



Office of Personnel Management (OPM), Federal Employees Health Benefits, Centralized Enrollment Clearinghouse System (CLER) for OPM



PUBLICATION CATEGORY
Insurance Processing

PROCEDURE MANUAL
CLER for OPM



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Introduction

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

This section includes the following topics:

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

Overview

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

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

System Capabilities and Interface

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

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



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

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

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

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

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

Reports

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

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

Forms

Forms associated with CLER activities are described below.

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



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

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

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

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

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

Responsibilities

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

Agency:

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



Carrier:

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

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

OPM:

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

NFC:

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

Who to Contact for Help

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

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



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



System Access

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

This section includes the following topics:

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

Requesting Access to CLER

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

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

Viewing the Online Application

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



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

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

Browser Information

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

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

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

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

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

Security Officer Responsibilities

The User's Security Officer will:

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



- Monitor users' activity for access violations.

NFC's Security Officer will:

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

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

Changing Your Password

To change your password:

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



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

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 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

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 1: CLER Logon Page

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

User ID (on page 349)

Password (see "*Change Password - Field Instruction*" on page 242)

Change Password (see "*Change Password - Field Instruction*" on page 242)



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

Change Your Password

Enter New Password

Confirm New Password

Submit

Figure 2: Change Your Password

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

Logging On to CLER

To log on:

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



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

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

User ID

Password

☐ Change Password

?

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OPM

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

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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 Login Page

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

User ID (on page 349)

Password (see "*Password - Field Instruction*" on page 312)



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

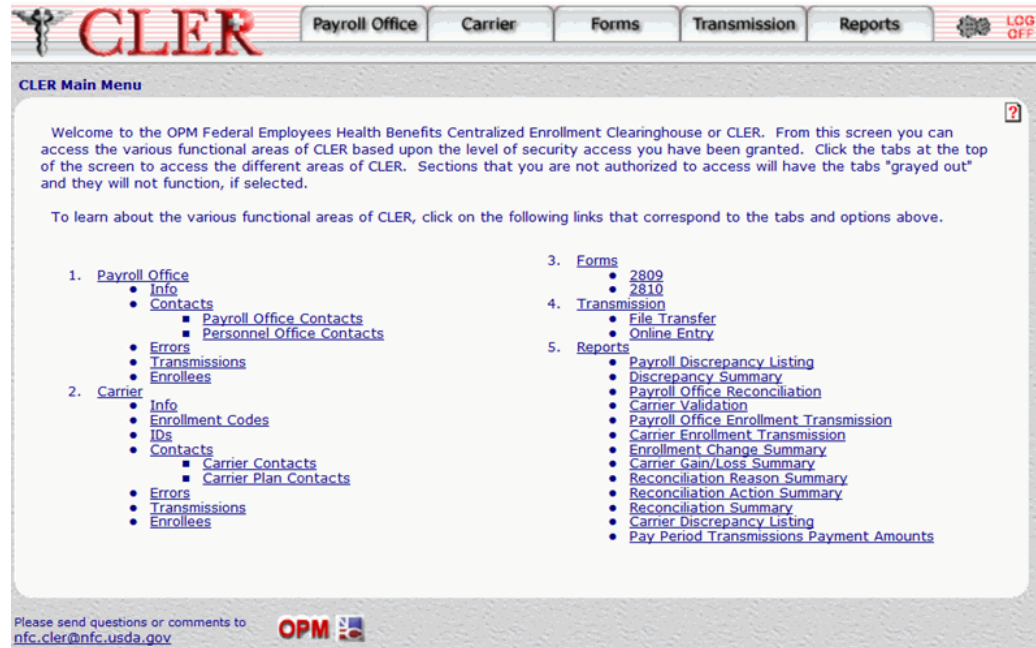


Figure 4: CLER Main Menu

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

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



Logging Off of CLER

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

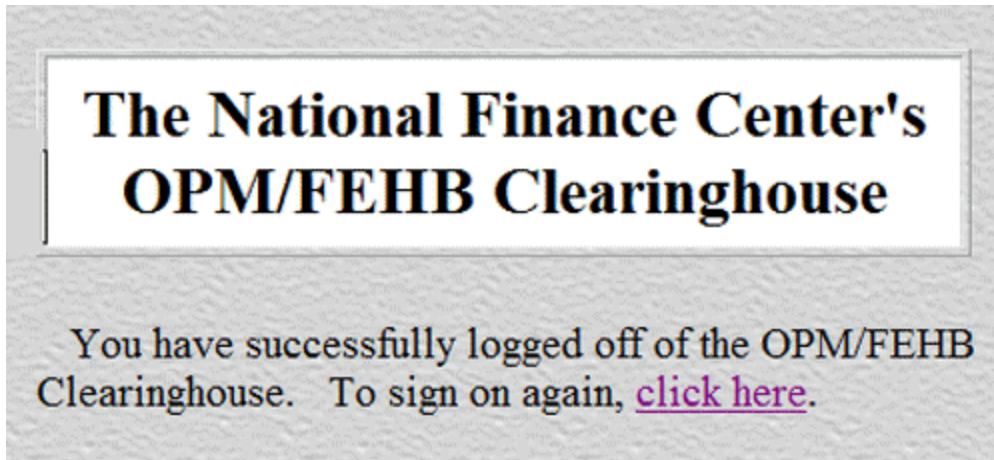


Figure 5: CLER Log off



Operating Features

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

This section includes the following topics:

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

Command Buttons

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

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



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

Popups

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

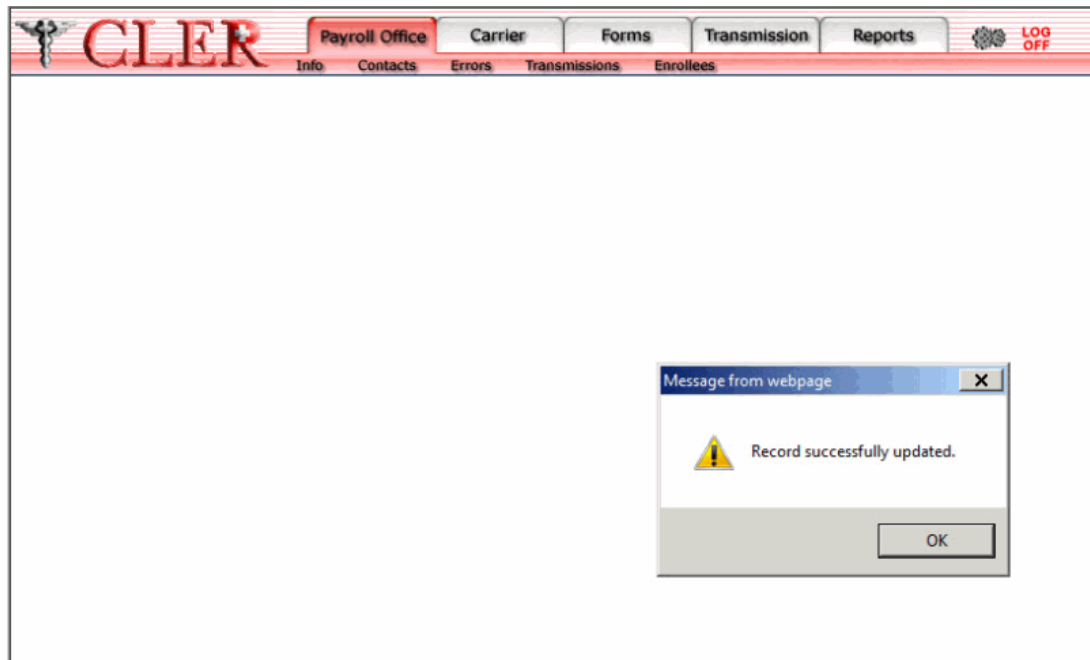


Figure 6: Payroll Office Contacts Update Popup Page

Search Criteria

There are certain CLER pages that are used to search for and display data records. The search criteria data entry fields displayed on these pages are completed to display records that contain data related to the search criteria entries. Also, the search criteria data entry fields on these pages may be partially completed to display a wider range of data records. For example, if you are searching for all data records that contain a payroll office ID number that begins with the number 2, enter 2 in the Payroll Office ID field to display data records that contain a payroll office ID number that begins with the number 2.



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

Drop-Down Menu

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

A screenshot of the CLER web application interface. The top navigation bar includes tabs for "Payroll Office", "Carrier", "Forms", "Transmission", and "Reports". Below this, a sub-header reads "Payroll Office Transmissions". The main content area contains a search form with fields for "Payroll Office ID", "Year", "Quarter", "Transmission Type", "Pay Cycle", and "As of Date". The "Transmission Type" field is currently selected, and a drop-down menu is open, displaying a list of values from 01 to 12. A red arrow points to the bottom of this menu. Below the search fields, there are radio buttons for "Order By:" with options "ID", "Year/Quarter", "Transmission Type", and "Pay Cycle". At the bottom of the form are "SUBMIT" and "RESET" buttons.

To Complete a Drop-down Menu Data Entry Field:

1. Select the arrow displayed next to the drop-down menu data entry field and the drop-down menu of valid values for that field is displayed.
2. Select the arrows that are displayed at the top and bottom of the drop-down menu to scroll through the menu and locate the appropriate value.
3. Select the appropriate value and that value is entered into the field.

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

Radio Buttons

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

Radio buttons are used to:



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

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

Figure 7: Radio Buttons Example Page



Transmission of Enrollment Data

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

This section includes the following topics:

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

Timeline for CLER Quarterly Reconciliation

The CLER reconciliation process includes four reconciliations (quarterly) 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 below.

Note: In the sample timeline 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 (mo/day)	Description
--	-------------



Quarterly Reconciliation Timeline Date (mo/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 the 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">• 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 the month pay cycle. Any data, subsequent to March 1, may cause unmatched errors when compared to enrollee records submitted by carriers. Please do not report changes effective after March 1.• Payroll offices with pay cycles other than monthly, must extract data effective as of the last pay period that falls between March 1 and March 15. The end of the pay period date must be reflected in the header as the as-of date. <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">• Carriers must extract data effective as of March 1. There are no changes to the frequency of transmissions from the Carriers. <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">• Payroll office: the date they send their file to NFC.• Carrier: the date they send their file to the OPM data hub.
3/10	<p>Reminders are emailed to the carriers that have not submitted their quarterly enrollment data.</p>
3/15	<p>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.</p>



Quarterly Reconciliation Timeline Date (mo/day)	Description
3/15	Enrollment data transmitted from carriers must be received by noon (ET) at the OPM data hub on this date to be accepted for inclusion into the reconciliation process. Payroll office transmissions must be received at NFC by 5:00 p.m. (CT) within 7 business days after the pay period end date . Any transmissions of enrollment data that are received after these times may not be included in the reconciliation process for this quarterly cycle. An email informing the submitter that the transmission is accepted or rejected is generated within 1 workday after receipt.
3/15	The OPM data hub provides CLER with the last files transmitted by carriers at approximately 3:00 p.m. (ET) .
3/15 - 3/19	The information required to produce discrepancy reports is processed and made available to Agencies and carriers through CLER, provided all Agencies and carriers submit their file by the deadline . The discrepancy report information will remain available until further notice. The Agencies have approximately 30 days to research discrepancies and respond with resolutions.
3/19	Lists of carriers and payroll offices that have not submitted their quarterly enrollment data are made available to OPM through CLER.
4/22	Reminders are emailed to the Agencies that responses are due on discrepancies by 8:00 a.m. (CT) on May 1 .
5/1	Responses from Agencies are due by 8:00 a.m. (CT) . <ul style="list-style-type: none"> • If the research shows that the payroll or personnel office records are incorrect, the payroll or personnel office will correct the error(s) in their payroll/personnel system and enter the reconciliation reason code in CLER. • If the research shows that the carrier's records are incorrect, the Agency will enter the results of their research in CLER for carrier correction. The Agency will submit supporting data through CLER or hard copy to the carrier.
5/1	On May 1 , after 8:00 a.m. (CT) , CLER will initiate the process of transferring the Corrective Action Request file to the OPM Data Hub for the retrieval of the file by carriers. CLER will notify carriers via email when the data is available after the OPM data hub has completed its processing.
5/1 - 5/31	Carriers enter Corrective Action Codes in CLER to indicate what actions were taken to resolve the discrepancies.
5/20	Reminders are emailed to the carriers that confirmation of the Corrective Actions must be completed by the beginning of the next month.



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**.



CLER Processing Instructions

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

This section includes the following topics:

Payroll Office Records	25
Personnel Office Records	59
Carrier Records.....	65
Forms Records	105
Transmission Records	125
Reports	131



Payroll Office Records

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

This section includes the following topics:

Viewing Payroll Office Information Records	25
Viewing a Payroll Office Contact Record	28
Viewing Payroll Office Transmission Records.....	32
Viewing a Payroll Office Enrollee Record.....	36
Viewing a Matching Payroll Office Enrollee Record or Duplicate Carrier Enrollee Record	43
Viewing Payroll Office Error Records	53

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

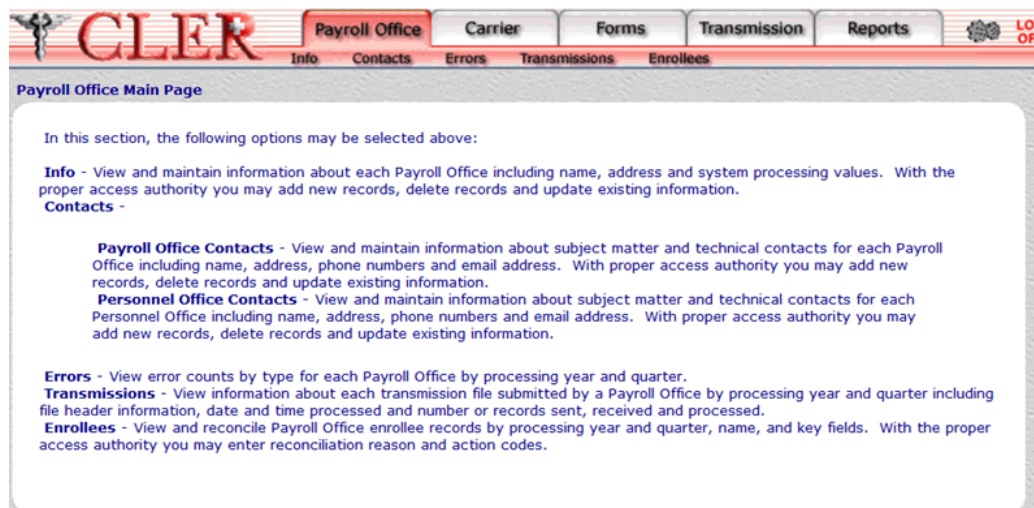


Figure 8: Payroll Office Main Page



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

Figure 9: Payroll Office Information Page

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

OR

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

Payroll Office ID (see "**Payroll Office ID - (Optional) Field Instruction**" on page 314)

Name

City (see "**City - Payroll Office Field Instruction**" on page 245)

State (see "**State - (Payroll Office) Field Instruction**" on page 337)

Order By (see "**Order By - (Payroll Office Information) Field Instruction**" on page 291)

The Payroll Office Information search results page is displayed.

Figure 10: Payroll Office Information Search Results Page

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

ID (see "**ID - Field Description**" on page 273)

Name (see "**Name - (Payroll Office) Field Description**" on page 284)



Address (see "**Address - Payroll Office Field Description**" on page 225)
City (see "**City - Payroll Office Field Description**" on page 245)
State (see "**State - Payroll Office Field Description**" on page 338)
Zip (see "**ZIP - Payroll Office Field Description**" on page 355)
Pay Cycle (see "**Pay Cycle - Field Description**" on page 313)
Options (see "**Options - (View, Update, Delete) Field Description**" on page 288)

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

Figure 11: Payroll Office Information View Page

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

Payroll Office ID (see "**Payroll Office ID - Field Description**" on page 315)
Pay Cycle (see "**Pay Cycle - Field Description**" on page 313)
Name (see "**Name - (Payroll Office) Field Description**" on page 284)
Address Line 1 (see "**Address Line 1 - Payroll Office Field Description**" on page 227)
Address Line 2 (see "**Address Line 2 - Payroll Office Field Description**" on page 230)
Address Line 3 (see "**Address Line 3 - Payroll Office Field Description**" on page 232)
City (see "**City - Payroll Office Field Description**" on page 245)



State (see "***State - Payroll Office Field Description***" on page 338)

Zip (see "***ZIP - Payroll Office Field Description***" on page 355)

Foreign Country (see "***Foreign Country - (Payroll Office) Field Description***" on page 271)

Start Date (see "***Start Date - Payroll Office Field Description***" on page 335)

End Date (see "***End Date - (Payroll Office) Field Description***" on page 264)

Error Threshold (see "***Error Threshold - (Payroll Office) Field Description***" on page 266)

Threshold Type (see "***Threshold Type - (Payroll Office) Field Description***" on page 342)

Transmission File Name (see "***Transmission File Name - (Payroll Office) Field Description***" on page 345)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 275)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 275)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 276)

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

Viewing a Payroll Office Contact Record

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

To View a Payroll Office Contact Record:

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



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

Figure 12: Contacts Main Page

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

Figure 13: Payroll Office Contacts Page

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

OR

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

Payroll Office ID (see "**Payroll Office ID - (Optional) Field Instruction**" on page 314)

Type (see "**Type - (Payroll Office Contact) Field Instruction**" on page 347)

Display (see "**Display - Payroll Office Contact Field Instruction**" on page 259)

Order By (see "**Order By - (Payroll Office Contact) Field Instruction**" on page 291)



The Payroll Office Contacts search results page is displayed.

ID	Type	Status	Name	Phone	Email	Options
	General	Inactive				View Activate Update Delete
	General	Active				View Inactivate Update Delete
	General	Active				View Inactivate Update Delete
	General	Active				View Inactivate Update Delete
	General	Active				View Inactivate Update Delete

Records Found: 5

Figure 14: Payroll Office Contacts Search Results Page

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

ID (see "*ID - (Payroll Office) Field Description*" on page 273)

Type (see "*Type - (Payroll Office Contact) Field Description*" on page 347)

Status (see "*Status - (Payroll Office Contacts) Search Results Field Description*" on page 338)

Name (see "*Name - Payroll Office Contact Field Description*" on page 285)

Phone

Email (see "*Email Address - (Payroll Office Contact) Field Description*" on page 262)

Options (see "*Options - (View, Activate, Update, Delete) Field Description*" on page 287)



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

The screenshot shows the "Payroll Office Contacts View" page in the CLER system. The page has a header with the CLER logo and navigation tabs: "Payroll Office", "Carrier", "Forms", "Transmission", and "Reports". Below the header, there are sub-tabs: "Info", "Contacts", "Errors", "Transmissions", and "Enrollees". The main content area is titled "Payroll Office Contacts View" and contains a form for viewing a specific contact. The form includes fields for "Payroll Office ID", "Type", "Role", "Name", "Address", "City", "State", "Zip", "Foreign Country", "Phone Number", "Fax Number", "Email Address", and "Remarks". At the bottom, there is a "Last Changed" section with fields for "ID", "Date", and "Time".

Figure 15: Payroll Office Contacts View Page

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

Payroll Office ID (see "*Payroll Office ID - Field Description*" on page 315)

Type (see "*Type - (Payroll Office Contact) Field Description*" on page 347)

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

Name (see "*Name - Payroll Office Contact Field Description*" on page 285)

Address Line 1 (see "*Address Line 1 - Payroll Office Contact Field Description*" on page 227)

Address Line 2 (see "*Address Line 2 - Payroll Office Contact Field Description*" on page 229)



Address Line 3 (see "**Address Line 3 - Payroll Office Contact Field Description**" on page 232)

City (see "**City - Payroll Office Field Description**" on page 245)

State (see "**State - Payroll Office Field Description**" on page 338)

Zip (see "**ZIP - Payroll Office Field Description**" on page 355)

Foreign Country (see "**Foreign Country - (Payroll Office) Field Description**" on page 271)

Phone Number (see "**Phone Number - (Payroll Office Contact) Field Description**" on page 317)

Fax Number (see "**Fax Number - (Payroll Office Contact) Field Description**" on page 269)

Email Address (see "**Email Address - (Payroll Office Contact) Field Description**" on page 262)

Remarks (see "**Remarks - Field Description**" on page 330)

Last Changed ID (see "**Last Changed ID - Field Description**" on page 275)

Last Changed Date (see "**Last Changed Date - Field Description**" on page 275)

Last Changed Time (see "**Last Changed Time - Field Description**" on page 276)

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

Viewing Payroll Office Transmission Records

The **View** function allows users to view payroll office transmission records.



To View a Payroll Office Transmission Record:

1. Select the **Payroll Office** tab on the CLER Main Menu. Select **Transmissions** on of the Payroll Office Main page. The Payroll Office Transmissions page is displayed.

Figure 16: Payroll Office Transmissions Page

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

Payroll Office ID (see "**Payroll Office ID - (Optional) Field Instruction**" on page 314)

Year (see "**Year - Field Instruction**" on page 352)

Quarter (see "**Quarter - Field Instruction**" on page 324)

Transmission Type (see "**Transmission Type - (Optional) Field Instruction**" on page 345)

Pay Cycle (see "**Pay Cycle - (Optional) Field Instruction**" on page 312)

As of Date From (see "**As of Date From - Field Instruction**" on page 237)

As of Date To (see "**As of Date To - Field Instruction**" on page 237)

Order By (see "**Order By - (Transmission) Field Instruction**" on page 292)

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



OR

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

The screenshot shows the CLER Payroll Office Transmissions page. The table displays the following data:

ID	Year	Quarter	Submission	Submission Date	Amt Sent	Amt Received	Code	Status	As of Date	Pay Cycle	Transmission Type	Options
	2014	4	1	01/31/2015	242449959.60	242449959.60	Initial	000	1/24/2015	B	P	View
	2014	4	1	02/14/2015	242683369.22	242683369.22	Initial	000	2/7/2015	B	P	View
	2014	4	1	02/28/2015	242513169.94	242513169.94	Initial	000	2/21/2015	B	P	View
	2014	4	1	12/19/2014	235002751.42	235002751.42	Initial	000	12/13/2014	B	P	View
	2014	4	1	01/03/2015	235038327.89	235038327.89	Initial	000	12/27/2014	B	P	View
	2014	4	1	01/17/2015	234637522.71	234637522.71	Initial	000	1/10/2015	B	P	View
	2014	4	2	02/11/2015	3758.56	3758.56	Add	000	1/24/2015	B	P	View
	2014	4	2	02/19/2015	4012.18	4012.18	Add	000	2/7/2015	B	P	View
	2014	4	2	12/22/2014	3881.87	3881.87	Add	000	12/13/2014	B	P	View
	2014	4	2	01/22/2015	3638.01	3638.01	Add	000	1/10/2015	B	P	View
	2015	1	1	03/14/2015	242794770.52	242794770.52	Initial	000	3/7/2015	B	P	View
	2015	1	1	03/28/2015	242647582.75	242647582.75	Initial	000	3/21/2015	B	P	View
	2015	1	1	04/11/2015	242658802.81	242658802.81	Initial	000	4/4/2015	B	P	View
	2015	1	1	04/25/2015	242466694.88	242466694.88	Initial	000	4/18/2015	B	P	View

Figure 17: Payroll Office Transmissions Page

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

ID (see "*ID - Field Description*" on page 273)

Year (see "*Year - (Payroll Office Enrollees) Search Results Field Description*" on page 351)

Quarter (see "*Quarter - Payroll Office Transmissions Search Results Field Description*" on page 324)

Submission (see "*Submission - Field Description*" on page 339)

Submission Date (see "*Submission Date - Field Description*" on page 340)

Amt Sent (see "*Amount Sent - Field Description*" on page 235)

Amt Received (see "*Amount Received - Field Description*" on page 235)

Code (see "*Code - Payroll Office Transmission Search Results Field Description*" on page 247)

Status (see "*Status - (Payroll Office Errors) View Field Description*" on page 338)

As of Date (see "*As of Date - Field Description*" on page 236)

Pay Cycle (see "*Pay Cycle - Field Description*" on page 313)



Transmission Type (see "**Transmission Type - Field Description**" on page 345)

Options (see "**Options - (View, Update, Delete) Field Description**" on page 288)

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

CLER Payroll Office Transmissions View

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

US DEPARTMENT OF AGRICULTURE

Payroll Office ID	Year	Quarter	Transmission Type
	2014	4	P

Submission	Submission Date	As of Date
1	01/31/2015	01/24/2015

Records Sent	Records Received	Records Processed
504668	504668	504074

Amount Sent	Amount Received
242449959.60	242449959.60

Date Processed	Time Processed	Code	Status	Source
02/02/2015	17:39:00	1	000	

Email Date	Email Time
01/01/1999	00:00:00

Figure 18: Payroll Office Transmissions View Page

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

Payroll Office ID (see "**Payroll Office ID - Field Description**" on page 315)

Year (see "**Year - (Payroll Office Enrollees) Search Results Field Description**" on page 351)

Quarter (see "**Quarter - Payroll Office Transmissions Search Results Field Description**" on page 324)

Transmission Type (see "**Transmission Type - Field Description**" on page 345)

Submission (see "**Submission - Field Description**" on page 339)

Submission Date (see "**Submission Date - Field Description**" on page 340)

As of Date (see "**As of Date - Field Description**" on page 236)

Records Sent (see "**Records Sent - Field Description**" on page 328)

Records Received (see "**Records Received - Field Description**" on page 328)



Records Processed (see "**Records Processed - Field Description**" on page 328)

Amount Sent (see "**Amount Sent - Field Description**" on page 235)

Amount Received (see "**Amount Received - Field Description**" on page 235)

Date Processed (see "**Date Processed - Field Description**" on page 255)

Time Processed (see "**Time Processed - Field Description**" on page 342)

Code (see "**Code - Payroll Office Transmission Search Results Field Description**" on page 247)

Status (see "**Status - (Payroll Office Errors) View Field Description**" on page 338)

Source (see "**Source - Field Description**" on page 333)

Email Date (see "**Email Date - Field Description**" on page 262)

Email Time (see "**Email Time - Field Description**" on page 263)

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

Viewing a Payroll Office Enrollee Record

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

To View a Payroll Office Enrollee Record:

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



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

Figure 19: Payroll Office Enrollees Page

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

Payroll Office ID (see "**Payroll Office ID - (Select - Required) Field Instruction**" on page 315)

Transmission Type (see "**Transmission Type - (Required) Field Instruction**" on page 345)

Year (see "**Year - (Required) Field Instruction**" on page 351)

Quarter (see "**Quarter - (Select - Reconciliation) Field Instruction**" on page 323)

As of Date for Pay Period Transmission From (see "**As of Date for Pay Period Transmission From - Field Instruction**" on page 236)

As of Date for Pay Period Transmission To (see "**As of Date for Pay Period Transmission To - Field Instruction**" on page 237)



Agency (see "***Agency - Field Instruction***" on page 233)

POI (see "***POI - Payroll Office Enrollee Field Instruction***" on page 319)

Carrier (see "***Carrier - Field Instruction***" on page 239)

Enrollment Code (see "***Enrollment Code - Field Instruction***" on page 266)

SSN - from

SSN - to (see "***SSN To - Field Instruction***" on page 334)

Other ID From (see "***Other ID From - Field Instruction***" on page 309)

Other ID To (see "***Other ID To - Field Instruction***" on page 309)

Last Name (see "***Last Name - Enrollee Field Instruction***" on page 280)

First Name (see "***First Name - Enrollee Field Instruction***" on page 270)

Middle Name (see "***Middle Name - Enrollee Field Instruction***" on page 283)

Employee/Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Instruction***" on page 263)

Error Code (see "***Error Code - (Select) Field Instruction***" on page 266)

Warning Code (see "***Warning Code - (Select) Field Instruction***" on page 350)

Display (see "***Display - (All Records) Field Instruction***" on page 257)

Order By 1st (see "***Order By 1st - (Enrollee) Field Instruction***" on page 293)

Order By 2nd (see "***Order By 2nd - Field Instruction***" on page 297)

Order By 3rd (see "***Order By 3rd - Field Instruction***" on page 300)

Order By 4th (see "***Order By 4th - Field Instruction***" on page 302)

Order By 5th (see "***Order By 5th - Field Instruction***" on page 304)

Order By 6th (see "***Order By 6th - Field Instruction***" on page 306)

Order By 7th (see "***Order By 7th - Agency Field Instruction***" on page 306)

Order By 8th (see "***Order By 8th - Agency Field Instruction***" on page 307)

Order By 9th (see "***Order by 9th - Agency Field Instruction***" on page 307)



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

OR

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

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

Enrollee SSN Last Name	First Name	Carrier Code Agency	POI	Employee Annuitant As of Indicator Date	Amount	Warning Count	Fail	Options
		BCBS 111		9999 R 3/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 2/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 3/1/2013	\$511.98	0	0	View
		BCBS 111		9999 R 2/1/2013	\$511.98	0	0	View
		BCBS 111		9999 R 2/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 3/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 2/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 3/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 2/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 3/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 2/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 3/1/2013	\$511.98	0	0	View
		BCBS 111		9999 R 2/1/2013	\$511.98	0	0	View
		BCBS 111		9999 R 3/1/2013	\$511.98	0	0	View
		BCBS 111		9999 R 2/1/2013	\$511.98	0	0	View
		BCBS 111		9999 R 3/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 2/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 3/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 2/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 3/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 2/1/2013	\$522.22	0	0	View
		BCBS 111		9999 R 3/1/2013	\$522.22	0	0	View

Figure 20: Payroll Office Enrollees Pay Period Transmissions Search Results Page

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

Enrollee SSN (see "**Enrollee SSN - Field Description**" on page 264)

Last Name (see "**Last Name - Enrollee Field Description**" on page 279)

First Name (see "**First Name - Enrollee Field Description**" on page 270)

Carrier (see "**Carrier - Field Description**" on page 239)

Code (see "**Code - Field Description**" on page 247)

Agency (see "**Agency - Enrollee Field Description**" on page 233)



POI (see "***POI - Field Description***" on page 319)

Employee Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Description***" on page 263)

As of Date (see "***As of Date - Carrier Transmissions Field Description***" on page 236)

Amount (see "***Amount - Field Description***" on page 235)

Warning

Fail Count (see "***Fail Count - Field Description***" on page 268)

Options (see "***Options - (View Only) Field Description***" on page 287)



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

CLER Payroll Office Carrier Forms Transmission Reports LOG OFF

Info Contacts Errors Transmissions Enrollees

Payroll Office Enrollees View

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

Payroll Office ID Year Quarter Submission
[] 2016 2 1

Transmission Type Employee Annuitant Indicator As of Date
R R 6/1/2016

Agency POI Carrier Enrollment Code SSN
[] [] [] [] []

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

Effective Date of Coverage Amount
05 01 2015 605.41

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

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

Date Processed Time Processed Source Fail Count
08 24 2016 13:03:22 M 0

Select another discrepancy: 1

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

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: [] [] [] []

Figure 21: Payroll Office Enrollees View Page

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

Payroll Office ID (see "*Payroll Office ID - Field Description*" on page 315)

Year (see "*Year - Field Description*" on page 351)

Quarter (see "*Quarter - Field Description*" on page 324)

Submission (see "*Submission - (Payroll Office Enrollees) Reconcile Field Description*" on page 339)



Transmission Type (see "***Transmission Type - Field Description***" on page 345)

Employee Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Description***" on page 263)

As of Date (see "***As of Date - Carrier Transmissions Field Description***" on page 236)

Agency (see "***Agency - Enrollee Field Description***" on page 233)

POI (see "***POI - Field Description***" on page 319)

Carrier (see "***Carrier - Field Description***" on page 239)

Enrollment Code (see "***Enrollment Code - Field Description***" on page 266)

SSN (see "***SSN - (Enrollee) Field Description***" on page 333)

Last Name (see "***Last Name - Enrollee Field Description***" on page 279)

First Name (see "***First Name - Enrollee Field Description***" on page 270)

Middle Name (see "***Middle Name - Enrollee Field Description***" on page 283)

Effective Date of Coverage (see "***Effective Date of Coverage - Field Description***" on page 261)

Amount (see "***Amount - Pay Period Field Description***" on page 235)

Deceased Annuitant SSN (see "***Deceased Annuitant SSN - Field Description***" on page 255)

Pseudo SSN (see "***Pseudo SSN - Field Description***" on page 322)

Other Payroll ID (see "***Other Payroll ID - Field Description***" on page 310)

Other Carrier ID (see "***Other Carrier ID - Field Description***" on page 308)

Submitter Use #1 (see "***Submitter Use #1 - Field Description***" on page 340)

Submitter Use #2 (see "***Submitter Use #2 - Field Description***" on page 341)

Submitter Use #3 (see "***Submitter Use #3 - Field Description***" on page 341)

Date Processed (see "***Date Processed - (Processed Run) Field Description***" on page 255)

Time Processed (see "***Time Processed - (Process Run) Field Description***" on page 342)

Source (see "***Source - Field Description***" on page 333)



Fail Count (see "***Fail Count - Field Description***" on page 268)

Discrepancy (see "***Discrepancy - (Explain/Duplicate - Code 166) Field Description***" on page 257)

Reconciliation Reason (see "***Reconciliation Reason - Field Description***" on page 326)

Reconciliation Action (see "***Reconciliation Action - Field Description***" on page 325)

Corrective Action (see "***Corrective Action (Code) - Field Description***" on page 251)

Payroll Office Comments (see "***Payroll Office Comments - Field Description***" on page 314)

Carrier Comments (see "***Carrier Comments - Field Description***" on page 240)

Last Payroll Update ID (see "***Last Payroll Update ID - Field Description***" on page 281)

Last Payroll Update Date (see "***Last Payroll Update Date - Field Description***" on page 280)

Last Payroll Update Time (see "***Last Payroll Update Time - Field Description***" on page 281)

Last Carrier Update ID (see "***Last Carrier Update ID - Field Description***" on page 275)

Last Carrier Update Date (see "***Last Carrier Update Date - Field Description***" on page 275)

Last Carrier Update Time (see "***Last Carrier Update Time - Field Description***" on page 275)

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

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

The **Matching** button on the Payroll Office Enrollees View page allows users to view certain enrollee data from a payroll office enrollee record that matches a selected carrier enrollee record. Since there may be more than one matching payroll office enrollee record, a Matching button is displayed for each matching record. The **Duplicate** button next to the Discrepancy field on the Carrier Enrollees View page allows users to view data from another carrier enrollee record that was submitted for the same enrollee. The Matching and Duplicate functions facilitate the reconciliation process.



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

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

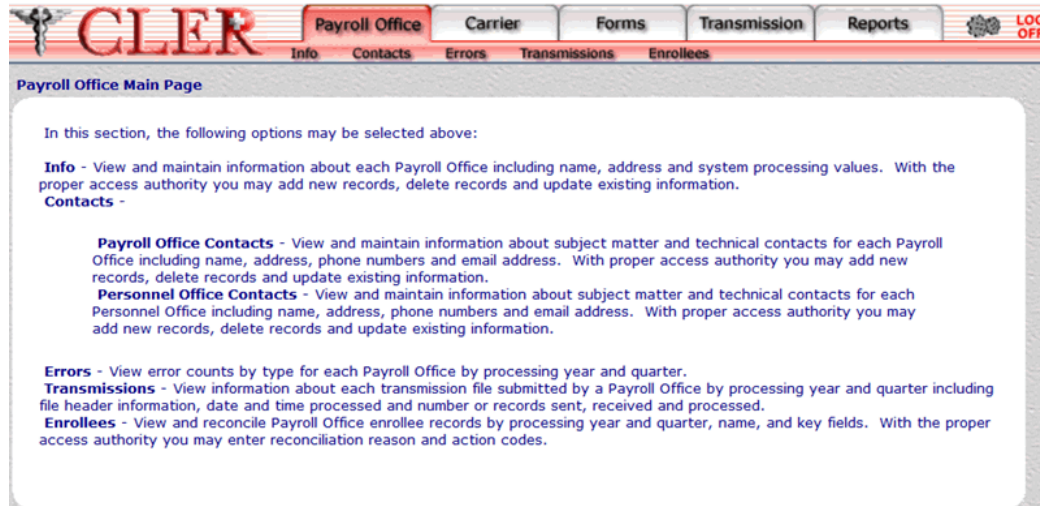


Figure 22: Payroll Office Main Page



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

Figure 23: Payroll Office Enrollees Page

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

Payroll Office ID (see "**Payroll Office ID - (Select - Required) Field Instruction**" on page 315)

Transmission Type (see "**Transmission Type - (Required) Field Instruction**" on page 345)

Year (see "**Year - (Required) Field Instruction**" on page 351)

Quarter (see "**Quarter - (Select - Reconciliation) Field Instruction**" on page 323)

As of Date for Pay Period Transmission From (see "**As of Date for Pay Period Transmission From - Field Instruction**" on page 236)

As of Date for Pay Period Transmission To (see "**As of Date for Pay Period Transmission To - Field Instruction**" on page 237)

Agency (see "**Agency - Field Instruction**" on page 233)



- POI*** (see "***POI - Payroll Office Enrollee Field Instruction***" on page 319)
- Carrier*** (see "***Carrier - Field Instruction***" on page 239)
- Enrollment Code*** (see "***Enrollment Code - Field Instruction***" on page 266)
- SSN - from***
- SSN - to*** (see "***SSN To - Field Instruction***" on page 334)
- Other ID From*** (see "***Other ID From - Field Instruction***" on page 309)
- Other ID To*** (see "***Other ID To - Field Instruction***" on page 309)
- Last Name*** (see "***Last Name - Enrollee Field Instruction***" on page 280)
- First Name*** (see "***First Name - Enrollee Field Instruction***" on page 270)
- Middle Name*** (see "***Middle Name - Enrollee Field Instruction***" on page 283)
- Employee/Annuitant Indicator*** (see "***Employee/Annuitant Indicator - Field Instruction***" on page 263)
- Error Code*** (see "***Error Code - (Select) Field Instruction***" on page 266)
- Warning Code*** (see "***Warning Code - (Select) Field Instruction***" on page 350)
- Display*** (see "***Display - (All Records) Field Instruction***" on page 257)
- Order By 1st*** (see "***Order By 1st - (Enrollee) Field Instruction***" on page 293)
- Order By 2nd*** (see "***Order By 2nd - Field Instruction***" on page 297)
- Order By 3rd*** (see "***Order By 3rd - Field Instruction***" on page 300)
- Order By 4th*** (see "***Order By 4th - Field Instruction***" on page 302)
- Order By 5th*** (see "***Order By 5th - Field Instruction***" on page 304)
- Order By 6th*** (see "***Order By 6th - Field Instruction***" on page 306)
- Order By 7th*** (see "***Order By 7th - Agency Field Instruction***" on page 306)
- Order By 8th*** (see "***Order By 8th - Agency Field Instruction***" on page 307)
- Order By 9th*** (see "***Order by 9th - Agency Field Instruction***" on page 307)
4. Select the **Submit** button to confirm the data entered. The Payroll Office Enrollees Search Results page is displayed.



OR

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

Enrollee SSN Last Name	First Name	Carrier Code Agency	POI	Employee Annuitant Indicator	As of Date	Amount	Warning Count	Fail	Options
		BCBS 111		9999 R	3/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	2/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	3/1/2013	\$511.98	0	Fail	View
		BCBS 111		9999 R	2/1/2013	\$511.98	0	Fail	View
		BCBS 111		9999 R	3/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	3/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	2/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	3/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	2/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	3/1/2013	\$511.98	0	Fail	View
		BCBS 111		9999 R	2/1/2013	\$511.98	0	Fail	View
		BCBS 111		9999 R	3/1/2013	\$511.98	0	Fail	View
		BCBS 111		9999 R	2/1/2013	\$511.98	0	Fail	View
		BCBS 111		9999 R	3/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	2/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	3/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	3/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	2/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	3/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	2/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	3/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	2/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	3/1/2013	\$522.22	0	Fail	View
		BCBS 111		9999 R	2/1/2013	\$522.22	0	Fail	View

Figure 24: Payroll Office Enrollees Pay Period Transmissions Search Results Page

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

Enrollee SSN (see "**Enrollee SSN - Field Description**" on page 264)

Last Name (see "**Last Name - Enrollee Field Description**" on page 279)

First Name (see "**First Name - Enrollee Field Description**" on page 270)

Carrier (see "**Carrier - Field Description**" on page 239)

Code (see "**Code - Field Description**" on page 247)

Agency (see "**Agency - Enrollee Field Description**" on page 233)

POI (see "**POI - Field Description**" on page 319)

Employee Annuitant Indicator (see "**Employee/Annuitant Indicator - Field Description**" on page 263)

As of Date (see "**As of Date - Carrier Transmissions Field Description**" on page 236)



Amount (see "**Amount - Field Description**" on page 235)

Warning

Fail Count (see "**Fail Count - Field Description**" on page 268)

Options (see "**Options - (View Only) Field Description**" on page 287)

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 25: Payroll Office Enrollees with Matching Carrier Record - Payroll Office Page



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

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 315)

Year (see "***Year - Field Description***" on page 351)

Quarter (see "***Quarter - Field Description***" on page 324)

Submission (see "***Submission - (Payroll Office Enrollees) Reconcile Field Description***" on page 339)

Transmission Type (see "***Transmission Type - Field Description***" on page 345)

Employee Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Description***" on page 263)

As of Date (see "***As of Date - Carrier Transmissions Field Description***" on page 236)

Agency (see "***Agency - Enrollee Field Description***" on page 233)

POI (see "***POI - Field Description***" on page 319)

Carrier (see "***Carrier - Field Description***" on page 239)

Enrollment Code (see "***Enrollment Code - Field Description***" on page 266)

SSN (see "***SSN - (Enrollee) Field Description***" on page 333)

Last Name (see "***Last Name - Enrollee Field Description***" on page 279)

First Name (see "***First Name - Enrollee Field Description***" on page 270)

Middle Name (see "***Middle Name - Enrollee Field Description***" on page 283)

Effective Date of Coverage (see "***Effective Date of Coverage - Field Description***" on page 261)

Amount (see "***Amount - Pay Period Field Description***" on page 235)

Deceased Annuitant SSN (see "***Deceased Annuitant SSN - Field Description***" on page 255)

Pseudo SSN (see "***Pseudo SSN - Field Description***" on page 322)

Other Payroll ID (see "***Other Payroll ID - Field Description***" on page 310)

Other Carrier ID (see "***Other Carrier ID - Field Description***" on page 308)



- Submitter Use #1*** (see "***Submitter Use #1 - Field Description***" on page 340)
- Submitter Use #2*** (see "***Submitter Use #2 - Field Description***" on page 341)
- Submitter Use #3*** (see "***Submitter Use #3 - Field Description***" on page 341)
- Date Processed*** (see "***Date Processed - (Processed Run) Field Description***" on page 255)
- Time Processed*** (see "***Time Processed - (Process Run) Field Description***" on page 342)
- Source*** (see "***Source - Field Description***" on page 333)
- Fail Count*** (see "***Fail Count - Field Description***" on page 268)
- Discrepancy*** (see "***Discrepancy - (Explain/Duplicate - Code 166) Field Description***" on page 257)
- Reconciliation Reason*** (see "***Reconciliation Reason - Field Description***" on page 326)
- Reconciliation Action*** (see "***Reconciliation Action - Field Description***" on page 325)
- Corrective Action*** (see "***Corrective Action (Code) - Field Description***" on page 251)
- Payroll Office Comments*** (see "***Payroll Office Comments - Field Description***" on page 314)
- Carrier Comments*** (see "***Carrier Comments - Field Description***" on page 240)
- Last Payroll Update ID*** (see "***Last Payroll Update ID - Field Description***" on page 281)
- Last Payroll Update Date*** (see "***Last Payroll Update Date - Field Description***" on page 280)
- Last Payroll Update Time*** (see "***Last Payroll Update Time - Field Description***" on page 281)
- Last Carrier Update ID*** (see "***Last Carrier Update ID - Field Description***" on page 275)
- Last Carrier Update Date*** (see "***Last Carrier Update Date - Field Description***" on page 275)
- Last Carrier Update Time*** (see "***Last Carrier Update Time - Field Description***" on page 275)
6. Select the **Matching** button on the Payroll Office Enrollees View page. The Carrier Enrollees View page containing the data from the matching payroll office 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 payroll office enrollee record was submitted.

