plan as shown below. (Copy the information requested below from front cover of brochure of the plan you select.)			
Name of plan		Enrollment code	
2a. Names of family members (last, first, middle initial)	2b. ZIP code	2c. Date of birth (mm/dd/yyyy)	2d. Sex
		2e. Relation- ship "code"	2f. Social Security Number (see instructions)
3a. Do you, your spouse or any other eligible family members have any group health insurance coverage other than the FEHB plan in which you are now enrolling or enrolled? <input type="checkbox"/> No <input type="checkbox"/> Yes → Complete 3b. Name of policyholder (last, first, middle initial)			
3b. Type of insurance <input type="checkbox"/> Medicare <input type="checkbox"/> You <input type="checkbox"/> Your spouse <input type="checkbox"/> TRICARE (Including CHAMPUS) <input type="checkbox"/> Other (specify name)			
<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> A <input type="checkbox"/> B			
<b>Part C - Fill in this part, as well as PART B, to change enrollment.</b>		<b>Part D - Event</b>	
1. Present Plan name	2. Present Plan enrollment code →	1. Event code that permits change (see Table of Permissible Changes)	2. Date of event that permits change (mm/dd/yyyy)
<b>Part E - Employees Only</b>		<b>Part F - Cancellation</b>	
Place an "X" in the box below if you wish NOT TO ENROLL in the FEHB Program.		Place an "X" in the box below if you wish to CANCEL your enrollment.	
<input type="checkbox"/> I elect not to enroll in the Federal Employees Health Benefits Program.		<input type="checkbox"/> I elect to cancel my enrollment in the Federal Employees Health Benefits Program. I am currently enrolled under the code shown above.	
My signature in PART G certifies that I have read and understand the information on page 4 regarding this election.		My signature in PART G certifies that I have read the information in the instructions on page 4 regarding cancellation of enrollment and that I understand that I must meet the 5-year requirement to qualify for FEHB coverage after retirement.	
<b>Part G - Fill in this part.</b>			
WARNING: Any intentionally false statement in this application or willful misrepresentation relative thereto is a violation of the law punishable by a fine of not more than \$10,000 or imprisonment of not more than 5 years, or both. (18 U.S.C. 1001.)			
1. Your signature (do not print)		2. Date (mm/dd/yyyy)	
<b>Part H - To be completed by agency</b>			
1. Name and address of employing office (include ZIP code)	2. Date received in employing office (mm/dd/yyyy)	3. Effective date of action (mm/dd/yyyy)	4. SF 2811 report number
	5. Payroll office number	6. Payroll contact and telephone number (including area code)	
		( )	
	7. Personnel contact and telephone number (including area code)		
	( )		
	8. Signature of authorized agency official and telephone number (including area code)		
	( )		
Remarks			
Office of Personnel Management			
NSN 7540-01-231-6227			
Copy 1 - OFFICIAL PERSONNEL FOLDER			
Standard Form 2809 Revised July 1999 Previous editions are not usable.			

Figure 167: Form SF 2809, Health Benefits Election Form



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


 <b>Notice of Change in Health Benefits Enrollment</b>		
<b>Part A - Identifying Information</b>		
1. Name (Last, first, middle initial)	2. Date of birth	3. Social security number
4. Home address (including ZIP Code)	5. Payroll office number	6. Enrollment code number
	7. SF 2811 Report number	8. Date this action becomes effective
<p>Only the item that is checked below affects your enrollment. Read that item carefully and follow any pertinent instructions. Keep this form for your records.</p>		
<b>Part B - Termination</b>		
<p><input type="checkbox"/> Your enrollment terminates on the date in Part A, item 8, above. However, your coverage is extended for 31 days after that date.</p> <p><b>Important Notice:</b> You have the right to convert to an individual (nongroup) contract with the carrier of your plan. You also may have the right to temporarily continue your group coverage. See Part B - Termination on the back of this form for information about 31-day extension of coverage, conversion, and temporary continuation of coverage.</p> <p>If termination is due to death of enrollee enter date of death <input type="text"/> Date of death (mo, dy, yr) <input type="text"/></p>		
<b>Part C - Transfer In</b>		<b>Part D - Reinstatement</b>
<p><input type="checkbox"/> The new Payroll Office (or Retirement System) shown in Part H below has accepted transfer of this enrollment and will continue it.</p>		<p><input type="checkbox"/> Your enrollment has been reinstated effective on the date in Part A, item 8, above.</p>
<b>Part E - Change in Name of Enrollee</b>		<b>Part F - Change in Enrollment-Survivor Annuitant</b>
<p><input type="checkbox"/> The name under which this enrollment is carried has been changed to:</p> <p>Name <input type="text"/> Date of Birth <input type="text"/></p> <p>Address (including ZIP Code) if different from Part A, item 4, above. <input type="text"/></p>		<p><input type="checkbox"/> Your enrollment has been changed from family coverage to self only. Your plan will send you a new identification card. Your new enrollment code number is shown below. (Note: This item is completed by Retirement Systems only.)</p> <p>New Enrollment Code Number <input type="text"/></p>
<b>Part G - Remarks</b>		
<b>Part H - Date of Notice</b>		
<p><i>Note: Instructions for Employing Offices are on the back of Copy 4 of this form.</i></p>		
Name and address of agency (including ZIP Code)		Personnel contact and telephone number ( )
		Payroll contact and telephone number ( )
Signature of authorized agency official		Date
<p>U.S. Office of Personnel Management          CSRS/FERS Handbook for Personnel and Payroll Offices          NSN 7540 01-232-1234          Copy 1 - To Enrollee          2810-104          Previous edition is usable          Standard Form 2810          Revised June 1995</p>		

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

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

[illegible]

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





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## # (System Generated) Field Instructions

#	<i>System generated</i> Displays the number of discrepancies.
---	--

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

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

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

%	<i>System generated</i> Displays the percentage of matching records to enrollee records.
---	---

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

%	<i>System generated</i> Displays the percentage of reconciled discrepancies to reported discrepancies.
---	---



## Accepted (System Generated) Field Instructions

Accepted	<p><i>System generated</i></p> <p>Displays the number of transmissions that passed front-end edits and were accepted for processing.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>
----------	--

## Action (System Generated) Field Instructions

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

## Action Code Field Instructions

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

## Address (System Generated) Carrier Field Instructions

Address	<p><i>System generated</i></p> <p>Displays the carrier's street or post office box address.</p>
---------	---

## Address (System Generated) Payroll Office Field Instructions

Address	<p><i>System generated</i></p> <p>Displays the payroll office's street or post office box address.</p>
---------	--





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

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

## Address Line 1 Field Instructions

Address Line 1	<i>Optional, alphanumeric, 40 positions maximum</i> 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	<i>System generated</i> 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	<i>System generated</i> 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	<i>System generated</i> 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	<i>System generated</i> 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	<i>System generated</i> Displays the first line payroll office's street or post office box address.
----------------	--

## Address Line 2 Field Instructions

Address Line 2	<i>Optional, alphanumeric, 40 positions maximum</i> 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	<i>System generated</i> 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	<i>System generated</i> 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	<i>System generated</i> 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	<i>System generated</i> 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	<i>System generated</i> 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	<i>System generated</i> Displays the second line of the personnel office contact's street or post office box address.
----------------	--

## Address Line 3 Field Instructions

Address Line 3	<i>Optional, alphanumeric, 40 positions maximum</i> 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	<i>System generated</i> 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	<i>System generated</i> 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	<i>System generated</i> 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	<i>System generated</i> 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	<i>System generated</i> Displays the third line payroll office's street or post office box address.
----------------	--



## Address Line 3 (System Generated) Personnel Office Contact Field Instructions

<b>Address Line 3</b>	<i>System generated</i> Displays the third line of the personnel office contact's street or post office box address.
-----------------------	---

## Affects (System Generated) Field Instructions

<b>Affects</b>	<i>System generated</i> The values listed below indicate the following: <b>Payroll Office</b> - indicates the code affects the payroll office only. <b>Carrier</b> - indicates the code affects the carrier only. <b>Both</b> - 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

<b>Affects Carrier</b>	<i>System generated</i> Valid values are <b>Yes</b> or <b>No</b> . Indicates whether or not the code affects the carrier.
------------------------	--

## Affects Payroll Field Instructions

<b>Affects Payroll</b>	<i>System generated</i> 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

<b>Agcy</b>	<i>System generated</i> Displays the Agency ID code. This code consists of the Department code and Agency code.
-------------	--



## Agency (System Generated) Field Instructions

<b>Agency</b>	<p><i>System generated</i></p> <p>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).</p> <hr/> <p>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.</p>
---------------	---

## Agency (System Generated) Report Field Instructions

<b>Agency</b>	<p><i>System generated</i></p> <p>Displays the Agency ID code. This code consists of the Department code and Agency code.</p> <hr/> <p>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.</p>
---------------	---

## Agency ID Field Instructions

<b>Agency</b>	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>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).</p>
---------------	---

## 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	<i>System generated</i> 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	<i>System generated</i> Displays the date the transmitted enrollment data was extracted.
------------	---

## As of Date\* (Drop-Down) Field Instructions

As of Date*	<i>Required</i> Select the from/to pay period from the drop-down menu.
-------------	---

## As of Date\* (Drop-Down) Req. From Field Instructions

As of Date* From	<i>Required</i> Select the from pay period from the drop-down menu.
------------------	--



## As of Date\* (Drop-Down) Req. To Field Instructions

As of Date* To	<i>Required</i> 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	<i>System generated</i> Displays the carrier code.
------	---

## Carrier - Field Description

### Carrier

#### *System generated*

Displays the carrier code.