Note: If the carrier enrollee record data displayed on the Carrier Enrollees View page is matched with the data from another carrier enrollee record, Discrepancy Code **166** is displayed in the Discrepancy field. When this discrepancy occurs, the Duplicate button is displayed next to the Discrepancy field. Select the **Duplicate** button to display the Carrier Enrollees View page containing the data from the matching carrier enrollee record. 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.

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 26: 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 315)

Year (see "***Year - Field Description***" on page 351)

Quarter (see "***Quarter - Field Description***" on page 324)

Submission (see "***Submission - (Payroll Office Enrollees) Reconcile Field Description***" on page 339)

Transmission Type (see "***Transmission Type - Field Description***" on page 345)

Employee Annuitant Indicator (see "***Employee/Annuitant Indicator - Field Description***" on page 263)

As of Date (see "***As of Date - Carrier Transmissions Field Description***" on page 236)

Agency (see "***Agency - Enrollee Field Description***" on page 233)

POI (see "***POI - Field Description***" on page 319)

Carrier (see "***Carrier - Field Description***" on page 239)

Enrollment Code (see "***Enrollment Code - Field Description***" on page 266)

SSN (see "***SSN - (Enrollee) Field Description***" on page 333)

Last Name (see "***Last Name - Enrollee Field Description***" on page 279)

First Name (see "***First Name - Enrollee Field Description***" on page 270)

Middle Name (see "***Middle Name - Enrollee Field Description***" on page 283)

Effective Date of Coverage (see "***Effective Date of Coverage - Field Description***" on page 261)

Amount (see "***Amount - Pay Period Field Description***" on page 235)

Deceased Annuitant SSN (see "***Deceased Annuitant SSN - Field Description***" on page 255)

Pseudo SSN (see "***Pseudo SSN - Field Description***" on page 322)

Other Payroll ID (see "***Other Payroll ID - Field Description***" on page 310)

Other Carrier ID (see "***Other Carrier ID - Field Description***" on page 308)

Submitter Use #1 (see "***Submitter Use #1 - Field Description***" on page 340)

Submitter Use #2 (see "***Submitter Use #2 - Field Description***" on page 341)



Submitter Use #3 (see "***Submitter Use #3 - Field Description***" on page 341)

Date Processed (see "***Date Processed - (Processed Run) Field Description***" on page 255)

Time Processed (see "***Time Processed - (Process Run) Field Description***" on page 342)

Source (see "***Source - Field Description***" on page 333)

Fail Count (see "***Fail Count - Field Description***" on page 268)

Discrepancy (see "***Discrepancy - (Explain/Duplicate - Code 166) Field Description***" on page 257)

Reconciliation Reason (see "***Reconciliation Reason - Field Description***" on page 326)

Reconciliation Action (see "***Reconciliation Action - Field Description***" on page 325)

Corrective Action (see "***Corrective Action (Code) - Field Description***" on page 251)

Payroll Office Comments (see "***Payroll Office Comments - Field Description***" on page 314)

Carrier Comments (see "***Carrier Comments - Field Description***" on page 240)

Last Payroll Update ID (see "***Last Payroll Update ID - Field Description***" on page 281)

Last Payroll Update Date (see "***Last Payroll Update Date - Field Description***" on page 280)

Last Payroll Update Time (see "***Last Payroll Update Time - Field Description***" on page 281)

Last Carrier Update ID (see "***Last Carrier Update ID - Field Description***" on page 275)

Last Carrier Update Date (see "***Last Carrier Update Date - Field Description***" on page 275)

Last Carrier Update Time (see "***Last Carrier Update Time - Field Description***" on page 275)

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

Viewing Payroll Office Error Records

The **Errors** option on the Payroll Office Main Page allows users to view errors information.



To View a Payroll Office Error record:

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

Figure 27: Payroll Office Main Page

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

Figure 28: Payroll Office Errors Page

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

Payroll Office ID (see "**Payroll Office ID - (Optional) Field Instruction**" on page 314)

Year (see "**Year - (Error Statistics) Field Instruction**" on page 350)

Quarter (see "**Quarter - Field Instruction**" on page 324)

Order By (see "**Order By - (ID - Year/Quarter) Field Instruction**" on page 291)

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



OR

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

ID	Year	Quarter	Records with Errors	Records with Warnings	Total Errors	Total Warnings	Options
	2002	1	80976	381136	114251	456974	View
	2002	2	33350	51662	98447	85341	View
	2002	3	10276	40696	18812	54305	View
	2002	4	15365	51788	34410	72018	View
	2003	1	12620	25305	23643	28134	View
	2003	2	7385	30594	13783	44432	View
	2003	3	5624	23019	13153	28600	View
	2003	4	8125	30952	12910	37450	View
	2004	1	9996	34148	17847	44775	View
	2004	2	4971	31879	11844	45166	View
	2004	3	5348	29920	9361	34447	View
	2004	4	6041	38994	10980	52390	View
	2005	1	6317	31477	14354	43979	View
	2005	2	7638	37510	17514	50330	View
	2005	3	50444	45150	56150	64885	View
	2005	4	12962	46042	17569	64814	View

Figure 29: Payroll Office Errors Search Results Page

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

ID (see "**ID - (Payroll Office) Field Description**" on page 273)

Year (see "**Year - (Error Statistics) Field Description**" on page 350)

Quarter (see "**Quarter - (Error Statistics) Field Description**" on page 323)

Records with Errors (see "**Records With Errors - (Payroll Office) Field Description**" on page 328)

Records with Warnings (see "**Records With Warnings - (Payroll Office) Field Description**" on page 328)

Total Errors (see "**Total Errors - Field Description**" on page 344)

Total Warnings (see "**Total Warnings - Field Description**" on page 345)

Options (see "**Options - (View Only) Field Description**" on page 287)



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

Payroll Office ID	Year	Quarter
	2002	1

Records with Errors	Records with Warnings
80976	381136

Total Errors	Total Warnings
114251	456974

Records Reconciled	Errors Reconciled
53	69

Carrier Errors	Disputed Errors	Confirmed Errors
57	0	0

Figure 30: Payroll Office Errors View Page

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

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 315)

Year (see "***Year - (Error Statistics) Field Description***" on page 350)

Quarter (see "***Quarter - (Error Statistics) Field Description***" on page 323)

Records with Errors (see "***Records With Errors - (Payroll Office) Field Description***" on page 328)

Records with Warnings (see "***Records With Warnings - (Payroll Office) Field Description***" on page 328)

Total Errors (see "***Total Errors - Field Description***" on page 344)

Total Warnings (see "***Total Warnings - Field Description***" on page 345)

Records Reconciled (see "***Records Reconciled - Field Description***" on page 328)

Errors Reconciled (see "***Errors Reconciled - Field Description***" on page 267)

Carrier Errors (see "***Carrier Errors - Field Description***" on page 240)

Disputed Errors (see "***Disputed Errors - Field Description***" on page 260)

Confirmed Errors (see "***Confirmed Errors - Field Description***" on page 248)



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.



Personnel Office Records

The **Personnel Office** option allows users to view personnel office information and records.

This section includes the following topics:

Viewing a Personnel Office Contact Record59

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

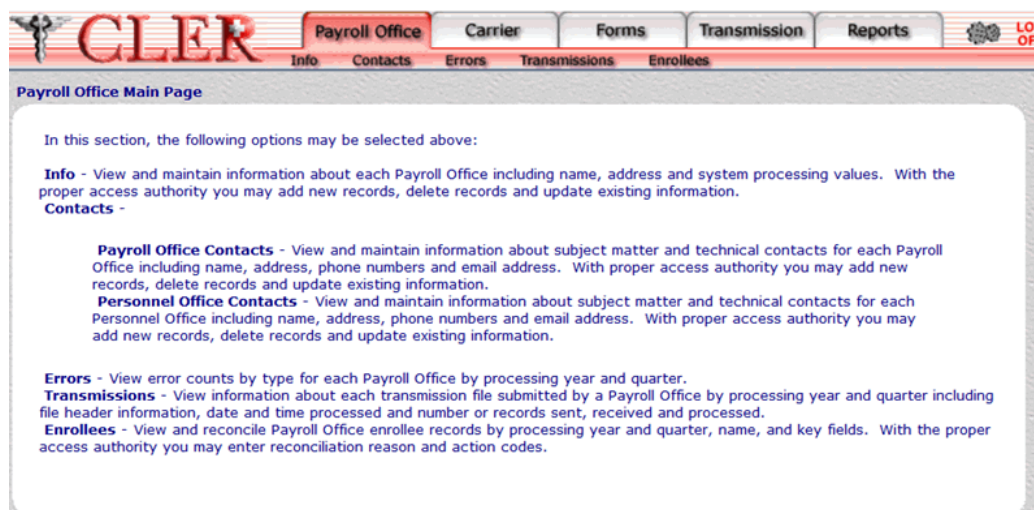


Figure 31: Payroll Office Main Page



2. 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 32: Contacts Main Page

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

Figure 33: Personnel Office Contacts Page

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

Payroll Office ID (see "**Payroll Office ID - (Optional) Field Instruction**" on page 314)

Personnel Office ID (see "**Personnel Office ID - (Optional) Field Instruction**" on page 316)

Type (see "**Type - (Personnel Office Contact - Optional) Field Instruction**" on page 348)

Display (see "**Display - (Personnel Office Contact) Field Instruction**" on page 259)

Order By (see "**Order By - (Personnel Office Contact) Field Instruction**" on page 292)

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



OR

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

ID	POI	Type	Status	Name	Phone	Email	Options
1	General	Active					View Inactivate Update Delete
2	General	Active					View Inactivate Update Delete

Records Found: 2

Figure 34: Personnel Office Contacts Search Results Page

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

ID (see "**ID - (Payroll Office) Field Description**" on page 273)

POI (see "**POI - (Personnel Office Contact) Field Description**" on page 318)

Type (see "**Type - Personnel Office Contacts Search Results Field Description**" on page 348)

Status (see "**Status - (Payroll Office Contacts) Search Results Field Description**" on page 338)

Name (see "**Name - Personnel Office Contact Field Description**" on page 285)

Phone (see "**Phone - (Personnel Office Contact) Field Description**" on page 317)

Email (see "**Email Address - (Personnel Office Contact) Field Description**" on page 262)

Options (see "**Options - (View, Activate, Update, Delete) Field Description**" on page 287)



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

Figure 35: Personnel Office Contacts View Page

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

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 315)

Personnel Office ID (see "***Personnel Office ID - Field Description***" on page 316)

Type (see "***Type - (Personnel Office Contact) Field Description***" on page 348)

Role (see "***Role - (Personnel Office Contact) Field Description***" on page 331)

Name (see "***Name - Personnel Office Contact Field Description***" on page 285)

Address Line 1 (see "***Address Line 1 - Personnel Office Contact Field Description***" on page 227)



Address Line 2 (see "***Address Line 2 - Personnel Office Contact Field Description***" on page 230)

Address Line 3 (see "***Address Line 3 - Personnel Office Contact Field Description***" on page 232)

City (see "***City - Personnel Office Contact Field Description***" on page 245)

State (see "***State - (Personnel Office Contact) Field Description***" on page 337)

Zip (see "***ZIP - (Personnel Office Contact) Field Description***" on page 354)

Foreign Country (see "***Foreign Country - (Personnel Office) Field Description***" on page 271)

Phone Number (see "***Phone Number - (Personnel Office Contact) Field Description***" on page 318)

Fax Number (see "***Fax Number - (Personnel Office Contact) Field Description***" on page 269)

Email Address (see "***Email Address - (Personnel Office Contact) Field Description***" on page 262)

Remarks (see "***Remarks - Field Description***" on page 330)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 275)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 275)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 276)

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



Carrier Records

The **Carrier** option allows users to view carrier information and records.

This section includes the following topics:

Viewing Carrier Information Records	65
Viewing Carrier ID Records	68
Viewing Carrier Enrollment Code Records	71
Viewing a Carrier Contact Record	74
Viewing Carrier Error Records	77
Viewing Carrier Transmission Records	81
Viewing Carrier Enrollee Records	84
Viewing a Carrier Plan Contact Record	90
Viewing a Matching Carrier Enrollee Record or Duplicate Payroll Office Enrollee Record	95

Viewing Carrier Information Records

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

To View a Carrier Information Record:

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

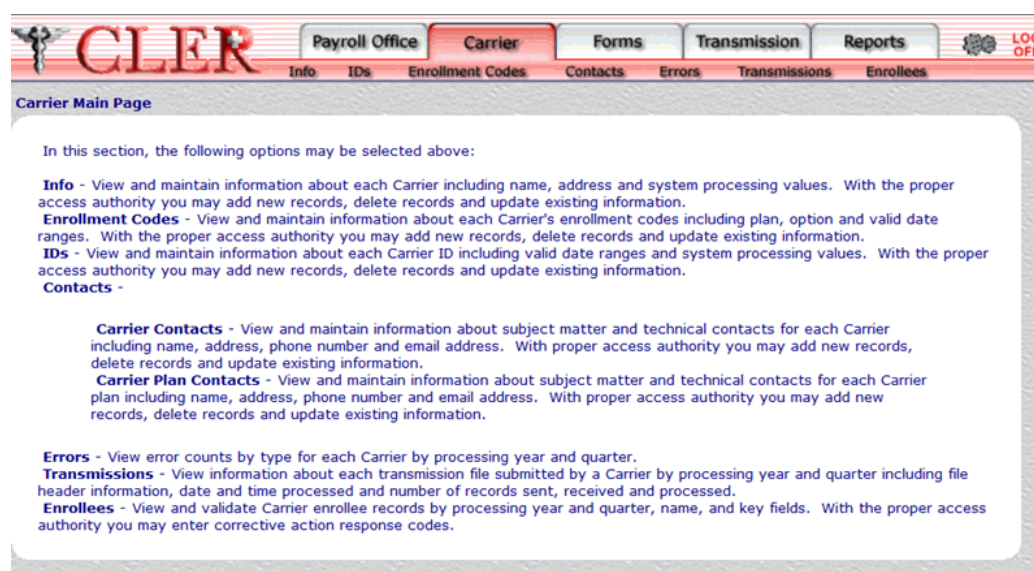


Figure 36: Carrier Main Page



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

Figure 37: Carrier Information Page

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

Carrier (see "**Carrier - Field Instruction**" on page 239)

Name (see "**Name - (Carrier) Field Instruction**" on page 283)

City (see "**City - Carrier Field Instruction**" on page 243)

State (see "**State - (Carrier) Field Instruction**" on page 336)

Order By (see "**Order By - (Carrier, Name, City, State Sorts) Field Instruction**" on page 290)

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

OR

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

Figure 38: 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 239)
- Name** (see "**Name - Carrier Field Description**" on page 284)
- Address** (see "**Address - Carrier Field Description**" on page 225)
- City** (see "**Viewing Reconciliation Action Summary (Report 10)**" on page 163)
- State** (see "**State - (Carrier) Field Description**" on page 336)
- Zip** (see "**ZIP - (Carrier) Field Description**" on page 353)
- Options** (see "**Options - (View, Update, Delete) Field Description**" on page 288)
5. Select the **View** button next to the applicable record. The Carrier Information View page is displayed.

Figure 39: 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 239)
- Name** (see "**Name - Carrier Field Description**" on page 284)
- Address Line 1** (see "**Address Line 1 - Carrier Field Description**" on page 225)
- Address Line 2** (see "**Address Line 2 - Carrier Field Description**" on page 228)
- Address Line 3** (see "**Address Line 3 - Carrier Field Description**" on page 230)



City (see "**City - Carrier Field Description**" on page 243)

State (see "**State - (Carrier) Field Description**" on page 336)

Zip (see "**ZIP - (Carrier) Field Description**" on page 353)

Foreign Country (see "**Foreign Country - (Carrier) Field Description**" on page 271)

Start Date (see "**Start Date - (Carrier) Field Description**" on page 335)

End Date (see "**End Date - (Carrier) Field Description**" on page 263)

Last Changed ID (see "**Last Changed ID - Field Description**" on page 275)

Last Changed Date (see "**Last Changed Date - Field Description**" on page 275)

Last Changed Time (see "**Last Changed Time - Field Description**" on page 276)

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

Viewing Carrier ID Records

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



To View a Carrier ID Record:

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

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 40: Carrier Main Page

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

Carrier Identifiers

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

Carrier ID

SUBMIT **RESET**

Figure 41: Carrier Identifiers Page

3. Complete the following field on the Carrier Identifiers page:
Carrier ID (see "**Carrier ID - Field Instruction**" on page 241)
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 42: 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 239)

Name (see "**Name - Carrier Field Description**" on page 284)

Start Date (see "**Start Date - (Carrier) Field Description**" on page 335)

End Date (see "**End Date - (Carrier) Field Description**" on page 263)

Options (see "**Options - (View, Update, Delete) Field Description**" on page 288)

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

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

Carrier ID:

Start Date: 01/02/2001 End Date: 12/31/9999

Error Threshold: 100 Threshold Type: (percent or number) P

Last Changed: ID: Date: 01/18/2002 Time: 14:15:53

Figure 43: Carrier Identifiers View Page

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

Carrier ID (see "**Carrier ID - Field Description**" on page 241)



Start Date (see "***Start Date - (Carrier Plan) Field Description***" on page 335)

End Date (see "***End Date - (Carrier Plan) Field Description***" on page 263)

Error Threshold (see "***Error Threshold - (Carrier) Field Description***" on page 266)

Threshold Type (see "***Threshold Type - Field Description***" on page 342)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 275)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 275)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 276)

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.

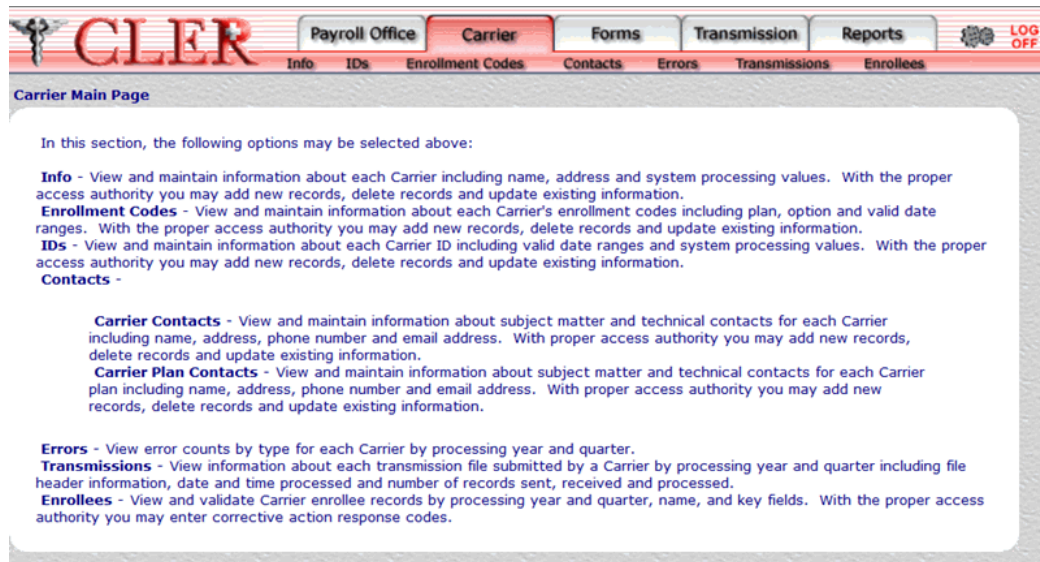


Figure 44: Carrier Main Page



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

Figure 45: Carrier Enrollment Codes Search Page

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

Carrier (see "**Carrier - Field Instruction**" on page 239)

Enrollment Code (see "**Enrollment Code - Field Instruction**" on page 266)

Order By (see "**Order By - (Carrier - Code Sort) Field Instruction**" on page 289)

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 46: 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 239)

Region (see "**Region - Field Description**" on page 329)

Code (see "**Code - Field Description**" on page 247)

Name (see "**Name - Carrier Field Description**" on page 284)

Start Date (see "**Start Date - (Carrier Enrollment Code) Field Description**" on page 335)

End Date (see "**End Date - (Carrier Enrollment Code) Field Description**" on page 263)

Options (see "**Options - (View, Update, Delete) Field Description**" on page 288)

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

The screenshot shows the 'Carrier Identifiers View' page in the CLER system. The page has a header with the CLER logo and navigation tabs: Payroll Office, Carrier (selected), Forms, Transmission, and Reports. Below the tabs are sub-tabs: Info, IDs, Enrollment Codes, Contacts, Errors, Transmissions, and Enrollees. The main content area is titled 'Carrier Identifiers View' and contains a search form. The form includes a 'Carrier ID' dropdown menu, 'Start Date' and 'End Date' date pickers, an 'Error Threshold' input field, and a 'Threshold Type' dropdown menu. At the bottom, there is a 'Last Changed' section with fields for ID, Date, and Time.

Figure 47: Carrier Identifiers View Page

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

Carrier ID (see "**Carrier ID - Field Description**" on page 241)

Start Date (see "**Start Date - (Carrier Enrollment Code) Field Description**" on page 335)

End Date (see "**End Date - (Carrier Enrollment Code) Field Description**" on page 263)

Error Threshold (see "**Error Threshold - (Carrier) Field Description**" on page 266)

Threshold Type (see "**Threshold Type - Field Description**" on page 342)

Last Changed ID (see "**Last Changed ID - Field Description**" on page 275)



Last Changed Date (see "**Last Changed Date - Field Description**" on page 275)

Last Changed Time (see "**Last Changed Time - Field Description**" on page 276)

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

Viewing a Carrier Contact Record

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

To View a Carrier Contact Record:

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

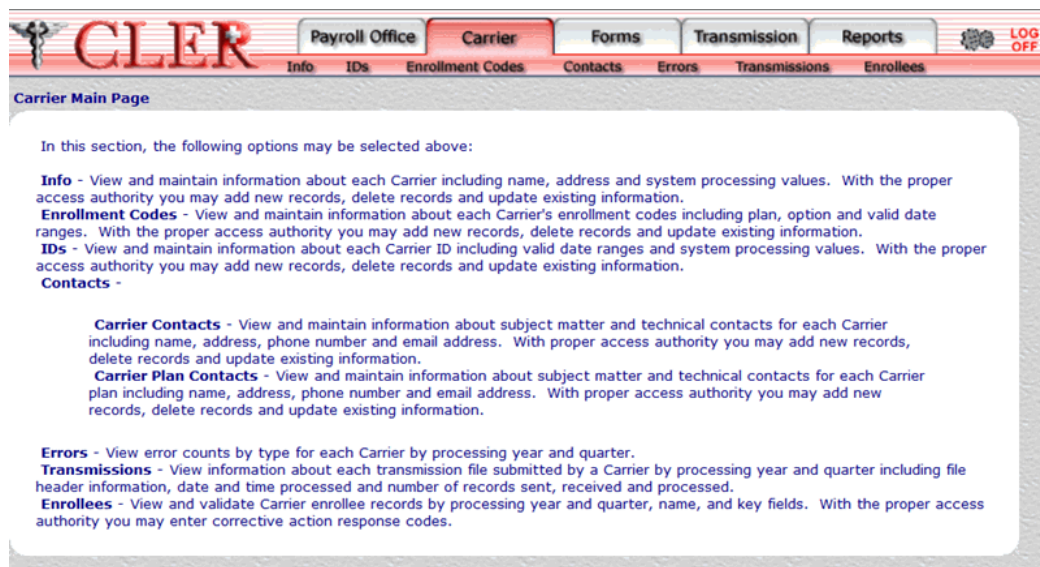


Figure 48: Carrier Main Page

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

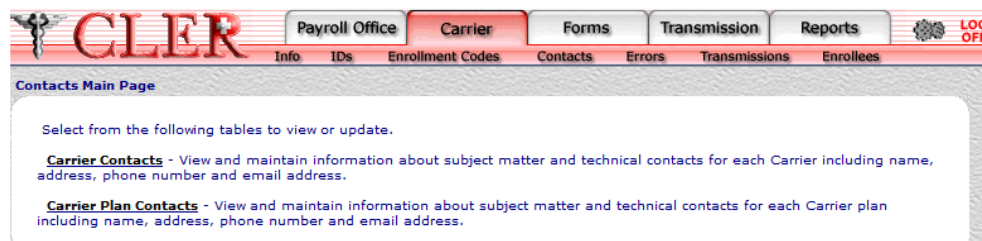


Figure 49: Contacts Main Page



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

Figure 50: Carrier Contacts Page

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

Carrier ID (see "**Carrier ID - Field Instruction**" on page 241)

Type (see "**Type - (Carrier Contact) Field Instruction**" on page 347)

Display (see "**Display - (Carrier Code) Field Instruction**" on page 258)

Order By (see "**Order By - (Carrier ID - Type Sort) Field Instruction**" on page 290)

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

OR

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

Carrier ID	Type	Status	Name	Phone	Email	Options
	General	Inactive				View Activate Update
	General	Inactive				View Activate Update
	General	Inactive				View Activate Update
	General	Inactive				View Activate Update

Figure 51: Carrier Contacts Search Results Page

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

Carrier ID (see "**Carrier ID - Field Description**" on page 241)

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



- Status** (see "**Status - (Active/Inactive) Field Description**" on page 338)
- Name** (see "**Name - (Carrier Contact) Field Description**" on page 283)
- Phone** (see "**Phone - (Carrier Contact) Field Description**" on page 316)
- Email** (see "**Email - (Carrier Contact) Field Description**" on page 261)
- Options** (see "**Options - (View, Activate, Update) Field Description**" on page 287)
6. Select the **View** button next to the applicable record. The Carrier Contacts View page is displayed.

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

Info IDs Enrollment Codes Contacts Errors Transmissions Enrollees

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 52: Carrier Contacts View Page

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

- Carrier ID** (see "**Carrier ID - Field Description**" on page 241)
- Type** (see "**Type - (Carrier Contact) Field Description**" on page 346)
- Role** (see "**Role - (Carrier Contact) Field Description**" on page 331)



Name (see "*Name - (Carrier Contact) Field Description*" on page 283)

Address Line 1 (see "*Address Line 1 - Carrier Contact Field Description*" on page 225)

Address Line 2 (see "*Address Line 2 - Carrier Contact Field Description*" on page 228)

Address Line 3 (see "*Address Line 3 - Carrier Contact Field Description*" on page 230)

City (see "*City - Carrier Contact Field Description*" on page 242)

State (see "*State - (Carrier Contact) Field Description*" on page 335)

Zip (see "*ZIP - (Carrier Contact) Field Description*" on page 353)

Foreign Country (see "*Foreign Country - (Carrier Contact) Field Description*" on page 270)

Phone Number (see "*Phone - (Carrier Contact) Field Description*" on page 316)

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

Email Address (see "*Email Address - (Carrier Contact) Field Description*" on page 261)

Remarks (see "*Remarks - Field Description*" on page 330)

Last Changed ID (see "*Last Changed ID - Field Description*" on page 275)

Last Changed Date (see "*Last Changed Date - Field Description*" on page 275)

Last Changed Time (see "*Last Changed Time - Field Description*" on page 276)

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

Viewing 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 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 53: Carrier Main Page

2. Select **Errors** on 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 54: Carrier Errors Search Page

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

Carrier ID (see "**Carrier ID - Field Instruction**" on page 241)

Year (see "**Year - (Error Statistics) Field Instruction**" on page 350)

Quarter (see "**Quarter - Field Instruction**" on page 324)

Order By

4. Select the **Submit** button to confirm all data entered. The Carrier Errors search results page is displayed.



OR

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

Carrier ID	Year	Quarter	Records with Errors	Records with Warnings	Total Errors	Total Warnings	Options
	2014	2	0	0	0	0	View

Records Found: 1

Figure 55: Carrier Errors Search Results Page

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

Carrier ID (see "***Carrier ID - Field Description***" on page 241)

Year (see "***Year - (Error Statistics) Field Description***" on page 350)

Quarter (see "***Quarter - (Error Statistics) Field Description***" on page 323)

Records with Errors (see "***Records With Errors - (Carrier) Field Description***" on page 224)

Records with Warnings (see "***Records With Warnings - (Carrier) Field Description***" on page 224)

Total Errors (see "***Total Errors - Field Description***" on page 344)

Total Warnings (see "***Total Warnings - Field Description***" on page 345)

Options (see "***Options - (View Only) Field Description***" on page 287)



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

Figure 56: Carrier Errors View Search Page

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

Carrier ID (see "**Carrier ID - Field Description**" on page 241)

Year (see "**Year - (Error Statistics) Field Description**" on page 350)

Quarter (see "**Quarter - (Error Statistics) Field Description**" on page 323)

Records with Errors (see "**Records With Errors - (Carrier) Field Description**" on page 224)

Records with Warnings (see "**Records With Warnings - (Carrier) Field Description**" on page 224)

Total Errors (see "**Total Errors - Field Description**" on page 344)

Total Warnings (see "**Total Warnings - Field Description**" on page 345)

Records Reconciled (see "**Records Reconciled - Field Description**" on page 328)

Errors Reconciled (see "**Errors Reconciled - Field Description**" on page 267)

Carrier Errors (see "**Carrier Errors - Field Description**" on page 240)

Disputed Errors (see "**Disputed Errors - Field Description**" on page 260)

Confirmed Errors (see "**Confirmed Errors - Field Description**" on page 248)



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

Viewing Carrier Transmission Records

The View function allows users to view carrier transmission records.

To View a Carrier Transmission Record:

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

CLER Payroll Office **Carrier** Forms Transmission Reports
Info IDs Enrollment Codes Contacts Errors Transmissions Enrollees

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

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

CLER Payroll Office **Carrier** Forms Transmission Reports
Info IDs Enrollment Codes Contacts Errors **Transmissions** Enrollees

Carrier Transmissions

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 ☐

SUBMIT **RESET**

Figure 58: Carrier Transmissions Page

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

Carrier ID (see "**Carrier ID - Field Instruction**" on page 241)



Year (see "**Year - (Reconciliation Year for Transmission Record) Field Instruction**" on page 351)

Quarter (see "**Quarter - (Reconciliation Quarter for Transmission Record) Field Instruction**" on page 324)

Order By

4. Select the **Submit** button to confirm all data entered. The Carrier Transmissions search results page is displayed.

OR

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

Carrier ID	Year	Quarter	Submission	Submission Date	Code	Status	Validation	Options
	2002	1	1	03/05/2002	Initial	000		View Validate
	2002	1	2	05/06/2002	Replace	000		View Validate
	2002	2	1	06/02/2002	Initial	000		View Validate
	2002	3	1	09/01/2002	Initial	000		View Validate
	2002	4	1	12/02/2002	Initial	000		View Validate
	2003	1	1	03/02/2003	Initial	000		View Validate
	2003	2	1	06/04/2003	Initial	000		View Validate
	2003	3	1	09/07/2003	Initial	000		View Validate
	2003	4	1	12/02/2003	Initial	000		View Validate
	2004	1	1	03/07/2004	Initial	000		View Validate
	2004	2	1	06/06/2004	Initial	000		View Validate
	2004	3	1	09/05/2004	Initial	404		View
	2004	3	2	09/05/2004	Replace	000		View Validate
	2004	4	1	12/05/2004	Initial	404		View
	2004	4	2	12/05/2004	Replace	000		View Validate
	2005	1	1	03/06/2005	Initial	000		View Validate
	2005	2	1	06/05/2005	Initial	000		View Validate

Figure 59: Carrier Transmissions Search Results Page

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

Carrier ID (see "**Carrier ID - Field Description**" on page 241)

Year (see "**Year - (Transmission Year Record) Field Description**" on page 351)

Quarter (see "**Quarter - Payroll Office Transmissions Search Results Field Description**" on page 324)

Submission (see "**Submission - (Number) Field Description**" on page 339)



Submission Date (see "**Submission Date - (Carrier Transmissions) Search Results Field Description**" on page 340)

Code (see "**Code - Carrier Transmissions Search Results Field Description**" on page 246)

Status (see "**Status - (Transmission Carrier) Field Description**" on page 339)

Validation (see "**Validation - Field Description**" on page 349)

Options (see "**Options - (View, Validate) Field Description**" on page 289)

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

Figure 60: Carrier Transmissions View Page

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

Carrier ID (see "**Carrier ID - Field Description**" on page 241)

Year (see "**Year - (Transmission Year Record) Field Description**" on page 351)

Quarter (see "**Quarter - Field Description**" on page 324)

Submission (see "**Submission - Field Description**" on page 339)

Submission Date (see "**Submission Date - Field Description**" on page 340)

As of Date (see "**As of Date - Carrier Transmissions Field Description**" on page 236)



Records Sent (see "***Records Sent - Field Description***" on page 328)

Records Received (see "***Records Received - Field Description***" on page 328)

Records Processed (see "***Records Processed - Field Description***" on page 328)

Date Processed (see "***Date Processed - Field Description***" on page 255)

Time Processed (see "***Time Processed - Field Description***" on page 342)

Code (see "***Code - Carrier Transmissions View Field Description***" on page 246)

Status (see "***Status - (Transmission Carrier) Field Description***" on page 339)

Email Date (see "***Email Date - Field Description***" on page 262)

Email Time (see "***Email Time - Field Description***" on page 263)

Last Validate Date (see "***Last Validate Date - Field Description***" on page 281)

Last Validate Time (see "***Last Validate Time - Field Description***" on page 281)

Last Validate ID (see "***Last Validate ID - Field Description***" on page 281)

Indicator (see "***Indicator - Field Description***" on page 273)

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

Viewing Carrier Enrollee Records

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



To View a Carrier Enrollee 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 61: Carrier Main Page

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

Carrier 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.

Carrier ID* Year* Quarter*

Payroll Office Enrollment Code SSN - from to

Last Name First Name Middle Name

Error Code Warning Code

101 201
102 202
120 203

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

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

SUBMIT RESET

Figure 62: Carrier Enrollees Page

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

Carrier ID (see "**Carrier ID - (Carrier Enrollees) Field Instruction**" on page 240)



Year (see "***Year - (Required) Field Instruction***" on page 351)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 323)

Payroll Office (see "***Payroll Office - Field Instruction***" on page 313)

Enrollment Code (see "***Enrollment Code - (Optional) Field Instruction***" on page 265)

SSN - from (see "***SSN From - Field Instruction***" on page 334)

SSN - to (see "***SSN To - Field Instruction***" on page 334)

Last Name (see "***Last Name - Enrollee Field Instruction***" on page 280)

First Name (see "***First Name - Enrollee Field Instruction***" on page 270)

Middle Name (see "***Middle Name - Field Instruction***" on page 283)

Error Code (see "***Error Code - (Select) Field Instruction***" on page 266)

Warning Code (see "***Warning Code - (Select) Field Instruction***" on page 350)

Display (see "***Display - (All Records) Field Instruction***" on page 257)

Order By 1st (see "***Order By 1st - (Enrollee) Field Instruction***" on page 293)

Order By 2nd (see "***Order By 2nd - Field Instruction***" on page 297)

Order By 3rd (see "***Order By 3rd - Field Instruction***" on page 300)

Order By 4th (see "***Order By 4th - Field Instruction***" on page 302)

Order By 5th (see "***Order By 5th - Field Instruction***" on page 304)

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



OR

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

Enrollee SSN	Last Name	First Name	Payroll Office	Code	Discrepancies	Fail Count	Options
XXXXXXXXXX	Doe	John A			160✓	1	View Validate
XXXXXXXXXX	Doe	John B			160✓	1	View Validate
XXXXXXXXXX	Doe	John C			160	2	View Validate
XXXXXXXXXX	Doe	John D				0	View
XXXXXXXXXX	Doe	John E				0	View
XXXXXXXXXX	Doe	John F			160✓	1	View Validate
XXXXXXXXXX	Doe	John G				0	View
XXXXXXXXXX	Doe	John H				0	View
XXXXXXXXXX	Doe	John I			160	2	View Validate

Figure 63: Carrier Enrollees Search Results Page

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

Carrier ID (see "*Carrier ID - Field Description*" on page 241)

Year/Quarter (see "*Year/Quarter - Field Description*" on page 352)

Enrollee SSN (see "*Enrollee SSN - Field Description*" on page 264)

Last Name (see "*Last Name - Enrollee Field Description*" on page 279)

First Name (see "*First Name - Enrollee Field Description*" on page 270)

Payroll Office (see "*Payroll Office ID - Field Description*" on page 315)

Code (see "*Code - Field Description*" on page 247)

Discrepancies (see "*Discrepancies - Field Description*" on page 256)

Fail Count (see "*Fail Count - Field Description*" on page 268)

Options (see "*Options - (View, Validate) Field Description*" on page 289)



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

CLER

Payroll Office Carrier Forms Transmission Reports

Info IDs Enrollment Codes Contacts Errors Transmissions Enrollees

Carrier Enrollees View

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

Carrier ID Year Quarter Submission

Payroll Office ID Enrollment Code SSN

Last Name First Name Middle Name

Effective Date of Coverage

Deceased Annuitant SSN Pseudo SSN Other Payroll ID Other Carrier ID

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

Date Processed Time Processed Source Fail Count

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 64: Carrier Enrollee Discrepancy Records View Page

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

Carrier ID (see "**Carrier ID - Field Description**" on page 241)

Year (see "**Year - Field Description**" on page 351)

Quarter (see "**Quarter - Field Description**" on page 324)

Submission (see "**Submission - (Payroll Office Enrollees) Reconcile Field Description**" on page 339)

Payroll Office ID (see "**Payroll Office ID - Field Description**" on page 315)



Enrollment Code (see "***Enrollment Code - Field Description***" on page 266)

SSN (see "***SSN - (Enrollee) Field Description***" on page 333)

Last Name (see "***Last Name - Enrollee Field Description***" on page 279)

First Name (see "***First Name - Enrollee Field Description***" on page 270)

Middle Name (see "***Middle Name - Enrollee Field Description***" on page 283)

Effective Date of Coverage (see "***Effective Date of Coverage - Field Description***" on page 261)

Deceased Annuitant SSN (see "***Deceased Annuitant SSN - Field Description***" on page 255)

Pseudo SSN (see "***Pseudo SSN - Field Description***" on page 322)

Other Payroll ID (see "***Other Payroll ID - Field Description***" on page 310)

Other Carrier ID (see "***Other Carrier ID - Field Description***" on page 308)

Submitter Use #1 (see "***Submitter Use #1 - Field Description***" on page 340)

Submitter Use #2 (see "***Submitter Use #2 - Field Description***" on page 341)

Submitter Use #3 (see "***Submitter Use #3 - Field Description***" on page 341)

Date Processed (see "***Date Processed - (Processed Run) Field Description***" on page 255)

Time Processed (see "***Time Processed - (Process Run) Field Description***" on page 342)

Source (see "***Source - Field Description***" on page 333)

Fail Count (see "***Fail Count - Field Description***" on page 268)

Discrepancy (see "***Discrepancy - (Explain/Duplicate - Code 166) Field Description***" on page 257)

Reconciliation Reason (see "***Reconciliation Reason - Field Description***" on page 326)

Reconciliation Action (see "***Reconciliation Action - Field Description***" on page 325)

Corrective Action (see "***Corrective Action (Code) - Field Description***" on page 251)

Payroll Office Comments (see "***Payroll Office Comments - Field Instruction***" on page 314)



Carrier Comments (see "**Carrier Comments - Field Instruction**" on page 240)

Last Payroll Update ID (see "**Last Payroll Update ID - Field Description**" on page 281)

Last Payroll Update Date (see "**Last Payroll Update Date - Field Description**" on page 280)

Last Payroll Update Time (see "**Last Payroll Update Time - Field Description**" on page 281)

Last Carrier Update ID (see "**Last Carrier Update ID - Field Description**" on page 275)

Last Carrier Update Date (see "**Last Carrier Update Date - Field Description**" on page 275)

Last Carrier Update Time (see "**Last Carrier Update Time - Field Description**" on page 275)

6. Select your browser's **Back** button to return to the Carrier Enrollees search results page to view another record. Select the **View** button next to the applicable record.

Viewing a Carrier Plan Contact Record

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

To View a Carrier Plan Contact Record:

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

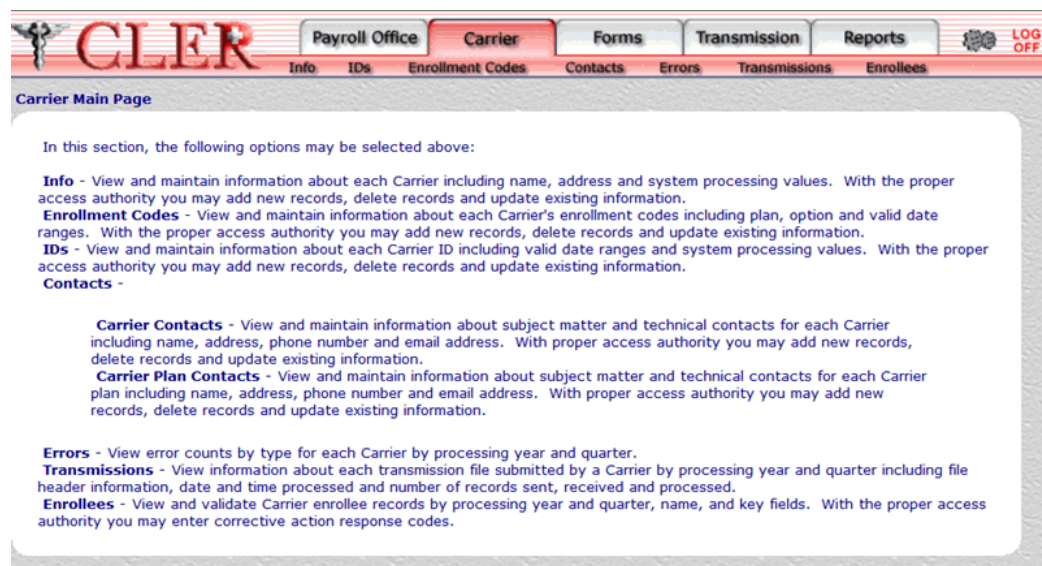


Figure 65: Carrier Main Page



2. Select **Contacts** on the Carrier Main Page. The Contacts Main Page is displayed.

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 66: Contacts Main Page

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

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 67: Carrier Plan Contacts Page

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

Carrier (see "**Carrier - Field Instruction**" on page 239)

Plan (see "**Plan - Field Instruction**" on page 318)

Type (see "**Type - (Carrier Contact) Field Instruction**" on page 347)

Display (see "**Display - (Carrier Code) Field Instruction**" on page 258)

Order By (see "**Order By - (Carrier - Plan Sort) Field Instruction**" on page 289)

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



OR

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

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

Figure 68: Carrier Plan Contacts Search Results Page

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

Carrier (see "*Carrier - Field Description*" on page 239)

Plan (see "*Plan - (Carrier) Field Description*" on page 318)

Type (see "*Type - (Carrier Plan Contact) Field Instruction*" on page 347)

Status (see "*Status - (Active/Inactive) Field Description*" on page 338)

Name (see "*Name - Carrier Plan Contact Field Description*" on page 284)

Phone (see "*Phone Number - (Carrier Plan Contact) Field Description*" on page 317)

Email (see "*Email - (Carrier Plan Contact) Field Description*" on page 261)

Options (see "*Options - (View, Activate, Update) Field Description*" on page 287)



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

Figure 69: Carrier Plan Contacts View Page

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

Carrier ID (see "***Carrier ID - Field Description***" on page 241)

Plan (see "***Plan - (Carrier) Field Description***" on page 318)

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

Role (see "***Role - (Carrier Plan Contact) Field Description***" on page 331)

Name (see "***Name - Carrier Plan Contact Field Description***" on page 284)

Address Line 1 (see "***Address Line 1 - Carrier Plan Contact Field Description***" on page 226)

Address Line 2 (see "***Address Line 2 - Carrier Plan Contact Field Description***" on page 228)



Address Line 3 (see "***Address Line 3 - Carrier Plan Contact Field Description***" on page 230)

City (see "***City - Carrier Plan Contact Field Description***" on page 243)

State (see "***State - (Carrier Plan Contact) Field Description***" on page 336)

Zip (see "***ZIP - (Carrier Plan Contact) Field Description***" on page 353)

Foreign Country (see "***Foreign Country (Carrier Plan Contact) - Field Description***" on page 270)

Phone Number (see "***Phone Number - (Carrier Plan Contact) Field Description***" on page 317)

Fax Number (see "***Fax Number - (Carrier Plan Contact) Field Description***" on page 268)

Email Address (see "***Email Address - (Carrier Plan Contact) Field Description***" on page 262)

Remarks (see "***Remarks - Field Description***" on page 330)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 275)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 275)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 276)

Note: To view another record, select your browser's **Back** button to return to the Carrier Plan Contacts search results page, then select the **View** button next to the applicable record.

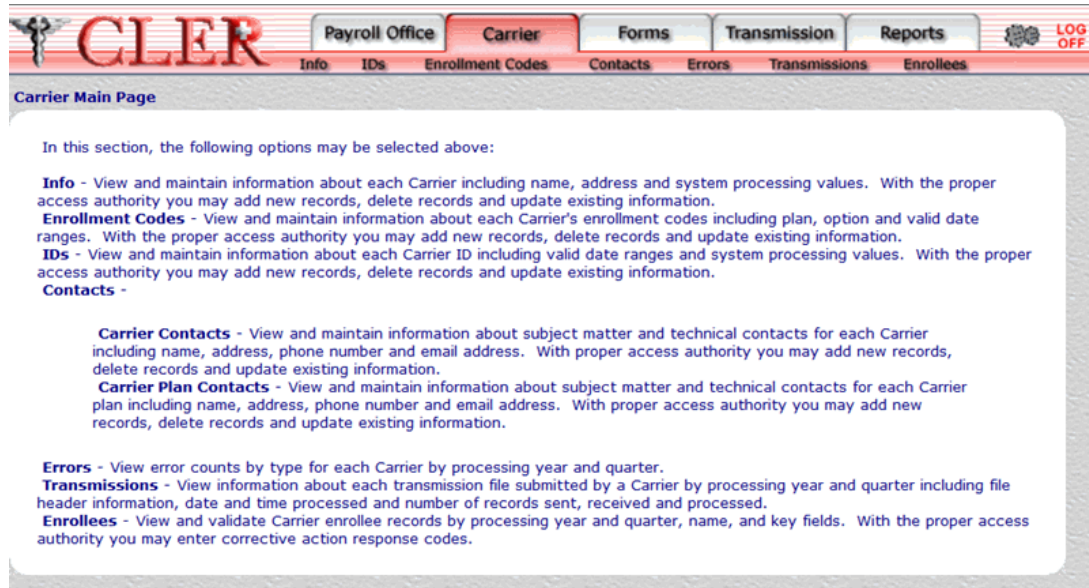


Viewing a Matching Carrier Enrollee Record or Duplicate Payroll Office Enrollee Record

The **Matching** button on the Carrier Enrollees View page allows users to view certain enrollee data from a payroll office enrollee record that matches a selected carrier enrollee record. Since there may be more than one matching payroll office enrollee record, a Matching button is displayed for each matching record. The **Duplicate** button next to the Discrepancy field on the Carrier Enrollees View page allows users to view data from another carrier enrollee record that was submitted for the same enrollee. The Matching and Duplicate functions facilitate the reconciliation process.

To View a Matching Carrier Enrollee Record or Duplicate Payroll Office Enrollee Record:

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





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

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

Carrier ID (see "**Carrier ID - (Carrier Enrollees) Field Instruction**" on page 240)

Year (see "**Year - (Required) Field Instruction**" on page 351)

Quarter (see "**Quarter - (Select) Field Instruction**" on page 323)

Payroll Office (see "**Payroll Office - Field Instruction**" on page 313)

Enrollment Code (see "**Enrollment Code - (Optional) Field Instruction**" on page 265)

SSN - from (see "**SSN From - Field Instruction**" on page 334)

SSN - to (see "**SSN To - Field Instruction**" on page 334)

Last Name (see "**Last Name - Enrollee Field Instruction**" on page 280)

First Name (see "**First Name - Enrollee Field Instruction**" on page 270)

Middle Name (see "**Middle Name - Field Instruction**" on page 283)

Error Code (see "**Error Code - (Select) Field Instruction**" on page 266)

Warning Code (see "**Warning Code - (Select) Field Instruction**" on page 350)



Display (see "**Display - (All Records) Field Instruction**" on page 257)

Order By 1st (see "**Order By 1st - (Enrollee) Field Instruction**" on page 293)

Order By 2nd (see "**Order By 2nd - Field Instruction**" on page 297)

Order By 3rd (see "**Order By 3rd - Field Instruction**" on page 300)

Order By 4th (see "**Order By 4th - Field Instruction**" on page 302)

Order By 5th (see "**Order By 5th - Field Instruction**" on page 304)

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

OR

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

Enrollee SSN	Last Name	First Name	Payroll Office	Code	Discrepancies	Fail Count	Options
XXXXXXXXXX	Doe	John A			160✓	1	View Validate
XXXXXXXXXX	Doe	John B			160✓	1	View Validate
XXXXXXXXXX	Doe	John C			160	2	View Validate
XXXXXXXXXX	Doe	John D				0	View
XXXXXXXXXX	Doe	John E				0	View
XXXXXXXXXX	Doe	John F			160✓	1	View Validate
XXXXXXXXXX	Doe	John G				0	View
XXXXXXXXXX	Doe	John H				0	View
XXXXXXXXXX	Doe	John I			160	2	View Validate

Figure 70: Carrier Enrollees Search Results Page

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

Carrier ID (see "**Carrier ID - Field Description**" on page 241)

Year/Quarter (see "**Year/Quarter - Field Description**" on page 352)

Enrollee SSN (see "**Enrollee SSN - Field Description**" on page 264)

Last Name (see "**Last Name - Enrollee Field Description**" on page 279)

First Name (see "**First Name - Enrollee Field Description**" on page 270)

Payroll Office (see "**Payroll Office ID - Field Description**" on page 315)



Code (see "*Code - Field Description*" on page 247)

Discrepancies (see "*Discrepancies - Field Description*" on page 256)

Fail Count (see "*Fail Count - Field Description*" on page 268)

Options (see "*Options - (View, Validate) Field Description*" on page 289)

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

CLER

Payroll Office Carrier Forms Transmission Reports

Info IDs Enrollment Codes Contacts Errors Transmissions Enrollees

Carrier Enrollees View

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

Carrier ID	Year	Quarter	Submission
	2018	1	2

Payroll Office ID	Enrollment Code	SSN
	JN4	

Last Name	First Name	Middle Name

Effective Date of Coverage

01 01 2014

Deceased Annuitant SSN	Pseudo SSN	Other Payroll ID	Other Carrier ID

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

Date Processed	Time Processed	Source	Fail Count
03 23 2018	19:42:42		0

Select another discrepancy:

Discrepancy	
Reconciliation Reason	
Reconciliation Action	
Corrective Action	

Payroll Office Comments (400 character max)

Carrier Comments (400 character max)

ID	Date	Time

Last Payroll Update:

Last Carrier Update:

Figure 71: Carrier Enrollees View Matching Payroll Office - Carrier Page

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

Carrier ID (see "*Carrier ID - Field Description*" on page 241)



Year (see "***Year - Field Description***" on page 351)

Quarter (see "***Quarter - Field Description***" on page 324)

Submission (see "***Submission - (Payroll Office Enrollees) Reconcile Field Description***" on page 339)

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 315)

Enrollment Code (see "***Enrollment Code - Field Description***" on page 266)

SSN (see "***SSN - (Enrollee) Field Description***" on page 333)

Last Name (see "***Last Name - Enrollee Field Description***" on page 279)

First Name (see "***First Name - Enrollee Field Description***" on page 270)

Middle Name (see "***Middle Name - Enrollee Field Description***" on page 283)

Effective Date of Coverage (see "***Effective Date of Coverage - Field Description***" on page 261)

Deceased Annuitant SSN (see "***Deceased Annuitant SSN - Field Description***" on page 255)

Pseudo SSN (see "***Pseudo SSN - Field Description***" on page 322)

Other Payroll ID (see "***Other Payroll ID - Field Description***" on page 310)

Other Carrier ID (see "***Other Carrier ID - Field Description***" on page 308)

Submitter Use #1 (see "***Submitter Use #1 - Field Description***" on page 340)

Submitter Use #2 (see "***Submitter Use #2 - Field Description***" on page 341)

Submitter Use #3 (see "***Submitter Use #3 - Field Description***" on page 341)

Date Processed (see "***Date Processed - (Processed Run) Field Description***" on page 255)

Time Processed (see "***Time Processed - (Process Run) Field Description***" on page 342)

Source (see "***Source - Field Description***" on page 333)

Fail Count (see "***Fail Count - Field Description***" on page 268)

Discrepancy (see "***Discrepancy - (Explain/Duplicate - Code 166) Field Description***" on page 257)



Reconciliation Reason (see "***Reconciliation Reason - Field Description***" on page 326)

Reconciliation Action (see "***Reconciliation Action - Field Description***" on page 325)

Corrective Action (see "***Corrective Action (Code) - Field Description***" on page 251)

Payroll Office Comments (see "***Payroll Office Comments - Field Instruction***" on page 314)

Carrier Comments (see "***Carrier Comments - Field Instruction***" on page 240)

Last Payroll Update ID (see "***Last Payroll Update ID - Field Description***" on page 281)

Last Payroll Update Date (see "***Last Payroll Update Date - Field Description***" on page 280)

Last Payroll Update Time (see "***Last Payroll Update Time - Field Description***" on page 281)

Last Carrier Update ID (see "***Last Carrier Update ID - Field Description***" on page 275)

Last Carrier Update Date (see "***Last Carrier Update Date - Field Description***" on page 275)

Last Carrier Update Time (see "***Last Carrier Update Time - Field Description***" on page 275)

Note: If the carrier enrollee record data displayed on the Carrier Enrollees View page is matched with the data from another carrier enrollee record, Discrepancy Code **166** is displayed in the Discrepancy field. When this discrepancy occurs, the Duplicate button is displayed next to the Discrepancy field. Select **Duplicate** to display the Carrier Enrollees View page containing the data from the matching carrier enrollee record. 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.



6. Select **Matching** on the Carrier Enrollees View page. The Payroll Office Enrollees View page containing the data from the matching payroll office enrollee record is displayed.

CLER

Payroll Office Carrier Forms Transmission Reports

Info Contacts Errors Transmissions Enrollees

Carrier Enrollees View

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

Carrier ID Year Quarter Submission

2018 1 2

Payroll Office ID Enrollment Code SSN

JN4

Last Name First Name Middle Name

Effective Date of Coverage

01 01 2014

Deceased Annuitant SSN Pseudo SSN Other Payroll ID Other Carrier ID

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

Date Processed Time Processed Source Fail Count

03 23 2018 19:42:42 0

Select another discrepancy:

Discrepancy

Reconciliation Reason

Reconciliation Action

Corrective Action

Payroll Office Comments (400 character max)

Carrier Comments (400 character max)

ID Date Time

Last Payroll Update:

Last Carrier Update:

Figure 72: Carrier Enrollees View Matching Payroll Office - Payroll Page

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.

Carrier ID (see "**Carrier ID - Field Description**" on page 241)

Year (see "**Year - Field Description**" on page 351)

Quarter (see "**Quarter - Field Description**" on page 324)

Submission (see "**Submission - (Payroll Office Enrollees) Reconcile Field Description**" on page 339)



Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 315)

Enrollment Code (see "***Enrollment Code - Field Description***" on page 266)

SSN (see "***SSN - (Enrollee) Field Description***" on page 333)

Last Name (see "***Last Name - Enrollee Field Description***" on page 279)

First Name (see "***First Name - Enrollee Field Description***" on page 270)

Middle Name (see "***Middle Name - Enrollee Field Description***" on page 283)

Effective Date of Coverage (see "***Effective Date of Coverage - Field Description***" on page 261)

Deceased Annuitant SSN (see "***Deceased Annuitant SSN - Field Description***" on page 255)

Pseudo SSN (see "***Pseudo SSN - Field Description***" on page 322)

Other Payroll ID (see "***Other Payroll ID - Field Description***" on page 310)

Other Carrier ID (see "***Other Carrier ID - Field Description***" on page 308)

Submitter Use #1 (see "***Submitter Use #1 - Field Description***" on page 340)

Submitter Use #2 (see "***Submitter Use #2 - Field Description***" on page 341)

Submitter Use #3 (see "***Submitter Use #3 - Field Description***" on page 341)

Date Processed (see "***Date Processed - (Processed Run) Field Description***" on page 255)

Time Processed (see "***Time Processed - (Process Run) Field Description***" on page 342)

Source (see "***Source - Field Description***" on page 333)

Fail Count (see "***Fail Count - Field Description***" on page 268)

Discrepancy (see "***Discrepancy - (Explain/Duplicate - Code 166) Field Description***" on page 257)

Reconciliation Reason (see "***Reconciliation Reason - Field Description***" on page 326)

Reconciliation Action (see "***Reconciliation Action - Field Description***" on page 325)

Corrective Action (see "***Corrective Action (Code) - Field Description***" on page 251)



Payroll Office Comments (see "***Payroll Office Comments - Field Instruction***" on page 314)

Carrier Comments (see "***Carrier Comments - Field Instruction***" on page 240)

Last Payroll Update ID (see "***Last Payroll Update ID - Field Description***" on page 281)

Last Payroll Update Date (see "***Last Payroll Update Date - Field Description***" on page 280)

Last Payroll Update Time (see "***Last Payroll Update Time - Field Description***" on page 281)

Last Carrier Update ID (see "***Last Carrier Update ID - Field Description***" on page 275)

Last Carrier Update Date (see "***Last Carrier Update Date - Field Description***" on page 275)

Last Carrier Update Time (see "***Last Carrier Update Time - Field Description***" on page 275)

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



Forms Records

The **Forms** option allows users to view forms information.

This section includes the following topics:

Viewing a 2809 Record.....	105
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Viewing a 2809 Record

The **View** function allows users to view 2809 records.

To View a 2809 Record:

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

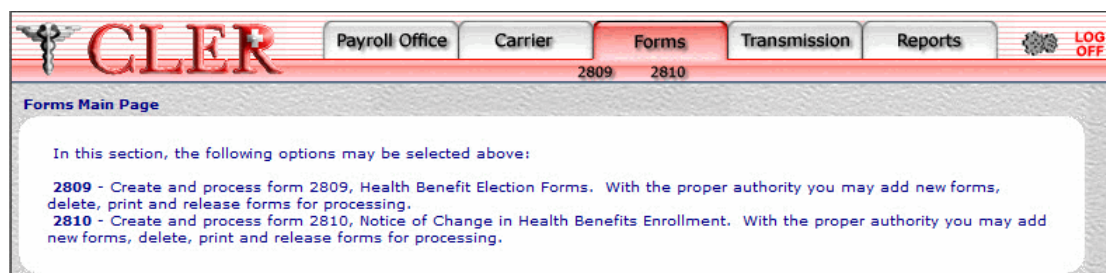


Figure 73: Forms Main Page



2. Select **2809** at the top on the Form Main page. The Form 2809 page is displayed.

Figure 74: Form 2809 Page

3. Complete the following fields on the Form 2809 page:

Payroll Office ID (see "**Payroll Office ID - (Select - Required) Field Instruction**" on page 315)

Year (see "**Year - (Required) Field Instruction**" on page 351)

Quarter (see "**Quarter - (Select) Field Instruction**" on page 323)

Agency ID (see "**Agency ID - Field Instruction**" on page 234)

POI (see "**POI - Field Description**" on page 319)

Enrollment Code (see "**Enrollment Code - Field Instruction**" on page 266)

SSN (see "**SSN - Field Instruction**" on page 334)

User ID (see "**User ID - (Form) Field Instruction**" on page 349)

Last Name (see "**Last Name - Enrollee Field Instruction**" on page 280)

First Name (see "**First Name - Enrollee Field Instruction**" on page 270)

Initial (see "**Initial - Field Instruction**" on page 274)



Display (see "**Display - (All) Field Instruction**" on page 258)

Order By (see "**Order By - (Agency ID) Field Instruction**" on page 289)

4. Select the **Submit** button to confirm all data entered. The Form 2809 search results page is displayed.

OR

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

The screenshot shows the 'Form 2809' search results page. At the top, there is a navigation bar with tabs for 'Payroll Office', 'Carrier', 'Forms', 'Transmission', and 'Reports'. The 'Forms' tab is selected, and it shows '2809' and '2810' under it. To the right of the navigation bar is a 'LOG OFF' button. Below the navigation bar, the page title is 'Form 2809'. The main content area contains a search form with the following fields: 'Payroll Office ID' (with a value of '2015/1'), 'Year/Quarter' (with a value of '2015/1'), 'Enrollee SSN' (with a value of 'XXXXXXXX'), 'Last Name', 'First Name', 'Release Date' (with a value of '7/31/2015'), 'Released By', 'Status' (with a value of 'Released'), and 'Options'. Below the search form, there is a table with one row of data. The table has columns for 'Enrollee SSN', 'Last Name', 'First Name', 'Release Date', 'Released By', 'Status', and 'Options'. The data row shows 'XXXXXXXX', 'Last Name', 'First Name', '7/31/2015', 'Released By', 'Released', and 'View' and 'Cancel' buttons. Below the table, it says 'Records Found: 1'.

Figure 75: Form 2809 Search Results Page

The data on the Form 2809 search results page is categorized into the following fields:

Payroll Office ID (see "**Payroll Office ID - Field Description**" on page 315)

Year/Quarter (see "**Year/Quarter - Field Description**" on page 352)

Enrollee SSN (see "**Enrollee SSN - Field Description**" on page 264)

Last Name (see "**Last Name - Enrollee Field Description**" on page 279)

First Name (see "**First Name - Enrollee Field Description**" on page 270)

Release Date (see "**Release Date - (Form 2809 Search Results) Field Description**" on page 329)

Released By (see "**Released By - Field Description**" on page 329)

Status (see "**Status - (Processed, Canceled, Released, Not Released) Field Description**" on page 339)

Options (see "**Options - (View, Update, Cancel) Field Description**" on page 288)



5. Select the **View** button next to the applicable record. The Form 2809 View (Part A) page is displayed.

CLER Payroll Office Carrier **Forms** Transmission Reports 2809 2810 LOG OFF

Form 2809 View

Use the browser Back arrow to select another record to view. To cancel the release of this form for processing, click the **Cancel** button.

[Part A](#) [Part A Continued](#) [Parts B - H](#) [Part I](#)

Payroll Office ID **Year** **Quarter** **Personnel Office ID** (Enter this item only if your access is limited to specific POI's.)

Nature of Action ☒ **START** ☐ **CHANGE** ☐ **STOP**

Part A

Last Name **First Name** **Initial**

Address

City **State** **Zip**

Foreign Country

SSN **Date of Birth** **Sex** **Married**

Other Insurance **Policyholder** **Last Name** **First Name** **Initial**

You **Spouse** **Medicare:** **TRICARE/CHAMPUS** **Other** **Name**

Last Changed: **ID** **Date** **Time**

Released:

Processed:

Figure 76: Form 2809 View Part A Page

The data on the Form 2809 View page is categorized into the following fields:

Payroll Office ID (see "**Payroll Office ID - Field Description**" on page 315)

Year (see "**Year - (Reconciliation Year) Field Description**" on page 351)

Quarter (see "**Quarter - (Reconciliation Quarter) Field Description**" on page 323)



Personnel Office ID (see "***Personnel Office ID - Field Description***" on page 316)

Nature of Action (see "***Nature of Action - Field Description***" on page 285)

The data on the Form 2809 View Part A is categorized into the following fields:

Last Name (see "***Last Name - Enrollee Field Description***" on page 279)

First Name (see "***First Name - Enrollee Field Description***" on page 270)

Initial (see "***Initial - Field Description***" on page 274)

Address Line 1 (see "***Address Line 1 - Enrollee Field Description***" on page 226)

Address Line 2 (see "***Address Line 2 - Enrollee Field Description***" on page 228)

Address Line 3 (see "***Address Line 3 - Enrollee Field Description***" on page 231)

City (see "***City - Enrollee Field Description***" on page 244)

State (see "***State - (Enrollee) Field Description***" on page 336)

Zip (see "***ZIP - (Enrollee) Field Description***" on page 353)

Foreign Country (see "***Foreign Country - Form 2809 View (Part A) Field Description***" on page 272)

SSN (see "***SSN - (Enrollee) Field Description***" on page 333)

Date of Birth (see "***Date of Birth (Enrollee) - Field Description***" on page 254)

Sex (see "***Sex - (Enrollee) Field Description***" on page 332)

Married (see "***Married - (Enrollee) Field Description***" on page 282)

Other Insurance (see "***Other Insurance - Field Description***" on page 310)

Policyholder Last Name (see "***Policyholder Last Name - Field Description***" on page 320)

Policyholder First Name (see "***Policyholder First Name - Field Description***" on page 319)

Policyholder Initial (see "***Policyholder Initial - Field Description***" on page 320)

Medicare You (see "***Medicare You - Field Description***" on page 283)

Medicare Spouse (see "***Medicare Spouse - Field Description***" on page 282)



TRICARE/CHAMPUS (see "**TRICARE/CHAMPUS - Field Description**" on page 346)

Other (see "**Other - Field Description**" on page 308)

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

Last Changed ID (see "**Last Changed ID - (Payroll Office) Field Description**" on page 275)

Last Changed Date (see "**Last Changed Date - (Payroll Office) Field Description**" on page 275)

Last Changed Time (see "**Last Changed Time - (Payroll Office) Field Description**" on page 276)

Released ID (see "**Released ID - Field Description**" on page 330)

Released Date (see "**Released Date - Field Description**" on page 329)

Released Time (see "**Released Time - Field Description**" on page 330)

Processed Date (see "**Processed Date - Field Description**" on page 321)

Processed Time (see "**Processed Time - Field Description**" on page 322)



6. Select **Part A Continued**. The Form 2809 Part A Continued is displayed.

Form 2809 View

Use the browser Back arrow to select another record to view. To cancel the release of this form for processing, click the **Cancel** button.

[Part A](#) [Part A Continued](#) [Parts B - H](#) [Part I](#)

Part A Continued

	Last Name	First Name	Initial	Date of Birth	Code	SSN	Sex	Zip
1.					9	XXXXXXXXXX	M <input type="radio"/> F <input checked="" type="radio"/>	
2.					1	XXXXXXXXXX	M <input checked="" type="radio"/> F <input type="radio"/>	
3.							M <input type="radio"/> F <input type="radio"/>	
4.							M <input type="radio"/> F <input type="radio"/>	
5.							M <input type="radio"/> F <input type="radio"/>	
6.							M <input type="radio"/> F <input type="radio"/>	
7.							M <input type="radio"/> F <input type="radio"/>	
8.							M <input type="radio"/> F <input type="radio"/>	
9.							M <input type="radio"/> F <input type="radio"/>	
10.							M <input type="radio"/> F <input type="radio"/>	

Relationship Codes
 01 - Spouse
 09 - Adopted Child
 10 - Foster Child
 17 - Stepchild
 19 - Unmarried dependent child under age 22
 99 - Eligible unmarried disabled child over age 22

Figure 77: Form 2809 View Part A Continued Page

The data on the Form 2809 View Part A Continued is categorized into the following fields:

Last Name (see "**Last Name - Form 2809 View (Part A Continued) Field Description**" on page 280)

First Name (see "**First Name - Form 2809 View (Part A Continued) Field Description**" on page 270)

Initial (see "**Initial - Form 2809 View (Part A Continued) Field Description**" on page 274)

Date of Birth (see "**Date of Birth - Form 2809 View (Part A Continued) Field Description**" on page 254)

Code (see "**Code - Form 2809 View (Part A Continued) Field Description**" on page 247)



- SSN* (see "*SSN - Form 2809 View (Part A Continued) Field Description*" on page 334)
- Sex* (see "*Sex - Form 2809 View (Part A Continued) Field Description*" on page 333)
- Zip* (see "*ZIP - Form 2809 View (Part A Continued) Field Description*" on page 354)
7. Select **Parts B through H** to display the Form 2809 View (Parts B through H) page.

The screenshot shows the CLER Form 2809 View page. The top navigation bar includes links for Payroll Office, Carrier, Forms (selected), Transmission, and Reports. Below the navigation bar, the page title is "Form 2809 View". A message states: "Use the browser Back arrow to select another record to view. To cancel the release of this form for processing, click the **Cancel** button." Below this message are links for Part A, Part A Continued, Parts B - H (selected), and Part I. The main content area is divided into sections for Part B, Part C, Part D, Part E, Part F, Part G, and Part H. Part B contains fields for Present Plan Name and Present Enrollment Code. Part C contains fields for New Plan Name and New Enrollment Code. Part D contains a dropdown for Event That Permits Change and a date field. Part E, Part F, and Part G are marked as "Not applicable to CLER". Part H contains fields for Date of Action and Phone.

Part B	
Present Plan Name	Present Enrollment Code

Part C	
New Plan Name	New Enrollment Code

Part D	
Event That Permits Change	Date

Part H	
Date of Action	Phone

Figure 78: Form 2809 View Page Parts B - H

The data on the Form 2809 View Part B is categorized into the following fields:

Present Plan Name (see "*Present Plan Name - Field Description*" on page 321)

Present Enrollment Code (see "*Present Enrollment Code - (Enrollee) Field Description*" on page 321)

The data on the Form 2809 View Part C is categorized into the following fields:

New Plan Name (see "*New Plan Name - Field Description*" on page 286)



New Enrollment Code (see "***New Enrollment Code - Field Description***" on page 286)

The data on the Form 2809 View Part D is categorized into the following fields:

Event That Permits Change (see "***Event That Permits Change - Field Description***" on page 267)

Date (see "***Date - Form 2809 View (Parts C and D) Field Description***" on page 253)

The Form 2809 View Part E field is not applicable to CLER.

The Form 2809 View Part F field denotes Cancellation = Nature of Transaction STOP.

The Form 2809 View Part G field is not applicable to CLER.

The data on the Form 2809 View Part H is categorized into the following fields:

Date of Action (see "***Date of Action - Field Description***" on page 253)

Phone (see "***Phone - (Enrollee) Field Description***" on page 317)



8. Select **Part I** to display the Form 2809 View (Part I) page.

CLER

Payroll Office Carrier **Forms** Transmission Reports

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Form 2809 View

Use the browser Back arrow to select another record to view. To cancel the release of this form for processing, click the **Cancel** button.

[Part A](#) [Part A Continued](#) [Parts B - H](#) [Part I](#)

Part I

Agency Name
USDA, OCFO, NFC

Address
13800 Old Gentilly Rd

City **State** **Zip**
New Orleans LA 70129

Foreign Country

Agency ID **Personnel Office ID**
90 5777

Authorized Official:

Last Name	First Name	Initial
Pelican	B	

CONTACT:

Last Name	First Name	Initial	Phone
Gator	A		5047777777
Praline	C		5047777778

Effective Date **Date Received**
07/31/2015 07/31/2015

Report #

Remarks (400 character max)
form complete

Figure 79: Form 2809 View Page Part I

The data on the Form 2809 View Part I is categorized into the following fields:

Agency Name (see "*Agency Name - Field Description*" on page 234)

Address Line 1 (see "*Address Line 1 - Coordinator Field Description*" on page 226)

Address Line 2 (see "*Address Line 2 - Coordinator Field Description*" on page 228)



Address Line 3 (see "***Address Line 3 - Coordinator Field Description***" on page 230)

City (see "***City - Coordinator Field Description***" on page 243)

State (see "***State - (Coordinator) Field Description***" on page 336)

Zip (see "***ZIP - (Coordinator) Field Description***" on page 353)

Foreign Country (see "***Foreign Country - (Enrollee Point of Contact) Field Description***" on page 271)

Agency ID (see "***Agency ID - Field Description***" on page 234)

Personnel Office ID (see "***Personnel Office ID - Enrollee Field Description***" on page 316)

Authorized Official Last Name (see "***Authorized Official - Last Name (SF 2809) Field Description***" on page 238)

Authorized Official First Name (see "***Authorized Official - First Name (SF 2809) Field Description***" on page 237)

Authorized Official Initial (see "***Authorized Official - Initial (SF 2809) Field Description***" on page 238)

Contact (Personnel) Last Name (see "***Contact (Personnel) Last Name - Field Description***" on page 250)

Contact (Personnel) First Name (see "***Contact (Personnel) First Name - Field Description***" on page 249)

Contact (Personnel) Initial (see "***Contact (Personnel) Initial - Field Description***" on page 250)

Contact (Personnel) Phone (see "***Contact (Personnel) Phone - Field Description***" on page 250)

Contact (Payroll) Last Name (see "***Contact (Payroll) Last Name - Field Description***" on page 248)

Contact (Payroll) First Name (see "***Contact (Payroll) First Name - Field Description***" on page 248)

Contact (Payroll) Initial (see "***Contact (Payroll) Initial - Field Description***" on page 248)

Contact (Payroll) Phone (see "***Contact (Payroll) Phone - Field Description***" on page 249)



Effective Date (see "**Effective Date - (Action) Field Description**" on page 260)

Date Received (see "**Date Received - Form 2809 View (Part I) Field Description**" on page 255)

Report # (see "**Report # - Field Description**" on page 330)

Remarks (see "**Remarks - Field Description**" on page 330)

Note: To view another record, select your browser's **Back** button to return to the Form 2809 search results page, then select the **View** button next to the applicable record.

Viewing a 2810 Record

The **View** function allows users to view 2810 records.

To View a 2810 Record:

1. Select **Forms** tab on the CLER Main Menu. Select **2810** on the Forms Main page. The Form 2810 page is displayed.

Figure 80: Form 2810 Search Page

2. Complete the following fields on the Form 2810 page:

Payroll Office ID (see "**Payroll Office ID - (Select - Required) Field Instruction**" on page 315)

Year (see "**Year - (Required) Field Instruction**" on page 351)



Quarter (see "**Quarter - (Select) Field Instruction**" on page 323)

Agency ID (see "**Agency ID - Field Instruction**" on page 234)

POI (see "**POI - Field Description**" on page 319)

Enrollment Code (see "**Enrollment Code - Field Instruction**" on page 266)

SSN (see "**SSN - Field Instruction**" on page 334)

User ID (see "**User ID - (Form) Field Instruction**" on page 349)

Last Name (see "**Last Name - Enrollee Field Instruction**" on page 280)

First Name (see "**First Name - Enrollee Field Instruction**" on page 270)

Initial (see "**Initial - Field Instruction**" on page 274)

Display (see "**Display - (All) Field Instruction**" on page 258)

Order By (see "**Order By - (Agency ID) Field Instruction**" on page 289)

3. Select the **Submit** button to confirm the data entered. The Form 2810 Search Results page is displayed.

OR

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

Enrollee SSN	Last Name	First Name	Release Date	Released By	Status	Options
000000000	DOE	Jon			Not Released	View Update Release
555555555	test	test			Not Released	View Update Release

Records Found: 2

Figure 81: Form 2810 Search Results Page

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

Payroll Office ID (see "**Payroll Office ID - Field Description**" on page 315)

Year/Quarter (see "**Year/Quarter - Field Description**" on page 352)

Enrollee SSN (see "**Enrollee SSN - Field Description**" on page 264)



- Last Name** (see "**Last Name - Enrollee Field Description**" on page 279)
- First Name** (see "**First Name - Enrollee Field Description**" on page 270)
- Release Date** (see "**Release Date - (Form 2809 Search Results) Field Description**" on page 329)
- Released By** (see "**Released By - Field Description**" on page 329)
- Status** (see "**Status - (Processed, Canceled, Released, Not Released) Field Description**" on page 339)
- Options** (see "**Options - (View, Update, Cancel) Field Description**" on page 288)
4. Select the **View** button next to the applicable record. The Form 2810 View (Part A) page is displayed.

The screenshot displays the 'Form 2810 View' page in the CLER system. The top navigation bar includes 'Payroll Office', 'Carrier', 'Forms', 'Transmission', and 'Reports'. The 'Forms' tab is active, showing '2809' and '2810'. Below the navigation bar, the page title is 'Form 2810 View'. A message states: 'Use the browser Back arrow to select another record to view.' Below this, there are links for 'Part A', 'Part B thru F', and 'Part G thru H'. The main section is titled 'Part A - Identifying Information'. It contains several input fields and dropdown menus: 'Payroll Office ID' (dropdown), 'Year' (dropdown with '2016' selected), 'Quarter' (dropdown with '2' selected), 'Personnel Office ID' (text field), 'Last Name' (text field), 'First Name' (text field), 'Initial' (text field), 'Address' (text area), 'City' (text field), 'State' (dropdown), 'Zip' (text field), 'Foreign Country' (dropdown), 'SSN' (text field), 'Date of Birth' (text field), 'Enrollment Code' (text field), 'Enrollment ID' (text field), 'Effective Date' (text field with '01/01/2016' entered), 'Annuity Claim #' (text field), 'Survivor Annuity Claim #' (text field), 'Report #' (text field), 'Last Changed' (text field with '07/27/2016' entered), 'Released' (text field), and 'Processed' (text field). A 'LOG OFF' button is visible in the top right corner.

Figure 82: Form 2810 View Page Part A

The data on the Form 2810 View Part A page is categorized into the following fields:

- Payroll Office ID** (see "**Payroll Office ID - Field Description**" on page 315)
- Year** (see "**Year - (Reconciliation) 2810 Form Field Description**" on page 351)
- Quarter** (see "**Quarter - (Reconciliation 2810 Form) Field Description**" on page 323)



Personnel Office ID (see "***Personnel Office ID - Field Description***" on page 316)

Last Name (see "***Last Name - Enrollee Field Description***" on page 279)

First Name (see "***First Name - Enrollee Field Description***" on page 270)

Initial (see "***Initial - Field Description***" on page 274)

Address Line 1 (see "***Address Line 1 - Enrollee Field Description***" on page 226)

Address Line 2 (see "***Address Line 2 - Enrollee Field Description***" on page 228)

Address Line 3 (see "***Address Line 3 - Enrollee Field Description***" on page 231)

City (see "***City - Enrollee Field Description***" on page 244)

State (see "***State - (Enrollee) Field Description***" on page 336)

Zip (see "***ZIP - (Enrollee) Field Description***" on page 353)

Foreign Country (see "***Foreign Country - (Enrollee) Field Description***" on page 271)

SSN (see "***SSN - (Enrollee) Field Description***" on page 333)

Date of Birth (see "***Date of Birth (Enrollee) - Field Description***" on page 254)

Enrollment Code (see "***Enrollment Code - Field Description***" on page 266)

Enrollment ID (see "***Enrollment ID - Field Description***" on page 266)

Effective Date (see "***Effective Date - Field Description***" on page 260)

Annuity Claim # (see "***Annuity Claim # - Form 2810 View (Part A) Field Description***" on page 236)

Survivor Annuity Claim # (see "***Survivor Annuity Claim # - Field Description***" on page 341)

Report # (see "***Report # - Field Description***" on page 330)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 275)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 275)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 276)

Released ID (see "***Released ID - Field Description***" on page 330)

Released Date (see "***Released Date - Field Description***" on page 329)



- Released Time** (see "**Released Time - Field Description**" on page 330)
- Processed Date** (see "**Processed Date - Field Description**" on page 321)
- Processed Time** (see "**Processed Time - Field Description**" on page 322)
5. Select **Part B through F** to display the Form 2810 View Part B through F page.

Figure 83: Form 2810 View Page Part B thru F

The data on the Form 2810 View page Part B - Termination is shown as indicated below.

Part B - Termination (see "**Part B - Termination - Field Description**" on page 310)

The data on the Form 2810 View page Part C - Transfer In is shown as indicated below.

Part C - Transfer In (see "**Part C - Transfer In - Field Description**" on page 311)

The data on the Form 2810 View page Part D - Reinstatement is shown as indicated below.

Part D - Reinstatement (see "**Part D - Reinstatement - Field Description**" on page 311)

The data on the Form 2810 View page Part E - Change of Enrollee Information is categorized into the following fields:

Part E - Change of Enrollee Information (see "**Part E - Change of Enrollee Information - Field Description**" on page 311)



Last Name (see "***Last Name - (Enrollee/Survivor) Field Description***" on page 279)

First Name (see "***First Name - (Enrollee New/Survivor) Field Description***" on page 269)

Initial (see "***Initial - (Enrollee New/Survivor) Field Description***" on page 274)

Address Line 1 (see "***Address Line 1 - Enrollee/Survivor Field Description***" on page 226)

Address Line 2 (see "***Address Line 2 - Enrollee/Survivor Field Description***" on page 228)

Address Line 3 (see "***Address Line 3 - Enrollee/Survivor Field Description***" on page 231)

City (see "***City - Enrollee/Survivor Field Description***" on page 244)

State (see "***State - (Enrollee/Survivor) Field Description***" on page 337)

Zip (see "***ZIP - (Enrollee/Survivor) Field Description***" on page 354)

Foreign Country (see "***Foreign Country - (Enrollee/Survivor) Field Description***" on page 271)

Date of Birth (see "***Date of Birth (Enrollee/Survivor) - Field Description***" on page 254)

SSN (see "***SSN - (Enrollee/Survivor) Field Description***" on page 333)

Sex (see "***Sex - (Enrollee/Survivor) Field Description***" on page 332)

The data on the Form 2810 View page Part F - Change in Enrollment/Survivor Annuitant is shown as indicated below.

Part F - Change in Enrollment/Survivor Annuitant (see "***Part F - Change in Enrollment/Survivor Annuitant - Field Description***" on page 312)

New Enrollment Code Number (see "***New Enrollment Code Number - (Survivor Annuitant) Field Description***" on page 286)



6. Select **Part G thru H** to display the Form 2810 View Part G thru H page.

CLER Payroll Office Carrier Forms Transmission Reports LOG OFF

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Form 2810 View

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

[Part A](#) [Part B thru F](#) [Part G thru H](#)

Part G - Remarks

Remarks (400 character max)

Date of Death (if applicable)

Part H - Date of Notice

Agency Name

Address

City State Zip

Foreign Country

Agency ID Personnel Office ID Agency Use

Authorized Official: Last Name First Name Initial Date

CONTACT: Last Name First Name Initial Phone

Personnel: Last Name First Name Initial Phone

Payroll: Last Name First Name Initial Phone

Figure 84: Form 2810 View Page Part G thru H

The data on the Form 2810 View page Part G - Remarks is categorized into the following fields:

Remarks (see "**Remarks - Field Description**" on page 330)

Date of Death (see "**Date of Death - Field Description**" on page 255)

The data on the Form 2810 View page Part H - Date of Notice is categorized into the following fields:

Agency Name (see "**Agency Name - Field Description**" on page 234)

Address Line 1 (see "**Address Line 1 - Coordinator Field Description**" on page 226)

Address Line 2 (see "**Address Line 2 - Coordinator Field Description**" on page 228)

Address Line 3 (see "**Address Line 3 - Coordinator Field Description**" on page 230)

City (see "**City - Coordinator Field Description**" on page 243)

State (see "**State - (Coordinator) Field Description**" on page 336)

Zip (see "**ZIP - (Coordinator) Field Description**" on page 353)



Foreign Country (see "***Foreign Country - (Enrollee Point of Contact) Field Description***" on page 271)

Agency ID (see "***Agency ID - Field Description***" on page 234)

Personnel Office ID (see "***Personnel Office ID - Enrollee Field Description***" on page 316)

Agency Use (see "***Agency Use - Field Description***" on page 234)

Authorized Official Last Name (see "***Authorized Official - Last Name (SF 2809) Field Description***" on page 238)

Authorized Official First Name (see "***Authorized Official - First Name (SF 2809) Field Description***" on page 237)

Authorized Official Initial (see "***Authorized Official - Initial (SF 2809) Field Description***" on page 238)

Authorized Official Date (see "***Authorized Official Date Signed - Form 2810 View (Part H) Field Description***" on page 238)

Contact (Personnel) Last Name (see "***Contact (Personnel) Last Name - Field Description***" on page 250)

Contact (Personnel) First Name (see "***Contact (Personnel) First Name - Field Description***" on page 249)

Contact (Personnel) Initial (see "***Contact (Personnel) Initial - Field Description***" on page 250)

Contact (Personnel) Phone (see "***Contact (Personnel) Phone - Field Description***" on page 250)

Contact (Payroll) Last Name (see "***Contact (Payroll) Last Name - Field Description***" on page 248)

Contact (Payroll) First Name (see "***Contact (Payroll) First Name - Field Description***" on page 248)

Contact (Payroll) Initial (see "***Contact (Payroll) Initial - Field Description***" on page 248)

Contact (Payroll) Phone (see "***Contact (Payroll) Phone - Field Description***" on page 249)

Note: To view another record, select your browser's **Back** button to return to the Form 2810 search results page then select the **View** button next to the applicable record.