## Carrier Field Instructions

Carrier	<i>System generated</i> 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	<i>Required</i> Select the carrier ID code from the drop-down menu.
---------	--

## Carrier (Drop-Down) Organization Carrier Code Field Instructions

Carrier	<i>Optional default</i> 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	<i>Optional, alphanumeric, 7 positions</i> Enter the carrier ID code.
---------	--

## Carrier (Optional) Identification Code Field Instructions

Carrier	<i>Optional, alphanumeric, 7 positions</i> Enter the carrier ID code.
---------	--



## Carrier (System Generated) Code Field Instructions

Carrier	<i>Optional</i> Select the carrier code from the drop-down menu.
---------	---

## Carrier (System Generated) Identification Code Field Instructions

Carrier	<i>System generated</i> Displays the carrier ID code.
---------	--

## Carrier\* (Drop-Down) Field Instructions

Carrier*	<i>Required</i> 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.  <u>Note: If <b>724</b> was selected in the Corrective Action field, comments explaining the corrective action must be entered in this field.</u>
------------------	--

## Carrier Comments (Conditional) Field Instructions

Carrier Comments	<i>Conditional, alphanumeric, 400 positions maximum</i> Enter comments about this record.
------------------	--



## Carrier Comments (System Generated) Field Instructions

Carrier Comments	<i>System generated</i> Displays the carrier's comments.
------------------	---

## Carrier Discrepancy (System Generated) Field Instructions

Discrepancy	<i>System generated</i> Displays the error or warning code generated by CLER. For lists and descriptions of error and warning codes, see <b>Discrepancy Codes Table</b> (on page 217) and <b>Warning Codes Table</b> (on page 218).
-------------	--

## Carrier EFF. Date (System Generated) Field Instructions

Eff. Date	<i>System generated</i> Displays the enrollment effective date (MM/DD/YYYY) submitted by the carrier.
-----------	--

## Carrier Errors (System Generated) Field Instructions

Carrier Errors	<i>System generated</i> 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	<i>System generated</i> Displays the number of times the initial discrepancy has been identified and reported.
------------	---

## Carrier Field Instructions

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.
---------	--



## Carrier From: (System Generated) Gain/Loss Rpt 8 Field Instruction

<b>From: Quarter/Year Carrier</b>	<i>System generated</i> 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

<b>Carrier Id</b>	<i>Required</i> 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	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
------------	--

## Carrier ID Field Instructions

Carrier ID	<i>Required, alphanumeric, 7 positions</i> Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
------------	--

## Carrier ID\* Field Instructions

Carrier ID*	<i>Required, default</i> 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*	<i>Optional, default</i> 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*	<i>Required</i> Select the carrier ID number from the drop-down menu.
-------------	--

## Carrier Name (System Generated) Field Instructions

Name	<i>System generated</i> Displays the enrollee's name submitted by the carrier.
------	---



## Carrier To: (System Generated) Sys. Gen. Gain/Loss Rpt 8 Field Instruction

<b>To: Quarter/Year Carrier</b>	<i>System generated</i> Displays the carrier code.
-------------------------------------	---

## Carrier-Total Field Instructions

<b>Carrier-Total</b>	<i>System generated</i> Displays the sum of records by carrier.  <div>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</div>
----------------------	---

## Change (#) (System Generated) Field Instructions

<b>Change (#)</b>	<i>System generated</i> Displays the change in the number of enrollment code changes from the prior quarter to the current quarter.
-------------------	--

## Change (%) (System Generated) Field Instructions

<b>Change (%)</b>	<i>System generated</i> Displays the change in percent of enrollment code changes from the prior quarter to the current quarter.
-------------------	---

## Change Actual (System Generated) Field Instructions

<b>Change Actual</b>	<i>System generated</i> Displays the number that indicates the actual changes in values between prior and current reconciliation years/quarters.
----------------------	---



## Change Password Field Instructions

<b>Change Password</b>	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> .
------------------------	--

## Change Percentage (System Generated) Field Instructions

<b>Change Percent</b>	<i>System generated</i> 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

<b>Check box to create report without totals</b>	<i>Optional</i> Select this check box to omit totals from the report.
--	--

## City (System Generated) Carrier Contact Field Instructions

<b>City</b>	<i>System generated</i> Displays the name of the carrier contact's city.  <u>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.</u>
-------------	--



## City (System Generated) Carrier Field Instructions

<b>City</b>	<i>System generated</i> Displays the name of the carrier's city.  <u>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.</u>
-------------	--

## City (System Generated) Carrier Plan Field Instructions

<b>City</b>	<i>System generated</i> Displays the name of the carrier plan contact's city.  <u>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.</u>
-------------	---

## City (System Generated) Payroll Office Contact Field Instructions

<b>City</b>	<i>System generated</i> Displays the name of the payroll office contact's city.  <u>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.</u>
-------------	---

## City (System Generated) Payroll Office Field Instructions

<b>City</b>	<i>System generated</i> Displays the name of the payroll office's city.  <u>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.</u>
-------------	---





## City (System Generated) Personnel Office Contact Field Instructions

<b>City</b>	<i>System generated</i> Displays the name of the personnel office contact's city. <hr/> <b>Note:</b> 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. <hr/>
-------------	---

## City Carrier Contact Fields Instructions

<b>City</b>	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier contact's city.
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## City Carrier Field Instructions

<b>City</b>	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier's city. <hr/> <b>Note:</b> 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. <hr/>
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## City Carrier Plan Contact Field Instructions

<b>City</b>	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier plan contact's city.
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## City Payroll Office Field Instructions

<b>City</b>	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the payroll office's city.
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## 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	<i>System generated</i> Displays the enrollment code submitted by the carrier.
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## Code (System Generated) Enrollment Code Field Instructions

Code	<i>System generated</i> Displays the enrollment code.
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## Code (System Generated) Submitted by Payroll Office/Carrier Field Instructions

Code	<i>System generated</i> Displays the enrollment code submitted by the payroll office/carrier.
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## Code (System Generated) Code Number Field Instructions

Code	<i>System generated</i> Displays the code number. For lists and descriptions of valid codes, see <b>CLER Reference Tables</b> (on page 217).
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## Code (System Generated) Transmissions Processing Code Field Instructions

<b>Code</b>	<i>System generated</i> 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.
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## Code From: (System Generated) Gain/Loss Rpt. 8 Field Instruction

<b>From: Quarter/Year Code</b>	<i>System generated</i> Displays the enrollment code.
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## Code To: (System Generated) Gain/Loss Rpt. 8 Field Instruction

<b>To: Quarter/Year Code</b>	<i>System generated</i> Displays the enrollment code.
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## Code-Total (System Generated) Field Instructions

<b>Code-Total</b>	<i>System generated</i> Displays the sum of records by enrollment code.  <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed.
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## Confirmed Errors (System Generated) Field Instructions

<b>Confirmed Errors</b>	<i>System generated</i> 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.
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## Corrective Action - Field Description

### Corrective Action

#### *System generated*

Displays the carrier's response to the reconciliation action code displayed next to the Reconciliation Action field.

To view a detailed explanation of the carrier's corrective action response, see ***Carrier Corrective Action Response Codes Table*** (on page 225).

## Corrective Action (System Generated) Carrier Validation Field Instructions

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.
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## Corrective Action (System Generated) Field Instructions

Corrective Action	<i>System generated</i>  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><i>Carrier Corrective Action Response Codes Table</i></b> (on page 225).
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## Corrective Action\* Field Instructions

Corrective Action*	<i>System generated</i>  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 <b><i>Carrier Corrective Action Response Codes Table</i></b> (on page 225).
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## Cut Off Date (System Generated) Field Instructions

<b>Cut Off Date</b>	<i>System generated</i> Displays the date that CLER accepts no quarterly enrollment data from carriers or payroll offices.
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## Date Due (System Generated) Field Instructions

<b>Date Due</b>	<i>System generated</i> 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

<b>Date Processed</b>	<i>System generated</i> Displays the date the record was processed.
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## Date Processed (System Generated) Transmissions Field Instructions

<b>Date Processed</b>	<i>System generated</i> Displays the current system date when the process was run.
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## Deceased Annuitant SSN - Field Description

### **Deceased Annuitant SSN**

*System generated*

Displays the deceased annuitant enrollee's SSN.



## Deceased Annuitant SSN (System Generated) Field Instructions

<b>Deceased Annuitant SSN</b>	<i>System generated</i> Displays the deceased annuitant enrollee's SSN.
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## Description (System Generated) Enrollment Field Instructions

<b>Description</b>	<i>System generated</i> Displays the descriptive text that corresponds the enrollment record.
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## Description (System Generated) Field Instructions

<b>Description</b>	<i>System generated</i> Displays the descriptive text that corresponds to the code.
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## Discrepancies (System Generated) 163 Search Field Instructions

<b>Discrepancies</b>	<i>System generated</i> Displays Discrepancy Code 163. For a detailed explanation of Discrepancy Code 163, see <b>Discrepancy Codes Table</b> (on page 217).  <u>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.</u>
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## Discrepancies (System Generated) Search Field Instructions

<b>Discrepancies</b>	<p><i>System generated</i></p> <p>Displays an error or warning. For lists and descriptions of error and warning codes, see <b>Discrepancy Codes Table</b> (on page 217) and <b>Warning Codes Table</b> (on page 218).</p> <hr/> <p>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.</p>
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### 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

<b>Discrepancy</b>	<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 <b>Discrepancy Codes Table</b> (on page 217).
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## Discrepancy (System Generated) Discrepancy Listing Field Instructions

<b>Discrepancy</b>	<i>System generated</i>  Displays the error or warning code generated by CLER. For lists and descriptions of error and warning codes, see <b>Discrepancy Codes Table</b> (on page 217) and <b>Warning Codes Table</b> (on page 218).
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## Discrepancy (System Generated) View Field Instructions