Transmission Records

The Transmission option allows users to view transmission information and records.

This section includes the following topics:

Viewing Transmission Records.....125

Viewing Transmission Records

The **View** function allows users to view transmission online entry records.

To View an Online Entry Record:

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

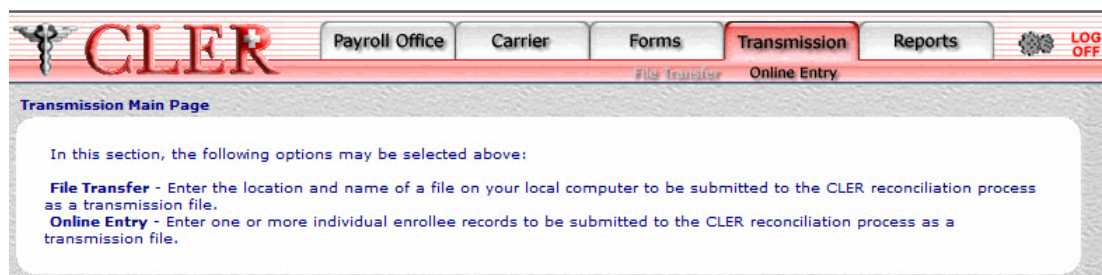


Figure 85: Transmission Main Page

2. Select **Online Entry** on the Transmission Main Page. The Transmission Online Entry page is displayed.

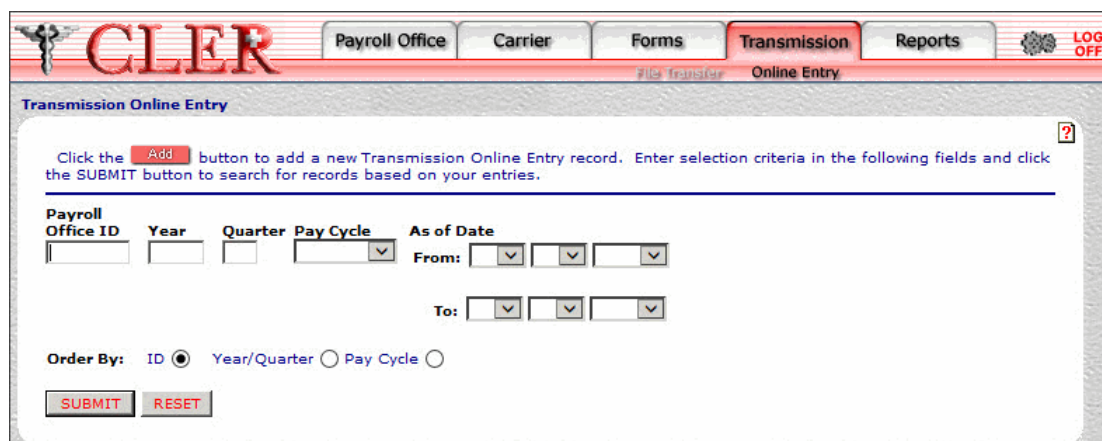


Figure 86: Transmission Online Entry Add Page



3. Complete the following fields on the Transmission Online Entry page:

Payroll Office ID (see "**Payroll Office ID - (Optional) Field Instruction**" on page 314)

Year (see "**Year - (Reconciliation Year for Transmission Record) Field Instruction**" on page 351)

Quarter (see "**Quarter - (Reconciliation Quarter for Transmission Record) Field Instruction**" on page 324)

Pay Cycle (see "**Pay Cycle - (Optional) Field Instruction**" on page 312)

As of Date From (see "**As of Date From - Field Instruction**" on page 237)

As of Date To (see "**As of Date To - Field Instruction**" on page 237)

Order By (see "**Order By - (ID - Year/Quarter - Pay Cycle) Field Instruction**" on page 290)

4. Select the **Submit** button. The Transmission Online Entries search results page is displayed.

OR

Select the **Reset** button to clear the data and refresh the page.

SELECT	ID	Year	Qtr	Submission Date	#	Code	Release Date	Status	Records	Pay Cycle	As of Date	Options
	12400001	2002	1	03/21/2002	1	Add		Not Released	0		2/21/2002	View List Add Update
	12400001	2002	1	03/21/2002	2	Add		Not Released	0		2/23/2002	View List Add Update
	12400001	2002	1	03/21/2002	3	Add		Not Released	0		2/23/2002	View List Add Update
	12400001	2002	1	04/24/2002	4	Add		Not Released	0		3/1/2002	View List Add Update
	12400001	2002	1	04/24/2002	5	Add		Not Released	0		3/1/2002	View List Add Update

Figure 87: Transmissions Online Entry View Page

5. Complete the following fields to select different search criteria:

Year (see "**Year - Field Instruction**" on page 352)

Quarter (see "**Quarter - Field Instruction**" on page 324)



6. Select the **Submit** button to generate the records. The transmission online entry records are displayed.

OR

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

The data on the Transmission Online Entries search results page is categorized into the following fields:

ID (see "**ID - Field Description**" on page 273)

Year (see "**Year - Field Description**" on page 351)

Qtr (see "**Qtr - Field Description**" on page 322)

Submission Date (see "**Submission Date - Field Description**" on page 340)

#

Code (see "**Code - Payroll Office Transmission Search Results Field Description**" on page 247)

Release Date (see "**Release Date - (Online Entries) Field Description**" on page 329)

Status (see "**Status - (Processed, Canceled, Released, Not Released) Field Description**" on page 339)

Records (see "**Records - Field Description**" on page 327)

Pay Cycle (see "**Pay Cycle - Field Description**" on page 313)

As of Date (see "**As of Date - Field Description**" on page 236)

Options (see "**Options - (View, List, Add) Field Description**" on page 288)



7. Select the **View** button next to the applicable record. The Transmission Online Entry View page is displayed.

Figure 88: Transmission Online Entry View Page

The data on the Transmission Online Entry View page is categorized into the following fields:

Payroll Office ID (see "***Payroll Office ID - Field Description***" on page 315)

Year (see "***Year - Field Description***" on page 351)

Quarter (see "***Quarter - Field Description***" on page 324)

Pay Cycle (see "***Pay Cycle - (Biweekly, Monthly, Other) Field Description***" on page 312)

As of Date (see "***As of Date - Field Description***" on page 236)

Processing Code (see "***Processing Code - Field Description***" on page 322)

Submission (see "***Submission - Field Description***" on page 339)

Status (see "***Status - (Transmission Payroll Office) Field Description***" on page 339)

Last Changed ID (see "***Last Changed ID - Field Description***" on page 275)

Last Changed Date (see "***Last Changed Date - Field Description***" on page 275)

Last Changed Time (see "***Last Changed Time - Field Description***" on page 276)



Note: To view another record select your browser's **Back** button to return to the Transmission Online Entries page and select the **View** button next to the applicable record.



Reports

The **Reports** option allows users to view reports information.

In this section the following options may be selected:

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

This section includes the following topics:



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Viewing Payroll Office Enrollment Transmission (Report 5).....	149
Viewing Carrier Enrollment Transmission (Report 6)	152
Viewing Enrollment Change Summary (Report 7).....	155
Viewing Carrier Gain/Loss Summary (Report 8).....	157
Viewing Reconciliation Reason Summary (Report 9)	160
Viewing Reconciliation Action Summary (Report 10)	163
Viewing Reconciliation Summary (Report 11)	167
Viewing Carrier Discrepancy Listing (Report 12)	170
Viewing Pay Period Transmissions Payment Amounts (Report 13).....	174

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 89: Reports Selection Page

2. On the drop-down menu on the Reports Selection page select **1. Payroll Discrepancy Listing**.



3. Select the **GO** button to display the 1. Payroll Discrepancy Listing page.

Figure 90: 1. Payroll Discrepancy Listing Report Search Page

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

Payroll Office ID (see "***Payroll Office ID - (Select - Required) Field Instruction***" on page 315)

Year (see "***Year - (Required) Field Instruction***" on page 351)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 323)

Fail Count From (see "***Fail Count From - Field Instruction***" on page 268)

Fail Count To (see "***Fail Count To - Field Instruction***" on page 268)

SSN From (see "***SSN From - Field Instruction***" on page 334)

SSN To (see "***SSN To - Field Instruction***" on page 334)

Other ID From (see "***Other ID From - Field Instruction***" on page 309)

Other ID To (see "***Other ID To - Field Instruction***" on page 309)

Agency (see "***Agency - Field Instruction***" on page 233)



- Personnel Office ID** (see "**Personnel Office ID - (Optional) Field Instruction**" on page 316)
- Carrier** (see "**Carrier - (Drop-down) Field Instruction**" on page 239)
- Enrollment Code** (see "**Enrollment Code - (Drop-down) Field Instruction**" on page 265)
- Error Code** (see "**Error Code - (Select) Field Instruction**" on page 266)
- Warning Code** (see "**Warning Code - (Select) Field Instruction**" on page 350)
- Display** (see "**Display - Field Instruction**" on page 259)
- Order By 1st** (see "**Order By 1st - (Report - Name Enrollment Code) Field Instruction**" on page 294)
- Order By 2nd** (see "**Order By 2nd - (Report - SSNO Enrollment Code) Field Instruction**" on page 297)
- Order By 3rd** (see "**Order By 3rd - (Report - Enrollment Code) Field Instruction**" on page 300)
- Order By 4th** (see "**Order By 4th - (Report - Enrollment Code) Field Instruction**" on page 302)
- Order By 5th** (see "**Order By 5th - (Report - Enrollment Code) Field Instruction**" on page 304)
- Order By 6th** (see "**Order By 6th - (Report - Enrollment Code) Field Instruction**" on page 306)
- Check Box to Create Report Without Totals** (see "**Check Box to Create Report Without Totals - Field Instruction**" on page 242)
5. Select the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report
 - Save report as a spreadsheet
 - Save report as a text file
 6. Select the **Submit** button to display the Payroll Discrepancy Listing report in the selected format.



OR

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

Payroll Discrepancy Listing

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

Figure 91: Payroll Discrepancy Listing Report Page

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

SSN (see "**SSN - (Enrollee) Field Description**" on page 333)

Name (see "**Name - Enrollee Payroll Field Description**" on page 285)

Code (see "**Code - Enrollment Payroll Field Description**" on page 247)

Eff. Date (see "**Eff. Date - (Payroll) Field Description**" on page 260)

Whld Amt (see "**Whld Amt - Field Description**" on page 350)

Agency (see "**Agency - with Note (No Example) Field Description**" on page 233)

POI (see "**POI - With Note Field Description**" on page 319)

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

Name (see "**Name - Enrollee Carrier Field Description**" on page 284)

Code (see "**Code - Carrier Enrollment Code Field Description**" on page 246)

Eff. Date (see "**Eff. Date - (Carrier) Field Description**" on page 260)

Discrepancy (see "**Discrepancy - (No Note) Field Description**" on page 257)

Fail Count (see "**Fail Count - Field Description**" on page 268)



Errors (see "**Errors - Field Description**" on page 267)

Warnings (see "**Warnings - Field Description**" on page 350)

Total Records (see "**Total Records - (Enrollee) Field Description**" on page 344)

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 92: Payroll Discrepancy Listing (Other ID) Report Page

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

Other ID (see "**Other ID - Field Description**" on page 309)

SSN (see "**SSN - (Enrollee) Field Description**" on page 333)

Name (see "**Name - Enrollee Payroll Field Description**" on page 285)

Code (see "**Code - Enrollment Payroll Field Description**" on page 247)

Eff. Date (see "**Eff. Date - (Payroll) Field Description**" on page 260)

Whld Amt (see "**Whld Amt - Field Description**" on page 350)

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

Name (see "**Name - Enrollee Carrier Field Description**" on page 284)

Code (see "**Code - Carrier Enrollment Code Field Description**" on page 246)



- Eff. Date** (see "**Eff. Date - (Carrier) Field Description**" on page 260)
- Discrepancy** (see "**Discrepancy - (No Note) Field Description**" on page 257)
- Fail Count** (see "**Fail Count - Field Description**" on page 268)
- Errors** (see "**Errors - Field Description**" on page 267)
- Warnings** (see "**Viewing Enrollment Change Summary (Report 7)**" on page 155)
- Total Records** (see "**Total Records - (Enrollee) Field Description**" on page 344)
7. Close the report to return to the 1. Payroll Discrepancy Listing page.

Viewing Discrepancy Summary (Report 2)

The **2. Discrepancy Summary** option on the Reports Selection page allows users to view the Discrepancy Summary report. This report provides a comparison of the number of enrollee records with discrepancies occurring in 1 quarter with those that occurred in any other quarter.

To View a Discrepancy Summary Report:

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

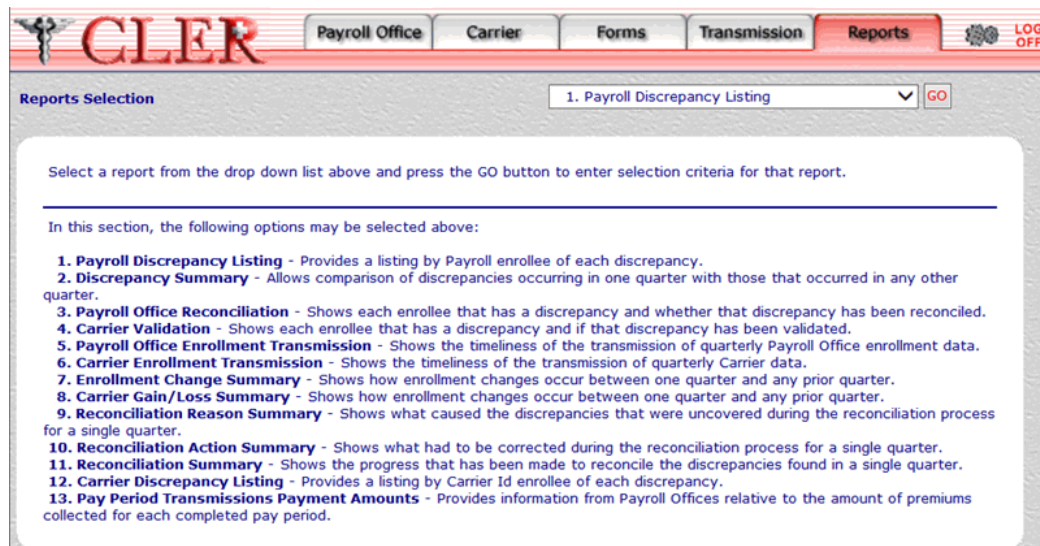


Figure 93: Reports Selection Page

2. On the drop-down menu on the Reports Selection page, select **2. Discrepancy Summary**.



3. Select the **GO** button to display the 2. Discrepancy Summary page.

The screenshot shows the CLER Reports Selection page. At the top, there is a navigation bar with tabs for Payroll Office, Carrier, Forms, Transmission, and Reports. The Reports tab is selected. Below the navigation bar, there is a dropdown menu for '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, there are several input fields: 'Year*' (From 2014, To 2014), 'Quarter*' (From 3, To 3), 'Payroll Office ID*' (00000001), 'Carrier' (empty), 'Enrollment Code' (empty), and 'Fail Count' (From empty, To empty). At the bottom, there is a dropdown menu for 'Display the report' and two buttons: 'SUBMIT' and 'RESET'.

Figure 94: 2. Discrepancy Summary Report Search Page

4. Complete the following fields on the 2. Discrepancy Summary page:

Year From (see "*Year From - (Range - Required) Field Instruction*" on page 352)

Year To (see "*Year To - (Range - Required) Field Instruction*" on page 352)

Quarter From (see "*Quarter From - Field Instruction*" on page 324)

Quarter To (see "*Quarter To - Field Instruction*" on page 324)

Payroll Office ID (see "*Payroll Office ID - (Select - Required) Field Instruction*" on page 315)

Carrier (see "*Carrier - (Drop-down) Field Instruction*" on page 239)

Enrollment Code (see "*Enrollment Code - (Drop-down) Field Instruction*" on page 265)

Fail Count From (see "*Fail Count From - Field Instruction*" on page 268)

Fail Count To (see "*Fail Count To - Field Instruction*" on page 268)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report.
 - Save report as a spreadsheet.
 - Save report as a text file.



6. Select the **Submit** button to display the Discrepancy Summary report in the selected format.

OR

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

Discrepancy Summary				
Payroll Office =				
	Year/Quarter		Change	
	From	To	Actual	Percent
Payroll Office:				
Total Enrollee Records				
Total Matches Found				
Total Discrepancies Found				
Total Discrepancies Reconciled				
Percent Discrepancies Reconciled				

Figure 95: Discrepancy Summary Report Page

The data on the Discrepancy Summary report is categorized into the following fields:

Payroll Office (see "*Payroll Office ID - Field Description*" on page 315)

Year/Quarter From (see "*Year/Quarter From - Field Description*" on page 352)

Year/Quarter To (see "*Year/Quarter To - Field Description*" on page 352)

Change Actual (see "*Change Actual - Field Description*" on page 242)

Change Percent (see "*Change Percent - Field Description*" on page 242)

Total Enrollee Records (see "*Total Enrollee Records - Field Description*" on page 344)

Total Matches Found (see "*Total Matches Found - Field Description*" on page 344)

Total Discrepancies Found (see "*Total Discrepancies Found - Field Description*" on page 343)

Total Discrepancies Reconciled (see "*Total Discrepancies Reconciled - Field Description*" on page 344)

Percent Discrepancies Reconciled (see "*Percent Discrepancies Reconciled - Field Description*" on page 315)

7. Close the report to return to the 2. Discrepancy Summary page.



Viewing Payroll Office Reconciliation (Report 3)

The **3. Payroll Office Reconciliation** option on the Reports Selection page allows users to view the Payroll Office Reconciliation report. This report lists each enrollee record that has a discrepancy and indicates whether that discrepancy has been reconciled.

To View a Payroll Office Reconciliation Report:

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

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 96: Reports Selection Page

2. On the drop-down menu on the Reports Selection page, select **3. Payroll Office Reconciliation**.



3. Select the **GO** button to display the 3. Payroll Office Reconciliation page.

Figure 97: 3. Payroll Office Reconciliation Search Page

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

Payroll Office ID (see "**Payroll Office ID - (Select - Required) Field Instruction**" on page 315)

Year (see "**Year - (Required) Field Instruction**" on page 351)

Quarter (see "**Quarter - (Select) Field Instruction**" on page 323)

Fail Count From (see "**Fail Count From - Field Instruction**" on page 268)

Fail Count To (see "**Fail Count To - Field Instruction**" on page 268)

Reconciliation Date From (see "**Reconciliation Date From - Field Instruction**" on page 326)

Reconciliation Date To (see "**Reconciliation Date To - Field Instruction**" on page 326)

SSN From (see "**SSN From - Field Instruction**" on page 334)

SSN To (see "**SSN To - Field Instruction**" on page 334)

Agency (see "**Agency - Field Instruction**" on page 233)



- Personnel Office ID** (see "**Personnel Office ID - (Optional) Field Instruction**" on page 316)
- Carrier** (see "**Carrier - (Drop-down) Field Instruction**" on page 239)
- Enrollment Code** (see "**Enrollment Code - (Drop-down) Field Instruction**" on page 265)
- User ID** (see "**User ID - (Report) Field Instruction**" on page 349)
- Other ID From** (see "**Other ID From - Field Instruction**" on page 309)
- Other ID To** (see "**Other ID To - Field Instruction**" on page 309)
- Order By 1st** (see "**Order By 1st - (Report - Name Enrollment Code) Field Instruction**" on page 294)
- Order By 2nd** (see "**Order By 2nd - (Report - SSNO Enrollment Code) Field Instruction**" on page 297)
- Order By 3rd** (see "**Order By 3rd - (Report - Enrollment Code) Field Instruction**" on page 300)
- Order By 4th** (see "**Order By 4th - (Report - Enrollment Code) Field Instruction**" on page 302)
- Order By 5th** (see "**Order By 5th - (Report - Enrollment Code) Field Instruction**" on page 304)
- Order By 6th** (see "**Order By 6th - (Report - Enrollment Code) Field Instruction**" on page 306)
- Check Box to Create Report Without Totals** (see "**Check Box to Create Report Without Totals - Field Instruction**" on page 242)
5. Select the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report.
 - Save report as a spreadsheet.
 - Save report as a text file.
 6. Select the **Submit** button to display the Payroll Office Reconciliation report in the selected format. The Payroll Office Reconciliation report is displayed.



OR

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

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

Figure 98: Payroll Office Reconciliation Report Page

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

SSN (see "**SSN - (Enrollee) Field Description**" on page 333)

Name (see "**Name - Enrollee Field Description**" on page 284)

Carrier (see "**Carrier - Field Description**" on page 239)

Agency (see "**Agency - with Note (No Example) Field Description**" on page 233)

POI (see "**POI - With Note Field Description**" on page 319)

Code (see "**Code - Carrier Enrollment Code Field Description**" on page 246)

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

Reason (see "**Reconciliation Reason - Field Description**" on page 326)

Date (see "**Reconciliation Date - Field Description**" on page 326)

User ID (see "**Reconciliation User ID - Field Description**" on page 327)

Action (see "**Reconciliation Action - Field Description**" on page 325)

Fail Count

Reconciliation Fail Count

System generated



Displays the number of times the initial discrepancy has been identified

With Errors (see "**Reconciliation With Errors - Field Description**" on page 327)

Without Errors (see "**Reconciliation Without Errors - Field Description**" on page 327)

Total Records (see "**Reconciliation Total Records - Field Description**" on page 327)

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

Figure 99: Payroll Office Reconciliation Other ID Report Page

The data in the Payroll Office Reconciliation (Other ID) report is categorized into the following fields:

Other ID (see "**Other ID - Field Description**" on page 309)

SSN (see "**SSN - (Enrollee) Field Description**" on page 333)

Name (see "**Name - Enrollee Field Description**" on page 284)

Carrier (see "**Carrier - Field Description**" on page 239)

Code (see "**Code - Field Description**" on page 247)

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 326)

Date (see "**Reconciliation Date - Field Description**" on page 326)

User ID (see "**Reconciliation User ID - Field Description**" on page 327)



Action (see "**Reconciliation Action - Field Description**" on page 325)

Fail Count

Reconciliation Fail Count

System generated

Displays the number of times the initial discrepancy has been identified

With Errors (see "**Reconciliation With Errors - Field Description**" on page 327)

Without Errors (see "**Reconciliation Without Errors - Field Description**" on page 327)

Total Records (see "**Reconciliation Total Records - Field Description**" on page 327)

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

Viewing Carrier Validation Reconciliation (Report 4)

The **4. Carrier Validation** option on the Reports Selection page allows users to view the Carrier Reconciliation report. This report lists each enrollee record that has a discrepancy that the payroll office has determined to be a problem with the carrier's records.

To View a Carrier Validation Report:

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

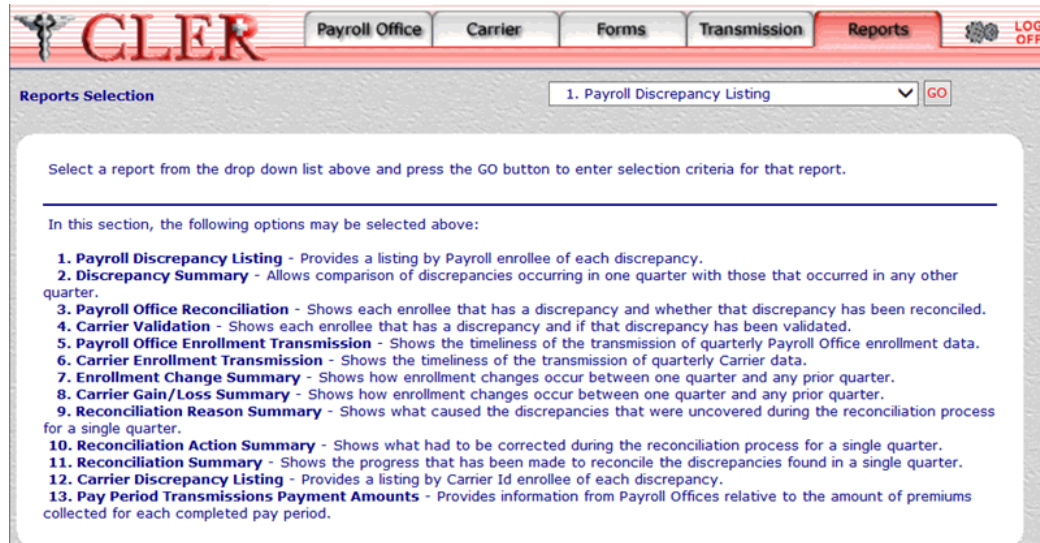


Figure 100: Reports Selection Page

2. On the drop-down menu on the Reports Selection page, select **4. Carrier Validation**.



3. Select the **GO** button to display the Carrier Validation page.

Figure 101: 4. Carrier Validation Report Search Page

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

Carrier ID (see "**Carrier ID - (Carrier Enrollees) Field Instruction**" on page 240)

Year (see "**Year - (Required) Field Instruction**" on page 351)

Quarter (see "**Quarter - (Select) Field Instruction**" on page 323)

Fail Count From (see "**Fail Count From - Field Instruction**" on page 268)

Fail Count To (see "**Fail Count To - Field Instruction**" on page 268)

Validation Date From (see "**Validation Date From - Field Instruction**" on page 349)

Validation Date To (see "**Validation Date To - Field Instructions**" on page 350)

SSN From (see "**SSN From - Field Instruction**" on page 334)

SSN To (see "**SSN To - Field Instruction**" on page 334)

Payroll Office ID (see "**Payroll Office ID - (Select - Optional) Field Instruction**" on page 315)

Enrollment Code (see "**Enrollment Code - (Drop-down) Field Instruction**" on page 265)



User ID (see "**User ID - (Report) Field Instruction**" on page 349)

Other ID From (see "**Other ID From - Field Instruction**" on page 309)

Other ID To (see "**Other ID To - Field Instruction**" on page 309)

Order By 1st (see "**Order By 1st - (Report - Name Enrollment Code) Field Instruction**" on page 294)

Order By 2nd (see "**Order By 2nd - (Report - SSNO Enrollment Code) Field Instruction**" on page 297)

Order By 3rd (see "**Order By 3rd - (Report - Enrollment Code) Field Instruction**" on page 300)

Order By 4th (see "**Order By 4th - (Report - Enrollment Code) Field Instruction**" on page 302)

Order By 5th (see "**Order By 5th - (Report - Enrollment Code) Field Instruction**" on page 304)

Order By 6th (see "**Order By 6th - (Report - Enrollment Code) Field Instruction**" on page 306)

Check Box to Create Report Without Totals (see "**Check Box to Create Report Without Totals - Field Instruction**" on page 242)

5. On the drop-down menu at the bottom of the page, 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 Reconciliation report in the selected format. The Carrier Validation report is displayed.



OR

Select the **Reset** button 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 102: Carrier Validation Report Page

The following fields are displayed on the Carrier section of the Carrier Validation report:

SSN (see "**SSN - (Enrollee) Field Description**" on page 333)

Enrollee (see "**Enrollee - (Carrier) Field Description**" on page 264)

Enrollment Code (see "**Enrollment Code - Field Description**" on page 266)

Payroll Office Number (see "**Payroll Office Number - Field Description**" on page 315)

Reason Code (see "**Reason Code - Field Description**" on page 325)

The following fields are displayed on the Validation section of the Carrier Validation report:

Validation Date (see "**Validation Date - Field Description**" on page 349)

User ID (see "**User ID - (Reconciliation) Field Description**" on page 349)

Corrective Action (see "**Corrective Action - Field Description**" on page 251)

Fail Count (see "**Fail Count - Field Description**" on page 268)

Total Records (see "**Total Records - (Enrollee) Field Description**" on page 344)

7. Close the report to return to the 4. Carrier Validation page.



Viewing Payroll Office Enrollment Transmission (Report 5)

The **5. Payroll Office Enrollment Transmission** option on the Reports Selection page allows users to view the Payroll Office Enrollment Transmission report. This report provides information regarding the timeliness of the transmission of quarterly payroll office enrollment data.

To View a Payroll Office Enrollment Transmission Report:

1. Select **Reports** on the CLER Main Menu. The Reports Selection page is displayed.

Figure 103: Reports Selection Page

2. Select the drop-down menu on the Reports Selection page and select **5. Payroll Office Enrollment Transmission**.



3. Select **GO** to display the 5. Payroll Office Enrollment Transmission page.

The screenshot shows the CLER Reports Selection page. 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 dropdown menu showing '5. Payroll Office Enrollment Transmission' and a 'GO' button. The main content area is titled '5. Payroll Office Enrollment Transmission' 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.' The form includes fields for 'Year' (From: 2014, To: 2014), 'Quarter' (From: 1, To: 1), and 'Payroll Office ID'. There are radio buttons for 'Transmissions': All (selected), Accepted, Rejected, and Not Received. Below these are 'Order By' dropdowns for 1st, 2nd, and 3rd. A checkbox '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 104: Payroll Office Enrollment Transmission Page

4. Complete the following fields on the 5. Payroll Office Enrollment Transmission page:

Year From (see "***Year From - (Range - Required) Field Instruction***" on page 352)

Year To (see "***Year To - (Range - Required) Field Instruction***" on page 352)

Quarter From (see "***Quarter From - Field Instruction***" on page 324)

Quarter To (see "***Quarter To - Field Instruction***" on page 324)

Payroll Office ID (see "***Payroll Office ID - (Select - Optional) Field Instruction***" on page 315)

Transmissions (see "***Transmissions - Field Instruction***" on page 346)

Order By 1st (see "***Order By 1st - (Payroll Office) Field Instruction***" on page 294)

Order By 2nd (see "***Order By 2nd - (Payroll Office) Field Instruction***" on page 297)

Order By 3rd (see "***Order By 3rd - (Payroll Office) Field Instruction***" on page 299)

Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 242)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:



- Display the report.
 - Save report as a spreadsheet.
 - Save report as a text file.
6. Select the **Submit** button to display the Payroll Office Enrollment Transmission report in the selected format. The Payroll Office Enrollment Transmission report is displayed.

OR

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

Payroll Office Enrollment Transmission						
From Year/Quarter = 2015/4 to Year/Quarter = 2015/2						
Payroll Office						
ID	Name	Year	Quarter	Date Due	Submission Date	Status
Accepted: 0						
Rejected: 0						
Not Received: 0						
Total: 0						

Figure 105: Payroll Office Enrollment Transmission Report

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

ID (see "**ID - (Payroll Office) Field Description**" on page 273)

Name (see "**Name - (Payroll Office) Field Description**" on page 284)

Year (see "**Year - Field Description**" on page 351)

Quarter (see "**Quarter - Field Description**" on page 324)

Date Due (see "**Date Due - Field Description**" on page 253)

Submission Date (see "**Submission Date - (Payroll) Field Description**" on page 340)

Status (see "**Status - (Transmission Payroll Office) Field Description**" on page 339)

Accepted (see "**Accepted - Field Description**" on page 224)

Rejected (see "**Rejected - Field Description**" on page 329)



Not Received (see "*Not Received - Field Description*" on page 287)

Total (see "*Total - (Transmission Records) Field Description*" on page 343)

7. Close the report to return to the 5. Payroll Office Enrollment Transmission page.

Viewing Carrier Enrollment Transmission (Report 6)

The **6. Carrier Enrollment Transmission** option on the Reports Selection page allows users to view the Carrier Enrollment Transmission report. This report provides information regarding the timeliness of the transmission of quarterly carrier enrollment data.

To View a Carrier Enrollment Transmission Report:

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

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 106: Reports Selection Page

2. Select the drop-down menu on the Reports Selection page and select **6. Carrier Enrollment Transmission**.



3. Select the **GO** button to display the 6. Carrier Enrollment Transmission page.

Figure 107: 6. Carrier Enrollment Transmission Report Search Page

4. Complete the following fields on the 6. Carrier Enrollment Transmission page:
Year From (see "*Year From - (Range - Required) Field Instruction*" on page 352)
Year To (see "*Year To - (Range - Required) Field Instruction*" on page 352)
Quarter From (see "*Quarter From - Field Instruction*" on page 324)
Quarter To (see "*Quarter To - Field Instruction*" on page 324)
Carrier ID (see "*Carrier ID - (Carrier Enrollees) Field Instruction*" on page 240)
Transmissions (see "*Transmissions - Field Instruction*" on page 346)
Order By 1st (see "*Order By 1st - (Carrier ID) Field Instruction*" on page 293)
Order By 2nd (see "*Order By 2nd - (Carrier ID) Field Instruction*" on page 296)
Order By 3rd (see "*Order By 3rd - (Carrier ID) Field Instruction*" on page 299)
Check Box to Create Report Without Totals (see "*Check Box to Create Report Without Totals - Field Instruction*" on page 242)
5. Select the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report.
 - Save report as a spreadsheet.



- Save report as a text file.
6. Select the **Submit** button to display the Carrier Enrollment Transmission report in the selected format. The Carrier Enrollment Transmission report page is displayed.

OR

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

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

Figure 108: Carrier Enrollment Transmission Report Page

The data in the Carrier Enrollment Transmission report is categorized into the following fields:

Carrier (see "**Carrier - Field Description**" on page 239)

Name (see "**Name - Carrier Field Description**" on page 284)

Year (see "**Year - Field Description**" on page 351)

Quarter (see "**Quarter - Field Description**" on page 324)

Date Due (see "**Date Due - Field Description**" on page 253)

Submission Date (see "**Submission Date - (Carrier) Field Description**" on page 340)

Status (see "**Status - (Transmission Payroll Office) Field Description**" on page 339)

Accepted (see "**Accepted - Field Description**" on page 224)

Rejected (see "**Rejected - Field Description**" on page 329)

Not Received (see "**Not Received - Field Description**" on page 287)

Total (see "**Total - (Transmission Records) Field Description**" on page 343)



7. Close the report to return to the 6. Carrier Enrollment Transmission page.

Viewing Enrollment Change Summary (Report 7)

The **7. Enrollment Change Summary** option on the Reports Selection page allows users to view the Enrollment Change Summary report. This report lists additions and changes in enrollment between carriers and enrollment codes when comparing 1 quarter to any prior quarter.

To View an Enrollment Change Summary Report:

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

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 109: 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.

The screenshot shows the CLER Reports Selection page. At the top, there is a navigation bar with tabs for Payroll Office, Carrier, Forms, Transmission, and Reports. The Reports tab is selected. Below the navigation bar, there is a dropdown menu for '7. Enrollment Change Summary' and a 'GO' button. The main content area is titled '7. Enrollment Change 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 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, and 'Enrollment Code' with a dropdown. At the bottom, there is a checkbox labeled 'Check box to create report without totals:' and a dropdown menu labeled 'Display the report' with a 'SUBMIT' button and a 'RESET' button.

Figure 110: 7. Enrollment Change Summary Report Search Page

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

Year From (see "**Year From - (Range - Required) Field Instruction**" on page 352)

Year To (see "**Year To - (Range - Required) Field Instruction**" on page 352)

Quarter From (see "**Quarter From - Field Instruction**" on page 324)

Quarter To (see "**Quarter To - Field Instruction**" on page 324)

Payroll Office ID (see "**Payroll Office ID - (Select - Required) Field Instruction**" on page 315)

Carrier (see "**Carrier - (Drop-down) Field Instruction**" on page 239)

Enrollment Code (see "**Enrollment Code - (Drop-down) Field Instruction**" on page 265)

Check Box to Create Report Without Totals (see "**Check Box to Create Report Without Totals - Field Instruction**" on page 242)

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 111: 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 239)

Code (see "**Code - Field Description**" on page 247)

From (Quarter/Year) (see "**From (Quarter/Year) - Field Description**" on page 273)

To (Quarter/Year) (see "**To (Quarter/Year) - Field Description**" on page 343)

Change # (see "**Change (#) - Field Description**" on page 241)

Change % (see "**Change (%) - Field Description**" on page 242)

Enrollees (New/Add) (see "**Enrollees (New/Add) - Field Description**" on page 264)

Enrollees (Left/Drop) (see "**Enrollees (Left/Drop) - Field Description**" on page 264)

Total Records (see "**Total Records - (Enrollee) Field Description**" on page 344)

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

Viewing Carrier Gain/Loss Summary (Report 8)

The **8. Carrier Gain/Loss Summary** option on the Reports Selection page allows users to view the Carrier Gain/Loss Summary report. This report provides information regarding the movement of



enrollees between carriers and plans (enrollment codes) when comparing 1 quarter to any prior quarter.

To View a Carrier Gain/Loss Summary Report:

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

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 112: Reports Selection Page

2. Select the drop-down menu on the Reports Selection page and select **8. Carrier Gain/Loss Summary**.
3. Select the **GO** button to display the 8. Carrier Gain/Loss Summary page.

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

Reports Selection 8. Carrier Gain/Loss Summary GO

8. Carrier Gain/Loss 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.

From	Year*	Quarter*	Carrier*	Enrollment Code	Payroll Office ID
To	2014	3			
	2014	3			

Check box to create report without totals: ☐

Display the report SUBMIT RESET

Figure 113: 8. Carrier Gain/Loss Summary Report Search Page

4. Complete the following fields on the 8. Carrier Gain/Loss Summary page:



Year From (see "***Year From - (Range - Required) Field Instruction***" on page 352)

Year To (see "***Year To - (Range - Required) Field Instruction***" on page 352)

Quarter From (see "***Quarter From - Field Instruction***" on page 324)

Quarter To (see "***Quarter To - Field Instruction***" on page 324)

Carrier (see "***Carrier - (Drop-down - Required) Field Instruction***" on page 239)

Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 265)

Payroll Office ID (see "***Payroll Office ID - (Select - Optional) Field Instruction***" on page 315)

Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 242)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report.
 - Save report as a spreadsheet.
 - Save report as a text file.
6. Select the **Submit** button to display the Carrier Gain/Loss Summary report in the selected format. The Carrier Gain/Loss Summary report is displayed.

OR

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

Carrier Gain/Loss Summary							
From: Qtr 3 2014		To: Qtr 3 2014		Enrollment Changes			
Carrier	Code	Carrier	Code	Added	%	Dropped	%
Total Records: 0				0	0.00%	0	100.00%

Figure 114: Carrier Gain/Loss Summary Report Page



The data in the Carrier Gain/Loss Summary report is categorized into the following fields:

From (Quarter/Year) Carrier (see "***From (Quarter/Year - Carrier) - Field Description***" on page 273)

From (Quarter/Year) Code (see "***From (Quarter/Year - Code) - Field Description***" on page 273)

To (Quarter/Year) Carrier (see "***To (Quarter/Year - Carrier) - Field Description***" on page 342)

To (Quarter/Year) Code (see "***To (Quarter/Year - Code) - Field Description***" on page 342)

Enrollment Changes Added (see "***Enrollment Changes Added - Field Description***" on page 265)

Enrollment Changes Added % (see "***Enrollment Changes % - (Added) Field Description***" on page 264)

Enrollment Changes Dropped (see "***Enrollment Changes Dropped - Field Description***" on page 265)

Enrollment Changes Dropped % (see "***Enrollment Changes % - (Dropped) Field Description***" on page 265)

Total Records (see "***Total Records - (Records) Field Description***" on page 345)

7. Close the report to return to the 8. Carrier Gain/Loss Summary page.

Viewing Reconciliation Reason Summary (Report 9)

The **9. Reconciliation Reason Summary** option on the Reports Selection page allows users to view the Reconciliation Reason Summary report. This report provides information regarding the cause of the discrepancies that were identified during the reconciliation process for a single quarter.



To View a Reconciliation Reason Summary Report:

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

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 115: 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

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 116: 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 351)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 323)

Carrier (see "***Carrier - (Drop-down) Field Instruction***" on page 239)

Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 265)

Payroll Office ID (see "***Payroll Office ID - (Select - Optional) Field Instruction***" on page 315)

Agency (see "***Agency - Field Instruction***" on page 233)

Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 316)

Reason Code (see "***Reason Code - Field Instruction***" on page 325)

Order By 1st (see "***Order By 1st - (Carrier - Reason Code) Field Instruction***" on page 293)

Order By 2nd (see "***Order By 2nd - (Carrier) Field Instruction***" on page 296)

Order By 3rd (see "***Order By 3rd - (Carrier) Field Instruction***" on page 299)

Order By 4th (see "***Order By 4th - (Carrier) Field Instruction***" on page 301)

Order By 5th (see "***Order By 5th - (Carrier) Field Instruction***" on page 303)

Order By 6th (see "***Order By 6th - (Carrier) Field Instruction***" on page 305)

Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 242)

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 117: 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 313)

Carrier (see "**Carrier - Field Description**" on page 239)

Code (see "**Code - Field Description**" on page 247)

Agency (see "**Agency ID - Field Description**" on page 234)

POI (see "**POI - Field Description**" on page 319)

Reason (see "**Reason - Field Description**" on page 325)

Total (see "**Total - (Reconciliation Reason Codes) Field Description**" on page 343)

Total Errors (see "**Total Errors - (Total Field) Field Description**" on page 344)

Total Records (see "**Total Records - (Records) Field Description**" on page 345)

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 118: 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 119: 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 351)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 323)

Carrier (see "***Carrier - (Drop-down) Field Instruction***" on page 239)

Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 265)

Payroll Office ID (see "***Payroll Office ID - (Select - Optional) Field Instruction***" on page 315)

Agency (see "***Agency - Field Instruction***" on page 233)

Personnel Office ID (see "***Personnel Office ID - (Optional) Field Instruction***" on page 316)

Action Code (see "***Action Code - Field Instruction***" on page 225)

Order By 1st (see "***Order By 1st - (Carrier - Action Code) Field Instruction***" on page 292)

Order By 2nd (see "***Order By 2nd - (Carrier - Action Code) Field Instruction***" on page 295)

Order By 3rd (see "***Order By 3rd - (Carrier - Action Code) Field Instruction***" on page 298)

Order By 4th (see "***Order By 4th - (Carrier - Action Code) Field Instruction***" on page 301)

Order By 5th (see "***Order By 5th - (Carrier - Action Code) Field Instruction***" on page 303)

Order By 6th (see "***Order By 6th - (Carrier - Action Code) Field Instruction***" on page 305)

Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 242)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report.
 - Save report as a spreadsheet.
 - Save report as a text file.



6. Select the **Submit** button to display the Reconciliation Action Summary report in the selected format. The Reconciliation Action Summary report is displayed.

OR

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

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

Figure 120: Reconciliation Action Summary Report Page

The data in the Reconciliation Action Summary report is categorized into the following fields:

Payroll Office (see "**Payroll Office - Field Description**" on page 313)

Carrier (see "**Carrier - Field Description**" on page 239)

Code (see "**Code - Field Description**" on page 247)

Agency (see "**Agency ID - Field Description**" on page 234)

POI (see "**POI - Field Description**" on page 319)

Action (see "**Action - Field Description**" on page 225)

Total (see "**Total - (Reconciliation Action Codes) Field Description**" on page 343)

Total Errors (see "**Total Errors - (Total Field) Field Description**" on page 344)

Total Records (see "**Total Records - (Records) Field Description**" on page 345)

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



Viewing Reconciliation Summary (Report 11)

The **11. Reconciliation Summary** option on the Reports Selection page allows users to view the Reconciliation Summary report. This report provides information regarding the progress that has been made to reconcile the discrepancies found in a single quarter.

To View a Reconciliation Summary Report:

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

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 121: Reports Selection Page

2. On the drop-down menu on the Reports Selection page, select **11. Reconciliation Summary**.



3. Select the **GO** button to display the 11. Reconciliation Summary page.

The screenshot shows the CLER system 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 showing '11. Reconciliation Summary' and a 'GO' button. The main content area is titled '11. Reconciliation 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.'

The form fields are organized as follows:

- Payroll Office ID***: A dropdown menu with '00000001' selected.
- Year***: A dropdown menu with '2014' selected.
- Quarter***: A dropdown menu with '3' selected.
- Reconciliation Date**: Two sets of dropdown menus for 'From' and 'To'.
- Agency**: A text input field.
- Personnel Office ID**: A text input field.
- Carrier**: A dropdown menu.
- Enrollment Code**: A dropdown menu.
- Order By**: A section with four dropdown menus labeled '1st', '2nd', '3rd', and '4th'. The '1st' dropdown is set to 'Carrier'.
- Check box to create report without totals**: An unchecked checkbox.
- Display the report**: A dropdown menu.
- SUBMIT** and **RESET** buttons.

Figure 122: 11. Reconciliation Summary Report Search Page

4. Complete the following fields on the 11. Reconciliation Summary page:

Payroll Office ID (see "**Payroll Office ID - (Select - Required) Field Instruction**" on page 315)

Year (see "**Year - (Required) Field Instruction**" on page 351)

Quarter (see "**Quarter - (Select) Field Instruction**" on page 323)

Reconciliation Date From (see "**Reconciliation Date From - Field Instruction**" on page 326)

Reconciliation Date To (see "**Reconciliation Date To - Field Instruction**" on page 326)

Agency (see "**Agency - Field Instruction**" on page 233)

Personnel Office ID (see "**Personnel Office ID - (Optional) Field Instruction**" on page 316)

Carrier (see "**Carrier - (Drop-down) Field Instruction**" on page 239)

Enrollment Code (see "**Enrollment Code - (Drop-down) Field Instruction**" on page 265)

Order By 1st (see "**Order By 1st - (Carrier - Agency) Field Instruction**" on page 292)



Match (see "***Match - Field Description***" on page 282)

% (see "***% (Matching Records) - Field Description***" on page 224)

Discrepancies # (see "***Discrepancies # - Field Description***" on page 256)

Discrepancies Recon (see "***Discrepancies Recon - Field Description***" on page 257)

Discrepancies % (see "***Discrepancies % - Field Description***" on page 256)

Discrepancies Unrecon (see "***Unrecon - Field Description***" on page 348)

Corrective Actions Validated (see "***Corrective Actions Validated - Field Description***" on page 252)

Corrective Actions % (see "***Corrective Actions % - Field Description***" on page 251)

Corrective Actions Unvalidated (see "***Corrective Actions Unvalidated - Field Description***" on page 252)

7. Close the report to return to the 11. Reconciliation Summary page.

Viewing Carrier Discrepancy Listing (Report 12)

The **12. Carrier Discrepancy Listing** option on the Reports Selection page allows users to view the Carrier Discrepancy Listing report. This report provides a listing by carrier identification code of carrier and payroll office enrollee records that match, as well as records marked with carrier warning and discrepancy codes.



To View a Carrier Discrepancy Listing Report:

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

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 124: Reports Selection Page

2. On the drop-down menu on the Reports Selection page, select **12. Carrier Discrepancy Listing**.
3. Select the **GO** button to display the 12. Carrier Discrepancy Listing page.

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

Reports Selection 12. Carrier Discrepancy Listing GO

12. Carrier 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.

Carrier ID* Year* Quarter* Fail Count SSN

From To From To

Payroll Office ID Enrollment Code Error Code Warning Code

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 125: 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 240)

Year (see "***Year - (Required) Field Instruction***" on page 351)

Quarter (see "***Quarter - (Select) Field Instruction***" on page 323)

Fail Count From (see "***Fail Count From - Field Instruction***" on page 268)

Fail Count To (see "***Fail Count To - Field Instruction***" on page 268)

SSN From (see "***SSN From - Field Instruction***" on page 334)

SSN To (see "***SSN To - Field Instruction***" on page 334)

Payroll Office ID (see "***Payroll Office ID - (Select - Optional) Field Instruction***" on page 315)

Enrollment Code (see "***Enrollment Code - (Drop-down) Field Instruction***" on page 265)

Error Code (see "***Error Code - (Select) Field Instruction***" on page 266)

Warning Code (see "***Warning Code - (Select) Field Instruction***" on page 350)

Display (see "***Display - Field Instruction***" on page 259)

Order By 1st (see "***Order By 1st - (Report 12) Field Instruction***" on page 294)

Order By 2nd (see "***Order By 2nd - (Enrollee) Field Instruction***" on page 296)

Order By 3rd (see "***Order By 3rd - (Enrollee) Field Instruction***" on page 299)

Order By 4th (see "***Order By 4th - (Enrollee) Field Instruction***" on page 302)

Order By 5th (see "***Order By 5th - (Enrollee) Field Instruction***" on page 303)

Order By 6th (see "***Order By 6th - (Enrollee) Field Instruction***" on page 305)

Check Box to Create Report Without Totals (see "***Check Box to Create Report Without Totals - Field Instruction***" on page 242)

5. Select the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report.
 - Save report as a spreadsheet.
 - Save report as a text file.



6. Select the **Submit** button to display the Carrier Discrepancy Listing report in the selected format. The Carrier Discrepancy Listing report is displayed.

OR

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

Carrier Discrepancy Listing										
Carrier					Payroll Office					
SSN	Name	Code	Eff. Date	Payroll Id	Name	Code	Eff. Date	Discrepancy	Fail Count	
Errors: 0										
Warnings: 0										
Total Records: 0										

Figure 126: Carrier Discrepancy Listing Report Page

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

SSN (see "*Carrier SSN - Field Description*" on page 241)

Name (see "*Carrier Name - Field Description*" on page 241)

Code (see "*Carrier Code - Field Description*" on page 240)

Eff. Date (see "*Carrier Eff. Date - Field Description*" on page 240)

Payroll ID (see "*Payroll Office Payroll ID - Field Description*" on page 315)

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

Name (see "*Payroll Office Name - Field Description*" on page 315)

Code (see "*Payroll Office Code - Field Description*" on page 313)

Eff. Date (see "*Payroll Office Eff. Date - Field Description*" on page 314)

Discrepancy (see "*Payroll Office Discrepancy - Field Description*" on page 314)

Fail Count (see "*Payroll Office Fail Count - Field Description*" on page 314)

Errors (see "*Errors - Field Description*" on page 267)



Warnings (see "**Warnings - Field Description**" on page 350)

Total Records (see "**Total Records - (Records) Field Description**" on page 345)

7. Close the report to return to the 12. Carrier Discrepancy Listing page.

Viewing Pay Period Transmissions Payment Amounts (Report 13)

The **13. Pay Period Transmissions Payment Amounts** option on the Reports Selection page allows FEHB carriers to see a grand total of all premiums collected or payments amount for enrollees by the payroll office.

To View a Pay Period Transmissions Payment Amount Report:

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

Figure 127: 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.

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 '13. Pay Period Transmissions Payment Amounts' and a 'GO' button. The main content area is titled '13. Pay Period Transmissions Payment Amounts' 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.' The form includes several fields: Payroll Office ID* (dropdown), Carrier ID* (dropdown), As of Date* (From and To date pickers), Pay Cycle* (dropdown), and Enrollment Code (dropdown). Below these fields are 'Order By' options: 1st (Carrier), 2nd, 3rd, 4th, and 5th. At the bottom, there are two radio buttons: 'Display Total Payment Amounts' (selected) and 'Display Payment Amounts for Enrollees'. There is also a 'Display the report' dropdown, a 'SUBMIT' button, and a 'RESET' button.

Figure 128: Pay Period Transmissions Payment Amounts Page

4. Complete the following fields on the 13. Pay Period Transmission Payment Amounts page:

Payroll Office ID (see "**Payroll Office ID - (Select - Required) Field Instruction**" on page 315)

Carrier ID (see "**Carrier ID - (Select - Required) Field Instruction**" on page 241)

As of Date From (see "**As of Date From - (Required) Field Instruction**" on page 237)

As of Date To (see "**As of Date To - (Required) Field Instruction**" on page 237)

Pay Cycle (see "**Pay Cycle - (Optional) Field Instruction**" on page 312)

Enrollment Code (see "**Enrollment Code - (Drop-down) Field Instruction**" on page 265)

Order By 1st (see "**Order By 1st - (Report 13) Field Instruction**" on page 295)

Order By 2nd (see "**Order By 2nd - (Report 13) Field Instruction**" on page 297)

Order By 3rd (see "**Order By 3rd - (Report 13) Field Instruction**" on page 300)

Order By 4th (see "**Order By 4th - (Report 13) Field Instruction**" on page 302)

Order By 5th (see "**Order By 5th - (Report 13) Field Instruction**" on page 304)

5. Select one of the following radio buttons:

Display Total Payment Amounts (see "**Display Total Payment Amounts - (Report 13) Field Instruction**" on page 259)



OR

Display Payment Amounts for Enrollees (see "**Display Total Payment Amounts - (Report 13) Field Instruction**" on page 259)

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 Carrier Discrepancy Listing report in the selected format. The Carrier Discrepancy Listing report is displayed.

OR

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

Controlled Unclassified Information

Carrier Discrepancy Listing

Carrier Id = and Year = 2013 and Quarter = 1 and Payroll Office = and Enrollment Code =

Carrier				Payroll Office					
SSN	Name	Code	Eff. Date	Payroll Id	Name	Code	Eff. Date	Discrepancy	Fail Count
			08/29/2012						0
			09/13/2012						0
			01/01/2011						0
			01/02/2013						0
			02/15/2012						0
			09/07/2012						0
			01/01/2003						0
			04/04/2012						0
			01/15/2012						0
			08/13/2012						0
			01/16/2013						0
			10/26/2011						0
			01/01/2006						0
			01/01/2006						0
			08/01/2012						0
			02/03/2013						0
			10/26/2011						0

The data in the Carrier Discrepancy Listing report is categorized into the following fields under the Carrier section:

SSN (see "**Carrier SSN - Field Description**" on page 241)

Name (see "**Carrier Name - Field Description**" on page 241)

Code (see "**Carrier Code - Field Description**" on page 240)

Eff. Date (see "**Carrier Eff. Date - Field Description**" on page 240)

Payroll ID (see "**Payroll Office Payroll ID - Field Description**" on page 315)



The data in the Carrier Discrepancy Listing report is categorized into the following fields under the Payroll Office section:

Name (see "**Payroll Office Name - Field Description**" on page 315)

Code (see "**Payroll Office Code - Field Description**" on page 313)

Eff. Date (see "**Payroll Office Eff. Date - Field Description**" on page 314)

Discrepancy (see "**Payroll Office Discrepancy - Field Description**" on page 314)

Fail Count (see "**Payroll Office Fail Count - Field Description**" on page 314)

8. Close the report to return to the 13. Pay Period Transmissions Payment Amounts page.



CLER Reference Tables

The following reference tables are used throughout the procedure as a guide for various codes and abbreviations:

- ***Discrepancy Codes Table*** (see "***Discrepancy Codes Table***" on page 179)
- ***Warning Codes Table*** (see "***Warning Codes Table***" on page 181)
- ***Payroll Office System Codes Table*** (see "***Payroll Office System Codes Table***" on page 182)
- ***Carrier System Codes Table*** (see "***Carrier System Codes Table***" on page 184)
- ***Reconciliation Reason Codes Table*** (see "***Reconciliation Reason Codes Table***" on page 185)
- ***Reconciliation Action Codes Table*** (see "***Reconciliation Action Codes Table***" on page 189)
- ***Carrier Corrective Action Response Codes Table*** (see "***Carrier Corrective Action Response Codes Table***" on page 190)
- ***State, U.S. Territory, and Overseas Military Abbreviations Table*** (see "***State, U.S. Territory, and Overseas Military Abbreviations Table***" on page 190)
- ***Country Codes Table*** (see "***Country Codes Table***" on page 193)

This section includes the following topics:

Discrepancy Codes Table.....	179
Warning Codes Table.....	181
Payroll Office System Codes Table	182
Carrier System Codes Table.....	184
Reconciliation Reason Codes Table.....	185
Reconciliation Action Codes Table	189
Carrier Corrective Action Response Codes Table	190
State, U.S. Territory, and Overseas Military Abbreviations Table	190
Country Codes Table	193
Event Code That Permits Change Table.....	203

Discrepancy Codes Table

A discrepancy code indicates an error occurred during the edit process. A record that has no discrepancies is considered reconciled. The table below lists discrepancy codes for CLER.



Code	Description	Explanation
101	Invalid Payroll Office ID Number On Payroll Office Record	NFC will investigate these and determine which payroll office is responsible for the record.
102	Invalid Payroll Office ID Number On Carrier Record	NFC will investigate these and determine which payroll office is responsible for the record.
120	Invalid/Missing Enrollment Code On Payroll Office Record	The enrollment code is for an invalid plan or option or it is missing.
121	Invalid/Missing Enrollment Code On Carrier Record	The enrollment code is for an invalid plan or option or it is missing.
140	Missing Enrollee ID Number On Payroll Office Record	The payroll office record did not contain a value for Enrollee SSN, Alternate SSN, Pseudo SSN, or Other Payroll Office ID.
141	Missing Enrollee ID Number On Carrier Record	The carrier record did not contain a value for Enrollee SSN, Alternate SSN, Pseudo SSN, or Other Payroll Office ID.
142	Missing Last Name On Payroll Office Record	The payroll office record did not contain the last name of the enrollee.
143	Missing Last Name On Carrier Record	The carrier record did not contain the last name of the enrollee.
160	Enrollee On Carrier Record But No Payroll Office Record Found	The carrier reported this enrollee as being under your payroll office but your office reported no record for this enrollee.
161	Enrollee On Carrier Record But Reported Under Different Payroll Office	The enrollee is reported on your payroll office records and a matching carrier record was found for this enrollee, but the carrier record lists the enrollee under a different payroll office.
162	Enrollee Reported On Carrier Record Under Pay ID, But Found In Another Carr. ID	Enrollee is reported on a carrier record under the Carrier ID for the enrollment plan you submitted. However, enrollee record also found on a different Carrier ID.
163	Enrollee On Your Payroll Office Record, But No Carrier Record Found	The payroll office lists this enrollee as having coverage, but there is no corresponding carrier record.
164	Enrollee On Payroll Office And Carrier Records But Enrollment Codes Do Not Match	The enrollee is on a payroll office record and a matching carrier record was found. The enrollment codes of the two records, however, do not match.



Code	Description	Explanation
165	Enrollee On Multiple Payroll Office Records - Reported To Each Payroll Office	This enrollee was included on more than one payroll office record. This situation usually happens when the enrollee is transferring jobs from one Agency to another. Payroll offices that report having this enrollee will receive this error message and should contact the other(s) to resolve this discrepancy. Also, payroll offices that service more than one Agency may have more than one record for an employee. These records will be reported to the servicing payroll office.
166	Enrollee On Multiple Carrier Records	This enrollee was included in the files of one or more carriers. Payroll offices specified in the carrier records will receive this error message and should contact each other to resolve this situation.
167	Enrollee ID On Payroll Office More Than Once	Same enrollee on the same payroll office record more than once.

Warning Codes Table

A warning code indicates that there is a certain condition that was flagged by CLER during the reconciliation process that is not considered a discrepancy error. Agencies, at their discretion, may correct records flagged with these warnings, but the presence of warnings, by themselves, do not make a record unreconciled. The table below lists warning codes for CLER.

Code	Description	Explanation
201	Enrollees Name Does Not Match	<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>



Code	Description	Explanation
202	Withholdings/Contribution Amount Missing Or Incorrect	The amount of withholdings/contributions does not match the standard expected amount or is missing entirely. Some situations that may result in this warning include: Enrollee transferred from one payroll office to another within a single pay period. Enrollee did not contribute any money that particular pay period. Enrollee record shows an adjustment of previously reported premium amounts.
203	Invalid Submitting Office Number	Submitting office number on payroll office enrollee does not match any payroll office personnel office identifier contact record.

Payroll Office System Codes Table

A payroll office system code indicates the status of a payroll office enrollment data transmission. The following table lists payroll office system codes for CLER.

Code	Description	Explanation
301	Invalid As-Of-Date	Invalid Gregorian date in the As-Of-Date field on the header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (Replacement) must be in the Processing Code field when the transmission is resubmitted.
302	The Footer Record Count and/or Total Amount not Equal to Detail Count	The Record Count and/or Total Amount listed in the FOOTER record is not equal to the actual count(s) produced from the program. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (Replacement) must be in the Processing Code field when the transmission is resubmitted.
303	Error Threshold Exceeded	The number or percentage of errors exceeded the allowed threshold or no threshold has been set. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (Replacement) must be in the Processing Code field when the transmission is resubmitted.



Code	Description	Explanation
304	No Footer Record	The Footer record was left off the transmission. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (Replacement) must be in the Processing Code field when the transmission is resubmitted.
305	Invalid Payroll Office ID on Footer Record	The Payroll Office ID listed on the Footer record does not match the Payroll Office ID on the Header. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (Replacement) must be in the Processing Code field when the transmission is resubmitted.
306	Invalid Payroll Office ID on Header Record	The Payroll Office ID on the Header record is invalid or not active during this time period. The transmission will be rejected, and no table will be updated. If this is the initial transmission, the processing code will need to be an I or space (Initial transmission) when the transmission is resubmitted.
307	Invalid Reconciliation Year and/or Quarter	The Reconciliation Year and/or Quarter does not match any record on the Schedule Table. The transmission will be rejected, and no table will be updated. If this is the initial transmission, the processing code will need to be an I or space (Initial transmission) when the transmission is resubmitted.
308	Invalid Processing Code	Either the Processing Code was invalid or used incorrectly for the type of transmission. The transmission will be rejected, and no table will be updated. If this is the initial transmission, the processing code will need to be an I or space (Initial transmission) when the transmission is resubmitted.
309	Payroll Office Transmission has Been Replaced	The payroll office transmission has been replaced by another transmission for the applicable year and quarter.
310	Invalid Submission Date	Invalid Gregorian date in the Submission date field on the header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (Replacement) must be in the Processing Code field when the transmission is resubmitted.



Carrier System Codes Table

A carrier system code indicates the status of a carrier enrollment data transmission. The following table lists carrier system codes for CLER.

Code	Description	Explanation
401	Invalid As-Of Date	Invalid Gregorian date in the As-Of-Date field on the header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
402	The Footer Record Count Not Equal To Detail Count	The Record Count listed in the FOOTER record is not equal to the actual count produced from the program. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
403	Error Threshold Exceeded	The number or percentage of errors exceeded the allowed threshold or NO threshold has been set. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
404	No Footer Record	The Footer record was left off the transmission. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
405	Invalid Carrier ID On Footer Record	The Carrier ID listed on the Footer record does not match the Carrier ID on the Header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
406	Invalid Carrier ID On Header Record	The Carrier ID on the Header record is invalid or not active during this time period. The transmission will be rejected and no table will be updated. If this is the initial transmission, the processing code will need to be an I or space (for Initial transmission) when the transmission is resubmitted.



Code	Description	Explanation
407	Invalid Reconciliation Year And/Or Quarter	The Reconciliation Year and/or Quarter does not match any on the Schedule Table. The transmission will be rejected and no table will be updated. If this is the initial transmission, the processing code will need to be an I or space (for Initial transmission) when the transmission is resubmitted.
408	Invalid Processing Code	Either the Processing Code was Invalid or used incorrectly for the type of transmission. The transmission will be rejected and no table will be updated. If this is the initial transmission, the processing code will need to be an I or space (for Initial transmission) when the transmission is resubmitted.
409	Carrier Transmission Has Been Replaced	The carrier transmission has been replaced by another transmission for the applicable year and quarter.
410	Invalid Submission Date	Invalid Gregorian date in the Submission date field on the header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.

Reconciliation Reason Codes Table

Reconciliation reason codes are used by Agencies to explain the cause of a discrepancy. After an Agency researches a discrepancy, it will enter one of the following codes into CLER to describe the reason the discrepancy occurred:

Code	Description	Explanation
501	Payroll/Personnel Office Did Not Process 2809 Or 2810	Use this code when the 2809, 2810, or Employee Express transaction was not received or not processed by the payroll office. Once the payroll/personnel office has processed the change, it needs to be transmitted to the carrier.
502	Payroll/Personnel Office Did Not Process 2809 Or 2810 Correctly	Use this code when the 2809, 2810, or Employee Express transaction was created but was either entered into the system incorrectly or was not properly processed by the payroll/personnel office. Once the payroll/personnel office has processed the change, it needs to be transmitted to the carrier.



Code	Description	Explanation
520	Carrier Did Not Process 2809 Or 2810	Use this code when the 2809, 2810, or Employee Express transaction was either not received or not processed by the carrier. The payroll/personnel office should then use CLER to create a 2809 or 2810 transaction that will be sent to the carrier. The 2809 or 2810 may be faxed or mailed to the carrier in lieu of using CLER. The 2809 or 2810 that is provided to the carrier is a reissue of the initial form.
521	Carrier Did Not Process 2809 Or 2810 Correctly	Use this code when the 2809, 2810, or Employee Express transaction was not received or processed correctly by the carrier. The payroll/personnel office should then use CLER to create a 2809 or 2810 transaction that will be sent to the carrier. The 2809 or 2810 may be faxed or mailed to the carrier in lieu of using CLER. The 2809 or 2810 that is provided to the carrier is a reissue of the initial form.
522	Carrier Enrolled Person Without Payroll/Personnel Office Authorization	The enrollee sent his/her information directly to the carrier (bypassing the personnel office). The carrier should never enroll an individual unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event this does happen, the payroll office should work with the personnel office, enrollee, and carrier to get proper enrollment paperwork that it can use to update the payroll office system.
523	Carrier Changed Plan - Enrollee Out Of Service Area	The enrollee requested a plan that is not allowed for the area in which he/she lives and the carrier automatically switched the enrollee to the correct plan. This should never happen as the carrier should never make enrollment changes unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event it does happen, the payroll office should work with the personnel office, enrollee, and carrier to get proper enrollment paperwork that it can use to update the payroll office system.



Code	Description	Explanation
524	Carrier Changed Option Without Payroll/Personnel Office Authorization	The enrollee sent his/her information directly to the carrier (bypassing the personnel office) or the carrier automatically changed the option when the enrollee got married or when the last dependent turned 22 years of age. The carrier should never make enrollment changes unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event it does happen, the payroll office should work with the personnel office, enrollee, and carrier to get the proper enrollment paperwork that they can use to update the payroll office system.
525	Carrier Rejected SF 2809 - Enrollee Out Of Service Area	The enrollee requested a plan that is not allowed for the area in which he/she lives so the carrier rejected the enrollment or enrollment change. The payroll office should work with the personnel office and enrollee to get the proper paperwork so that it can update its system and send the enrollment or enrollment change to the carrier.
526	Carrier Terminated Coverage Due To Death Of Enrollee	This should never happen as the carrier should never make enrollment changes unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event it does happen, the payroll office should work with the personnel office, enrollee, and carrier to get proper enrollment paperwork that they can use to update the payroll office system.
540	Enrollee In Unpaid Status - No Deductions For Pay Period	Some payroll offices only send in records for those enrollees for whom premiums were paid (either by deductions from enrollee pay or by contribution from the enrollees Agency). If an enrollee did not pay that pay period but was truly enrolled, then use this code to indicate why the discrepancy occurred. For this situation, no change would be required to either the payroll office's records or the carrier's records.
541	Enrollee Separation Not Submitted Timely	Use this code if the enrollee's separation paperwork is not received promptly by the payroll office and is therefore still reported by the payroll/personnel office (and possibly the carrier) as being enrolled.
542	Enrollee Reported Under Two Payroll Offices - Transfer During Pay Period	Use this code if two different payroll offices or Agencies report an enrollee because that enrollee was transferring-in during the reconciliation pay period. For this situation, no corrective action is required as both payroll offices and Agencies properly reported this enrollee to CLER.



Code	Description	Explanation
550	Transfer In Not Processed Timely By Gaining Payroll Office	Use this code when the gaining payroll office has not processed the transfer in for the enrollee's prior payroll office. Contact the other payroll office so that it can obtain the proper paperwork and update its records.
551	Transfer In Not Processed Timely By OWCP	Use this code if the carrier reports an enrollee as belonging to your payroll office even though that enrollee should be handled by the Office of Workers Compensation Program (OWCP).
552	Transfer In Not Processed Timely By Gaining Payroll Office	Use this code if the carrier reports a retiree as still belonging to the enrollee's prior payroll office. A transfer in to correct both records needs to be processed.
560	Retiree Transfer In Not Processed Timely	This code should be used when the discrepancy is due solely to the difference in extraction date between the payroll office and carriers (refer to the Payroll Office Enrollment File Layout Specifications for more details). For example, the carriers extract their data on the first of the month and a payroll office that pays biweekly might extract data on the fifth. Between the first and fifth of the month, some enrollees may have dropped or changed coverage while others may have enrolled for the first time.
570	Pseudo SSN Used	Enrollees are not required to provide their SSN to the carrier so some enrollees provide a fake or pseudo SSN. This can result in a discrepancy unless the payroll office system also sends the pseudo SSN to CLER so that records can be properly matched. Use this code whenever the discrepancy is due to a pseudo SSN.
580	Other - See Comments	Use this code when no other code is suitable. Comments must be supplied to explain the reconciliation reason.
590	OPM USE ONLY - Multiple Accounts with Shared CSA/CSF number	Civil Service Retirement Claim (CSA/CSF) number shared by more than one annuitant/survivor.
591	OPM USE ONLY - Enrollee Dropped Due to Death/Suspend Status - PO to investigate	Enrollment is dropped due to death or because the case is in suspend status - Payroll office will investigate these and notify carrier of the termination effective date.



Reconciliation Action Codes Table

Reconciliation action codes are used by Agencies to describe which system(s) needs to be updated as part of resolving a discrepancy. After an Agency researches a discrepancy, it will enter one of the codes listed below in CLER.

Code	Description	Explanation
601	Payroll/Personnel Office Correction Required - Processed Through Payroll System	Use this code when only the payroll office's system needs to be updated. At its discretion, the payroll office may send the carrier a confirmation of the fact that the payroll office records were updated.
610	Carrier Correction Required - Submitted By Payroll/Personnel Office Through CLER	Use this code when only the carrier's system needs to be changed and the carrier was informed of those changes through the use of CLER's 2809 or 2810 online forms.
611	Carrier Correction Required - Submitted By Payroll/Personnel Office By Fax	Use this code when only the carrier system needs to be changed and the payroll/personnel office informed the carrier via a fax of the SF 2809 or SF 2810 form.
612	Carrier Correction Required - Submitted By Payroll/Personnel Office By Mail	Use this code when only the carrier system needs to be changed and the payroll/personnel office informed the carrier via a copy of the SF 2809 or SF 2810 through the mail.
620	Correction Required By Carrier And Payroll Office - Processed Through Payroll System	Use this code when both the payroll office and the carrier need to correct their records.
630	Action Required By Another Payroll/Personnel Office	Use this code when the enrollee is no longer the responsibility of your payroll office but has, instead, transferred to another payroll office.
640	No Action Required	Use this code when neither the payroll office nor carrier needs to make changes to their records. For example, this code would be used in conjunction with reconciliation reason codes: 540 Enrollee In Unpaid Status - No Deductions for Pay Period. 542 Enrollee Reported Under Two Payroll Offices - Transfer During The Pay Period. 560 Discrepancy Due to Timing.



Carrier Corrective Action Response Codes Table

Carrier corrective action response codes are entered into CLER by carriers to record agreement with and completion of the requested correction specified by the Agency office, or disagreement with the corrective action specified by the Agency office. The following table lists the carrier corrective action response codes for CLER.

Code	Description	Explanation
701	Agree And Correction Processed Successfully	The carrier would enter this code when they agree with the change requested by the payroll office and have successfully updated its records.
721	Disagree - Enrollee Out Of Servicing Area	The carrier is unable to process the requested change because they do not offer that plan for the area where the individual lives.
722	Disagree - Last Dependent Reached Age 22	The carrier cannot change the individual to a family option because the enrollee no longer has dependents under age 22.
723	Disagree - Enrollment Terminated Due To Non-Payment of Membership Fees	The carrier cannot enroll or update enrollment for this individual because the enrollment has been terminated due to the non-payment of dues.
724	Other - See Comments	Use this code when no other code is suitable. Comments must be supplied to explain the Corrective Action.

State, U.S. Territory, and Overseas Military Abbreviations Table

The following table lists valid state, U.S. territory, and overseas military abbreviations for CLER.

Abbreviation	Description
AA	Armed Forces Americas (except Canada and United States of America)
AE	Armed Forces Africa, Canada, Europe, and Middle East
AK	Alaska
AL	Alabama
AP	Armed Forces Pacific
AR	Arkansas



Abbreviation	Description
AS	American Samoa
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia
DE	Delaware
FL	Florida
FM	Federated States of Micronesia
GA	Georgia
GU	Guam
HI	Hawaii
IA	Iowa
ID	Idaho
IL	Illinois
IN	Indiana
KS	Kansas
KY	Kentucky
LA	Louisiana
MA	Massachusetts
MD	Maryland
ME	Maine
MH	Marshall Islands
MI	Michigan
MN	Minnesota
MO	Missouri



Abbreviation	Description
MP	Northern Mariana Islands
MS	Mississippi
MT	Montana
NC	North Carolina
ND	North Dakota
NE	Nebraska
NH	New Hampshire
NJ	New Jersey
NM	New Mexico
NV	Nevada
NY	New York
OH	Ohio
OK	Oklahoma
OR	Oregon
PA	Pennsylvania
PR	Puerto Rico
PW	Palau
RI	Rhode Island
SC	South Carolina
SD	South Dakota
TN	Tennessee
TX	Texas
UT	Utah
VA	Virginia
VI	Virgin Islands
VT	Vermont



Abbreviation	Description
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



Country	Code
Baker Island	FQ
Bangladesh	BG
Barbados	BB
Bassas da India	BS
Belarus	BO
Belgium	BE
Belize	BH
Benin	BN
Bermuda	BD
Bhutan	BT
Bolivia	BL
Bosnia and Herzegovina	BK
Botswana	BC
Bouvet Island	BV
Brazil	BR
British Indian Ocean Territory	IO
British Virgin Islands	VI
Brunei	BX
Bulgaria	BU
Burkina Faso	UV
Burma	BM
Burundi	BY
Cambodia	CB
Cameroon	CM
Canada	CA
Cape Verde	CV



Country	Code
Cayman Islands	CJ
Central African Republic	CT
Chad	CD
Chile	CI
China	CH
Christmas Island	KT
Clipperton Island	IP
Cocos (Keeling) Islands	CK
Colombia	CO
Comoros	CN
Congo, Democratic Republic of the	CG
Congo, Republic of the	CF
Cook Islands	CW
Coral Sea Islands	CR
Costa Rica	CS
Cote d'Ivoire	IV
Croatia	HR
Cuba	CU
Cyprus	CY
Czech Republic	EZ
Denmark	DA
Djibouti	DJ
Dominica	DO
Dominican Republic	DR
East Timor	TT
Ecuador	EC



Country	Code
Egypt	EG
El Salvador	ES
Equatorial Guinea	EK
Eritrea	ER
Estonia	EN
Ethiopia	ET
Europa Island	EU
Falkland Islands (Islas Malvinas)	FA
Faroe Islands	FO
Fiji	FJ
Finland	FI
France	FR
French Guiana	FG
French Polynesia	FP
French Southern and Antarctic Lands	FS
Gabon	GB
Gambia, The	GA
Gaza Strip	GZ
Georgia	GG
Germany	GM
Ghana	GH
Gibraltar	GI
Glorioso Islands	GO
Greece	GR
Greenland	GL
Grenada	GJ



Country	Code
Guadeloupe	GP
Guatemala	GT
Guernsey	GK
Guinea	GV
Guinea-Bissau	PU
Guyana	GY
Haiti	HA
Heard Island and McDonald Islands	HM
Honduras	HO
Hong Kong	HK
Howland Island	HQ
Hungary	HU
Iceland	IC
India	IN
Indonesia	ID
Iran	IR
Iraq	IZ
Ireland	EI
Israel	IL
Italy	IT
Jamaica	JM
Jan Mayen	JN
Japan	JA
Jarvis Island	DQ
Jersey	JE
Johnston Atoll	JQ



Country	Code
Jordan	JO
Juan de Nova Island	JU
Kazakhstan	KZ
Kenya	KE
Kingman Reef	KQ
Kiribati	KR
Korea, North	KN
Korea, South	KS
Kuwait	KU
Kyrgyzstan	KG
Laos	LA
Latvia	LG
Lebanon	LE
Lesotho	LT
Liberia	LI
Libya	LY
Liechtenstein	LS
Lithuania	LH
Luxembourg	LU
Macau	MC
Macedonia, The Republic of	MK
Madagascar	MA
Malawi	MI
Malaysia	MY
Maldives	MV
Mali	ML



Country	Code
Malta	MT
Man, Isle of IM	IM
Marshall Islands	RM
Martinique	MB
Mauritania	MR
Mauritius	MP
Mayotte	ME
Mexico	MX
Micronesia, Federated States of	FM
Midway Islands	MQ
Moldova	MD
Monaco	MN
Mongolia	MG
Montserrat	MH
Morocco	MO
Mozambique	MZ
Namibia	WA
Nauru	NR
Navassa Island	BQ
Nepal	NP
Netherlands	NL
Netherlands Antilles	NT
New Caledonia	NC
New Zealand	NZ
Nicaragua	NU
Niger	NG



Country	Code
Nigeria	NI
Niue	NE
Norfolk Island	NF
Northern Mariana Islands	CQ
Norway	NO
Oman	MU
Pakistan	PK
Palau	PS
Palmyra Atoll	LQ
Panama	PM
Papua New Guinea	PP
Paracel Islands	PF
Paraguay	PA
Peru	PE
Philippines	RP
Pitcairn Islands	PC
Poland	PL
Portugal	PO
Qatar	QA
Reunion	RE
Romania	RO
Russia	RS
Rwanda	RW
Saint Helena	SH
Saint Kitts and Nevis	SC
Saint Lucia	ST



Country	Code
Saint Pierre and Miquelon	SB
Saint Vincent and the Grenadines	VC
Samoa	WS
San Marino	SM
Sao Tome and Principe	TP
Saudi Arabia	SA
Senegal	SG
Serbia and Montenegro	YI
Seychelles	SE
Sierra Leone	SL
Singapore	SN
Slovakia	LO
Slovenia	SI
Solomon Islands	BP
Somalia	SO
South Africa	SF
South Georgia and the Islands	SX
Spain	SP
Spratly Islands	PG
Sri Lanka	CE
Sudan	SU
Suriname	NS
Svalbard	SV
Swaziland	WZ
Sweden	SW
Switzerland	SZ



Country	Code
Syria	SY
Taiwan	TW
Tajikistan	TI
Tanzania	TZ
Thailand	TH
Togo	TO
Tokelau	TL
Tonga	TN
Trinidad and Tobago	TD
Tromelin Island	TE
Tunisia	TS
Turkey	TU
Turkmenistan	TX
Turks and Caicos Islands	TK
Tuvalu	TV
Uganda	UG
Ukraine	UP
United Arab Emirates	AE
United Kingdom	UK
United States	US
Uruguay	UY
Uzbekistan	UZ
Vanuatu	NH
Vatican City	VT
Venezuela	VE
Vietnam	VM



Country	Code
Wake Island	WQ
Wallis and Futuna	WF
West Bank	WE
Western Sahara	WI
Yemen	YM
Zambia	ZA
Zimbabwe	ZI

Event Code That Permits Change Table

Code	Description
1	Employee electing to receive or receiving premium conversion tax benefits.
1A	Initial opportunity to enroll.
1B	Open season.
1C	Change in family status that results in increase or decrease in number of eligible family members.
1D	Any change in employee's employment status that could result in entitlement to coverage.
1E	Any change in employee's employment status that could affect cost of insurance.
1F	Employee restored to civilian position after serving in uniformed services.
1G	Employee, spouse, or dependent: Begins nonpay status or insufficient pay Ends nonpay status or insufficient pay if coverage continued Note: If employee's coverage is terminated, see 1D. Note: If spouse's or dependent's coverage is terminated, see 1M.
1H	Salary of temporary employee insufficient to make withholdings for plan in which enrolled.
1I	Employee (or covered family member) enrolled in FEHB health maintenance organization (HMO) moves or becomes employed outside the geographic area from which the FEHB carrier accepts enrollments, or, if already outside the area.
1J	Transfer from post of duty within a State of the United States or the District of Columbia to a



Code	Description
	post of duty outside of the United States or District of Columbia, or reverse.
1K	Separation from Federal employment when the employee or employee's spouse is pregnant.
1L	Employee becomes eligible for Medicare and wants to change to another plan or option.
1M	<p>Employee or eligible family member loses coverage under FEHB or another group insurance plan including the following:</p> <p>Loss of coverage under another FEHB enrollment due to termination, cancellation, or change to Self Only of the covering enrollment.</p> <p>Loss of coverage due to termination of membership in employee organization sponsoring the FEHB plan.</p> <p>Loss of coverage under another Federally sponsored health benefits program, including TRICARE, MEDICARE, Indian Health Service.</p> <p>Loss of coverage under Medicaid or similar State-sponsored program of medical assistance for the needy.</p> <p>Loss of coverage under a non-Federal Health plan, including foreign, State, or local Government, private sector.</p> <p>Loss of coverage due to change in worksite or residence.</p>
1N	Loss of coverage under a non-Federal group health plan because an employee moves out of the commuting area to accept another position and the employee's non-Federally employed spouse terminates employment to accompany the spouse.
1O	Employee or eligible family members loses coverage due to discontinuance in whole or part of FEHB plan.
1P	<p>Enrolled employee or eligible family member gains coverage under FEHB or another group insurance plan, including the following:</p> <p>Medicare</p> <p>TRICARE for life, due to enrollment in Medicare</p> <p>TRICARE due to change in employment status, including (1) entry into active military service, or (2) retirement from reserve military service under Chapter 67, Title 10.</p> <p>Medicaid or similar State-sponsored program of Medical assistance for the needy.</p> <p>Health insurance acquired due to change of worksite or residence that affects eligibility for coverage.</p>
1Q	Change in spouse's or dependent's coverage option under a non-Federal health plan.
1R	Employee or eligible family member becomes eligible for assistance under Medicaid or a State Children's Health Insurance Program (CHIP).
1Z	Change from family or self to self plus 1.
5	Employees who are not participating in premium conversion.
5A	Initial opportunity to enroll



Code	Description
5B	Open season
5C	Change in family status; for example: marriage, birth or death of family member, adoption, legal separation, or divorce.
5D	Change in employment status.
5E	Separation from Federal employment when the employee is or the employee's spouse is pregnant.
5F	Transfer from a post of duty within the United States to a post of duty outside the United States, or reverse.
5G	Employee or eligible family member loses coverage under FEHB or another group insurance plan.
5H	Enrollee or eligible family member loses coverage due to the discontinuance, in whole or part, of a FEHB plan.
5I	Loss of coverage under a non-Federal group health plan because an employee's spouse terminates employment to accompany the employee.
5J	Employee or covered family member in an HMO moves or becomes employed outside the geographic area from which the carrier accepts enrollments, or if already outside the area, moves or becomes employed further from this area.
5K	On becoming eligible for Medicare. Note: This change may be made only once in a lifetime.
5L	Temporary employee completes one year of continuous service in accordance with 5 U.S.C. Section 8906a.
5M	Salary of temporary employee insufficient to make withholdings for plan in which enrolled.
5R	Agency TA only



Embedded Topics

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% (Matching Records) - Field Description

%

System generated

Displays the percentage of matching records to enrollee records

Records With Errors - (Carrier) Field Description

Records With Errors

System generated

Displays the total number of carrier enrollee records with errors

Note: Records with warnings are not included.

Records With Warnings - (Carrier) Field Description

Records With Warnings

System generated

Displays the total number of carrier records with warnings

Note: Records with errors are not included.

Accepted - Field Description

Accepted

System generated

Displays the number of transmissions that passed front-end edits and were accepted for processing.

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



Action - Field Description

Action

System generated

Displays the reconciliation action code. Refer to the ***Reconciliation Action Codes Table*** (see "***Reconciliation Action Codes Table***" on page 189) for a list and descriptions of these codes

Action Code - Field Instruction

Action Code

Optional

Select the drop-down menu and select the reconciliation action code. Refer to the ***Reconciliation Action Codes Table*** (see "***Reconciliation Action Codes Table***" on page 189) for a list and descriptions of these codes.