<b>Discrepancy</b>	<i>System generated</i>  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.
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## 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

<b>Display</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>All Records</b> - Displays all records related to the search criteria.</p> <p><b>Matches</b> - Displays all matched records related to the search criteria.</p> <p><b>No Matches</b> - Displays all unmatched records related to the search criteria.</p> <p><b>Discrepancies</b> - Displays all records with discrepancies related to the search criteria.</p> <p><b>Warnings</b> - Displays all records with warnings related to the search criteria.</p> <p><b>Unreconciled</b> - Displays all records with unreconciled discrepancies related to the search criteria.</p> <p><b>Reconciled</b> - Displays all records with reconciled discrepancies related to the search criteria.</p> <p><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.</p> <p><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.</p> <p><b>Not Validated</b> - Displays all records that have not been validated.</p>
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## Display Field Instructions

<b>Display</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>All</b> - Displays all contacts for the payroll office ID and type code entered.</p> <p><b>Active</b> - Displays active contacts for the payroll office ID and type code entered.</p> <p><b>Inactive</b> - Displays inactive contacts for the payroll office ID and type code entered.</p>
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## Display Payroll Discrepancy Listing Field Instructions

<b>Display</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>All</b> - Displays all records related to the search criteria.</p> <p><b>Unreconciled</b> - Displays all records with unreconciled discrepancies related to the search criteria.</p> <p><b>Errors</b> - Displays all records with errors related to the search criteria.</p> <p><b>Warnings</b> - Displays all records with warnings related to the search criteria.</p> <p><b>Reconciled</b> - Displays all records with reconciled discrepancies related to the search criteria.</p> <p><b>Matches</b> - Displays all records with matches related to the search criteria.</p> <p><b>Not Validated</b> - Displays records related to the search criteria that have not been validated.</p>
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## Display Payroll Office Enrollees Field Instructions

### Display (Payroll Office Enrollees)

*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 Records** - Displays all records related to the search criteria.

**Matches** - Displays all matched records related to the search criteria.

**No Matches** - Displays records with no matches related to the search criteria. No Matches are discrepancies where the carrier record is not found.

**Discrepancies** - Displays all records with discrepancies related to the search criteria.

**Warnings** - Displays all records with warnings related to the search criteria.

**Unreconciled** - Displays all records with unreconciled discrepancies related to the search criteria. Unreconciled discrepancies are discrepancies where the payroll office has not entered a reconciliation reason or reconciliation action code.

**Reconciled** - Displays all records with reconciled discrepancies related to the search criteria.

**Confirmed** - Displays all records with confirmed discrepancies related to the search criteria. Confirmed discrepancies are discrepancies where the carrier is in agreement with the payroll office's reconciliation reason and reconciliation action.

**Disputed** - Displays all records with disputed discrepancies related to the search criteria. Disputed discrepancies are discrepancies where the carrier is not in agreement with the payroll office's reconciliation reason and reconciliation action.

**Not Validated** - Displays all records with discrepancies that are not validated. Not Validated discrepancies are discrepancies that the carrier has not yet agreed that the Agency's reconciliation reason and actions are correct.



## Display System Codes Field Instructions

<b>Display</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>All</b> - Displays all codes.</p> <p><b>Discrepancy</b> - Displays all discrepancy codes.</p> <p><b>Warning</b> - Displays all warning codes.</p> <p><b>Reconciliation Reason</b> - Displays all reconciliation reason codes.</p> <p><b>Reconciliation Action</b> - Displays all reconciliation action codes.</p> <p><b>Corrective Action</b> - Displays all corrective action response codes.</p> <p><b>System</b> - Displays all system codes.</p>
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## 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

<b>Display Total Payment Amounts</b>	<p><i>Optional, default</i></p> <p>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>.</p>
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## Disputed Errors (System-Generated) Field Instructions

<b>Disputed Errors</b>	<i>System generated</i>  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.
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## 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

<b>Eff. Date</b>	<i>System generated</i>  Displays the effective date (MM/DD/YYYY) submitted by the payroll office/carrier.
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## Effective Date (System Generated) Field Instructions

<b>Effective Date</b>	<i>System generated</i>  Displays the effective date of the enrollment.
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## Email (Optional) Carrier Contact Field Instructions

<b>Email</b>	<i>Optional, alphanumeric, 60 positions</i>  Enter the carrier contact's email address.
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## Email (System Generated) Carrier Contact Field Instruction

<b>Email</b>	<i>System generated</i>  Displays the carrier contact's email address.
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## Email (System Generated) Carrier Plan Contact Field Instruction

<b>Email</b>	<i>System generated</i> Displays the carrier plan contact's email address.
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## Email (System Generated) Payroll Office Field Instructions

<b>Email</b>	<i>System generated</i> Displays the payroll office contact's email address.
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## Email (System Generated) Personnel Office Field Instructions

<b>Email</b>	<i>System generated</i> Displays the personnel office contact's email address.
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## Email Address Carrier Contact Field Instructions

<b>Email Address</b>	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier contact's email address.
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## Email Address Carrier Plan Contact Field Instructions

<b>Email Address</b>	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier plan contact's email address.
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## Email Address (System Generated) Carrier Contact Field Instructions

<b>Email Address</b>	<i>System generated</i> Displays the carrier contact's email address.
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## Email Address (System Generated) Carrier Plan Contact Field Instructions

Email Address	<i>System generated</i> Displays the carrier plan contact's email address.
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## Email Address (System Generated) Personnel Office Contact Field Instructions

Email Address	<i>System generated</i> Displays the personnel office contact's email address.
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## Email Date (System Generated) Transmissions Field Instructions

Email Date	<i>System generated</i> Displays the date the last email was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter.
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## Email/Email Address (System Generated) Personnel Office Field Instructions

Email/Email Address	<i>System generated</i> Displays the personnel office contact's email address.
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## Email Time (System Generated) Transmissions Field Instructions

Email Time	<i>System generated</i> Displays the time the last email was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter.
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## 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

<b>End Date</b>	<i>System generated</i> Displays the the last date the carrier enrollment code will be valid.
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## End Date (System Generated) Carrier Field Instructions

<b>End Date</b>	<i>System generated</i> Displays the last date (MMDDYYYY) the carrier plan will be valid. If the date is not known, <b>12/31/9999</b> is displayed.
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## End Date (System Generated) Field Instructions

<b>End Date</b>	<i>System generated</i> Displays the last date the payroll office will be valid.
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## Enrollee (System Generated) Field Instructions

<b>Enrollee</b>	<i>System generated</i> Displays the enrollee's name.
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## 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	<i>System generated</i> Displays the enrollee's SSN.
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## Enrollees (Left/Drop) (System Generated) Field Instructions

Enrollees (Left/Drop)	<i>System generated</i> Displays the number of dropped enrollees.
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## Enrollees (New/Add (System Generated) Field Instructions

<b>Enrollees (New/Add)</b>	<i>System generated</i> Displays the number of new or added enrollees.
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## Enrollees (System Generated) Reconciliation Summary Field Instructions

<b>Enrollees</b>	<i>System generated</i> Displays the number of enrollee records that meet the criteria entered on the Reconciliation Summary page.
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## Enrollment Changes % (System Generated) Added Field Instructions

<b>Enrollment Changes %</b>	<i>System generated</i> Displays the percent of enrollment changes that were added.
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## Enrollment Changes % (System Generated) Dropped Field Instructions

<b>Enrollment Changes %</b>	<i>System generated</i> Displays percent of enrollment changes that were dropped.
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## Enrollment Changes Added (System Generated) Field Instructions

<b>Enrollment Changes Added</b>	<i>System generated</i> Displays the number of enrollment changes that were added.
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## Enrollment Changes Dropped (System Generated) Field Instructions

<b>Enrollment Changes Dropped</b>	<i>System generated</i> Displays the number of enrollment changes that were dropped.
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## Enrollment Code Field Instructions

Enrollment Code	<i>Optional, alphanumeric, 3 positions</i> Enter the enrollment/carrier enrollment code.
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## 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	<i>Optional</i> Select the enrollment code from the drop-down list.
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## Enrollment Code (System Generated) Field Instructions

Enrollment Code	<i>System generated</i> Displays the enrollment code/carrier enrollment code.
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## Error Code (Drop-Down) Field Instructions

Error Code	<i>Optional</i> Select the applicable error code from the drop-down menu. For a list and descriptions of error codes, see <b>Discrepancy Codes Table</b> (on page 217).
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## Error Codes Field Instructions

<b>Error Code</b>	<i>Optional</i> 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 <b><i>Discrepancy Codes Table</i></b> (on page 217).
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## 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

<b>Error Threshold</b>	<i>System generated</i> Displays the number of percentage of errors permitted for the payroll office/carrier before a transmission file is rejected.
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## Errors - Field Description

### Errors

*System generated*

Displays the sum of error codes displayed in the Discrepancy field.

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Note: If the check box used to omit totals from a report is selected, this field is not displayed.