Address - Carrier Field Description

Address

System generated

Displays the street or P.O. Box address of the carrier

Address - Payroll Office Field Description

Address

System generated

Displays the street or P.O. Box address of the payroll office

Address Line 1 - Carrier Contact Field Description

Address Line 1

System generated

Displays the first line of the carrier contact's street or P.O. Box address

Address Line 1 - Carrier Field Description

Address Line 1

System generated

Displays the first line of the carrier's street or P.O. Box address



Address Line 1 - Carrier Plan Contact Field Description

Address Line 1

System generated

Displays the first line of the carrier plan contact's street or P.O. Box address

Address Line 1 - Coordinator Field Description

Address Line 1

System generated

Displays the first line of the domestic or foreign street, P.O. Box, rural route, etc., address of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage

Address Line 1 - Enrollee Field Description

Address Line 1

System generated

Displays the first line of the enrollee's domestic or foreign street, apartment number, P.O. Box, or rural route address

Address Line 1 - Enrollee/Survivor Field Description

Address Line 1

System generated

Displays the first line of the enrollee or survivor annuitant's new domestic or foreign street, apartment number, P.O. Box, or rural route address

Address Line 1 - Form 2809 Add (Part A) Field Instruction

Address Line 1

Required, alphanumeric, 35 positions

Enter the first line of the enrollee's street or P.O. Box address.

Address Line 1 - Form 2809 Add (Part I) Field Instruction

Address Line 1

Required, alphanumeric, 35 positions maximum

Enter the first line of the domestic or foreign street, P.O. Box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.



Address Line 1 - Form 2810 Add (Part A) Field Instruction

Address Line 1

Required, alphanumeric, 35 positions

Enter the first line of the enrollee's domestic or foreign street, apartment or P.O. Box, rural route, etc., if applicable.

Address Line 1 - Form 2810 Add (Parts B through F) Field Instruction

Address Line 1

Conditional, alphanumeric, 35 positions

If the **Change of Enrollee Information** radio button is selected, and the first line of the street address for the enrollee or survivor annuitant is different than the address listed in Part A-Address Line 1, enter the first line of the enrollee's domestic or foreign street, apartment or P.O. Box, rural route, etc., if applicable.

Address Line 1 - Payroll Office Contact Field Description

Address Line 1

System generated

Displays the first line of the payroll office contact's street or P.O. Box address.

Address Line 1 - Payroll Office Contacts Add Field Instruction

Address Line 1

Optional, alphanumeric, 40 positions

Enter the first line of the payroll office's street or P.O. Box address.

Address Line 1 - Payroll Office Field Description

Address Line 1

System generated

Displays the first line of the payroll office's street or P.O. Box address

Address Line 1 - Personnel Office Contact Field Description

Address Line 1

System generated

Displays the first line of the personnel office contact's street or P.O. Box address



Address Line 2 - Carrier Contact Field Description

Address Line 2

System generated

Displays the second line of the carrier contact's street or P.O. Box address

Address Line 2 - Carrier Field Description

Address Line 2

System generated

Displays the second line of the carrier's street or P.O. Box address

Address Line 2 - Carrier Plan Contact Field Description

Address Line 2

System generated

Displays the second line of the carrier plan contact's street or P.O. Box address

Address Line 2 - Coordinator Field Description

Address Line 2

System generated

Displays the second line of the domestic or foreign street, P.O. Box, rural route, etc., address of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage

Address Line 2 - Enrollee Field Description

Address Line 2

System generated

Displays the second line of the enrollee's domestic or foreign street, apartment number, P.O. Box, or rural route address

Address Line 2 - Enrollee/Survivor Field Description

Address Line 2

System generated

Displays the second line of the enrollee or survivor annuitant's new domestic or foreign street, apartment number, P.O. Box, or rural route address



Address Line 2 - Form 2809 Add (Part A) Field Instruction

Address Line 2

Required, alphanumeric, 35 positions

Enter the second line of the enrollee's street or P.O. Box address.

Address Line 2 - Form 2809 Add (Part I) Field Instruction

Address Line 2

Conditional, alphanumeric, 35 positions maximum

If applicable, enter the second line of the domestic or foreign street, P.O. box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Address Line 2 - Form 2810 Add (Part A) Field Instruction

Address Line 2

Required, alphanumeric, 35 positions

Enter the second line of the enrollee's domestic or foreign street, apartment or P.O. Box, rural route, etc., if applicable.

Address Line 2 - Form 2810 Add (Parts B through F) Field Instruction

Address Line 2

Conditional, alphanumeric, 35 positions

If the **Change of Enrollee Information** radio button is selected, and the second line of the street address for the enrollee or survivor annuitant is different than the address listed in Part A-Address Line 2, enter the second line of the enrollee's domestic or foreign street, apartment or P.O. Box, rural route, etc., if applicable.

Address Line 2 - Payroll Office Contact Field Description

Address Line 2

System generated

Displays the second line of the payroll office contact's street or P.O. Box address

Address Line 2 - Payroll Office Contacts Add Field Instruction

Address Line 2

Optional, alphanumeric, 40 positions

Enter the second line of the payroll office's street or P.O. Box address.



Address Line 2 - Payroll Office Field Description

Address Line 2

System generated

Displays the second line of the payroll office's street or P.O. Box address

Address Line 2 - Personnel Office Contact Field Description

Address Line 2

System generated

Displays the second line of the personnel office contact's street or P.O. Box address

Address Line 2 - Personnel Office Contacts Add Field Instruction

Address Line 2

Optional, alphanumeric, 40 positions maximum

Enter the second line of the personnel office's street or P.O. Box address

Address Line 3 - Carrier Contact Field Description

Address Line 3

System generated

Displays the third line of the carrier contact's street or P.O. Box address

Address Line 3 - Carrier Field Description

Address Line 3

System generated

Displays the third line of the carrier's street or P.O. Box address

Address Line 3 - Carrier Plan Contact Field Description

Address Line 3

System generated

Displays the third line of the carrier plan contact's street or P.O. Box address

Address Line 3 - Coordinator Field Description

Address Line 3

System generated



Displays the third line of the domestic or foreign street, P.O. Box, rural route, etc., address of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage

Address Line 3 - Enrollee Field Description

Address Line 3

System generated

Displays the third line of the enrollee's domestic or foreign street, apartment number, P.O. Box, or rural route address

Address Line 3 - Enrollee/Survivor Field Description

Address Line 3

System generated

Displays the third line of the enrollee or survivor annuitant's new domestic or foreign street, apartment number, P.O. Box, or rural route address

Address Line 3 - Form 2809 Add (Part A) Field Instruction

Address Line 3

Required, alphanumeric, 35 positions

Enter the third line of the enrollee's street or P.O. Box address.

Address Line 3 - Form 2809 Add (Part I) Field Instruction

Address Line 3

Conditional, alphanumeric, 35 positions maximum

If applicable, enter the third line of the domestic or foreign street, P.O. Box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Address Line 3 - Form 2810 Add (Part A) Field Instruction

Address Line 3

Required, alphanumeric, 35 positions

Enter the third line of the enrollee's domestic or foreign street, apartment or P.O. Box, rural route, etc., if applicable.



Address Line 3 - Form 2810 Add (Parts B through F) Field Instruction

Address Line 3

Conditional, alphanumeric, 35 positions

If the **Change of Enrollee Information** radio button is selected, and the third line of the street address for the enrollee or survivor annuitant is different than the address listed in Part A-Address Line 3, enter the third line of the enrollee's domestic or foreign street, apartment or P.O. Box, rural route, etc., if applicable.

Address Line 3 - Payroll Office Contact Field Description

Address Line 3

System generated

Displays the third line of the payroll office contact's street or P.O. Box address

Address Line 3 - Payroll Office Contacts Add Field Instruction

Address Line 3

Optional, alphanumeric, 40 positions

Enter the third line of the payroll office's street or P.O. Box address.

Address Line 3 - Payroll Office Field Description

Address Line 3

System generated

Displays the third line of the payroll office's street or P.O. Box address

Address Line 3 - Personnel Office Contact Field Description

Address Line 3

System generated

Displays the third line of the personnel office contact's street or P.O. Box address

Affects

System generated

Selected radio button indicates if the system code affects the **Payroll Office, Carrier, Both** or is **Not Applicable**

Affects Carrier

System generated

Indicates if this code affects the carrier

Yes - This code affects the carrier

No - This code does not affect the carrier



Affects Payroll - Field Description

Affects Payroll

System generated

Indicates if this code affects the payroll office

Yes - This code affects the payroll office

No - This code does not affect the payroll office

Agcy Field Description

Agcy

System generated

Displays the Agency identification code

Agency - Enrollee Field Description

Agency

System generated

Displays the Agency identification code of the office where the enrollee is employed

Agency - Enrollee Field Instruction

Agency

Required, alphanumeric, four positions

Enter the Agency identification code of the office where the enrollee is employed.

Agency - Field Instruction

Agency

Optional, alphanumeric, four positions

Enter the Agency identification code of the office where the enrollee is employed (example:

AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Agency - with Note (No Example) Field Description

Agency

System generated

Displays the Agency identification code of the office where the enrollee is employed

Note: The Other ID field is displayed in lieu of the this field when **24900002**, **24900003**, or **160099xx** is entered in the Payroll Office ID field on the Payroll Office Enrollees page.



Agency ID - Field Description

Agency ID

System generated

Displays the Agency identification code of the enrollee's employing, personnel, or point-of-contact office (Example: **AG90** for U.S. Department of Agriculture, Office of the Chief Financial Officer)

Agency ID - Field Instruction

Agency ID

Optional, alphanumeric, four positions

Enter the Agency identification code of the office where the enrollee is employed (example: **AG90** for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Agency Name - Field Description

Agency Name

System generated

Displays the name of the employing, personnel, or point-of-contact that is responsible for coordinating the enrollee's FEHB coverage

Agency Name - Form 2809 Add (Part I) Field Instruction

Agency Name

Required, alphanumeric, 35 positions maximum

Enter the name of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Agency Use - Field Description

Agency Use

System generated

Displays remarks used by the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage

Agency Use - Field Instruction

Agency Use

Optional



Enter remarks from the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage

Amount - Field Description

Amount

System generated

Displays the enrollee's withholding/premium amounts received

Amount - Field Description

Amount

Optional

Enter the enrollee's withholding/premium amounts for the applicable enrollment code.

Amount - Pay Period Field Description

Amount

System generated

Displays the enrollee's withholding/premium per pay period

Amount Received - Field Description

Amount Received

System generated

Displays the total withholding/premium amounts received

Amount Sent - Field Description

Amount Sent

System generated

Displays the total withholding/premium amounts sent, as indicated on the transmission file header record

Annuitant Indicator - Field Description

Annuitant Indicator

System generated

Displays the annuitant indicator symbol:

I indicates Interim

R indicates Regular



s indicates Suspend

Annuity Claim # - Form 2810 Add (Part A) Field Instruction

Annuity Claim #

Optional, alphanumeric, nine positions

Enter the civil service annuitant (CSA) number assigned to the enrollee by OPM.

Annuity Claim # - Form 2810 View (Part A) Field Description

Annuity Claim #

System generated

Displays the civil service annuitant (CSA) number assigned to the enrollee by OPM

As of Date - (Required) Field Instruction

As of Date

Required

Select the first drop-down menu and select the month, select the second drop-down menu and select the day and select the third drop-down menu and select the year.

As of Date - Carrier Transmissions Field Description

As of Date

System generated

Displays the date the transmitted enrollment data was extracted

As of Date - Field Description

As of Date

System generated

Displays the date the transmitted enrollment data was extracted from the payroll/personnel office database

As of Date for Pay Period Transmission From - Field Instruction

As of Date for Pay Period Transmission From

Optional

Select the first drop-down menu and select the month, select the second drop-down menu and select the day, and select the third drop-down menu and select the year.



As of Date for Pay Period Transmission To - Field Instruction

As of Date for Pay Period Transmission To

Optional

Select the first drop-down menu and select the month, select the second drop-down menu and select the day and select the third drop-down menu and select the year.

As of Date From - (Required) Field Instruction

As of Date From

Required

Select the first drop-down menu and select the month, select the second drop-down menu and select the day and select the third drop-down menu and select the year.

As of Date From - Field Instruction

As of Date From

Optional

Select the first drop-down menu and select the month, select the second drop-down menu and select the day and select the third drop-down menu and select the year.

As of Date To - (Required) Field Instruction

As of Date To

Required

Select the first drop-down menu and select the month, select the second drop-down menu and select the day and select the third drop-down menu and select the year.

As of Date To - Field Instruction

As of Date To

Optional

Select the first drop-down menu and select the month, select the second drop-down menu and select the day and select the third drop-down menu and select the year.

Authorized Official - First Name (SF 2809) Field Description

Authorized Official - First Name

System generated

Displays the first name of the Agency official who is authorized to sign the Standard Form 2809, Health Benefits Election Form



Authorized Official - Initial (SF 2809) Field Description

Authorized Official - Initial

System generated

Displays the middle initial of the Agency official who is authorized to sign the Standard Form 2809, Health Benefits Election Form

Authorized Official - Last Name (SF 2809) Field Description

Authorized Official - Last Name

System generated

Displays the last name of the Agency official who is authorized to sign the Standard Form 2809, Health Benefits Election Form

Authorized Official Date Signed - Form 2810 Add (Part H) Field Instruction

Authorized Official Date Signed

Required, alphanumeric, eight positions

Enter the date (MMDDYYYY) the authorized Agency official signed the document.

Authorized Official Date Signed - Form 2810 View (Part H) Field Description

Authorized Official Date Signed

System generated

Displays the date (MMDDYYYY) the authorized Agency official signed the document

Authorized Official First Name - Form 2809 Add (Part I) Field Instruction

Authorized Official - First Name

Required, alphanumeric, 17 positions maximum

Enter the first name of Agency Official who is authorized to sign the Form 2809.

Authorized Official Initial - Form 2809 Add (Part I) Field Instruction

Authorized Official - Initial

Optional, alphanumeric, one position

Enter the middle initial of Agency Official who is authorized to sign the Form 2809.



Authorized Official Last Name - Form 2809 Add (Part I) Field Instruction

Authorized Official - Last Name

Required, alphanumeric, 25 positions

Enter the last name of Agency Official who is authorized to sign the Form 2809. If the Agency Official has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Carr - Field Description

Carr

System generated

Displays the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit

Carrier - (Drop-down - Required) Field Instruction

Carrier

Required

Select the drop-down menu and select the carrier code.

Carrier - (Drop-down) Field Instruction

Carrier

Optional

Select the drop-down menu and select the carrier code.

Carrier - Field Description

Carrier

System generated

Displays the carrier code

Carrier - Field Instruction

Carrier

Optional, alphanumeric, four positions

Enter the carrier code.



Carrier Code - Field Description

Carrier Code

System generated

Displays the enrollment code submitted by the carrier

Carrier Comments - Field Description

Carrier Comments

System generated

Display the carrier's comments

Carrier Comments - Field Instruction

Carrier Comments

Optional, 400 characters maximum

Enter comments about the reconciliation actions for this record.

Carrier Eff. Date - Field Description

Carrier Eff. Date

System generated

Displays the enrollment effective date (MM/DD/YYYY) submitted by the carrier

Carrier Errors - Field Description

Carrier Errors

System generated

Displays the count of errors that have reconciliation reason and action code entered that indicate the carrier is at fault

Carrier ID - (Carrier Enrollees) Field Instruction

Carrier ID

Required

Select the drop-down menu and select the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.



Carrier ID - (Select - Required) Field Instruction

Carrier ID

Required

Select the drop-down menu and select the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Carrier ID - Field Description

Carrier ID

System generated

Displays the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit

Carrier ID - Field Instruction

Carrier ID

Optional, alphanumeric, seven positions

Enter the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Carrier Name - Field Description

Carrier Name

System generated

Displays the enrollee's name submitted by the carrier

Carrier SSN - Field Description

Carrier SSN

System generated

Displays the enrollee's SSN submitted by the carrier

Change (#) - Field Description

Change (#)

System generated

Displays the change in the number of enrollment code changes from the prior quarter to the current quarter



Change (%) - Field Description

Change (%)

System generated

Displays the change in percent of enrollment code changes from the prior quarter to the current quarter

Change Actual - Field Description

Change Actual

System generated

Displays the number that indicates the actual changes in values between prior and current reconciliation years/quarters

Change Password - Field Instruction

Change Password

To change the password, select the checkbox. The Change Your Password pop-up window is displayed, prompting the user to enter and confirm the new password. Type the new password in the Enter New Password and Confirm New Password fields and select **Submit**.

Change Percent - Field Description

Change Percent

System generated

Displays the percent changes in values between prior and current reconciliation years/quarters

Check Box to Create Report Without Totals - Field Instruction

Check Box to Create Report Without Totals

Optional

Select this check box to omit totals from the report.

City - Carrier Contact Field Description

City

System generated

Displays the city of the carrier contact

Note: If the address is an overseas military address, this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.



City - Carrier Field Description

City

System generated

Displays the city of the carrier

Note: If the address is an overseas military address, this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Carrier Field Instruction

City

Optional, alphanumeric, 25 positions maximum

Enter the city of the carrier

Note: If the address is an overseas military address, type **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Carrier Plan Contact Field Description

City

System generated

Displays the city of the carrier plan contact

Note: If the address is an overseas military address, this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Coordinator Field Description

City

System generated

Displays the name of the domestic or foreign city for the enrollee's employing, personnel, or point-of-contact office

Note: If the address is an overseas military address this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.



City - Enrollee Field Description

City

System generated

Displays the name of the enrollee's domestic or foreign city

Note: If the address is an overseas military address this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Enrollee/Survivor Field Description

City

System generated

Displays the new name of the city for the enrollee or survivor annuitant's address.

Note: If the address is an overseas military address this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Form 2809 Add (Part I) Field Instruction

City

Required, alphanumeric, 23 positions maximum

Enter the name of the domestic or foreign city for the enrollee's employing, personnel, or point-of-contact office.

Note: If the address is an overseas military address, type **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Form 2809/2810 Add (Part A) Field Instruction

City

Required, alphanumeric, 23 positions maximum

Enter the name of the enrollee's domestic domestic or foreign city.

Note: If the address is an overseas military address, type **FPO** for fleet post office or **APO** for army post office in lieu of the city.



City - Form 2810 Add (Parts B thru F) Field Instruction

City

Conditional, alphanumeric, 23 positions maximum

If the **Change of Enrollee Information** radio button is selected, and the domestic or foreign city for the enrollee or survivor annuitant's address is different than the city listed in Part A- City, type the name of the new city for the enrollee or survivor annuitant's address. If the address is an overseas military address, type FPO for fleet post office or APO for army post office in lieu of the city.

City - Payroll Office Field Description

City

System generated

Displays the city of the payroll office

Note: If the address is an overseas military address, this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Payroll Office Field Instruction

City

Optional, alphanumeric, 25 positions maximum

Enter the city of the payroll office.

Note: If the address is an overseas military address, type **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Personnel Office Contact Field Description

City

System generated

Displays the name of the personnel office contact's city

Note: If the address is an overseas military address, this field displays **FPO** for fleet post office or **APO** for army post office in lieu of the city.

City - Personnel Office Contacts Add Field Instruction

City



Optional, alphanumeric, 25 positions maximum

Enter the city of the personnel office.

Note: If the address is an overseas military address, type **FPO** for fleet post office or **APO** for army post office in lieu of the city.

Code - (Form 2809 Part A Continued) Field Instruction

Code

Optional

Select the drop-down menu and choose the code used to identify the family member's relation to the enrollee.

The relationship codes are as follows:

- 01 - Spouse
- 09 - Adopted Child
- 10 - Foster Child
- 17 - Stepchild
- 19 - Unmarried dependent child under age 22
- 99 - Eligible unmarried disabled child over age 22

Code - Carrier Enrollment Code Field Description

Code

System generated

Displays the enrollment code submitted by the carrier

Code - Carrier Transmissions Search Results Field Description

Code

System generated

Displays the transmission processing code

Initial code indicates an initial transmission file

Add code indicates an additional file

Replace indicates a replacement file.

Code - Carrier Transmissions View Field Description

Code

System generated

Displays the transmission processing code as follows:



I or blank - Initial file
A - Additional file
R - Replace all previous files

Code - Enrollment Payroll Field Description

Code
System generated
Displays the enrollment code submitted by the payroll office

Code - Field Description

Code
System generated
Displays the enrollment code

Code - Form 2809 View (Part A Continued) Field Description

Code
System generated
Displays one of the following codes that identifies the family member's relation to the enrollee:
01 - Spouse
09 - Adopted child
10 - Foster child
17 - Stepchild
19 - Unmarried dependent child under age 22
99 - Eligible unmarried disabled child over age 22

Code - Number Field Description

Code
System generated
Displays the code number

Code - Payroll Office Transmission Search Results Field Description

Code
System generated
Displays the transmission processing code as follows:
Initial - Indicates an initial transmission file



Additional - Indicates an addition to the transmission file

Replace - Indicates a replacement of the transmission file

Confirmed Errors - Field Description

Confirmed Errors

System generated

Displays the count of errors that have reconciliation reason and action code entered that indicate the carrier is at fault and the carrier accepts the claim

Contact (Payroll) First Name - Field Description

Contact (Payroll) First Name

System generated

Displays the first name of the payroll office contact

Contact (Payroll) First Name - Form 2809 Add (Part I) Field Instruction

Contact (Payroll) First Name

Conditional, alphanumeric, 17 positions maximum

If the Last Name field under Contact (Payroll) is completed, enter the first name of the payroll office contact.

Contact (Payroll) Initial - Field Description

Contact

System generated

Displays the middle initial of the payroll office contact

Contact (Payroll) Initial - Form 2809 Add (Part I) Field Instruction

Contact (Payroll) Initial

Conditional, alphanumeric, one position

If the Last Name field under Contact (Payroll) is completed, enter the middle initial of the payroll office contact.

Contact (Payroll) Last Name - Field Description

Contact (Payroll) Last Name

System generated



Displays the last name of the payroll office contact

Contact (Payroll) Last Name - Form 2809 Add (Part I) Field Instruction

Contact (Payroll) Last Name

Conditional, alphanumeric, 25 positions maximum

Enter the last name of the payroll office contact. If the contact has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the Last Name field under Contact (Personnel) is not completed, this field is required; otherwise, this field is optional.

Contact (Payroll) Phone - Field Description

Contact (Payroll) Phone

System generated

Displays the daytime area code and telephone number of the payroll office contact

Contact (Payroll) Phone - Form 2809 Add (Part I) Field Instruction

Contact (Payroll) Phone

Conditional, numeric, 10 positions

If the Last Name field under Contact (Payroll) is completed, enter the daytime area code and telephone number of the payroll office contact. Do not type alpha characters, spaces, dashes, parenthesis, periods, etc.

Contact (Personnel) First Name - Field Description

Contact (Personnel) First Name

System generated

Displays the first name of the personnel office contact

Contact (Personnel) First Name - Form 2809 Add (Part I) Field Instruction

Contact (Personnel) First Name

Conditional, alphanumeric, 17 positions maximum

If the Last Name field under Contact (Personnel) is completed, enter the first name of the personnel office contact.



Contact (Personnel) Initial - Field Description

Contact (Personnel) Initial

System generated

Displays the middle initial of the personnel office contact

Contact (Personnel) Initial - Form 2809 Add (Part I) Field Instruction

Contact (Personnel) Initial

Conditional, alphanumeric, one position

If the Last Name field under Contact (Personnel) is completed, enter the middle initial of the personnel office contact.

Contact (Personnel) Last Name - Field Description

Contact (Personnel) Last Name

System generated

Displays the last name of the personnel office contact

Contact (Personnel) Last Name - Form 2809 Add (Part I) Field Instruction

Contact (Personnel) Last Name

Conditional, alphanumeric, 25 positions maximum

Enter the last name of the personnel office contact. If the contact has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the Last Name field under Contact (Payroll) is not completed, this field is required; otherwise, this field is optional.

Contact (Personnel) Phone - Field Description

Contact (Personnel) Phone

System generated

Displays the daytime area code and telephone number of the personnel office contact

Contact (Personnel) Phone - Form 2809 Add (Part I) Field Instruction

Contact (Personnel) Phone

Conditional, numeric, 10 positions



If the Last Name field under Contact (Personnel) is completed, enter the daytime area code and telephone number of the personnel office contact. Do not type alpha characters, spaces, dashes, parenthesis, periods, etc.

Corrective Action (Code) - Field Description

Corrective Action

System generated

Displays the code that identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field

A short description is displayed next to the code. To view a detailed explanation of the carrier's corrective action response code, select **Explain** or see *Carrier Corrective Action Response Codes Table* (on page 190).

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 190).

Corrective Action - Field Instruction

Corrective Action

Required

Select the drop-down menu to choose the code that identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field. A short description is displayed next to the code. To view a detailed explanation of the carrier's corrective action response code, select **Explain** or see *Carrier Corrective Action Response Codes Table* (on page 190).

Corrective Actions % - Field Description

Corrective Actions %

System generated

Displays the percentage of discrepancies/reconciliation actions validated to total corrective actions



Corrective Actions Unvalidated - Field Description

Corrective Actions Unvalidated

System generated

Displays the number of discrepancies/reconciliation actions that were not validated by the carrier

Corrective Actions Validated - Field Description

Corrective Actions Validated

System generated

Displays the number of discrepancies/reconciliation actions that were validated by the carrier

Country - (Payroll Office Contacts Add) Field Instruction

Country

Optional

Select the drop-down menu and select the country code of the payroll office.

For a list and descriptions of country codes, see *Country Codes Table* (on page 193).

Country - Personnel Office Contacts Add Field Instruction

Country

Optional

Select the drop-down menu and select the country code of the personnel office.

For a list and descriptions of country codes, see *Country Codes Table* (on page 193).

Country - Personnel Office Contacts Add Field Instruction

Country

Optional

Select the drop-down menu and select the country code of the personnel office.

For a list and descriptions of country codes, see *Country Codes Table* (on page 193).

Cut Off Date - Field Description

Cut Off Date

System generated

Displays the date that CLER accepts no quarterly enrollment data from carriers or payroll offices



Date - Form 2809 Add (Part D) Field Instruction

Date

Conditional, numeric, eight positions

Enter the date (MMDDYYYY) of the event that initiated the enrollee's action.

Note: If the Nature of Action in Part A is **Start** or **Change**, this field is required. If the Nature of Action in Part A is **Stop** or **Suspend**, do not complete this field.

Date - Form 2809 Update (Part D) Field Instruction

Date

Required, numeric, eight positions

Enter the date (MMDDYYYY) of the event that initiated the enrollee's action.

Date - Form 2809 View (Parts C and D) Field Description

Date

System generated

Displays the date (MMDDYYYY) of the event that initiated the enrollee's action

Date Due - Field Description

Date Due

System generated

Displays the transmission due date (MMDDYYYY) for the reconciliation quarter

Date of Action - Field Description

Date of Action

System generated

Displays the date (MMDDYYYY) the enrollee made this election

Date of Action - Form 2809 Add (Part H) Field Instruction

Date of Action

Required, numeric, eight positions

Enter the date (MMDDYYYY) the enrollee made this election.



Date of Birth (Enrollee) - Field Description

Date of Birth

System generated

Displays the date of birth of the enrollee (MMDDYYYY)

Date of Birth (Enrollee/Survivor) - Field Description

Date of Birth

System generated

Displays the date of birth of the enrollee or survivor annuitant (MMDDYYYY)

Date of Birth - (Form 2809 Part A Continued) Field Instruction

Date of Birth

Optional, numeric, eight positions

Enter the date of birth (MMDDYYYY) of the enrollee's family member who is enrolled/enrolling in FEHB.

Date of Birth - Form 2809 View (Part A Continued) Field Description

Date of Birth

System generated

Displays the date of birth (MMDDYYYY) of the enrollee's family member who is enrolled/enrolling in FEHB

Date of Birth - Form 2809/2810 Add (Part A) Field Instruction

Date of Birth

Required, numeric, eight positions

Enter the date of birth for the enrollee (MMDDYYYY).

Date of Birth - Form 2810 Add (Parts B thru F) Field Instruction

Date of Birth

Conditional, numeric, eight positions

If the **Change of Enrollee Information** box is selected, enter the enrollee or survivor annuitant's date of birth MMDDYYYY; otherwise, do not complete this field. .



Date of Death - Field Description

Date of Death

System generated

Displays the date of death of the deceased enrollee (MMDDYYYY)

Date of Death - Form 2810 Add (Parts G and H) Field Instruction

Date of Death

Conditional, numeric, eight positions

If the enrollee is deceased, type the enrollee's date of death (MMDDYYYY); otherwise, do not complete this field.

Date Processed - (Processed Run) Field Description

Date Processed

System generated

Displays the current system date when the process was run

Date Processed - Field Description

Date Processed

System generated

Displays the current system date when the process was run

Date Received - Form 2809 Add (Part I) Field Instruction

Date Received

Required, numeric, eight positions

Enter the date (MMDDYYYY) the Agency received the original Form 2809.

Date Received - Form 2809 View (Part I) Field Description

Date Received

System generated

Displays the date (MMDDYYYY) the Agency received the original Form 2809

Deceased Annuitant SSN - Field Description

Deceased Annuitant SSN

System generated



Displays the deceased annuitant enrollee's SSN

Deceased Annuitant SSN - Field Instruction

Deceased Annuitant SSN

Optional, numeric

Enter the deceased annuitant enrollee's SSN.

Description - (Enrollment) Field Description

Description

System generated

Displays the descriptive text regarding the enrollment record

Description

System generated

Displays an explanation of the system code

Discrepancies # - Field Description

Discrepancies

System generated

Displays the number of discrepancies

Discrepancies % - Field Description

Discrepancies %

System generated

Displays the percentage of reconciled discrepancies to reported discrepancies

Discrepancies - Field Description

Discrepancies

System generated

Displays a code that identifies an error or warning

For lists and descriptions of error and warning codes, see **Discrepancy Codes Table** (on page 179) and **Warning Codes Table** (on page 181).

Note: Check marks are displayed next to discrepancy codes that have been addressed by Agencies and carriers. Red check marks are displayed next to discrepancies that Agencies addressed by selecting the appropriate reconciliation action and reason codes on the Payroll Office Enrollees Reconcile page. Green check marks are displayed next to discrepancies that have been addressed by carriers. To display the most current check marks, select **Refresh** at the top of the Payroll Office Enrollees Search Results page.



Discrepancies Recon - Field Description

Discrepancies Recon

System generated

Displays the number of reconciled discrepancies

Discrepancy - (Explain/Duplicate - Code 166) Field Description

Discrepancy

System generated

Displays the discrepancy code that identifies an error or warning

A short description is displayed next to the code. To view a detailed explanation of the discrepancy code, select **Explain** or see **Discrepancy Codes Table** (on page 179). If Discrepancy Code **166** is displayed in the the Discrepancy field, the **Duplicate** button is also displayed. Select **Duplicate** to display the duplicate payroll office enrollee record for this enrollee record.

Discrepancy - (No Note) Field Description

Discrepancy

System generated

Displays the code that identifies an error or warning

For lists and descriptions of error and warning codes, see **Discrepancy Codes Table** (on page 179) and **Warning Codes Table** (on page 181).

Display - (All Records) Field Instruction

Display

Optional, default

Defaults to the **All Records** display option

To choose another type of option, select the radio button next to one of the following options:

All Records - Displays all records related to the search criteria

Matches - Displays all matched records related to the search criteria

No Matches - Displays records with no matches related to the search criteria

No matches are discrepancies where the carrier record is not found.

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

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

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

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

Confirmed - Displays all records with confirmed discrepancies related to the search criteria

Confirmed discrepancies are discrepancies where the carrier is in agreement with the payroll



office's reconciliation reason and reconciliation action.

Disputed - Displays all records with disputed discrepancies related to the search criteria

Disputed discrepancies are discrepancies where the carrier is not in agreement with the payroll office's reconciliation reason and reconciliation action.

Not Validated - Displays all records with discrepancies that are not validated

Not validated discrepancies are discrepancies that the carrier has not yet agreed that the Agency's reconciliation reason and actions are correct.

Display - (All) Field Instruction

Display

Optional, default

Defaults to the **All** display option

To choose another type of option, select the radio button next to one of the following options:

All - Displays all records related to the search criteria

Released - Displays all records released for processing

Cancelled - Displays all records that were cancelled before being processed

Not Released - Displays all records not released for processing

Processed - Displays all processed records

Display - (Carrier Code) Field Instruction

Display

Optional default

Defaults to the **All** display option

Allows users to display search results by the options listed below

To choose a display option, select the radio button next to one of the following menu options:

All - Displays all contacts for the carrier code and type code entered

Active - Displays active contacts for the carrier code and type code entered

Inactive - Displays inactive contacts for the carrier code and type code entered

Display - (Payroll Office Contact) Field Instruction

Display

Optional, default

Defaults to the **All** display option

Allows users to display search results by the options listed below.

To choose a display option, select the radio button next to one of the following menu options:

All - Displays all contacts for the payroll office ID and type code entered

Active - Displays active contacts for the payroll office ID and type code entered

Inactive - Displays inactive contacts for the payroll office ID and type code entered



Display - (Personnel Office Contact) Field Instruction

Display

Optional, default

Defaults to the **All** display option

Allows users to display search results by the options listed below

To choose a display option, select the radio button next to one of the following menu options:

All - Displays all contacts for the payroll office ID, personnel office ID, and type code entered

Active - Displays active contacts for the payroll office ID, personnel office ID, and type code entered

Inactive - Displays inactive contacts for the payroll office ID, personnel office ID, and type code entered

Display - Field Instruction

Display

Optional, default

Defaults to the **All** display option

To choose another type of search results display, select the radio button next to one of the following options:

All - Displays all records related to the search criteria

Unreconciled - Displays all records with unreconciled discrepancies related to the search criteria

Errors - Displays all records with errors related to the search criteria

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

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

Matches - Displays all records that match to the search criteria

Not Validated - Displays all records with discrepancies that are not validated

Display - Payroll Office Contact Field Instruction

Display

Optional, default

Defaults to the **All** display option

Allows users to display search results by the options listed below

To choose a display option, select the radio button next to one of the following menu options:

All - Displays all contacts for the payroll office ID and type code entered

Active - Displays active contacts for the payroll office ID and type code entered

Inactive - Displays inactive contacts for the payroll office ID and type code entered

Display Total Payment Amounts - (Report 13) Field Instruction

Display Total Payment Amounts

Or

Display Payment Amounts for Enrollee



Optional, default

Defaults to the **Display Total Payment Amounts** menu option, which displays the total payment amounts. To display the payment amounts for enrollees, select the radio button next to the menu option **Display Payment Amounts for Enrollees**.

Disputed Errors - Field Description

Disputed Errors

System generated

Displays the count of errors that have reconciliation reason and action code entered that indicate the carrier is at fault and the carrier disputes the claim

Eff. Date - (Carrier) Field Description

Eff. Date

System generated

Displays the enrollment effective date (MMDDYYYY) submitted by the carrier

Eff. Date - (Payroll) Field Description

Eff. Date

System generated

Displays the enrollment effective date (MMDDYYYY) submitted by the payroll office

Effective Date - (Action) Field Description

Effective Date

System generated

Displays the date (MMDDYYYY) the requested actions goes into effect

Effective Date - Field Description

Effective Date

System generated

Displays the effective date of the enrollment

Effective Date - Form 2809 View (Part I) Field Instruction

Effective Date

Required, alphanumeric, eight positions



Enter the date (MMDDYYYY) the requested action goes into effect.

Effective Date - Form 2810 Add Field Instruction

Effective Date

Required, alphanumeric, eight positions

Enter the date (MMDDYYYY) the requested action goes into effect.

Effective Date of Coverage - Field Description

Effective Date of Coverage

System generated

Displays the effective date of the enrollment

Effective Date of Coverage - Field Instruction

Effective Date of Coverage

Optional

Enter the effective date of the enrollment. Select the first drop-down menu and select the month, select the second drop-down menu and select the day and select the third drop-down menu and select the year.

Email - (Carrier Contact) Field Description

Email

System generated

Displays the email address of the carrier contact

Email - (Carrier Plan Contact) Field Description

Email

System generated

Displays the email address of the carrier plan contact

Email Address - (Carrier Contact) Field Description

Email Address

System generated

Displays the email address of the carrier contact



Email Address - (Carrier Plan Contact) Field Description

Email Address

System generated

Displays the email address of the carrier plan contact

Email Address - (Payroll Office Contact) Field Description

Email Address

System generated

Displays the email address of the payroll office contact

Email Address - (Payroll Office Contacts Add) Field Instruction

Email Address

Optional, alphanumeric, 60 positions maximum

Enter the email address of the payroll office contact

Email Address - (Personnel Office Contact) Field Description

Email Address

System generated

Displays the email address of the personnel office contact

Email Address - (Personnel Office Contact) Field Description

Email Address

System generated

Displays the email address of the personnel office contact

Email Address - (Personnel Office Contacts Add) Field Instruction

Email Address

Optional, alphanumeric, 60 positions maximum

Enter the email address of the personnel office contact.

Email Date - Field Description

Email Date

System generated



Displays the date the last email was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter

Email Time - Field Description

Email Time

System generated

Displays the time the last email was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter

Employee/Annuitant Indicator - Field Description

Employee/Annuitant Indicator

System generated

Displays the employee/annuitant indicator: **Interim**, **Regular** or **Suspend**

Employee/Annuitant Indicator - Field Instruction

Employee/Annuitant Indicator

Optional

Select the drop-down menu and select the employee/annuitant indicator: **Interim**, **Regular** or **Suspend**.

End Date - (Carrier Enrollment Code) Field Description

End Date

System generated

Displays the last date the carrier enrollment code will be valid

End Date - (Carrier Plan) Field Description

End Date

System generated

Displays the last date (MMDDYYYY) the carrier plan will be valid
If the date is not known, 12/31/9999 is displayed.

End Date - (Carrier) Field Description

End Date

System generated

Displays the last date the carrier will be valid



End Date - (Payroll Office) Field Description

End Date

System generated

Displays the last date the payroll office will be valid

Enrollee - (Carrier) Field Description

Enrollee

System generated

Displays the enrollee's name submitted by the carrier

Enrollee SSN - Field Description

Enrollee SSN

System generated

Displays the SSN or pseudo SSN of the enrollee

Enrollees (Left/Drop) - Field Description

Enrollees (Left/Drop)

System generated

Displays the number of dropped enrollees

Enrollees (New/Add) - Field Description

Enrollees (New/Add)

System generated

Displays the number of new or added enrollees

Enrollees - Field Description

Enrollees

System generated

Displays the number of enrollee records that meet the criteria entered on the Reconciliation Summary page

Enrollment Changes % - (Added) Field Description

Enrollment Changes %



System generated

Displays the percent of enrollment changes that were added

Enrollment Changes % - (Dropped) Field Description

Enrollment Changes %

System generated

Displays the percent of enrollment changes that were dropped

Enrollment Changes Added - Field Description

Enrollment Change Added

System generated

Displays the number of enrollment changes that were added

Enrollment Changes Dropped - Field Description

Enrollment Changes Dropped

System generated

Displays the number of enrollment changes that were dropped

Enrollment Code - (Drop-down) Field Instruction

Enrollment Code

Optional

Select the drop-down menu and select the enrollment code

Enrollment Code - (Optional) Field Instruction

Enrollment Code

Optional, alphanumeric, three positions

Enter the enrollment code.

Enrollment Code - (Required) Field Instruction

Enrollment Code

Required, alphanumeric, three positions

Enter the enrollment code.



Enrollment Code - Field Description

Enrollment Code

System generated

Displays the enrollment code

Enrollment Code - Field Instruction

Enrollment Code

Optional, alphanumeric, three positions

Enter the enrollment code.

Enrollment ID - Field Description

Enrollment ID

System generated

Displays the SSN of the deceased annuitant

Error Code - (Select) Field Instruction

Error Code

Optional

Select the applicable error code from the list. For a list descriptions of error codes, see *Discrepancy Codes Table* (on page 179).

Error Threshold - (Carrier) Field Description

Error Threshold

System generated

Displays the number or percentage of errors permitted for the carrier before a transmission file is rejected

Error Threshold - (Payroll Office) Field Description

Error Threshold

System generated

Displays the number or percentage of errors permitted for the payroll office before a transmission file is rejected



Errors - Field Description

Errors

System generated

Displays the sum of error codes displayed in the Discrepancy field

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

Errors Reconciled - Field Description

Errors Reconciled

System generated

Displays the count of errors that have reconciliation reason and action code entered

Event That Permits Change - Field Description

Event That Permits Change

System generated

Displays the FEHB Event Code that identifies the event that initiated the enrollee's action

For a list of applicable event codes, see *Event Code That Permits Change Table* (on page 203).

Event That Permits Change - Form 2809 (Part D) Field Instruction

Event That Permits Change

Conditional

Select the drop-down menu and select the FEHB Event Code that identifies the event that initiated the enrollee's action. For a list of applicable event codes, see *Event Code That Permits Change Table* (on page 203).

Event That Permits Change - Form 2809 Update (Part D) Field Instruction

Event That Permits Change

Required

Select the drop-down menu and select the FEHB Event Code that identifies the event that initiated the enrollee's action. For a list of applicable event codes, see *Event Code That Permits Change Table* (on page 203).

Explanation - Field Description

Explanation

System generated



Displays the detailed explanation of the code

Fail Count - Field Description

Fail Count

System generated

Displays the number of times this record has failed the quarterly edit process

Fail Count From - Field Instruction

Fail Count From

Optional, numeric, three positions maximum

Enter a specific fail count number to search for enrollee records by a specific fail count number.

OR

Enter the number that starts the range of fail count numbers to search for enrollee records by a range of fail count numbers, then proceed to the To field.

Fail Count To - Field Instruction

Fail Count To

Optional, numeric, three positions maximum

Enter the number that was entered in the From field, to search enrollee records by a specific fail count number.

OR

Enter the number that ends the range of fail count numbers to search for enrollee records by a range of fail count numbers.

Fax Number - (Carrier Contact) Field Description

Fax Number

System generated

Displays the fax number of the carrier contact

Fax Number - (Carrier Plan Contact) Field Description

Fax Number

System generated

Displays the fax number of the carrier plan contact



Fax Number - (Payroll Office Contact) Field Description

Fax Number

System generated

Displays the fax number of the payroll office contact

Fax Number - (Payroll Office Contacts Add) Field Instruction

Fax Number

Optional, alphanumeric, 25 positions maximum

Enter the fax number of the payroll office contact.

Fax Number - (Personnel Office Contact) Field Description

Fax Number

System generated

Displays the fax number of the personnel office contact

Fax Number - (Personnel Office Contacts Add) Field Instruction

Fax Number

Optional, numeric, 25 positions maximum

Enter the fax number of the personnel office contact.

First Name - (Enrollee New/Survivor) Field Description

First Name

System generated

Displays the enrollee's new first name or the first name of the new survivor annuitant, as applicable

First Name - (Form 2809 Part A Continued) Field Instruction

First Name

Optional, alphanumeric

Enter the first name of the enrollee's family member who is enrolled/enrolling in FEHB.

First Name - (Required) Enrollee Field Instruction

First Name

Required, alphanumeric, 12 positions maximum



Enter the first name of the enrollee.

First Name - Enrollee Field Description

First Name

System generated

Displays the first name of the enrollee

First Name - Enrollee Field Instruction

First Name

Optional, alphanumeric, 12 positions maximum

Enter the first name of the enrollee.

First Name - Form 2809 View (Part A Continued) Field Description

First Name

System generated

Displays the first name of the enrollee's family member who is enrolled/enrolling in FEHB

First Name - Form 2810 Add (Part E) Field Instruction

First Name

Conditional, alphanumeric, 12 positions

If the **Change of Enrollee Information** box is selected, and the first name for the enrollee or survivor annuitant is different than the first name listed in Part A, enter the enrollee or survivor annuitant's new first name.

Foreign Country (Carrier Plan Contact) - Field Description

Foreign Country

System generated

Displays the country code of the carrier plan contact

For a list and descriptions of country codes, see **Country Codes Table** (on page 193).

Foreign Country - (Carrier Contact) Field Description

Foreign Country

System generated

Displays the country code of the carrier contact



For a list and descriptions of country codes, see *Country Codes Table* (on page 193).

Foreign Country - (Carrier) Field Description

Foreign Country

System generated

Displays the country code of the carrier

For a list and descriptions of country codes, see *Country Codes Table* (on page 193).

Foreign Country - (Enrollee Point of Contact) Field Description

Foreign Country

System generated

Displays the country code for the enrollee's employing, personnel, or point-of-contact office

For a list and descriptions of country codes, see *Country Codes Table* (on page 193).

Foreign Country - (Enrollee) Field Description

Foreign Country

System generated

Displays the enrollee's country code

For a list and descriptions of country codes, see *Country Codes Table* (on page 193).

Foreign Country - (Enrollee/Survivor) Field Description

Foreign Country

System generated

Displays the new country code for the enrollee's employing, personnel, or point-of-contact office

For a list and descriptions of country codes, see *Country Codes Table* (on page 193).

Foreign Country - (Payroll Office) Field Description

Foreign Country

System generated

Displays the country code of the payroll office

For a list and descriptions of country codes, see *Country Codes Table* (on page 193).

Foreign Country - (Personnel Office) Field Description

Foreign Country

System generated



Displays the country code of the personnel office

For a list and descriptions of country codes, see *Country Codes Table* (on page 193).

Foreign Country - Form 2809 Add (Part I) Field Instruction

Foreign Country

Conditional

Select the drop-down menu and select the employing, personnel, or point-of-contact office's country code. For a list and descriptions of country codes, see *Country Codes Table* (on page 193).

Note: If the State field is completed, do not complete this field. If the State field is not completed, and the address is from a country other than the United States, a country other than the United States, a country code must be entered.

Foreign Country - Form 2809 View (Part A) Field Description

Foreign Country

System generated

Displays the country code of the enrollee

For a list and descriptions of country codes, see *Country Codes Table* (on page 193).

Foreign Country - Form 2809/2810 Add (Part A) Field Instruction

Foreign Country

Conditional

Select the drop-down menu and select the country code of the payroll office. For a list and descriptions of country codes, see *Country Codes Table* (on page 193).

Note: If the State field is completed, do not complete this field. If the State field is not completed, and the address is from a country other than the United States, a country other than the United States, a country code must be entered.

Foreign Country - Form 2810 Add (Parts B thru F) Field Instruction

Foreign Country

Conditional

If (1) the **Change of Enrollee Information** box is selected, (2) the address is foreign, and (3) the country code for the enrollee or survivor annuitant's address is different than the country code listed in Part A - Country Code, select the drop-down menu and select the new country code for



the enrollee or survivor annuitant's address. For a list and descriptions of country codes, see *Country Codes Table* (see "*Country Codes Table*" on page 193).

From (Quarter/Year - Carrier) - Field Description

From (Quarter/Year) Carrier

System generated

Displays the carrier's code

From (Quarter/Year - Code) - Field Description

From (Quarter/Year) Code

System generated

Displays the enrollment code

From (Quarter/Year) - Field Description

From (Quarter/Year)

System generated

Displays the number of enrollees covered by the enrollment code displayed in the Code field during the selected quarter and year

ID - (Payroll Office) Field Description

ID

System generated

Displays the payroll office identification number

ID - Field Description

ID

System generated

Displays the payroll office identification number

Indicator - Field Description

Indicator

System generated

Displays the code that indicates if the transmission has been validated by the carrier

The code **Y** indicates the transmission has been validated, **C** indicates the transmission has been cancelled, and an empty field indicates the transmission has not been validated.



Initial - (Enrollee New/Survivor) Field Description

Initial

System generated

Displays the enrollee's new middle initial or the middle initial of the new survivor annuitant, as applicable

Initial - (Form 2809 Part A Continued) Field Instruction

Initial

Optional, alphanumeric

Enter the middle initial of the enrollee's family member who is enrolled/enrolling in FEHB.

Initial - Field Description

Initial

System generated

Displays the middle name of the enrollee

Initial - Field Instruction

Initial

Optional, alphanumeric, one position

Enter the middle initial of the enrollee.

Initial - Form 2809 View (Part A Continued) Field Description

Initial

System generated

Displays the middle initial of the enrollee's family member who is enrolled/enrolling in FEHB

Initial - Form 2810 Add (Part E) Field Instruction

Initial

Conditional, alphanumeric, 1 position

If the **Change of Enrollee Information** box is selected, and the initial for the enrollee or survivor annuitant is different than the initial listed in Part A, enter the enrollee or survivor annuitant's new initial.



Last Carrier Update Date - Field Description

Last Carrier Update Date

System generated

Displays the date of the most recent change

Last Carrier Update ID - Field Description

Last Carrier Update ID

System generated

Displays the user identification number of the carrier representative who made the most recent change to the record

Last Carrier Update Time - Field Description

Last Carrier Update Time

System generated

Displays the time of the most recent change

Last Changed Date - (Payroll Office) Field Description

Last Changed Date

System generated

Displays the date of the most recent change

Last Changed Date - Field Description

Last Changed Date

System generated

Displays the date of the most recent change

Last Changed ID - (Payroll Office) Field Description

Last Changed ID

System generated

Displays the user identification number of the individual who made the most recent change to the record

Last Changed ID - Field Description

Last Changed ID



System generated

Displays the user identification number of the individual who made the most recent change to the record

Last Changed Time - (Payroll Office) Field Description

Last Changed Time

System generated

Displays the time of the most recent change

Last Changed Time - Field Description

Last Changed Time

System generated

Displays the time of the most recent change

Last CL10 Date - Field Description

Last CL10 Date

System generated

Displays the last date of the initial editing and processing of the payroll office enrollment file transmission

Last CL10 Time - Field Description

Last CL10 Time

System generated

Displays the last time of the initial editing and processing of the payroll office enrollment file transmission

Last CL20 Date - Field Description

Last CL20 Date

System generated

Displays the last date of the initial editing and processing of the carrier enrollment file transmission

Last CL20 Time - Field Description

Last CL20 Date



System generated

Displays the last time of the initial editing and processing of the carrier enrollment file transmission

Last CL30 Date - Field Description

Last CL30 Date

System generated

Displays the last date the payroll office enrollment record fields were edited and matched

Last CL30 Time - Field Description

Last CL30 Time

System generated

Displays the last date the payroll office enrollment record fields were edited and matched

Last CL40 Date (System Generated) Field Instructions

Last CL40 Date

System generated

Displays the last date the carrier enrollment record fields were edited and matched

Last CL40 Time - Field Description

Last CL40 Time

System generated

Displays the last date the carrier enrollment record fields were edited and matched

Last CL50 Date - Field Description

Last CL50 Date

Reserved for future use

Last CL50 Time - Field Description

Last CL50 Time

Reserved for future use



Last CL60 Date - Field Description

Last CL60 Date

System generated

Displays the last date the error statistics record fields were updated

Last CL60 Time - Field Description

Last CL60 Time

System generated

Displays the last time the error statistics record fields were updated

Last CL70 Date Field Instructions

Last CL70 Date

Reserved for future use

Last CL70 Time - Field Description

Last CL70 Time

Reserved for future use

Last CL80 Date - Field Description

Last CL80 Date

System generated

Displays the last date the 2809 corrective action files were processed and transmitted to OPM Data Hub

Last CL80 Time - Field Description

Last CL80 Time

System generated

Displays the last time the 2809 corrective action files were processed and transmitted to OPM Data Hub

Last CL90 Date - Field Description

Last CL90 Date

System generated



Displays the last date the 2810 corrective action files were processed and transmitted to OPM Data Hub

Last CL90 Time - Field Description

Last CL90 Time

System generated

Displays the last time the 2810 corrective action files were processed and transmitted to OPM Data Hub

Last Name - (Enrollee/Survivor) Field Description

Last Name

System generated

Displays the enrollee's new last name or the last name of the new survivor annuitant, as applicable

Last Name - (Form 2809 Part A Continued) Field Instruction

Last Name

Optional, alphanumeric

Enter the last name of the enrollee's family member who is enrolled/enrolling in FEHB.

Last Name - (Required) Field Instruction

Last Name

Required, alphanumeric, 25 positions maximum

Enter the enrollee's last name.

Note: If the enrollee has a title (e.g., Jr., Sr., I, II, or III) it should be entered after the last name without punctuation.

OR

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

Last Name - Enrollee Field Description

Last Name

System generated

Displays the last name of the enrollee



Last Name - Enrollee Field Instruction

Last Name

Optional, alphanumeric, 25 positions maximum

Enter the last name of the enrollee.

Note: If the enrollee has a title (e.g., Jr, Sr, I, II, or III) it should be entered after the last name without punctuation.

OR

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

Last Name - Form 2809 View (Part A Continued) Field Description

Last Name

System generated

Displays the last name of the enrollee's family member who is enrolled/enrolling in FEHB

Last Name - Form 2810 Add (Part E) Field Instruction

Last Name

Conditional, alphanumeric, 25 positions maximum

If the Change of Enrollee Information box is selected, and the last name for the enrollee or survivor annuitant is different than the last name listed in Part A, enter the enrollee or survivor annuitant's new last name.

Note: If the enrollee or survivor annuitant has a title (e.g., Jr., Sr., I, II, or III) it should be entered after the last name without punctuation.

OR

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

Last Payroll Update Date - Field Description

Last Payroll Update Date

System generated

Displays the date of the most recent change



Last Payroll Update ID - Field Description

Last Payroll Update ID

System generated

Displays the user identification number of the payroll office representative who made the most recent change to the record

Last Payroll Update Time - Field Description

Last Payroll Update Time

System generated

Displays the time of the most recent change

Last Validate Date - Field Description

Last Validate Date

System generated

Displays the date of transmission was last validated

Last Validate ID - Field Description

Last Validate ID

System generated

Displays the user identification number of the person who last validated the transmission

Last Validate Time - Field Description

Last Validate Time

System generated

Displays the time the transmission was last validated

Married - (Enrollee - Required) Field Instruction

Married

Required

Select the radio button next to one of the following:

Y - Indicates the enrollee is married

N - Indicates the enrollee is single



Married - (Enrollee) Field Description

Married

System generated

Selected radio button indicates the following value:

Y - Enrollee is married

N - Enrollee is single

Match - Field Description

Match

System generated

Displays the number of matching records that meet the criteria entered on the Reconciliation Summary page

Medicare Spouse - (Enrollee) Field Instruction

Medicare Spouse

Conditional

Select the check box next to one of the following values, if applicable:

A - Indicates the enrollee or enrollee's spouse who is enrolled/enrolling in FEHB is covered by Medicare Part A

B - Indicates the enrollee or enrollee's spouse who is enrolled/enrolling in FEHB is covered by Medicare Part B

Medicare Spouse - Field Description

Medicare Spouse

System generated

Selected check box indicates one of the following values:

A - Enrollee's spouse who is enrolled/enrolling in FEHB is covered by Medicare Part A

B - Enrollee's spouse who is enrolled/enrolling in FEHB is covered by Medicare Part B

Medicare You - (Enrollee) Field Instruction

Medicare You

Conditional

Select the check box next to one of the following values, if applicable:

A - Indicates the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by Medicare Part A



B - Indicates the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by Medicare Part B

Medicare You - Field Description

Medicare You

System generated

Selected check box indicates one of the following values:

A - Enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by Medicare Part A

B - Enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by Medicare Part B

Middle Name - Enrollee Field Description

Middle Name

System generated

Displays the middle name or initial of the enrollee

Middle Name - Enrollee Field Instruction

Middle Name

Optional, alphanumeric, 12 positions maximum

Enter the middle name of the enrollee.

Middle Name - Field Instruction

Middle Name

Optional, alphanumeric, 12 positions maximum

Enter the middle name of the enrollee.

Name - (Carrier Contact) Field Description

Name

System generated

Displays the name of the carrier contact

Name - (Carrier) Field Instruction

Name

Optional, alphanumeric, 40 positions



Enter the name of the carrier.

Name - (Payroll Office) Field Description

Name

System generated

Displays the name of the payroll office

Name - (Payroll Office) Field Instruction

Name

Optional, alphanumeric, 40 positions

Enter the name of the payroll office.

Name - Carrier Field Description

Name

System generated

Displays the name of the carrier

Name - Carrier Plan Contact Field Description

Name

System generated

Displays the name of the carrier plan contact

Name - Enrollee Carrier Field Description

Name

System generated

Displays the enrollee's name submitted by the carrier

Name - Enrollee Field Description

Name

System generated

Displays the name of the enrollee



Name - Enrollee Payroll Field Description

Name

System generated

Displays the enrollee's name submitted by the payroll office

Name - Payroll Office Contact Field Description

Name

System generated

Displays the name of the payroll office contact

Name - Personnel Office Contact Field Description

Name

System generated

Displays the name of the personnel office contact

Name - Personnel Office Contacts Add Field Instruction

Name

Optional, alphanumeric, 30 positions maximum

Enter the name of the personnel office.

Nature of Action - Field Description

Nature of Action

System generated

Selected radio button indicates one of the following:

Start - Creates a new enrollment in FEHB

Change - Change to a current FEHB enrollment

Stop - Indicates the cancellation of an FEHB enrollment

Nature of Action - Field Instruction

Nature of Action

Required

Select the applicable radio button to indicate one of the following:

Start - Creates a new enrollment in FEHB

Change - Change to a current FEHB enrollment

Stop - Indicates the cancellation of an FEHB enrollment



New Enrollment Code - Field Description

New Enrollment Code

System generated

Displays the new enrollment code for the enrollee

New Enrollment Code - Form 2809 Add (Part C) Field Instruction

New Enrollment Code

Conditional

Enter the new enrollment code for the enrollee.

New Enrollment Code - Form 2809 Update (Part C) Field Instruction

New Enrollment Code

Required

Enter the new enrollment code for the enrollee.

New Enrollment Code Number - (Survivor Annuitant) Field Description

New Enrollment Code Number

System generated

Displays the new enrollment code for the survivor annuitant

New Enrollment Code Number - Form 2810 Add (Part F) Field Instruction

New Enrollment Code Number

Conditional, alphanumeric, three positions

If the **Change in Enrollment/Survivor Annuitant** box is selected, enter the enrollee or survivor annuitant's new enrollment code number; otherwise, do not complete this field.

New Plan Name - Field Description

New Plan Name

System generated

Displays the name of the FEHB health insurance plan in which the individual is enrolled/enrolling



New Plan Name - Form 2809 Add (Part C) Field Instruction

New Plan Name

Conditional

Enter the name of the new FEHB health insurance plan in which the individual is enrolled/enrolling

New Plan Name - Form 2809 Update (Part C) Field Instruction

New Plan Name

Required

Enter the name of the new FEHB health insurance plan in which the individual is enrolled/enrolling.

Not Received - Field Description

Not Received

System generated

Displays the number of transmissions that were expected but not received

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

Options - (View Only) Field Description

Options

System generated

View - Allows the user to view the record

Options - (View, Activate, Update) Field Description

Options

System generated

View - Allows the user to view the record

Activate/Inactivate - Allows the user to make the record active or inactive in the system

Update - Allows the user to make changes to the record

Options - (View, Activate, Update, Delete) Field Description

Options

System generated



View - Allows the user to view the record

Activate/Inactivate - Allows the user to make the record active or inactive in the system

Update - Allows the user to make changes to the record

Delete - Allows the user to remove the record (For NFC use only)

Options - (View, List, Add) Field Description

Options

System generated

View - Allows the user to view the record

List - Allows the user to view the list of enrollees in the record

Add - Allows the user to add enrollees to the record

Update - Allows the user to make changes to the record

Release - Allows the user to release the record

Cancel - Allows the user to cancel the record

Options - (View, Reconcile) Field Description

Options

System generated

View - Allows the user to view the record

Reconcile - Allows the user to reconcile the record

Options - (View, Update, Cancel) Field Description

Options

System generated

View - Allows the user to view the record

Update - Allows the user to make changes to the record

Release - Allows the user to release the record

Cancel - Allows the user to cancel the record

Options - (View, Update, Delete) Field Description

Options

System generated

View - Allows the user to view the record

Update - Allows the user to make changes to the record

Delete - Allows the user to remove the record



Options - (View, Update, Release) Field Description

Options

System generated

View - Allows the user to view the record

Update - Allows the user to make changes to the record

Release - Allows the user to release the record

Cancel - Allows the user to cancel the record

Options - (View, Validate) Field Description

Options

System generated

View - Allows the user to view the record

Validate - Allows the user to validate the record

Order By - (Agency ID) Field Instruction

Order By

Optional, default

Defaults to the **Agency ID** sort option

This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:

Agency ID - Sorts search results by Agency identification code

SSN - Sorts search results by enrollee Social Security number

Name - Sorts search results by enrollee name

User ID - Sorts search results by user identification number

Status - Sorts search results by status (e.g., released, processed, not released, or cancelled release)

Order By - (Carrier - Code Sort) Field Instruction

Order By

Optional, default

Defaults to the **Carrier** sort option

This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:

Carrier - Sorts search results by carrier code

Code - Sorts search results by carrier enrollment code

Order By - (Carrier - Plan Sort) Field Instruction

Order By



Optional, default

Defaults to the **Carrier** sort option

This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:

Carrier - Sorts search results by carrier code

Plan - Sorts search results by plan code

Type - Sorts search results by type code

Order By - (Carrier ID - Type Sort) Field Instruction

Order By

Optional, default

Defaults to the **ID** sort option

This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:

ID - Sorts search results by carrier ID

Type - Sorts search results by type code

Order By - (Carrier, Name, City, State Sorts) Field Instruction

Order By

Optional, default

Defaults to the **Carrier** sort option

This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:

Carrier - Sorts search results by carrier code

Name - Sorts search results by name

City - Sorts search results by city

State - Sorts search results by State

Order By - (ID - Year/Quarter - Pay Cycle) Field Instruction

Order By

Optional, default

Defaults to the **ID** sort option

This field allows users to sort search results by the options listed below.

To choose a sort option, select the radio button next to one of the following menu options:

ID - Sorts search results by payroll office identification number (ID)

Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter

Pay Cycle - Sorts search results by pay cycle type



Order By - (ID - Year/Quarter) Field Instruction

Order By

Optional, default

Defaults to the **ID** sort option

This field allows users to sort search results by the options listed below.

To choose a sort option, select the radio button next to one of the following menu options:

ID - Sorts search results by payroll office identification number (ID)

Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter

Order By - (Payroll Office Contact) Field Instruction

Order By

Optional, default

Defaults to the **ID** sort option

This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:

ID - Sorts search results by payroll office identification number (ID)

Year - Sorts search results by year

Order By - (Payroll Office Contact) Field Instruction

Order By

Optional, default

Defaults to the **ID** sort option

This field allows users to sort search results by the options listed below.

To choose a sort option, select the radio button next to one of the following menu options:

ID - Sorts search results by payroll office identification number (ID)

Type - Sorts search results by type code

Order By - (Payroll Office Information) Field Instruction

Order By

Optional, default

Defaults to the **ID** sort option

This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:

ID - Sorts search results by payroll office identification number (ID)

Pay Cycle - Sorts search results by the pay cycle

Name - Sorts search results by payroll office name

City - Sorts search results by payroll office city



Order By - (Personnel Office Contact) Field Instruction

Order By

Optional, default

Defaults to the **ID** sort option

This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following menu options:

ID - Sorts search results by payroll office identification number (ID)

POI - Sorts search results by personnel office ID

Type - Sorts search results by type code

Order By - (Transmission) Field Instruction

Order By

Optional, default

Defaults to the **ID** sort option

This field allows users to sort search results by the options listed below.

To choose a sort option, select the radio button next to one of the following menu options:

ID - Sorts search results by payroll office identification number (ID)

Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter

Transmission Type - Sorts search results by pay period or reconciliation transmissions

Pay Cycle - Sorts search results by biweekly, monthly, or other pay cycles

Order By 1st - (Carrier - Action Code) Field Instruction

Order By 1st

Optional default

Defaults to the **Carrier** option

To choose another type of sort option, select the drop-down menu and select one of the following menu options:

Action Code - Sort search results by reconciliation action code

Agency - Sorts search results by Agency code

Carrier - Sorts search results by carrier code

Enrollment Code - Sorts search results by enrollment code

Payroll Office - Sorts search results by payroll office identification number

Personnel Office ID - Sorts search results by personnel office identification number

Order By 1st - (Carrier - Agency) Field Instruction

Order By 1st

Optional default

Defaults to the **Carrier** option



To choose another type of sort option, select the drop-down menu and select one of the following menu options:

Agency - Sorts search results by Agency code

Carrier - Sorts search results by carrier code

Enrollment Code - Sorts search results by enrollment code

Pers. Office ID - Sorts search results by personnel office identification number

Order By 1st - (Carrier - Reason Code) Field Instruction

Order By 1st

Optional, default

Defaults to the **Carrier** option

To choose another type of sort option, select the drop-down menu and select one of the following menu options:

Agency - Sorts search results by Agency code

Carrier - Sorts search results by carrier code

Enrollment Code - Sorts search results by enrollment code

Payroll Office - Sorts search results by payroll office identification number

Personnel Office ID - Sorts search results by personnel office identification number

Reason Code - Sorts search results by reconciliation reason code

Order By 1st - (Carrier ID) Field Instruction

Order By 1st

Optional, default

Defaults to the **Carrier ID** option

To choose another type of sort option, select the drop-down menu and select one of the following menu options:

Carrier ID - Sorts search results by carrier identification number

Name - Sorts search results by enrollee name

Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter

Submission Date - Sorts search results by submission date

Status - Sorts search results by transmission status

Order By 1st - (Enrollee) Field Instruction

Order By 1st

Optional, default

Defaults to the **Name** option

To choose another type of sort option in the first sort search order, select the drop-down menu and select one of the following menu options:

Agency - Sorts research results by agency code

Carrier - Sorts research results by carrier code

Enrollment Code - Sorts search results by enrollment code



Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process

Name - Sorts search results by enrollee name

Pers. Office ID - Sorts search by the personnel office identification number

SSNO - Sorts search results by enrollee SSN

Other ID - Sorts search results by the identifier used by RSP/OWCP to identify the enrollee

Transmission Type - Sorts search results by the transmission type

Employee/Annuitant - Sorts search results by the employee/annuitant type

As of Date - Sorts search results by the as of date range

Order By 1st - (Payroll Office) Field Instruction

Order By 1st

Optional, default

Defaults to the **Payroll Office** option

To choose another type of sort option, select the drop-down menu and select one of the following menu options:

Payroll Office - Sorts search results by payroll office identification number

Name - Sorts search results by enrollee name

Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter

Submission Date - Sorts search results by submission date

Status - Sorts search results by transmission status

Order By 1st - (Report - Name Enrollment Code) Field Instruction

Order By 1st

Optional, default

Defaults to the **Name** option

To choose another type of sort option, select the drop-down menu and select one of the following menu options:

Agency - Sorts search results by Agency code.

Enrollment Code - Sorts search results by enrollment code.

Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process.

Name - Sorts search results by enrollee name.

Pers. Office ID - Sorts search results by personnel office identification number.

SSNO - Sorts search results by enrollee Social Security number.

Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee.

Order By 1st - (Report 12) Field Instruction

Order By 1st



Optional, default

Defaults to the **Name** option

To choose another type of sort option select the drop-down menu and select one of the following menu options to display the selected criteria in the first sort search order:

Enrollment Code - Sorts search results by enrollment code.

Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process.

Name - Sorts search results by enrollee name.

SSNO - Sorts search results by enrollee Social Security number.

Payroll ID - Sorts search results by payroll office identification number.

Order By 1st - (Report 13) Field Instruction

Order By 1st

Optional, default

Defaults to the **Carrier** option

To choose another type of sort option, select the drop-down menu and select one of the following menu options:

Carrier - Sorts search results by carrier code.

Pay Cycle - Sorts search results by pay cycle.

Enrollment Code - Sorts search results by enrollment code.

As of Date - Sorts search results by as of dates.

Order By 2nd - (Carrier - Action Code) Field Instruction

Order By 2nd

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the second sort search order:

Action Code - Sort search results by reconciliation action code.

Agency - Sorts search results by Agency code.

Carrier - Sorts search results by carrier code.

Enrollment Code - Sorts search results by enrollment code.

Payroll Office - Sorts search results by payroll office identification number.

Personnel Office ID - Sorts search results by personnel office identification number.

Order By 2nd - (Carrier - Agency) Field Instruction

Order By 2nd

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the second sort search order:

Agency - Sorts search results by Agency code.

Carrier - Sorts search results by carrier code.



Enrollment Code - Sorts search results by enrollment code.

Pers. Office ID - Sorts search results by personnel office identification number.

Order By 2nd - (Carrier ID) Field Instruction

Order By 2nd

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the second sort search order:

Carrier ID - Sorts search results by carrier identification number.

Name - Sorts search results by enrollee name.

Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter.

Submission Date - Sorts search results by submission date.

Status - Sorts search results by transmission status.

Order By 2nd - (Carrier) Field Instruction

Order By 2nd

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the second sort search order:

Agency - Sorts search results by Agency code.

Carrier - Sorts search results by carrier code.

Enrollment Code - Sorts search results by enrollment code.

Payroll Office - Sorts search results by payroll office identification number.

Personnel Office ID - Sorts search results by personnel office identification number.

Reason Code - Sorts search results by reconciliation reason code.

Order By 2nd - (Enrollee) Field Instruction

Order By 2nd

Optional, default

Defaults to the **SSNO** option

To choose another type of sort option select the drop-down menu and select one of the following menu options to display the selected criteria in the second sort search order:

Enrollment Code - Sorts search results by enrollment code

Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process

Name - Sorts search results by enrollee name

SSNO - Sorts search results by enrollee SSN

Payroll ID - Sorts search results by payroll office identification number



Order By 2nd - (Payroll Office) Field Instruction

Order By 2nd

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the second sort search order:

Payroll Office - Sorts search results by payroll office identification number.

Name - Sorts search results by enrollee name.

Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter.

Submission Date - Sorts search results by submission date.

Status - Sorts search results by transmission status.

Order By 2nd - (Report - SSNO Enrollment Code) Field Instruction

Order By 2nd

Optional, default

Defaults to the **SSNO** option

To choose another type of sort option, select the drop-down menu and select one of the following menu options:

Agency - Sorts search results by Agency code.

Enrollment Code - Sorts search results by enrollment code.

Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process.

Name - Sorts search results by enrollee name.

Pers. Office ID - Sorts search results by personnel office identification number.

SSNO - Sorts search results by enrollee Social Security number.

Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee.

Order By 2nd - (Report 13) Field Instruction

Order By 2nd

Optional

To choose a sort option, select the drop-down menu and select one of the following menu options:

Carrier - Sorts search results by carrier code.

Pay Cycle - Sorts search results by pay cycle.

Enrollment Code - Sorts search results by enrollment code.

As of Date - Sorts search results by as of dates.

Order By 2nd - Field Instruction

Order By 2nd

Optional



Defaults to the **SSNO** sort option if no sort option is selected

To choose another sort option, select the drop-down menu and select one of the following options to display the selected criteria in the second sort order:

Agency - Sorts search results by Agency code

Carrier - Sorts search results by carrier code

Enrollment Code - Sorts search results by enrollment code

Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process

Name - Sorts search results by enrollee name

Pers. Office ID - Sorts search results by personnel office identification number

SSNO - Sorts search results by enrollee Social Security number

Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee

Transmission Type - Sorts search results by the transmission type

Employee/Annuitant - Sorts search results by the employee/annuitant type

As of Date - Sorts search results by the As of Date range

Order By 3rd - (Carrier - Action Code) Field Instruction

Order By 3rd

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the third sort search order:

Action Code - Sort search results by reconciliation action code.

Agency - Sorts search results by Agency code.

Carrier - Sorts search results by carrier code.

Enrollment Code - Sorts search results by enrollment code.

Payroll Office - Sorts search results by payroll office identification number.

Personnel Office ID - Sorts search results by personnel office identification number.

Order By 3rd - (Carrier - Agency) Field Instruction

Order By 3rd

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the third sort search order:

Agency - Sorts search results by Agency code.

Carrier - Sorts search results by carrier code.

Enrollment Code - Sorts search results by enrollment code.

Pers. Office ID - Sorts search results by personnel office identification number.



Order By 3rd - (Carrier ID) Field Instruction

Order By 3rd

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the third sort search order:

Carrier ID - Sorts search results by carrier identification number.

Name - Sorts search results by enrollee name.

Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter.

Submission Date - Sorts search results by submission date.

Status - Sorts search results by transmission status.

Order By 3rd - (Carrier) Field Instruction

Order By 3rd

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the third sort search order:

Agency - Sorts search results by Agency code.

Carrier - Sorts search results by carrier code.

Enrollment Code - Sorts search results by enrollment code.

Payroll Office - Sorts search results by payroll office identification number.

Personnel Office ID - Sorts search results by personnel office identification number.

Reason Code - Sorts search results by reconciliation reason code.

Order By 3rd - (Enrollee) Field Instruction

Order By 3rd

Optional

Select the drop-down menu and select one of the following options to display the selected criteria in the third sort search order:

Enrollment Code - Sorts search results by enrollment code

Name - Sorts search results by enrollee name

SSNO - Sorts search results by enrollee SSN

Order By 3rd - (Payroll Office) Field Instruction

Order By 3rd

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the third sort search order:

Payroll Office - Sorts search results by payroll office identification number.

Name - Sorts search results by enrollee name.

Year/Quarter - Sorts search results by reconciliation year and reconciliation quarter.



Submission Date - Sorts search results by submission date.

Status - Sorts search results by transmission status.

Order By 3rd - (Report - Enrollment Code) Field Instruction

Order By 3rd

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the third sort search order:

Agency - Sorts search results by Agency code.

Enrollment Code - Sorts search results by enrollment code.

Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process.

Name - Sorts search results by enrollee name.

Pers. Office ID - Sorts search results by personnel office identification number.

SSNO - Sorts search results by enrollee Social Security number.

Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee.

Order By 3rd - (Report 13) Field Instruction

Order By 3rd

Optional

To choose a sort option, select the drop-down menu and select one of the following menu options:

Carrier - Sorts search results by carrier code.

Pay Cycle - Sorts search results by pay cycle.

Enrollment Code - Sorts search results by enrollment code.

As of Date - Sorts search results by as of dates.

Order By 3rd - Field Instruction

Order By 3rd

Optional

Select the drop-down menu and select one of the following options to display the selected criteria in the third sort order:

Agency - Sorts search results by Agency code

Carrier - Sorts search results by carrier code

Enrollment Code - Sorts search results by enrollment code

Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process

Name - Sorts search results by enrollee name

Pers. Office ID - Sorts search results by personnel office identification number



SSNO - Sorts search results by enrollee Social Security number
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee
Transmission Type - Sorts search results by the transmission type
Employee/Annuitant - Sorts search results by the employee/annuitant type
As of Date - Sorts search results by the As of Date range

Order By 4th - (Carrier - Action Code) Field Instruction

Order By 4th

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the fourth sort search order:

Action Code - Sort search results by reconciliation action code.

Agency - Sorts search results by Agency code.

Carrier - Sorts search results by carrier code.

Enrollment Code - Sorts search results by enrollment code.

Payroll Office - Sorts search results by payroll office identification number.

Personnel Office ID - Sorts search results by personnel office identification number.

Order By 4th - (Carrier - Agency) Field Instruction

Order By 4th

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the fourth sort search order:

Agency - Sorts search results by Agency code.

Carrier - Sorts search results by carrier code.

Enrollment Code - Sorts search results by enrollment code.

Pers. Office ID - Sorts search results by personnel office identification number.

Order By 4th - (Carrier) Field Instruction

Order By 4th

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the fourth sort search order:

Agency - Sorts search results by Agency code.

Carrier - Sorts search results by carrier code.

Enrollment Code - Sorts search results by enrollment code.

Payroll Office - Sorts search results by payroll office identification number.

Personnel Office ID - Sorts search results by personnel office identification number.

Reason Code - Sorts search results by reconciliation reason code.



Order By 4th - (Enrollee) Field Instruction

Order By 4th

Optional

Select the drop-down menu and select one of the following options to display the selected criteria in the fourth sort search order:

Enrollment Code - Sorts search results by enrollment code

Name - Sorts search results by enrollee name

SSNO - Sorts search results by enrollee SSN

Order By 4th - (Report - Enrollment Code) Field Instruction

Order By 4th

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the fourth sort search order:

Agency - Sorts search results by Agency code.

Enrollment Code - Sorts search results by enrollment code.

Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process.

Name - Sorts search results by enrollee name.

Pers. Office ID - Sorts search results by personnel office identification number.

SSNO - Sorts search results by enrollee Social Security number.

Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee.

Order By 4th - (Report 13) Field Instruction

Order By 4th

Optional

To choose a sort option, select the drop-down menu and select one of the following menu options:

Carrier - Sorts search results by carrier code.

Pay Cycle - Sorts search results by pay cycle.

Enrollment Code - Sorts search results by enrollment code.

As of Date - Sorts search results by as of dates.

Order By 4th - Field Instruction

Order By 4th

Optional

Select the drop-down menu and select one of the following options to display the selected criteria in the fourth sort order:



Agency - Sorts search results by Agency code
Carrier - Sorts search results by carrier code
Enrollment Code - Sorts search results by enrollment code
Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process
Name - Sorts search results by enrollee name
Pers. Office ID - Sorts search results by personnel office identification number
SSNO - Sorts search results by enrollee Social Security number
Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee
Transmission Type - Sorts search results by the transmission type
Employee/Annuitant - Sorts search results by the employee/annuitant type
As of Date - Sorts search results by the As of Date range

Order By 5th - (Carrier - Action Code) Field Instruction

Order By 5th

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the fifth sort search order:

Action Code - Sort search results by reconciliation action code.
Agency - Sorts search results by Agency code.
Carrier - Sorts search results by carrier code.
Enrollment Code - Sorts search results by enrollment code.
Payroll Office - Sorts search results by payroll office identification number.
Personnel Office ID - Sorts search results by personnel office identification number.

Order By 5th - (Carrier) Field Instruction

Order By 5th

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the fifth sort search order:

Agency - Sorts search results by Agency code.
Carrier - Sorts search results by carrier code.
Enrollment Code - Sorts search results by enrollment code.
Payroll Office - Sorts search results by payroll office identification number.
Personnel Office ID - Sorts search results by personnel office identification number.
Reason Code - Sorts search results by reconciliation reason code.

Order By 5th - (Enrollee) Field Instruction

Order By 5th

Optional



Select the drop-down menu and select one of the following options to display the selected criteria in the fifth sort search order:

Enrollment Code - Sorts search results by enrollment code

Name - Sorts search results by enrollee name

SSNO - Sorts search results by enrollee SSN

Order By 5th - (Report - Enrollment Code) Field Instruction

Order By 5th

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the fifth sort search order:

Agency - Sorts search results by Agency code.

Enrollment Code - Sorts search results by enrollment code.

Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process.

Name - Sorts search results by enrollee name.

Pers. Office ID - Sorts search results by personnel office identification number.

SSNO - Sorts search results by enrollee Social Security number.

Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee.

Order By 5th - (Report 13) Field Instruction

Order By 5th

Optional

To choose a sort option, select the drop-down menu and select one of the following menu options:

Carrier - Sorts search results by carrier code.

Pay Cycle - Sorts search results by pay cycle.

Enrollment Code - Sorts search results by enrollment code.

As of Date - Sorts search results by as of dates.

Order By 5th - Field Instruction

Order By 5th

Optional

Select the drop-down menu and select one of the following options to display the selected criteria in the fifth sort order:

Agency - Sorts search results by Agency code

Carrier - Sorts search results by carrier code

Enrollment Code - Sorts search results by enrollment code

Fail Count - Sorts search results by the number of times a discrepancy or warning record has



failed the quarterly edit process

Name - Sorts search results by enrollee name

Pers. Office ID - Sorts search results by personnel office identification number

SSNO - Sorts search results by enrollee Social Security number

Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee

Transmission Type - Sorts search results by the transmission type

Employee/Annuitant - Sorts search results by the employee/annuitant type

As of Date - Sorts search results by the As of Date range

Order By 6th - (Carrier - Action Code) Field Instruction

Order By 6th

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the sixth sort search order:

Action Code - Sort search results by reconciliation action code.

Agency - Sorts search results by Agency code.

Carrier - Sorts search results by carrier code.

Enrollment Code - Sorts search results by enrollment code.

Payroll Office - Sorts search results by payroll office identification number.

Personnel Office ID - Sorts search results by personnel office identification number.

Order By 6th - (Carrier) Field Instruction

Order By 6th

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the sixth sort search order:

Agency - Sorts search results by Agency code.

Carrier - Sorts search results by carrier code.

Enrollment Code - Sorts search results by enrollment code.

Payroll Office - Sorts search results by payroll office identification number.

Personnel Office ID - Sorts search results by personnel office identification number.

Reason Code - Sorts search results by reconciliation reason code.

Order By 6th - (Enrollee) Field Instruction

Order By 6th

Optional

Select the drop-down menu and select one of the following options to display the selected criteria in the sixth sort search order:

Enrollment Code - Sorts search results by enrollment code

Name - Sorts search results by enrollee name



SSNO - Sorts search results by enrollee SSN

Order By 6th - (Report - Enrollment Code) Field Instruction

Order By 6th

Optional

Select the drop-down menu and select one of the following menu options to display the selected criteria in the sixth sort search order:

Agency - Sorts search results by Agency code.

Enrollment Code - Sorts search results by enrollment code.

Fail Count - Sorts search results by the number of times a record has failed the quarterly edit process.

Name - Sorts search results by enrollee name.

Pers. Office ID - Sorts search results by personnel office identification number.

SSNO - Sorts search results by enrollee Social Security number.

Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee.

Order By 6th - Field Instruction

Order By 6th

Optional

Select the drop-down menu and select one of the following options to display the selected criteria in the sixth sort order:

Agency - Sorts search results by Agency code

Carrier - Sorts search results by carrier code

Enrollment Code - Sorts search results by enrollment code

Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process

Name - Sorts search results by enrollee name

Pers. Office ID - Sorts search results by personnel office identification number

SSNO - Sorts search results by enrollee Social Security number

Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee

Transmission Type - Sorts search results by the transmission type

Employee/Annuitant - Sorts search results by the employee/annuitant type

As of Date - Sorts search results by the As of Date range

Order By 7th - Agency Field Instruction

Order By 7th

Optional



Select the drop-down menu and select one of the following options to display the selected criteria in the seventh sort search order:

Agency - Sorts search results by Agency code

Carrier - Sorts search results by carrier code

Enrollment Code - Sorts search results by enrollment code

Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process

Name - Sorts search results by enrollee name

Pers. Office ID - Sorts search results by personnel office identification number

SSNO - Sorts search results by enrollee Social Security number

Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee

Transmission Type - Sorts search results by the transmission type

Employee/Annuitant - Sorts search results by the employee/annuitant type

As of Date - Sorts search results by the As of Date range

Order By 8th - Agency Field Instruction

Order By 8th

Optional

Select the drop-down menu and select one of the following options to display the selected criteria in the eighth sort search order:

Agency - Sorts search results by Agency code

Carrier - Sorts search results by carrier code

Enrollment Code - Sorts search results by enrollment code

Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process

Name - Sorts search results by enrollee name

Pers. Office ID - Sorts search results by personnel office identification number

SSNO - Sorts search results by enrollee Social Security number

Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee

Transmission Type - Sorts search results by the transmission type

Employee/Annuitant - Sorts search results by the employee/annuitant type

As of Date - Sorts search results by the As of Date range

Order by 9th - Agency Field Instruction

Order By 9th

Optional

Select the drop-down menu and select one of the following options to display the selected criteria in the ninth sort search order:

Agency - Sorts search results by Agency code

Carrier - Sorts search results by carrier code

Enrollment Code - Sorts search results by enrollment code



Fail Count - Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process

Name - Sorts search results by enrollee name

Pers. Office ID - Sorts search results by personnel office identification number

SSNO - Sorts search results by enrollee Social Security number

Other ID - Sorts search results by the identifier used by the Retirement Services Program (RSP)/Office of Workers' Compensation Programs (OWCP) to identify the enrollee

Transmission Type - Sorts search results by the transmission type

Employee/Annuitant - Sorts search results by the employee/annuitant type

As of Date - Sorts search results by the As of Date range

Other (Name) - Field Description

Other (Name)

System generated

Displays the name of the health insurance program other than TRICARE or Civilian Health and Medical Program of the Uniformed Services (CHAMPUS) that covers the enrollee or enrollee's family member

Other - (Enrollee) Field Instruction

Other

Conditional

Select the check box to indicate the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by a health insurance program other than Tricare or CHAMPUS.

If selected, enter the name of the insurance carrier; otherwise, do not complete this field.