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## Errors (System Generated) Field Instructions

<b>Errors</b>	<i>System generated</i> Displays the sum of error codes displayed in the Discrepancy field. <hr/> <i>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</i>
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## Errors Reconciled (System Generated) Field Instructions

<b>Errors Reconciled</b>	<i>System generated</i> Displays the count of errors that have a reconciliation reason and action entered.
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## Explanation (System Generated) Field Instructions

<b>Explanation</b>	<i>System generated</i> Displays the detailed explanation of the code.
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## 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

<b>Fail Count</b>	<i>System generated</i> Displays the number of times this record has failed the quarterly edit process.
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## Fail Count Discrepancy and Reconciliation Reports Field Instructions

<b>Fail Count</b>	<i>System generated</i> Displays the number of times the initial discrepancy has been identified and reported.
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## 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

<b>Fail Count From</b>	<p><i>Optional, numeric, 3 positions maximum.</i></p> <p>Enter a specific fail count number to search for enrollee records by a specific fail count number, then proceed to the To field.</p> <p><b>OR</b></p> <p>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.</p>
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## 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

<b>Fail Count To</b>	<p><i>Optional, numeric, 3 positions maximum</i></p> <p>Entered the number that was entered in the From field to search enrollee records by a specific fail count number.</p> <p style="text-align: center;"><b>OR</b></p> <p>Enter the number that ends the range of fail count numbers to search for enrollee records by a range of fail count numbers.</p>
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## Fax Number Carrier Contact Field Instructions

<b>Fax Number</b>	<p><i>Optional, alphanumeric, 25 positions</i></p> <p>Enter the carrier contact's fax number.</p>
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## Fax Number Carrier Plan Contact Field Instructions

<b>Fax Number</b>	<p><i>Optional, alphanumeric, 25 positions</i></p> <p>Enter the carrier plan contact's fax number.</p>
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## Fax Number (System Generated) Carrier Contact Field Instructions

<b>Fax Number</b>	<p><i>System generated</i></p> <p>Displays the carrier contact's fax number.</p>
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## Fax Number (System Generated) Carrier Plan Contact Field Instructions

<b>Fax Number</b>	<p><i>System generated</i></p> <p>Displays the carrier plan contact's fax number.</p>
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## Fax Number (System Generated) Payroll Office Contact Field Instructions

<b>Fax Number</b>	<i>System generated</i> Displays the payroll office contact's fax number.
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## Fax Number (System Generated) Personnel Office Contact Field Instructions

<b>Fax Number</b>	<i>System generated</i> Displays the personnel office contact's fax number.
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## 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

<b>First Name</b>	<i>Optional, alphanumeric, 12 positions maximum</i> Enter the enrollee's first name. This must be provided with the exception of an enrollee with only one name.
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## First Name (System Generated) Field Instructions

<b>First Name</b>	<i>System generated</i> Displays the enrollee's first name.
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## Foreign Country (Drop-Down) Carrier Contact Field Instructions

Foreign Country	<i>Optional</i> Select the carrier 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).
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## Foreign Country (Drop-Down) Carrier Plan Contact Field Instructions

Foreign Country	<i>Optional</i> 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).
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## Foreign Country (System Generated) Carrier Contact Field Instructions

Foreign Country	<i>System generated</i> Displays the carrier contact's country code. For a list and descriptions of country codes, see <b>Country Codes Table</b> (on page 229).
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## Foreign Country (System Generated) Carrier Field Instructions

Foreign Country	<i>System generated</i> Displays the carrier's country code. For a list and descriptions of country codes, see <b>Country Codes Table</b> (on page 229).
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## Foreign Country (System Generated) Carrier Plan Contact Field Instructions

Foreign Country	<i>System generated</i> Displays the carrier plan contact's country code. For a list and descriptions of country codes, see <b>Country Codes Table</b> (on page 229).
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## Foreign Country (System Generated) Payroll Office Contact Field Instructions

<b>Foreign Country</b>	<p><i>System generated</i></p> <p>Displays the payroll office contact's country code. For a list and descriptions of country codes, see <b>Country Codes Table</b> (on page 229).</p>
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## Foreign Country (System Generated) Payroll Office Field Instructions

<b>Foreign Country</b>	<p><i>System generated</i></p> <p>Displays the payroll office's country code. For a list and descriptions of country codes, see <b>Country Codes Table</b> (on page 229).</p>
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## Foreign Country (System Generated) Personnel Office Contact Field Instructions

<b>Foreign Country</b>	<p><i>System generated</i></p> <p>Displays the personnel office contact's country code. For a list and descriptions of country codes, see <b>Country Codes Table</b> (on page 229).</p>
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## From (Quarter/Year) (System Generated) Field Instructions

<b>From (Quarter/Year)</b>	<p><i>System generated</i></p> <p>Displays the number of enrollees covered by the enrollment code displayed in the Code field during the selected quarter and year.</p>
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## Grand-Total (System Generated) Field Instructions

<b>Grand-Total</b>	<p><i>System generated</i></p> <p>Displays the sum of records by enrollment code and carrier.</p> <hr/> <p><u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u></p>
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## ID (System Generated) Field Instructions

<b>ID</b>	<i>System generated</i> Displays the payroll office identification number.
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## Indicator (System Generated) Field Instructions

<b>Indicator</b>	<i>System generated</i> Displays if the transmission has been validated by the carrier. <b>Y</b> indicates the transmission has been validated, <b>C</b> indicates the transmission has been cancelled, and an empty field indicates the transmission has not been validated.
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## 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

<b>Last Carrier Update Date</b>	<i>System generated</i> Displays the date of the most recent change.
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## 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

<b>Last Carrier Update ID</b>	<i>System generated</i> Displays the user ID number of the carrier representative/individual who made the most recent change to the record.
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## 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

<b>Last Carrier Update Time</b>	<i>System generated</i> Displays the the time of the most recent change.
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## Last Changed Date (System Generated) Field Instructions

<b>Last Changed Date</b>	<i>System generated</i> Displays the date of the most recent change.
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## Last Changed ID (System Generated) Field Instructions

<b>Last Changed ID</b>	<i>System generated</i> Displays the user ID number of the individual who made the most recent change to the record.
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## Last Changed Time (System Generated) Field Instructions

<b>Last Changed Time</b>	<i>System generated</i> Displays the time of the most recent change.
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## Last CL10 Date (System Generated) Field Instructions

<b>Last CL10 Date</b>	<i>System generated</i> Displays the last date of the initial editing and processing of the payroll office enrollment file transmission.
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### Last CL10 Time (System Generated) Field Instructions

<b>Last CL10 Time</b>	<i>System generated</i>  Displays the last time of the initial editing and processing of the payroll office enrollment file transmission.
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### Last CL20 Date (System Generated) Field Instructions

<b>Last CL20 Date</b>	<i>System generated</i>  Displays the last date of the initial editing and processing of the carrier enrollment file transmission.
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### Last CL20 Time (System Generated) Field Instructions

<b>Last CL20 Time</b>	<i>System generated</i>  Displays the last time of the initial editing and processing of the carrier enrollment file transmission.
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### Last CL30 Date (System Generated) Field Instructions

<b>Last CL30 Date</b>	<i>System generated</i>  Displays the last date the payroll office enrollment record fields were edited and matched.
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### Last CL30 Time (System Generated) Field Instructions

<b>Last CL30 Time</b>	<i>System generated</i>  Displays the last time the payroll office enrollment record fields were edited and matched.
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### Last CL40 Date (System Generated) Field Instructions

<b>Last CL40 Date</b>	<i>System generated</i>  Displays the last date the carrier enrollment record fields were edited and matched.
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## Last CL40 Time (System Generated) Field Instructions

Last CL40 Time	<i>System generated</i> Displays the last time the carrier enrollment record fields were edited and matched.
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## 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	<i>System generated</i> Displays the last date the error statistics record fields were updated.
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## Last CL60 Time (System Generated) Field Instructions

Last CL60 Time	<i>System generated</i> Displays the last time the error statistics record fields were updated.
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## Last CL70 Date Field Instructions

Last CL70 Date	Reserved for future use.
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## Last CL70 Time Field Instructions

Last CL70 Time	Reserved for future use.
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## Last CL80 Date (System Generated) Field Instructions

<b>Last CL80 Date</b>	<i>System generated</i>  Displays the last date the 2809 corrective action files were processed and transmitted to OPM Data Hub.
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## Last CL80 Time (System Generated) Field Instructions

<b>Last CL80 Time</b>	<i>System generated</i>  Displays the last time the 2809 corrective action files were processed and transmitted to OPM Data Hub.
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## Last CL90 Date (System Generated) Field Instructions

<b>Last CL90 Date</b>	<i>System generated</i>  Displays the last date the 2810 corrective action files were processed and transmitted to OPM Data Hub.
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## Last CL90 Time (System Generated) Field Instructions

<b>Last CL90 Time</b>	<i>System generated</i>  Displays the last time the 2810 corrective action files were processed and transmitted to OPM Data Hub.
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## 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.






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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.

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**OR**

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If the enrollee has only one name, enter that name in this field.

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## Last Name Field Instructions

<b>Last Name</b>	<i>Optional, alphanumeric, 25 positions maximum</i>  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.
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## Last Name (System Generated) Field Instructions

<b>Last Name</b>	<i>System generated</i>  Displays the enrollee's last name.
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## 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

<b>Last Payroll Update Date</b>	<i>System generated</i>  Displays the date of the most recent change.
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## 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

<b>Last Payroll Update ID</b>	<i>System generated</i> Displays the user ID number of the payroll office representative who made the most recent change to the record.
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## 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

<b>Last Payroll Update Time</b>	<i>System generated</i> Displays the time of the most recent change.
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## Last Validate Date (System Generated) Field Instructions

<b>Last Validate Date</b>	<i>System generated</i> Displays the date the transmission was last validated.
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## Last Validate ID (System Generated) Field Instructions

<b>Last Validate ID</b>	<i>System generated</i> Displays the user ID number of the person who last validated the transmission.
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## Last Validate Time (System Generated) Field Instructions

<b>Last Validate Time</b>	<i>System generated</i> Displays the time the transmission was last validated.
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## Match (System Generated) Field Instructions

<b>Match</b>	<i>System generated</i> Displays the number of matching records that meet the criteria entered on the Reconciliation Summary page.
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## Middle Name - Enrollee Field Description

### Middle Name

*System generated*

Displays the middle name or initial of the enrollee.