Other - Field Description

Other

System generated

Selected check box indicates that the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by a health insurance program other than TRICARE or Civilian Health and Medical Program of the Uniformed Services (CHAMPUS)

Other Carrier ID - Field Description

Other Carrier ID

System generated

Displays the identifier used by the carrier to identify the enrollee



Other Carrier ID - Field Description

Other Carrier ID

Optional, alphanumeric

Enter the identifier used by the carrier to identify the enrollee.

Other ID - Field Description

Other ID

System generated

Used by the Retirement Services Program (RSP) and Office of Worker's Compensation Programs (OWCP). RSP personnel use this field to reference an enrollee's civil service annuitant or civil service final identifier. OWCP personnel use this field to reference an enrollee's claim identifier.

Note: The Agency and personnel office identifier (POI) fields are displayed in lieu of this field when a payroll office identification number other than **24900002**, **24900003**, or **160099xx** is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

Other ID From - Field Instruction

Other ID From

Optional, alphanumeric, 15 positions

To search for a specific enrollee record by the Other ID, enter the Other ID.

OR

To search for a range of enrollee records by a range of Other IDs, enter the Other ID that starts the range, then go to the **Other ID To** field.

Note for RSP: Enter the CSA or CSF identifier without the first two characters (i.e., CS). For example, the CSA identifier is entered as **AXXXXXXXXXX**, and the CSF identifier is entered as **FXXXXXXXXX**.

Other ID To - Field Instruction

Other ID To

Optional, alphanumeric, 15 positions maximum

Enter the Other identification (ID) number that ends the range or leave blank, when searching for a range of enrollee records by Other IDs.



Other Insurance - (Enrollee - Required) Field Instruction

Other Insurance

Required

Select the radio button next to one of the following values:

Y - Indicates the enrollee's family member is enrolled in another group health insurance program

N - Indicates the enrollee's family member is not enrolled in another group health insurance program

Other Insurance - Field Description

Other Insurance

System generated

Selected radio button values identified below indicate the following:

Y - Enrollee's family is enrolled in another group health insurance program.

N - Enrollee's family member is not enrolled in another group health insurance program.

Other Payroll ID - Field Description

Other Payroll ID

System generated

Displays the identifier used by the Agency to identify the enrollee

Other Payroll ID - Field Description

Other Payroll ID

Optional, alphanumeric

Enter the identifier used by the Agency to identify the enrollee.

Part B - Termination - Field Description

Part B - Termination

System generated

Selected radio button indicates the enrollment is terminated

Part B - Termination - Field Instruction

Part B - Termination

Required, if applicable

Select the box to indicate the enrollment is to be terminated.



Part C - Transfer In - Field Description

Part C - Transfer In

System generated

Selected radio button indicates the enrollment is being transferred from one payroll office to another

Part C - Transfer In - Field Instruction

Part C - Transfer In

Required, if applicable

Select the box to indicate the enrollment is to be transferred from one payroll office to another.

Part D - Reinstatement - Field Description

Part D - Reinstatement

System generated

Selected radio button indicates the enrollment is being reinstated

Part D - Reinstatement - Field Instruction

Part D - Reinstatement

Required, if applicable

Select the box to indicate the enrollment is to be reinstated.

Part E - Change of Enrollee Information - Field Description

Part E - Change of Enrollee Information

System generated

Selected radio button indicates one of the following:

Enrollee's name has changed.

Enrollment has changed from the enrollee's name to the name of the survivor annuitant.

Enrollment has changed from the survivor annuitant's name of another survivor annuitant.

Part E - Change of Enrollee Information - Field Instruction

Part E - Change of Enrollee Information

Required, if applicable

Select the box to indicate one of the following:

Enrollee's name has changed.

Enrollment has changed from the enrollee's name to the name of the survivor annuitant.

Enrollment has changed from the survivor annuitant's name to another survivor annuitant.



Enrollee or survivor annuitant's address has changed.

Part F - Change in Enrollment/Survivor Annuitant - Field Description

Part F - Change in Enrollment/Survivor Annuitant

System generated

Selected radio button indicates the survivor annuitant's enrollment code has changed

Part F - Change in Enrollment/Survivor Annuitant - Field Instruction

Part F - Change in Enrollment/Survivor Annuitant

Required, if applicable

Select the box to indicate the enrollee or survivor annuitant's enrollment code has changed.

Password - Field Instruction

Password

Enter password.

If unsuccessful, a message will appear stating that the user ID or password entered is invalid.

Pay Cycle - (Biweekly, Monthly, Other) Field Description

Pay Cycle

System generated

Displays one of the following pay cycle types:

- ***Biweekly***
- ***Monthly***
- ***Other***

Pay Cycle - (Optional) Field Instruction

Pay Cycle

Optional

Select the payroll office pay cycle from the drop-down menu:

- ***Biweekly***
- ***Monthly***
- ***Other***



Pay Cycle - (Required) Field Instruction

Pay Cycle

Required

Select the payroll office pay cycle from the drop-down menu:

- **Biweekly**
- **Monthly**
- **Other**

Pay Cycle - Field Description

Pay Cycle

System generated

Displays the pay cycle type:

- M** - Monthly
- B** - Bi-Weekly
- O** - Other

Pay Ofc - Field Description

Pay Ofc

System generated

Displays the payroll office identification number

Payroll Office - Field Description

Payroll Office

System generated

Displays the payroll office identification number

Payroll Office - Field Instruction

Payroll Office

Optional, alphanumeric, eight positions

Enter the payroll office identification number.

Payroll Office Code - Field Description

Payroll Office Code

System generated



Displays the enrollment code submitted by the payroll office

Payroll Office Comments - Field Description

Payroll Office Comments

System generated

Displays the comments that were entered on the Payroll Office Enrollee Reconcile page

Payroll Office Comments - Field Instruction

Payroll Office Comments

Optional, 400 character maximum

Enter comments about the reconciliation actions for this record.

Payroll Office Discrepancy - Field Description

Payroll Office Discrepancy

System generated

Displays the error or warning code generated by CLER. See the ***Discrepancy Codes Table*** (see "***Discrepancy Codes Table***" on page 179) and ***Warning Codes Table*** (see "***Warning Codes Table***" on page 181) for a list and descriptions of error and warning codes

Payroll Office Eff. Date - Field Description

Payroll Office Eff. Date

System generated

Displays the enrollment effective date (MMDDYYYY) submitted by the payroll office

Payroll Office Fail Count - Field Description

Payroll Office Fail Count

System generated

Displays the number of times the initial discrepancy has been identified and reported

Payroll Office ID - (Optional) Field Instruction

Payroll Office ID

Optional, alphanumeric, eight positions

Enter the Payroll Office identification number.



Payroll Office ID - (Select - Optional) Field Instruction

Payroll Office ID

Optional

Select the drop-down menu and select the payroll office identification number.

Payroll Office ID - (Select - Required) Field Instruction

Payroll Office ID

Required

Select the drop-down menu and select the applicable Payroll Office ID.

Payroll Office ID - Field Description

Payroll Office ID

System generated

Displays the payroll office identification number

Payroll Office Name - Field Description

Payroll Office Name

System generated

Displays the name of the enrollee submitted by the payroll office

Payroll Office Number - Field Description

Payroll Office ID

System generated

Displays the payroll office identification number

Payroll Office Payroll ID - Field Description

Payroll Office Payroll ID

System generated

Displays the payroll office identification number

Percent Discrepancies Reconciled - Field Description

Percent Discrepancies Reconciled

System generated



Displays the percentage of records reconciled to total discrepancies that meet the criteria entered on the Discrepancy Summary page

Personnel Office ID - (Optional) Field Instruction

Personnel Office ID

Optional, alphanumeric, four positions

Enter the personnel office identification number.

Personnel Office ID - (Required) Field Instruction

Personnel Office ID

Required, alphanumeric, four positions

Enter the personnel office number for the enrollee's employing, personnel, or point-of-contact office.

Personnel Office ID - Enrollee Field Description

Personnel Office ID

System generated

Displays the personnel office number for the enrollee's employing, personnel, or point-of-contact office

Personnel Office ID - Field Description

Personnel Office ID

System generated

Displays the personnel office identification number

Phone - (Carrier Contact) Field Description

Phone

System generated

Displays the telephone number of the carrier contact

Phone - (Carrier Contact) Field Description

Phone

System generated

Displays the telephone number of the carrier contact



Phone - (Enrollee) Field Description

Phone

System generated

Displays the daytime area code and telephone number of the enrollee

Phone - (Payroll Office Contact) Field Description

Phone

System generated

Displays the telephone number of the payroll office contact

Phone - (Personnel Office Contact) Field Description

Phone

System generated

Displays the telephone number of the personnel office contact

Phone - Form 2809 (Part H) Field Instruction

Phone

Optional

Enter the telephone number of the agency or payroll office contact.

Phone Number - (Carrier Plan Contact) Field Description

Phone Number

System generated

Displays the telephone number of the carrier plan contact

Phone Number - (Payroll Office Contact) Field Description

Phone Number

System generated

Displays the telephone number of the payroll office contact

Phone Number - (Payroll Office Contact) Field Description

Phone Number

System generated

Displays the telephone number of the payroll office contact



Phone Number - (Payroll Office Contacts Add) Field Instruction

Phone Number

Optional, alphanumeric, 25 positions maximum

Enter the telephone number of the payroll office contact.

Phone Number - (Personnel Office Contact) Field Description

Phone Number

System generated

Displays the telephone number of the personnel office contact

Phone Number - Personnel Office Contacts Add Field Instruction

Phone Number

Optional, numeric, 25 positions maximum

Enter the telephone number of the personnel office contact.

Plan - (Carrier) Field Description

Plan

System generated

Displays the first two positions of the carrier enrollment code

Plan - Field Instruction

Plan

Optional, alphanumeric, two positions

Enter the first two positions of the carrier enrollment code.

POI - (Personnel Office Contact) Field Description

POI

System generated

Displays the personnel office identification number

POI - (Required) Field Instruction

POI

Required, alphanumeric, four positions



Enter the personnel office identifier of the office where the enrollee's records are maintained.

POI - Field Description

POI

System generated

Displays the personnel office identification number

POI - Payroll Office Enrollee Field Instruction

POI

Optional, alphanumeric, four positions

Enter the personnel office identifier of the office where the enrollee's records are maintained.

POI - With Note Field Description

POI

System generated

Displays the personnel office identifier of the office where the enrollee's records are maintained.

Note: The Other ID field is displayed in lieu of the this field when **24900002**, **24900003**, or **160099xx** is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

Policyholder First Name - (Enrollee) Field Instruction

Policyholder First Name

Conditional, alphanumeric, 17 positions max

Enter the first name of the individual who holds the policy from another group health insurance program under which the enrollee or family member is covered. If the policyholder has a title (e.g., I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the Other Insurance Field is Y, complete this field. If the Other Insurance Field is N, do not complete this field.

Policyholder First Name - Field Description

Policyholder First Name

System generated



Displays the first name of the individual who holds the policy from another group insurance program under which the enrollee or family member is covered

Policyholder Initial - (Enrollee) Field Instruction

Policyholder Initial

Conditional, alphanumeric, one position

Enter the middle initial of the individual who holds the policy from another group health insurance program under which the enrollee or family member is covered. If the policyholder has a title (e.g., I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the Other Insurance Field is Y, complete this field. If the Other Insurance Field is N, do not complete this field.

Policyholder Initial - Field Description

Policyholder Initial

System generated

Displays the middle initial of the individual who holds the policy from another group insurance program under which the enrollee or family member is covered

Policyholder Last Name - (Enrollee) Field Instruction

Policyholder Last Name

Conditional, alphanumeric, 25 positions max

Enter the last name of the individual who holds the policy from another group health insurance program under which the enrollee or family member is covered. If the policyholder has a title (e.g., I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the Other Insurance Field is Y, complete this field. If the Other Insurance Field is N, do not complete this field.

Policyholder Last Name - Field Description

Policyholder Last Name

System generated

Displays the last name of the individual who holds the policy from another group insurance program under which the enrollee or family member is covered



Present Enrollment Code - (Enrollee) Field Description

Present Enrollment Code

System generated

Displays the present enrollment code for the enrollee

Present Enrollment Code - Form 2809 Add (Part B) Field Instruction

Present Enrollment Code

Conditional

Enter the present enrollment code for the enrollee.

Present Enrollment Code - Form 2809 Update (Part B) Field Instruction

Present Enrollment Code

System generated

Displays the present enrollment code for the enrollee

Present Plan Name - Field Description

Present Plan Name

System generated

Displays the name of the FEHB health insurance plan in which the enrollee is currently enrolled

Present Plan Name - Form 2809 Add (Part B) Field Instruction

Present Plan Name

Conditional

Enter the name of the FEHB health insurance plan in which the enrollee is currently enrolled.

Present Plan Name - Form 2809 Update (Part B) Field Instruction

Present Plan Name

System Generated

Displays the name of the FEHB health insurance plan in which the enrollee is currently enrolled

Processed Date - Field Description

Processed Date

System generated

Displays the date the record was processed



Processed Time - Field Description

Processed Time

System generated

Displays the time the record was processed

Processing Code - Field Description

Processing Code

System generated

Displays one of the following processing codes:

Initial - Initial file for the quarter.

Add - Add to existing enrollments.

Replace - Replace all files and records that have been previously sent for this quarter.

Processing Code - Field Instruction

Processing Code

Required

Select the drop-down menu and choose one of the following processing codes:

Initial - Initial file for the quarter

Add - Add to existing enrollments

Replace - Replace all files and records that have been previously sent for this quarter

Pseudo SSN - Field Description

Pseudo SSN

System generated

Displays the pseudo SSN used by the Agency and carrier to identify the enrollee

Pseudo SSN - Field Description

Pseudo SSN

Optional, numeric

Enter the pseudo SSN used by the Agency and carrier to identify the enrollee.

Qtr - Field Description

Qtr

System generated

Displays the reconciliation quarter



Quarter - (Error Statistics) Field Description

Quarter

System generated

Displays the reconciliation quarter for the requested error statistics

Quarter - (Quarter Transmission Record) Field Description

Quarter

System generated

Displays the reconciliation quarter for the requested transmission record

Quarter - (Reconciliation 2810 Form) Field Description

Quarter

System generated

Displays the reconciliation quarter the 2810 form was created

Quarter - (Reconciliation Quarter) Field Description

Quarter

System generated

Displays the reconciliation quarter

Quarter - (Select - Reconciliation) Field Instruction

Quarter

Required, default

Defaults to the current reconciliation quarter

To choose a different reconciliation quarter select the drop-down menu and select the desired reconciliation quarter.

Quarter - (Select) Field Instruction

Quarter

Required, default

Defaults to the current quarter

To choose a different quarter, select the drop-down menu and select the desired quarter.



Quarter - Field Description

Quarter

System generated

Displays the reconciliation quarter

Quarter - Field Instruction

Quarter

Optional, alphanumeric, one position

Enter the reconciliation quarter for the requested error statistics.

Quarter - Payroll Office Transmissions Search Results Field Description

Quarter

System generated

Displays the reconciliation quarter for the requested transmission record

Quarter - (Reconciliation Quarter for Transmission Record) Field Instruction

Quarter

Optional, alphanumeric, one position

Enter the reconciliation quarter for the requested transmission record.

Quarter From - Field Instruction

Quarter From

Required, default

Defaults to the current reconciliation quarter

To choose a different quarter that begins the range of reconciliation quarters, select the drop-down menu and select the quarter.

Quarter To - Field Instruction

Quarter To

Required, default

Defaults to the current reconciliation quarter

To choose a different quarter that ends the range of reconciliation quarters, select the drop-down menu and select the quarter.



Reason - Field Description

Reason

System generated

Displays the reconciliation reason code

Refer to the ***Reconciliation Reason Codes Table*** (on page 185) for a list and description of reconciliation reason codes.

Reason Code - Field Description

Reason Code

System generated

Displays the reconciliation reason code

Refer to the ***Reconciliation Reason Codes Table*** (on page 185) for a list and description of reconciliation reason codes.

Reason Code - Field Instruction

Reason Code

Optional

Select the drop-down menu and select the reconciliation reason code.

Refer to the ***Reconciliation Reason Codes Table*** (on page 185) for a list and description of these codes.

Reconciliation Action - Field Description

Reconciliation Action

System generated

Displays the code that identifies the action requested by the Agency to resolve the discrepancy. A short description is displayed next to the code. To view a detailed explanation of the reconciliation action code, select **Explain** or see ***Reconciliation Action Codes Table*** (on page 189).

Reconciliation Action - Field Instruction

Reconciliation Action

Required

Select the drop-down menu to choose the code that identifies the action requested by the Agency to resolve the discrepancy.

A short description is displayed next to the code. To view a detailed explanation of the reconciliation action code, select **Explain** or see ***Reconciliation Action Codes Table*** (on page 189).



Reconciliation Date - Field Description

Reconciliation Date

System generated

Displays the reconciliation date

Reconciliation Date From - Field Instruction

Reconciliation Date From

Optional

Select the date that begins the range of reconciliation dates by selecting the first drop-down menu and select the month; select the second drop-down menu and select the day; and select the third drop-down menu and select the year.

Reconciliation Date To - Field Instruction

Reconciliation Date To

Optional

Select the date that ends the range of reconciliation dates by selecting the first drop-down menu and select the month; select the second drop-down menu and select the day; and select the third drop-down menu and select the year.

Reconciliation Fail Count - Field Description

Reconciliation Fail Count

System generated

Displays the number of times the initial discrepancy has been identified

Reconciliation Reason - Field Description

Reconciliation Reason

System generated

Displays the cause of the discrepancy as reported by the Agency

A short description is displayed next to the code. To view a detailed explanation of the reconciliation reason code, select **Explain** or see **Reconciliation Reason Codes Table** (on page 185).

Reconciliation Reason - Field Instruction

Reconciliation Reason

Required



Select the drop-down menu to choose the cause of the discrepancy as reported by the Agency. A short description is displayed next to the code. To view a detailed explanation of the reconciliation reason code, select **Explain** or see **Reconciliation Reason Codes Table** (on page 185).

Reconciliation Total Records - Field Description

Reconciliation Total Records

System generated

Displays the sum of enrollee records displayed on the report

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

Reconciliation User ID - Field Description

Reconciliation User ID

System generated

Displays the user identification number of the person who entered the reconciliation reason code

Reconciliation With Errors - Field Description

Reconciliation With Errors

System generated

Displays the sum of enrollee records with codes displayed in the Reason and Action fields

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

Reconciliation Without Errors - Field Description

Reconciliation Without Errors

System generated

Displays the sum of enrollee records with no codes displayed in the Reason and Action fields

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

Records - Field Description

Records

System generated



Displays the number of records contained in the transmission

Records Processed - Field Description

Records Processed

System generated

Displays the number of records accepted to store in the CLER tables

Records Received - Field Description

Records Received

System generated

Displays the number of records found in the transmission file during processing

Records Reconciled - Field Description

Records Reconciled

System generated

Displays the count of records that have a reconciliation reason and action code entered for every error on the record

Records Sent - Field Description

Records Sent

System generated

Displays the number of records sent in the transmission

Records With Errors - (Payroll Office) Field Description

Records With Errors

System generated

Displays the total number of payroll office enrollee records with errors

Note: Records with warnings are not included.

Records With Warnings - (Payroll Office) Field Description

Records With Warnings

System generated

Displays the total number of payroll office records with warnings



Note: Records with errors are not included.

Region - Field Description

Region

System generated

Displays the carrier's enrollment data transmission location code assigned by NFC's CLER Operations and Reconciliation Unit

Rejected - Field Description

Rejected

System generated

Displays the number of transmissions that did not pass front-end edits and were rejected

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

Release Date - (Form 2809 Search Results) Field Description

Release Date

System generated

Displays the date of the record was released for processing

Release Date - (Online Entries) Field Description

Release Date

System generated

Displays the date of the record was released for processing

Released By - Field Description

Released By

System generated

Displays the user identification number of the individual who released the record for processing

Released Date - Field Description

Released Date

System generated



Displays the date the record was released for processing

Released ID - Field Description

Released ID

System generated

Displays the user identification number of the individual who released the record for processing

Released Time - Field Description

Released Time

System generated

Displays the time the record was released for processing

Remarks - (400 Max) Field Instruction

Remarks

Optional, alphanumeric, 400 positions maximum

Enter remarks regarding the creation of this record.

Remarks - Field Description

Remarks

System generated

Displays the remarks about this record

Remarks - Field Instruction

Remarks

Optional, alphanumeric, 80 positions maximum

Enter remarks about this record.

Report # - Field Description

Report

System generated

Displays the number of the original report (e.g., notification to carrier or transmittal number)



Report # - Field Instruction

Report

Optional, alphanumeric, seven positions maximum

Enter the number of the original report (e.g., notification to carrier and transmittal number).

Response Reminder Date - Field Description

Response Reminder Date

System generated

Displays the date a reminder regarding the lack of response to discrepancy reasons and actions codes will be sent to carriers

Role - (Carrier Contact) Field Description

Role

System generated

Displays the title, position, etc., of the carrier contact

Role - (Carrier Plan Contact) Field Description

Role

System generated

Displays the title, position, etc., of the carrier plan contact

Role - (Payroll Office Contact) Field Description

Role

System generated

Displays the title, position, etc., of the payroll office contact

Role - (Payroll Office Contacts Add) Field Instruction

Role

Optional, alphanumeric, 40 positions

Enter the title, position, etc., of the payroll office contact.

Role - (Personnel Office Contact) Field Description

Role

System generated



Displays the title, position, etc., of the personnel office contact

Role - (Personnel Office Contacts Add) Field Instruction

Role

Optional, alphanumeric, 40 positions maximum

Enter the title, position, etc., of the personnel office contact.

Sex - (Enrollee - Required) Field Instruction

Sex

Required

Select the radio button next to one of the following values:

M - Indicates the enrollee is male

F - Indicates the enrollee is female

Sex - (Enrollee) Field Description

Sex

System generated

Selected radio button indicates the following value:

M - Enrollee is a male

F - Enrollee is a female

Sex - (Enrollee/Survivor) Field Description

Sex

System generated

Selected radio button indicates the following value:

M - Enrollee or survivor annuitant is a male

F - Enrollee or survivor annuitant is a female

Sex - (Form 2809 Part A Continued) Field Instruction

Sex

Optional

Select the applicable radio button to indicate the following value:

M - Enrollee's family member who is enrolled/enrolling in FEHB is a male

F - Enrollee's family member who is enrolled/enrolling in FEHB is a female



Sex - Form 2809 View (Part A Continued) Field Description

Sex

System generated

Selected radio button indicates the following value:

M - Enrollee's first family member who is enrolled/enrolling in FEHB is a male

F - Enrollee's first family member who is enrolled/enrolling in FEHB is a female

Sex - Form 2810 Add (Part E) Field Instruction

Sex

Conditional

Select the applicable radio button to indicate the following value:

M - Enrollee or survivor annuitant is a male.

F - Enrollee or survivor annuitant is a female.

Source - Field Description

Source

System generated

Displays the source of transmission data indicator

The value in the first position equals **M** for mainframe or **S** for server. The value in the second position equals **T** for transmission or **M** for manual entry.

SSN - (Enrollee) Field Description

SSN

System generated

Displays the enrollee's SSN or pseudo SSN

SSN - (Enrollee/Survivor) Field Description

SSN

System generated

Displays the enrollee or survivor annuitant's Social Security number (SSN) or pseudo SSN

SSN - (Form 2809 Part A Continued) Field Instruction

SSN

Optional, numeric

Enter the SSN or pseudo SSN of the enrollee's family member who is enrolled/enrolling in FEHB.



SSN - (Required) Field Instruction

SSN

Required, numeric, nine positions

Enter the SSN of the enrollee. If the enrollee does not want his/her SSN provided to the carrier, a pseudo SSN may be used if the pseudo SSN is also reported to CLER.

SSN - Field Instruction

SSN

Optional, numeric, nine positions

Enter the SSN or pseudo SSN to search for a specific enrollee record.

SSN - Form 2809 View (Part A Continued) Field Description

SSN

System generated

Displays the Social Security number of the enrollee's family member who is enrolled/enrolling in FEHB

SSN - Form 2810 Add (Part E) Field Instruction

SSN

Conditional, numeric, nine positions

Enter the enrollee or survivor annuitant's SSN or pseudo SSN.

SSN From - Field Instruction

SSN - From

Optional, numeric, nine positions

Enter the SSN that begins the search range of enrollee records by SSN.

SSN To - Field Instruction

SSN - To

Optional, numeric, nine positions

Enter the SSN that ends the search range of enrollee records by SSN.



Start Date - (Carrier Enrollment Code) Field Description

Start Date

System generated

Displays the first date the carrier enrollment code will be valid

Start Date - (Carrier Plan) Field Description

Start Date

System generated

Displays the first date (MMDDYYYY) the carrier plan will be valid

If the date is not known, 01/01/2001 is displayed.

Start Date - (Carrier) Field Description

Start Date

System generated

Displays the first date the carrier will be valid

Start Date - (Processed) Field Description

Start Date

System generated

Displays the date the input from carriers and payroll offices was processed

Start Date - Payroll Office Field Description

Start Date

System generated

Displays the first date the payroll office will be valid

State - (Carrier Contact) Field Description

State

System generated

Displays the carrier contact's State, U.S. territory, or overseas military abbreviation

For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see *State, U.S. Territory, and Overseas Military Abbreviations Table* (on page 190).



State - (Carrier Plan Contact) Field Description

State

System generated

Displays the carrier plan contact's State, U.S. territory, or overseas military abbreviation

For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see *State, U.S. Territory, and Overseas Military Abbreviations Table* (on page 190).

State - (Carrier) Field Description

State

System generated

Displays the carrier's State, U.S. territory, or overseas military abbreviation

For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see *State, U.S. Territory, and Overseas Military Abbreviations Table* (on page 190).

State - (Carrier) Field Instruction

State

Optional

Select the drop-down menu and select the carrier's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see *State, U.S. Territory, and Overseas Military Abbreviations Table* (on page 190).

State - (Coordinator) Field Description

State

System generated

Displays the State, U.S. territory, or overseas military abbreviation for the enrollee's employing, personnel, or point-of-contact office

For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see *State, U.S. Territory, and Overseas Military Abbreviations Table* (on page 190).

State - (Enrollee) Field Description

State

System generated

Displays the enrollee's State, U.S. territory, or overseas military abbreviation

For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see *State, U.S. Territory, and Overseas Military Abbreviations Table* (on page 190).



State - (Enrollee) Field Description

State

Conditional

Select the drop-down menu to choose the enrollee's State, U.S. territory, or overseas military abbreviation.

For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see *State, U.S. Territory, and Overseas Military Abbreviations Table* (on page 190).

State - (Enrollee/Survivor) Field Description

State

System generated

Displays the new State, U.S. territory, or overseas military abbreviation for the enrollee or survivor annuitant's address

For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see *State, U.S. Territory, and Overseas Military Abbreviations Table* (on page 190).

State - (Payroll Office) Field Instruction

State

Optional

Select the drop-down menu and select the payroll office's, carriers, carrier contact's, or carrier plan contact's State, U.S. territory, or overseas military abbreviation.

For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see *State, U.S. Territory, and Overseas Military Abbreviations Table* (on page 190).

State - (Personnel Office Contact) Field Description

State

System generated

Displays the personnel office contact's State, U.S. territory, or overseas military abbreviation

For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see *State, U.S. Territory, and Overseas Military Abbreviations Table* (on page 190).

State

Conditional

Select the drop-down menu and select the employing, personnel, or point of contact office's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see *State, U.S. Territory, and Overseas Military Abbreviations Table* (on page 190).



State - Payroll Office Field Description

State

System generated

Displays the State, U.S. territory, or overseas military abbreviation of the payroll office

For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see *State, U.S. Territory, and Overseas Military Abbreviations Table* (on page 190).

State - Personnel Office Contacts Add Field Instruction

State

Optional

Select the drop-down menu and select the personnel office's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see *State, U.S. Territory, and Overseas Military Abbreviations Table* (on page 190).

Status - (Active/Inactive) Field Description

Status

System generated

Active status indicates that the record has been activated in CLER.

Inactive status indicates that the record has been inactivated in CLER.

Status - (Payroll Office Contacts) Search Results Field Description

Status

System generated

Displays the status of the record

Active - Indicates that the record has been activated in CLER

Inactive - Indicates that the record has been inactivated in CLER

Status - (Payroll Office Errors) View Field Description

Status

System generated

Displays 000 for an accepted transmission; otherwise, a payroll office enrollment data transmission

For a list and descriptions of payroll office systems, see *Payroll Office System Codes Table* (see "*Payroll Office System Codes Table*" on page 182).



Status - (Processed, Canceled, Released, Not Released) Field Description

Status

System generated

Displays the status of the transmission: **Processed**, **Canceled**, **Released**, or **Not Released**

Status - (Transmission Carrier) Field Description

Status

System generated

Displays **000** for an accepted transmission; otherwise, a carrier system code is displayed. It indicates the status of a carrier enrollment data transmission. For a list and descriptions of carrier system codes, see *Carrier System Codes Table* (see "*Carrier System Codes Table*" on page 184).

Status - (Transmission Payroll Office) Field Description

Status

System generated

Displays **000** for an accepted transmission; otherwise, a payroll office system code is displayed. It indicates the status of a payroll office enrollment data transmission. For a list and descriptions of payroll office system codes, see *Payroll Office System Codes Table* (see "*Payroll Office System Codes Table*" on page 182).

Submission - (Number) Field Description

Submission

System generated

Displays the transmission submission number for this record

Submission - (Payroll Office Enrollees) Reconcile Field Description

Submission

System generated

Displays the transmission submission for this record

Submission - Field Description

Submission

System generated



Displays the transmission file submitted for the reconciliation quarter is assigned a sequential submission number

Submission Date - (Carrier Transmissions) Search Results Field Description

Submission Date

System generated

Displays the date transmission was submitted

Submission Date - (Carrier) Field Description

Submission Date

System generated

Displays the date (MMDDYYYY) the carrier enrollment data file was submitted for processing

Submission Date - (Payroll) Field Description

Submission Date

System generated

Displays the date (MMDDYYYY) the payroll office enrollment data file was submitted for processing

Submission Date - Field Description

Submission Date

System generated

Displays the date the transmission file was submitted

Submission Reminder Date - Field Description

Submission Reminder Date

System generated

Displays the date the submission reminder is sent

Submitter Use #1 - Field Description

Submitter Use #1

System generated

Displays the remarks that were entered by the organization that created the record



Submitter Use #1 - Field Description

Submitter Use #1

Optional, alphanumeric

Enter remarks about the record.

Submitter Use #2 - Field Description

Submitter Use #2

System generated

Displays the remarks that were entered by the organization that created the record

Submitter Use #2 - Field Instruction

Submitter Use #2

Optional, alphanumeric

Enter remarks about the record.

Submitter Use #3 - Field Description

Submitter Use #3

System generated

Displays the remarks that were entered by the organization that created the record

Submitter Use #3 - Field Instruction

Submitter Use #3

Optional, alphanumeric

Enter remarks about the record.

Survivor Annuity Claim # - Field Description

Survivor Annuity Claim #

System generated

Displays the civil service final (CSF) number assigned to the enrollee by the Office of Personnel Management

Survivor Annuity Claim # - Field Instruction

Survivor Annuity Claim #

Optional, alphanumeric



Enter the civil service final (CSF) number assigned to the enrollee by the Office of Personnel Management.

Threshold Type - (Payroll Office) Field Description

Threshold Type

System generated

Displays the measure of the error threshold as follows:

P - Percent

N - Number

Threshold Type - Field Description

Threshold Type

System generated

Displays the measure of the error threshold

The code **P** represents percent and code **N** represents number.

Time Processed - (Process Run) Field Description

Time Processed

System generated

Displays the current system time when the process was run

Time Processed - Field Description

Time Processed

System generated

Displays the current system time when the process was run

To (Quarter/Year - Carrier) - Field Description

To (Quarter/Year) Carrier

System generated

Displays the carrier's code

To (Quarter/Year - Code) - Field Description

To (Quarter/Year) Code

System generated



Displays the enrollment code

To (Quarter/Year) - Field Description

To (Quarter/Year)

System generated

Displays the number of enrollees covered by the enrollment code displayed in the Code field during the selected quarter and year

Total - (Reconciliation Action Codes) Field Description

Total

System generated

Displays the number of specified reconciliation action codes that meet the criteria entered on the Reconciliation Action Summary page

Total - (Reconciliation Reason Codes) Field Description

Total

System generated

Displays the number of specified reconciliation reason codes that meet the criteria entered on the Reconciliation Reason Summary page

Total - (Transmission Records) Field Description

Total

System generated

Displays the sum of transmission records displayed on the report

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

Total Discrepancies Found - Field Description

Total Discrepancies Found

System generated

Displays the total number of records with discrepancies that meet the criteria entered on the Discrepancy Summary page



Total Discrepancies Reconciled - Field Description

Total Discrepancies Reconciled

System generated

Displays the total number of reconciled records that meet the criteria entered on the Discrepancy Summary page

Total Enrollee Records - Field Description

Total Enrollee Records

System generated

Displays the total number of enrollees that meet the criteria entered on the Discrepancy Summary page

Total Errors - (Total Field) Field Description

Total Errors

System generated

Displays the sum of the numbers displayed in the Total field

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

Total Errors - Field Description

Total Errors

System generated

Displays the number the errors identified in transmission file

Total Matches Found - Field Description

Total Matches Found

System generated

Displays the total number of matched records that meet the criteria entered on the Discrepancy Summary page

Total Records - (Enrollee) Field Description

Total Records

System generated

Displays the total number of enrollee records displayed on the report.



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

Total Records - (Records) Field Description

Total Records

System generated

Displays the total number of records displayed on the report

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

Total Warnings - Field Description

Total Warnings

System generated

Displays the total number of warnings identified

Transmission File Name - (Payroll Office) Field Description

Transmission File Name

System generated

Displays the name of the quarterly transmission file sent by the payroll office

Transmission Type - (Optional) Field Instruction

Transmission Type

Optional

Select the drop-down menu and select the transmission type.

Transmission Type - (Required) Field Instruction

Transmission Type

Required

Select the drop-down menu and select the transmission type.

The options are **Pay Period** and **Transmission**.

Transmission Type - Field Description

Transmission Type

System generated



Displays the transmission type:

P - Pay Period

T - Transmission

Transmissions - Field Instruction

Transmissions

Optional, default

Defaults to the **All** option

To choose a different display option, select the drop-down menu and select one of the option as follows:

All - Displays all records related to the search criteria

Accepted - Displays all accepted records related to the search criteria

Rejected - Displays all rejected records related to the search criteria

Not Received - Displays statistics for all transmissions that were not received

TRICARE/CHAMPUS - (Enrollee) Field Instruction

TRICARE/CHAMPUS

Conditional

If the enrollee's family member who is enrolled/enrolling in FEHB is covered by Tricare or Civilian Health and Medical Program of the Uniformed Services (CHAMPUS), select the check box next to TRICARE/CHAMPUS; otherwise, do not complete this field.

TRICARE/CHAMPUS - Field Description

TRICARE/CHAMPUS

System generated

Selected check box indicates that the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by TRICARE or Civilian Health and Medical Program of the Uniformed Services (CHAMPUS).

Type - (Carrier Contact) Field Description

Type

System generated

Displays whether the carrier contact is an **General** type code for an administrative contact or **Technical** type code for a technical contact



Type - (Carrier Contact) Field Instruction

Type

Optional

Select the Type code **General** for an administrative contact or **Technical** for a technical contact from the drop-down menu.

The Type code indicates whether the carrier contact is an administrative contact or a technical contact.

Type - (Carrier Plan Contact) Field Instruction

Type

System generated

Displays whether the carrier plan contact is an **General** type code for a administrative contact or **Technical** type code for a technical contact

Type - (Payroll Office Contact) Field Description

Type

System generated

Displays whether the payroll office contact is a **General** type code for an Administrative contact or **Technical** type code for a Technical contact

Type - (Payroll Office Contact) Field Instruction

Type

Optional

Select the drop-down menu and select the Type code identified below that indicates whether the payroll office contact is an administrative or technical contact.

General - Administrative contact

Technical - Technical contact

Type - (Payroll Office Contacts Add) Field Instruction

Type

Required

Select the drop-down menu and select the Type code identified below that indicates whether the payroll office contact is an administrative or technical contact.

General - indicates the contact is an Administrative contact

Technical - indicates the contact is a Technical contact



Type - (Personnel Office Contact - Optional) Field Instruction

Type

Optional

Select the drop-down menu and select the Type code, **General** for an administrative contact or **Technical** for a technical contact. The Type code indicates whether the personnel office contact is an administrative contact or a technical contact.

Type - (Personnel Office Contact) Field Description

Type

System generated

Displays which type of contact the personnel office contact is by displaying one of the following codes:

General - Administrative contact

Technical - Technical contact

Type - Personnel Office Contacts Field Instruction

Type

Required

Select the drop-down menu and select the Type code identified below that indicates whether the personnel office contact is an administrative or technical contact.

General - Indicates contact is an Administrative contact

Technical - Indicates contact is a Technical contact

Type - Personnel Office Contacts Search Results Field Description

Type

System generated

Displays whether the personnel office contact is an administrative or technical contact as follows:

General - Indicates the contact is an Administrative contact

Technical - Indicates the contact is a Technical contact

Unrecon - Field Description

Unrecon

System generated

Displays the number of unreconciled discrepancies



User ID - (Form) Field Instruction

User ID

Optional, alphanumeric, eight positions maximum

Enter the user identification (ID) number of the person creating the form.

User ID - (Reconciliation) Field Description

User ID

System generated

Displays the user identification number of the person who entered the reconciliation reason code

User ID - (Report) Field Instruction

User ID

Optional, alphanumeric, eight positions maximum

Enter the user identification (ID) number of the person creating the report.

User ID

Required, alphanumeric, eight positions maximum

Enter the assigned NFC user ID.

Validation - Field Description

Validation

System generated

Displays the status of the validation

The **validated** code is displayed when the transmission is validated. The **Cleared** code is displayed when the transmission validation is cleared.

Validation Date - Field Description

Validation Date

System generated

Displays the date that the record was validated

Validation Date From - Field Instruction

Validation Date From

Optional

Select the date that begins the range of reconciliation dates by selecting the first drop-down menu and select the month; select the second drop-down menu and select the day; and select the third drop-down menu and select the year.



Validation Date To - Field Instructions

Validation Date To

Optional

Select the date that ends the range of reconciliation dates by selecting the first drop-down menu and select the month; select the second drop-down menu and select the day; and select the third drop-down menu and select the year.

Warning Code - (Select) Field Instruction

Warning Code

Optional

Select the drop-down menu and select the warning code. For a list and descriptions of these codes, see ***Warning Codes Table*** (on page 181).

Warnings - Field Description

Warnings

System generated

Displays the sum of warning codes displayed in the Discrepancy field

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

Whld Amt - Field Description

Whld Amt

System generated

Displays the enrollee's withholding amount

Year - (Error Statistics) Field Description

Year

System generated

Displays the reconciliation year for the requested error statistics

Year - (Error Statistics) Field Instruction

Year

Optional, alphanumeric, four positions

Enter the reconciliation year for the requested error statistics.



Year - (Payroll Office Enrollees) Search Results Field Description

Year

System generated

Displays the reconciliation year

Year - (Reconciliation Year for Transmission Record) Field Instruction

Year

Optional, alphanumeric, four positions

Enter the reconciliation year for the requested transmission record.

Year - (Reconciliation Year) Field Description

Year

System generated

Displays the reconciliation year

Year - (Reconciliation) 2810 Form Field Description

Year

System generated

Displays the reconciliation year the 2810 form was created

Year - (Required) Field Instruction

Year

Required, default

Defaults to the current year

To choose a different year, select the drop-down menu and select the desired year.

Year - (Transmission Year Record) Field Description

Year

System generated

Displays the reconciliation year for the requested transmission record

Year - Field Description

Year

System generated



Displays the reconciliation year for the requested error statistics

Year - Field Instruction

Year

Optional, alphanumeric, four positions

Enter the reconciliation year for the requested error statistics.

Year From - (Range - Required) Field Instruction

Year From

Required, default

Defaults to the current reconciliation year

To choose a different year that begins the range of reconciliation years, select the drop-down menu and select the desired reconciliation year.

Year To - (Range - Required) Field Instruction

Year To

Required, default

Defaults to the current reconciliation year

To choose a different year that ends the range of reconciliation years, select the drop-down menu and select the desired reconciliation year.

Year/Quarter - Field Description

Year/Quarter

System generated

Displays the reconciliation year/quarter

Year/Quarter From - Field Description

Year/Quarter From

System generated

Displays the reconciliation year/quarter that begins the range of reconciliation years/quarters

Year/Quarter To - Field Description

Year/Quarter To

System generated



Displays the reconciliation year/quarter that ends the range of reconciliation years/quarters

ZIP - (Carrier Contact) Field Description

ZIP

System generated

Displays the ZIP Code of the carrier contact

ZIP - (Carrier Plan Contact) Field Description

ZIP

System generated

Displays the ZIP Code of the carrier plan contact

ZIP - (Carrier) Field Description

ZIP

System generated

Displays the ZIP Code of the carrier

ZIP - (Coordinator) Field Description

ZIP

System generated

Displays the domestic ZIP Code or foreign postal code for the enrollee's employing, personnel, or point-of-contact office

ZIP - (Coordinator) Field Instruction

Zip

Conditional, alphanumeric, 11 positions

Enter the employing, personnel, or point-of-contact office's domestic ZIP Code or foreign postal code.

ZIP - (Enrollee) Field Description

ZIP

System generated

Displays the domestic ZIP Code or foreign postal code of the enrollee



ZIP - (Enrollee) Field Description

ZIP

Optional, numeric, 11 positions maximum

Enter the ZIP Code of the enrollee.

ZIP - (Enrollee/Survivor) Field Description

ZIP

System generated

Displays the new ZIP Code or foreign postal code for the enrollee or survivor annuitant's address

Zip - (Form 2809 Part A Continued) Field Instruction

Zip

Optional, numeric

Enter the domestic ZIP Code or foreign postal code of the enrollee's family member who is enrolled/enrolling in FEHB.

ZIP - (Payroll Office Contacts Add) Field Instruction

ZIP

Optional, alphanumeric, 11 positions maximum

Enter the payroll office's ZIP Code.

ZIP - (Personnel Office Contact) Field Description

ZIP

System generated

Displays the ZIP Code of the personnel office contact

ZIP - Form 2809 View (Part A Continued) Field Description

Zip

System generated

Displays the domestic ZIP Code or foreign postal code of the enrollee's family member who is enrolled/enrolling in FEHB



ZIP - Payroll Office Field Description

ZIP

System generated

Displays the ZIP Code of the payroll office



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