## Middle Name Field Instructions

<b>Middle Name</b>	<i>Optional, alphanumeric, 12 positions maximum</i> Enter the enrollee's middle name/initial.
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## Middle Name - Field Instruction

### Middle Name

*Optional, alphanumeric, 12 positions maximum*

Enter the middle name of the enrollee.

## Middle Name (System Generated) Field Instructions

<b>Middle Name</b>	<i>System generated</i> Displays the enrollee's middle name or initial.
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## Name (Optional) Carrier Contact Field Instructions

<b>Name</b>	<i>Optional, alphanumeric, 30 positions maximum</i> Enter the name of the carrier contact.
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### **Name (System Generated) Carrier Contact Field Instructions**

<b>Name</b>	<i>System generated</i> Displays the name of the carrier contact.
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### **Name (System Generated) Carrier Field Instructions**

<b>Name</b>	<i>System generated</i> Displays the name of the carrier.
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### **Name (System Generated) Carrier Plan Contact Field Instructions**

<b>Name</b>	<i>System generated</i> Displays the name of the carrier plan contact.
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### **Name (System Generated) Payroll Office Contact Field Instructions**

<b>Name</b>	<i>System generated</i> Displays the name of the payroll office contact.
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### **Name (System Generated) Payroll Office Field Instructions**

<b>Name</b>	<i>System generated</i> Displays the name of the payroll office.
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### **Name (System Generated) Personnel Office Field Instructions**

<b>Name</b>	<i>System generated</i> Displays the name of the personnel office contact.
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## Name (System Generated) Report Field Instructions

<b>Name</b>	<i>System generated</i> Displays the enrollee's name submitted by the payroll office/carrier.
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## Name (System Generated) Rpt.1, Carrier Field Instructions

<b>Name</b>	<i>System generated</i> Displays the enrollee's name submitted by the carrier.
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## Name Carrier Field Instructions

<b>Name</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the name of the carrier.
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## Name - Carrier Field Description

**Name**  
*System generated*  
Displays the name of the carrier.

## Name Carrier Plan Contact Field Instructions

<b>Name</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the name of the carrier plan contact.
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## Name Payroll Office Field Instructions

<b>Name</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the name of the payroll office.
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## Not Received (System Generated) Field Instructions

<b>Not Received</b>	<p><i>System generated</i></p> <p>Displays the number of transmissions that were expected but not received.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>
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## Note Field Instructions

<b>Note</b>	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.
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## Order By Carrier Field Instructions

<b>Order By</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Name</b> - Search by name.</p> <p><b>City</b> - Search by city.</p> <p><b>State</b> - Search by State.</p>
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## Order By Carrier Code Field Instructions

<b>Order By</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Code</b> - Search by carrier enrollment code.</p>
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## Order By Carrier Contacts Field Instructions

Order By	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Carrier ID</b> - Search by Carrier ID.</p> <p><b>Year/Quarter</b> - Search by reconciliation year and reconciliation quarter.</p>
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## Order By Carrier Errors Page Field Instructions

Order By	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Carrier ID</b> - Search by carrier ID.</p> <p><b>Year/Quarter</b> - Search by reconciliation year and reconciliation quarter.</p>
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## Order By Carrier Plan Contacts Field Instructions

Order By	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Plan</b> - Search by plan code.</p> <p><b>Type</b> - Search by type code.</p>
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## Order By Contacts Page Field Instructions

Order By	<p><i>Optional, default</i></p> <p>Defaults to the <b>ID</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:</p> <p><b>ID</b> - Search by ID number.</p> <p><b>Type</b> - Search by type code.</p>
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## Order By Payroll Office Information Page Field Instructions

<b>Order By</b>	<p><i>Optional, default</i></p> <p>Defaults to the <b>ID</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:</p> <p><b>ID</b> - Search by payroll office identification number.</p> <p><b>Pay Cycle</b> - Search by pay cycle.</p> <p><b>Name</b> - Search by payroll office name.</p> <p><b>City</b> - Search by payroll office city.</p>
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## Order By Personnel Office Contacts Page Field Instructions

<b>Order By</b>	<p><i>Optional, default</i></p> <p>Defaults to the <b>ID</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:</p> <p><b>ID</b> - Search by payroll office identification number.</p> <p><b>POI</b> - Search by personnel office identification number.</p> <p><b>Type</b> - Search by type code.</p>
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## 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

<b>Order By: 1st</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
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## Order By: 1st Carrier Discrepancy Field Instructions

<b>Order By: 1st</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Payroll ID</b> - Search by payroll office identification number.</p>
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## Order By: 1st Carrier Enrollees Field Instructions

<b>Order By: 1st</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p>
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## Order By: 1st Carrier Enrollment Transmission Field Instructions

Order By: 1st	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Carrier ID</b> - Search by carrier ID number.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Year/Quarter</b> - Search by reconciliation year and reconciliation quarter.</p> <p><b>Submission Date</b> - Search by submission date.</p> <p><b>Status</b> - Search by transmission status.</p>
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## Order By: 1st Carrier Validation Field Instructions

Order By: 1st	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p>
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## Order By: 1st Pay Period Transmissions Payment Amounts Report Field Instructions

Order By: 1st	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Carrier</b> - Search by carrier.</p> <p><b>Pay Cycle</b> - Search by pay cycle.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>As of Date</b> - Search by as of date.</p>
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## Order By: 1st Payroll Discrepancy Listing Field Instructions

<b>Order By: 1st</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Other ID</b> - Search by the identifier used by the RSP/OWCP to identify the enrollee.</p>
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## Order By: 1st Reconciliation Action Field Instructions

<b>Order By: 1st</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Action Code</b> - Search by reconciliation action code.</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Personnel Office ID</b> - Search by POI number.</p>
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## Order By: 1st Reconciliation Reason Field Instructions

<b>Order By: 1st</b>	<p><i>Optional, default</i></p> <p>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.</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>Reason Code</b> - Search by reconciliation reason code.</p>
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## Order By: 1st Reconciliation Report Field Instructions

<b>Order By: 1st</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Agency</b> - Search results by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>Reconciliation Date</b> - Search by reconciliation date.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p><b>User ID</b> - Search by user ID number.</p>
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## Order By: 1st Reconciliation Summary Field Instructions

<b>Order By: 1st</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Personnel Office ID</b> - Search by POI number.</p>
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## 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	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
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## Order By: 2nd Carrier Discrepancy Field Instructions

Order By: 2nd	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Payroll ID</b> - Search by payroll office identification number.</p>
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## Order By: 2nd Carrier Enrollees Field Instructions

<b>Order By: 2nd</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p>
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## Order By: 2nd Carrier Enrollment Transmission Field Instructions

<b>Order By: 2nd</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p><b>Carrier ID</b> - Search by carrier ID number.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Year/Quarter</b> - Search by reconciliation year and reconciliation quarter.</p> <p><b>Submission Date</b> - Search by submission date.</p> <p><b>Status</b> - Search by transmission status.</p>
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## Order By: 2nd Carrier Validation Field Instructions

<b>Order By: 2nd</b>	<p><i>Optional</i></p> <p>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:</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p>
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## Order By: 2nd Pay Period Transmission Payment Amounts Report Field Instructions

Order By: 2nd	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Carrier</b> - Search by carrier.</p> <p><b>Pay Cycle</b> - Search by pay cycle.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>As of Date</b> - Search by as of date.</p>
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## Order By: 2nd Payroll Discrepancy Listing Field Instructions

Order By: 2nd	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Agency</b> - Sorts search results by Agency code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Other ID</b> - Search by the identifier used by RSP/ OWCP to identify the enrollee.</p>
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## Order By: 2nd Reconciliation Action Field Instructions

<b>Order By: 2nd</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p><b>Action Code</b> - Search by reconciliation action code.</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Personnel Office ID</b> - Search by POI number.</p>
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## Order By: 2nd Reconciliation Reason Field Instructions

<b>Order By: 2nd</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>Reason Code</b> - Search by reconciliation reason code.</p>
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## Order By: 2nd Reconciliation Report Field Instructions

<b>Order By: 2nd</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>Reconciliation Date</b> - Search by reconciliation date.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Other ID</b> - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p><b>User ID</b> - Search by user ID number.</p>
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## Order By: 2nd Reconciliation Summary Field Instructions

<b>Order By: 2nd</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p>
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## Order By: 3rd Field Instructions

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

Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p>
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## Order By: 3rd Carrier Enrollment Transmission Field Instructions

<b>Order By: 3rd</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p><b>Carrier ID</b> - Search by carrier ID number.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>Year/Quarter</b> - Search by reconciliation year and reconciliation quarter.</p> <p><b>Submission Date</b> - Search by submission date.</p> <p><b>Status</b> - Search by transmission status.</p>
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## Order By: 3rd Carrier Validation Field Instructions

<b>Order By: 3rd</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p>
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## Order By: 3rd Pay Period Transmissions Payment Amounts Report Field Instructions

<b>Order By: 3rd</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Carrier</b> - Search by carrier.</p> <p><b>Pay Cycle</b> - Search by pay cycle.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>As of Date</b> - Search by as of date.</p>
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## Order By: 3rd Payroll Discrepancy Listing Field Instructions

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

Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p><b>Action Code</b> - Search by reconciliation action code.</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Personnel Office ID</b> - Search by POI number.</p>
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## Order By: 3rd Reconciliation Reason Field Instructions

<b>Order By: 3rd</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>Reason Code</b> - Search by reconciliation reason code.</p>
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## Order By: 3rd Reconciliation Report Field Instructions

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

Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p>
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## 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

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

Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Payroll ID</b> - Search by payroll office identification number.</p>
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## Order By: 4th Carrier Enrollees Field Instructions

Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p>
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## Order By: 4th Carrier Validation Field Instructions

Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p>
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## Order By: 4th Pay Period Transmissions Payment Amounts Report Field Instructions

<b>Order By: 4th</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Carrier</b> - Search by carrier.</p> <p><b>Pay Cycle</b> - Search by pay cycle.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>As of Date</b> - Search by as of date.</p>
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## Order By: 4th Payroll Discrepancy Listing Field Instructions

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

<b>Order By: 4th</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p><b>Action Code</b> - Search by reconciliation action code.</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Personnel Office ID</b> - Search by POI number.</p>
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## Order By: 4th Reconciliation Reason Field Instructions

<b>Order By: 4th</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>Reason Code</b> - Search by reconciliation reason code.</p>
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## Order By: 4th Reconciliation Report Field Instructions

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

<b>Order By: 4th</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p>
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## Order By: 5th Field Instructions

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

<b>Order By: 5th</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Payroll ID</b> - Search by payroll office identification number.</p>
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## Order By: 5th Carrier Enrollees Field Instructions

Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p>
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## Order By: 5th Carrier Validation Field Instructions

Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p>
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## Order By: 5th Pay Period Transmissions Payment Amounts Report Field Instructions

Order By: 5th	<p><i>Optional, default</i></p> <p>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:</p> <p><b>Carrier</b> - Search by carrier.</p> <p><b>Pay Cycle</b> - Search by pay cycle.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>As of Date</b> - Search by as of date.</p>
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## Order By: 5th Payroll Discrepancy Listing Field Instructions

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

<b>Order By: 5th</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p><b>Action Code</b> - Search by reconciliation action code.</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Personnel Office ID</b> - Search by POI number.</p>
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## Order By: 5th Reconciliation Reason Field Instructions

Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>Reason Code</b> - Search by reconciliation reason code.</p>
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## Order By: 5th Reconciliation Report Field Instructions

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

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

<b>Order By: 6th</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Fail Count</b> - Search by the number of times a record has failed the quarterly edit process.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p> <p><b>Payroll ID</b> - Search by payroll office identification number.</p>
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## Order By: 6th Carrier Validation Field Instructions

Order By: 6th	<p><i>Optional</i></p> <p>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:</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Name</b> - Search by enrollee name.</p> <p><b>SSNO</b> - Search by enrollee SSN.</p>
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## Order By: 6th Payroll Discrepancy Listing Field Instructions

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

Order By: 6th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p><b>Action Code</b> - Search by reconciliation action code.</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Payroll Office</b> - Search by POI number.</p> <p><b>Personnel Office ID</b> - Search by POI number.</p>
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## Order By: 6th Reconciliation Reason Field Instructions

<b>Order By: 6th</b>	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p><b>Agency</b> - Search by Agency code.</p> <p><b>Carrier</b> - Search by carrier code.</p> <p><b>Enrollment Code</b> - Search by enrollment code.</p> <p><b>Payroll Office</b> - Search by payroll office identification number.</p> <p><b>Pers. Office ID</b> - Search by POI number.</p> <p><b>Reason Code</b> - Search by reconciliation reason code.</p>
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## Order By: 6th Reconciliation Report Field Instructions

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

<b>Other Carrier ID</b>	<i>System generated</i> Displays an identifier used by the carrier to identify the enrollee.
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## Other ID (System Generated) Field Instructions

<b>Other ID</b>	<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.  <u>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.</u>
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## Other ID - From Field Instructions

<b>Other ID - From</b>	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>To search for a specific enrollee record by Other ID, enter the Other ID and skip the To field.</p> <p>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.</p> <hr/> <p>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 AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>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.</p> <hr/> <p>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.</p> <hr/>
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## Other ID - To Field Instructions

Other ID - To	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>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.</p> <hr/> <p>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 AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>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.</p> <hr/> <p>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.</p> <hr/>
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## 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	<p><i>System generated</i></p> <p>Displays an identifier used by the Agency to identify the enrollee.</p>
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## Password Field Instructions

Password	<p><i>Required</i></p> <p>Enter the password. If unsuccessful, a message will appear stating that the user ID or password entered is invalid.</p>
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## Pay Cycle (Drop-Down) Field Instructions

<b>Pay Cycle</b>	<i>Required</i> Select the payroll office pay cycle from the drop-down menu. <b>B</b> - Biweekly <b>M</b> - Monthly <b>O</b> - Other
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## Pay Cycle - (Optional) Field Instruction

### **Pay Cycle**

#### *Optional*

Select the payroll office pay cycle from the drop-down menu:

- **Biweekly**
- **Monthly**
- **Other**

## Pay Cycle - (Required) Field Instruction

### **Pay Cycle**

#### *Required*

Select the payroll office pay cycle from the drop-down menu:

- **Biweekly**
- **Monthly**
- **Other**

## Payroll ID (System Generated) Field Instructions

<b>Payroll ID</b>	<i>System generated</i> Displays the payroll office identification number.
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## 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

<b>Payroll Office</b>	<i>Optional, alphanumeric, 8 position</i> Enter the payroll office identification number.
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## Payroll Office (System Generated) Field Instructions

<b>Payroll Office</b>	<i>System generated</i> Displays the payroll office identification number.
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## Payroll Office\* (Drop-Down) Field Instructions

<b>Payroll Office*</b>	<i>Required</i> Select the payroll office identification number from the drop-down menu.
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## 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

<b>Payroll Office Comments</b>	<i>System generated</i> Displays the payroll office's or Agency's comments.
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## Payroll Office Contact Field Instructions

<b>Payroll Office Contact</b>	Displays the 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

<b>Payroll Office ID</b>	<i>Optional, alphanumeric, 8 position</i> Enter the payroll office identification number.
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## Payroll Office ID (Drop-Down) Field Instructions

<b>Payroll Office ID</b>	<i>Required</i> Select the payroll office identification number from the drop-down menu.
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## 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

<b>Payroll Office ID</b>	<i>System generated</i> Displays the payroll office identification number.
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### Payroll Office ID\* (Drop-Down) Field Instructions

<b>Payroll Office ID*</b>	<i>Required</i> Select the payroll office identification number from the drop-down menu.
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### Payroll Office Number (System Generated) Field Instructions

<b>Payroll Office Number</b>	<i>System generated</i> Displays the payroll office number.
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### Payroll Office POI Number Field Instruction

<b>Payroll Office</b>	<i>System generated</i> Displays the payroll office identification number.
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### Percent Discrepancies Reconciled (System Generated) Field Instructions

<b>Percent Discrepancies Reconciled</b>	<i>System generated</i> 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

<b>Personnel Office ID</b>	<i>Optional, alphanumeric, 4 positions</i> Enter the personnel office identification (POI) number.
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## Personnel Office ID (POI Acronym) Field Instructions

Personnel Office ID	<i>Optional, alphanumeric, 4 positions</i> Enter the POI number.
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## Personnel Office ID (System Generated) Field Instructions

Personnel Office ID	<i>System generated</i> Displays the personnel office identification number.
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## Phone (System Generated) Carrier Contact Field Instructions

Phone	<i>System generated</i> Displays the carrier contact's telephone number.
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## Phone (System Generated) Carrier Plan Contact Field Instruction

Phone	<i>System generated</i> Displays the carrier plan contact's telephone number.
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## Phone (System Generated) Payroll Office Contact Field Instructions

Phone	<i>System generated</i> Displays the payroll office contact's telephone number.
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## Phone Number Carrier Contact Field Instructions

Phone Number	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier contact's telephone number.
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## Phone Number Carrier Plan Contact Record Field Instructions

Phone Number	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier plan contact's telephone number.
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## Phone Number (System Generated) Carrier Contact Field Instruction

Phone Number	<i>System generated</i> Displays the carrier contact's telephone number.
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## Phone Number (System Generated) Carrier Plan Field Instructions

Phone Number	<i>System generated</i> Displays the carrier plan contact's telephone number.
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## Phone Number (System Generated) Personnel Office Contact Field Instructions

Phone Number	<i>System generated</i> Displays the personnel Office contact's telephone number.
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## Phone/Phone Number (System Generated) Carrier Plan Contact Field Instructions

Phone/Phone Number	<i>System generated</i> Displays the carrier plan contact's telephone number.
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## Plan (Required) Field Instructions

Plan	<i>Required, alphanumeric, 2 positions</i> Enter the first two positions of the carrier enrollment code.
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## Plan (System Generated) Field Instructions

Plan	<i>System generated</i> Displays the first two positions of the carrier enrollment code.
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## Plan\* Field Instructions

Plan*	<i>Required, alphanumeric, 2 positions</i> Enter the first two positions of the carrier enrollment code.
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## POI Field Instructions

POI	<i>Optional, alphanumeric, 4 positions</i> Enter the POI of the office where the enrollee's records are maintained.
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## POI (System Generated) Field Instructions

POI	<i>System generated</i> Displays the POI of the office where the enrollee's records are maintained.  <u>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.</u>
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## POI (System Generated) Report Field Instructions

POI	<i>System generated</i> Displays the POI number.  <u>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.</u>
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## 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	<i>System generated</i> Displays the pseudo SSN used by the Agency and carrier to identify the enrollee.
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## Quarter (Drop-Down) Field Instructions

Quarter*	<i>Optional 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.
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## 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	<i>System generated</i> Displays the reconciliation quarter for the requested error statistics.
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## Quarter (System Generated) Field Instructions

Quarter	<i>System generated</i> Displays the reconciliation quarter.
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## Quarter (System Generated) Transmission Record Field Instructions

Quarter	<i>System generated</i> Displays the reconciliation quarter for the requested transmission record.
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## Quarter Error Statistics Field Instructions

Quarter	<i>Optional, alphanumeric, 1 position</i> Enter the reconciliation quarter for the requested error statistics.
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## Quarter Transmission Record Field Instructions

Quarter	<i>Optional, alphanumeric, 1 position</i> Enter the reconciliation quarter for the requested transmission record.
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## Quarter\* (Drop-Down) Field Instructions

Quarter*	<p><i>Required default</i></p> <p>Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.</p>
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## Quarter\* (Optional) Field Instructions

Quarter*	<p><i>Optional, alphanumeric, 1 position</i></p> <p>Enter the reconciliation quarter for the requested error statistics.</p>
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## Quarter\* (Required) Field Instructions

Quarter*	<p><i>Required, alphanumeric, 1 position</i></p> <p>Enter the reconciliation quarter for the requested error statistics.</p>
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## Quarter\* From (Optional) Field Instructions

Quarter* From	<p><i>Optional, default</i></p> <p>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.</p>
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## Quarter\* From (Required) Field Instructions

Quarter* From	<p><i>Required, default</i></p> <p>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.</p>
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## Quarter\* To (Optional) Field Instructions

Quarter* To	<p><i>Optional, default</i></p> <p>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.</p>
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## Quarter\* To (Required) Field Instruction

Quarter* To	<i>Required, default</i>  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.
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## Reason (System Generated) Field Instructions

Reason	<i>System generated</i>  Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see <b>Reconciliation Reason Codes Table</b> (on page 221).
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## Reason Code (Drop-Down) Field Instructions

Reason Code	<i>Optional</i>  Select the reconciliation reason code from the drop-down menu. For a list and descriptions of these codes, see <b>Reconciliation Reason Codes Table</b> (on page 221).
-------------	---

## Reason/Reason Code (System Generated) Field Instructions

Reason/Reason Code	<i>System generated</i>  Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see <b>Reconciliation Reason Codes Table</b> (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

<b>Reconciliation Action</b>	<p><i>System generated</i></p> <p>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).</p>
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## Reconciliation Action (System Generated) Reconciliation Report Field Instructions

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

## Reconciliation Date From Field Instructions

<b>Reconciliation Date From</b>	<p><i>Optional</i></p> <p>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.</p>
---------------------------------	--

## Reconciliation Date (System Generated) Reconciliation Report Field Instructions

<b>Reconciliation Date</b>	<p><i>System generated</i></p> <p>Displays the reconciliation date.</p>
----------------------------	---

## Reconciliation Date To Field Instructions

<b>Reconciliation Date To</b>	<p><i>Optional</i></p> <p>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.</p>
-------------------------------	--



## Reconciliation Fail Count (System Generated) Reconciliation Report Field Instructions

<b>Reconciliation Fail Count</b>	<i>System generated</i> 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

<b>Reconciliation Reason</b>	<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 <b>Reconciliation Reason Codes Table</b> (on page 221).
------------------------------	---

## Reconciliation Reason (System Generated) Reconciliation Report Field Instructions

<b>Reconciliation Reason</b>	<i>System generated</i> Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see <b>Reconciliation Reason Codes Table</b> (on page 221).
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## Reconciliation User ID (System Generated) Reconciliation Report Field Instructions

<b>Reconciliation User ID</b>	<i>System generated</i> Displays the user identification number of the person who entered the reconciliation reason code.
-------------------------------	--



## Records Processed (System Generated) Field Instructions

<b>Records Processed</b>	<i>System generated</i> Displays the number of records accepted to store in the CLER tables.
--------------------------	---

## Records Received (System Generated) Field Instructions

<b>Records Received</b>	<i>System generated</i> Displays the number of records found in the transmission file during processing.
-------------------------	---

## Records Reconciled (System Generated) Field Instructions

<b>Records Reconciled</b>	<i>System generated</i> 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

<b>Records Sent</b>	<i>System generated</i> Displays the number of records sent in the transmission.
---------------------	---

## Records With Errors (System Generated) Field Instructions

<b>Records with Errors</b>	<i>System generated</i> Displays the total number of carrier enrollee records with errors. Records with warnings are not included.
----------------------------	---

## Records With Warnings (System Generated) Field Instructions

<b>Records with Warnings</b>	<i>System generated</i> Displays the total number of carrier records with warnings. Records with errors are not included.
------------------------------	--



## Region (System Generated) Carrier Enrollment Field Instructions

Region	<i>System generated</i> 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.  <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>
----------	---

## Remarks (System Generated) Field Instructions

Remarks	<i>System generated</i> Displays the remarks about this record.
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## Remarks Field Instructions

Remarks	<i>Optional, alphanumeric, 80 positions</i> Enter remarks about this record.
---------	---

## Rencon Field Instructions

Recon	Displays the number of reconciled discrepancies.
-------	--

## Report (Drop-Down) Field Instructions

Report	<i>Optional, default</i> Select the report from the drop-down menu.
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## Response Reminder Date (System Generated) Field Instructions

<b>Response Reminder Date</b>	<i>System generated</i> Displays the date a reminder regarding the lack of response to discrepancy reasons and action codes will be sent to carriers.
-------------------------------	--

## Role Field Instructions

<b>Role</b>	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the title, position, etc., of the carrier contact/carrier plan contact.
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## Role (System Generated) Field Instructions

<b>Role</b>	<i>System generated</i> 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

<b>Select another discrepancy</b>	<i>Optional</i> 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 **M** for Mainframe or **S** for Server. The value in the second position equals **T** for Transmission or **M** for Manual entry.



## Source (System Generated) Field Instructions

<b>Source</b>	<i>System generated</i>  Displays the source of transmission data indicator. The value in the first position equals <b>M</b> for mainframe or <b>S</b> for server. The value in the second position equals <b>T</b> for transmission or <b>M</b> for manual entry.
---------------	--

## SSN - Field Description

### SSN

*System generated*

Displays the enrollee's Social Security number.

## SSN (System Generated) Field Instructions

<b>SSN</b>	<i>System generated</i>  Displays the enrollee's SSN.
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## SSN (System Generated) Reports Field Instructions

<b>SSN</b>	<i>System generated</i>  Displays the enrollee's SSN submitted by the payroll office.
------------	---

## SSN - From Field Instructions

<b>SSN - From</b>	<i>Optional, alphanumeric, 9 positions</i>  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.  <hr/> <p>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.</p> <hr/>
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## SSN - From (SSN Acronym) Field Instructions

<b>SSN - From</b>	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a specific enrollee record by SSN, enter the SSN and skip the To field.</p> <p>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.</p> <hr/> <p>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.</p>
-------------------	---

## 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

<b>SSN - To</b>	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.</p> <hr/> <p>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.</p>
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## Start Date (System Generated) Field Instructions

Start Date	<i>System generated</i> 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	<i>System generated</i> Displays the first date the carrier enrollment code will be valid.
------------	---

## Start Date (System Generated) Carrier Field Instructions

Start Date	<i>System generated</i> 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	<i>System generated</i> Displays the date the input from carriers and payroll offices is processed.
------------	--



## State Field Instructions

<b>State</b>	<p><i>Optional, alphanumeric, 2 positions maximum</i></p> <p>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 <b>State, U.S. Territory, and Overseas Military Abbreviations Table</b> (on page 226) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.</p>
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## State (System Generated) Carrier Contact Field Instructions

<b>State</b>	<p><i>System generated</i></p> <p>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 <b>State, U.S. Territory, and Overseas Military Abbreviations Table</b> (on page 226).</p>
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## State (System Generated) Carrier Field Instructions

<b>State</b>	<p><i>System generated</i></p> <p>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 <b>State, U.S. Territory, and Overseas Military Abbreviations Table</b> (on page 226).</p>
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## State (System Generated) Carrier Plan Contact Field Instructions

<b>State</b>	<p><i>System generated</i></p> <p>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. Territory, and Overseas Military Abbreviations Table</b> (on page 226).</p>
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## State (System Generated) Payroll Office Contact Field Instructions

<b>State</b>	<i>System generated</i>  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 <b>State, U.S. Territory, and Overseas Military Abbreviations Table</b> (on page 226).
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## State (System Generated) Payroll Office Field Instructions

<b>State</b>	<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 <b>State, U.S. Territory, and Overseas Military Abbreviations Table</b> (on page 226).
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## State (System Generated) Personnel Office Contact Field Instructions

<b>State</b>	<i>System generated</i>  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, <b>State, U.S. Territory, and Overseas Military Abbreviations Table</b> (on page 226).
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## Status (System Generated) Carrier Enrollment Transmission Field Instructions

<b>Status</b>	<i>System generated</i>  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 <b>Carrier System Codes Table</b> (on page 219).
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## Status (System Generated) Field Instructions

<b>Status</b>	<p><i>System generated</i></p> <p>Displays <b>active</b> to indicate that the record has been activated in CLER.</p> <p>Displays <b>inactive</b> to indicate that the record has been inactivated in CLER.</p>
---------------	--

## Status (System Generated) Transmissions Field Instructions

<b>Status</b>	<p><i>System generated</i></p> <p>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 <b>Carrier System Codes Table</b> (on page 219).</p>
---------------	---

## Submission - (Number) Field Description

### Submission

*System generated*

Displays the transmission submission number for this record.

## Submission (System Generated) Field Instructions

<b>Submission</b>	<p><i>System generated</i></p> <p>Displays the transmission submission for this enrollee record.</p>
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## Submission (System Generated) Transmission Date Field Instructions

<b>Submission</b>	<p><i>System generated</i></p> <p>Displays the number of transmissions submitted for the reconciliation quarter selected.</p>
-------------------	---



## Submission Date (System Generated) Carrier Enrollment Transmission Field Instructions

<b>Submission Date</b>	<i>System generated</i> Displays the date (MMDDYYYY) the carrier enrollment data file was submitted for processing.
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## Submission Date (System Generated) Field Instructions

<b>Submission Date</b>	<i>System generated</i> Displays the date the transmission was submitted.
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## Submission Reminder Date (System Generated) Field Instructions

<b>Submission Reminder Date</b>	<i>System generated</i> Displays the date the submission reminder is sent.
---------------------------------	---

## Submitter Use #1 (System Generated) Field Instructions

<b>Submitter Use #1</b>	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
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## 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	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
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## Submitter Use #3 (System Generated) Field Instructions

Submitter Use #3	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
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## Threshold Type (System Generated) Field Instructions

Threshold Type	<i>System generated</i> Displays the number measure of the error threshold. <b>P</b> represents percent and <b>N</b> represents number.
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## 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	<i>System generated</i> Displays the time the record was processed (using military time).
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## Time Processed (System Generated) Transmissions Field Instructions

<b>Time Processed</b>	<i>System generated</i> Displays the current application time when the process was run.
-----------------------	--

## To (Quarter/Year) (System Generated) Field Instructions

<b>To (Quarter/Year)</b>	<i>System generated</i> Displays the number of enrollees covered by the enrollment code displayed in the Code field during the selected quarter and year.
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## Total (System Generated) Field Instructions

<b>Total</b>	<i>System generated</i> Displays the sum of transmission records displayed on the report.  <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>
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## Total (System Generated) Reconciliation Action Field Instructions

<b>Total</b>	<i>System generated</i> Displays the number of specified reconciliation action codes that meet the criteria entered on the Reconciliation Action Summary page.
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## Total (System Generated) Reconciliation Reason Field Instructions

<b>Total</b>	<i>System generated</i> Displays the number of specified reconciliation reason codes that meet the criteria entered on the Reconciliation Reason Summary page.
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## Total Discrepancies Found (System Generated) Field Instructions

<b>Total Discrepancies Found</b>	<i>System generated</i> Displays the total number of records with discrepancies that meet the criteria entered on the Discrepancy Summary page.
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## Total Discrepancies Reconciled (System Generated) Field Instructions

<b>Total Discrepancies Reconciled</b>	<i>System generated</i> Displays the total number of reconciled records that meet the criteria entered on the Discrepancy Summary page.
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## Total Enrollee Records (System Generated) Field Instructions

<b>Total Enrollee Records</b>	<i>System generated</i> Displays the total number of enrollees that meet the criteria entered on the Discrepancy Summary page.
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## Total Errors (System Generated) Field Instructions

<b>Total Errors</b>	<i>System generated</i> Displays the total number of errors identified.
---------------------	--

## Total Errors (System Generated) Reconciliation Field Instructions

<b>Total Errors</b>	<i>System generated</i> Displays the sum of the numbers displayed in the Total field.  <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed.
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## Total Matches Found (System Generated) Field Instructions

<b>Total Matches Found</b>	<i>System generated</i> Displays the total number of matched records that meet the criteria entered on the Discrepancy Summary page.
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## Total Records - (Records) Field Description

### Total Records

*System generated*

Displays the total number of records displayed on the report.

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Note: If the check box used to omit totals from a report is selected, this field is not displayed.

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## Total Records (System Generated) Field Instructions

<b>Total Records</b>	<i>System generated</i> Displays the total number of enrollee records displayed on the report. <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed. <hr/>
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## Total Records (System Generated) Reconciliation Field Instructions

<b>Total Records</b>	<i>System generated</i> Displays the total number of records displayed on the report. <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed. <hr/>
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## Total Records (System Generated) Reconciliation Report Field Instructions

<b>Total Records</b>	<p><i>System generated</i></p> <p>Displays the the sum of enrollee records on the report.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>
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## Total Warnings (System Generated) Field Instructions

<b>Total Warnings</b>	<p><i>System generated</i></p> <p>Displays the total number of warnings identified.</p>
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## Transmission File Name (System Generated) Field Instructions

<b>Transmission File Name</b>	<p><i>System generated</i></p> <p>Displays the name of the quarterly transmission file sent by the payroll office.</p>
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## 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

<b>Transmissions</b>	<p><i>Optional, default</i></p> <p>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:</p> <p><b>All</b> - Search by all transmissions.</p> <p><b>Accepted</b> - Search by accepted transmissions.</p> <p><b>Rejected</b> - Search by rejected transmissions.</p> <p><b>Not Received</b> - Search by not received transmissions.</p>
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## Type Field Instructions

<b>Type</b>	<p><i>Optional</i></p> <p>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.</p>
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## Type (System Generated) Field Instructions

<b>Type</b>	<p><i>System generated</i></p> <p>Displays <b>General</b> type code to indicate that the payroll office contact holds an administrative position.</p> <p>Displays <b>Technical</b> type code to indicate that the payroll office contact holds a technical position.</p>
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## Type\* Field Instructions

<b>Type*</b>	<p><i>Required</i></p> <p>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.</p>
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## Unrecon (System Generated) Field Instructions

<b>Unrecon</b>	<i>System generated</i> Displays the number of unreconciled discrepancies.
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## Unvalidated (System Generated) Field Instructions

<b>Unvalidated</b>	<i>System generated</i> Displays the number of discrepancies/reconciliation actions that were not validated by the carrier.
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## User ID (Optional) Field Instructions

<b>User ID</b>	<i>Optional, alphanumeric, 8 positions maximum</i> Enter the user identification number of the person creating the report.
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## User ID (Required) Field Instructions

<b>User ID</b>	<i>Required, alphanumeric, 8 positions maximum</i> Enter the assigned National Finance Center user ID.
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## User ID (System Generated) Field Instructions

<b>User ID</b>	<i>System generated</i> Displays the user identification number of the person who entered the validation reason code.
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## Validated (System Generated) Field Instructions

<b>Validated</b>	<i>System generated</i> Displays the number of discrepancies/reconciliation actions that were validated by the carrier.
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## Validation (System Generated) Field Instruction

Validation	<i>System generated</i> Displays the status of the validation.
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## Validation (System Generated) Transmission Field Instructions

Validation	<i>System generated</i> 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.
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## Validation Date (System Generated) Field Instructions

Validation Date	<i>System generated</i> Displays the validation date.
-----------------	--

## Validation Date From Field Instructions

Validation Date From	<i>Optional</i> 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	<i>Optional</i> 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

<b>Warning Code</b>	<i>Optional</i> Select the warning code from the drop-down menu. Refer to the <b>Warning Codes Table</b> (on page 218) for a list and descriptions of these codes.
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## Warning Code (Optional) Field Instructions

<b>Warning Code</b>	<i>Optional</i> Select the applicable warning code from the list of warning codes. Refer to the <b>Warning Codes Table</b> (on page 218) for a list and descriptions of warning codes.
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## Warnings - Field Description

### Warnings

#### *System generated*

Displays the sum of warning codes displayed in the Discrepancy field.

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Note: If the check box used to omit totals from a report is selected, this field is not displayed.

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## Warnings (System Generated) Field Instructions

<b>Warnings</b>	<i>System generated</i> Displays the sum of warning codes displayed in the Discrepancy field. <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed.
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## Whld Amt (System Generated) Report Field Instructions

Whld Amt	<i>System generated</i> Displays the enrollee's withholding amount submitted by the payroll office.
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## 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.  <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>
-------------	--

## 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.  <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>
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## Year (Drop-Down) Field Instructions

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.
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## Year (Error Statistics) Field Instructions

Year	<i>Optional, alphanumeric, 4 positions</i> Enter the reconciliation year for the requested error statistics.
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## Year (Optional) Transmission Record Field Instructions

<b>Year</b>	<i>Optional, alphanumeric, 4 positions</i> Enter the reconciliation year for the requested transmission record.
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## 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

<b>Year</b>	<i>Required, alphanumeric, 4 positions</i> Enter the reconciliation year.
-------------	--



## Year (System Generated) Carrier Errors Field Instructions

Year	<i>System generated</i> Displays the reconciliation year for the requested error statistics.
------	---

## Year (System Generated) Field Instructions

Year	<i>System generated</i> Displays the reconciliation year.
------	--

## Year (System Generated) Transmission Record Field Instructions

Year	<i>System generated</i> Displays the reconciliation year for the requested transmission record.
------	--

## Year\* From (Optional) Field Instructions

Year* From	<i>Optional, default</i> 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	<i>Required, default</i> 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	<i>Optional, default</i> 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	<i>Required, default</i> 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	<i>System generated</i> Displays the reconciliation year/quarter that begins the range of reconciliation years/quarters.
-------------------	---

## Year/Quarter To (System Generated) Field Instructions

Year/Quarter To	<i>System generated</i> Displays the reconciliation year/quarter that ends the range of reconciliation years/quarters.
-----------------	---

## Zip (Optional) Carrier Contact Field Instructions

Zip	<i>Optional, alphanumeric, 11 positions maximum</i> Enter the carrier contact's ZIP Code.
-----	--

## Zip (System Generated) Carrier Contact Field Instructions

Zip	<i>System generated</i> Displays the carrier contact's ZIP Code.
-----	---



### Zip (System Generated) Carrier Field Instructions

Zip	<i>System generated</i> Displays the carrier's ZIP Code.
-----	---

### Zip (System Generated) Carrier Plan Contact Field Instructions

Zip	<i>System generated</i> Displays the carrier plan contact's ZIP Code.
-----	--

### ZIP (System Generated) Payroll Office Contact Field Instructions

Zip	<i>System generated</i> Displays the payroll office contact's ZIP Code.
-----	--

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

Zip	<i>System generated</i> Displays the payroll office's ZIP Code.
-----	--

### ZIP (System Generated) Personnel Office Contact Field Instructions

Zip	<i>System generated</i> Displays the personnel office contact's ZIP Code.
-----	--



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