


# Deltek Costpoint® Essentials and Costpoint Foundations

Employee Self Service Enhancements

October 25, 2018



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## Overview

This Costpoint release provides the following enhancements to Employee Self Service applications:

### Limited Purpose Flexible Spending Account (FSA) Flag

A Limited Purpose flag for flexible spending account (HSA) was added to support the current health savings account (HSA) functionality. The new flag will indicate if the employee's current medical FSA was previously flagged as limited purpose. You can select both an FSA and an HSA, only if the FSA is limited purpose. This means that it can only be used for dental and vision expenses, and not health expenses.

Prior to this release, you can flag a new FSA election as limited purpose during benefits enrollment/life events, however, it does not flow through the system. The new flag ensures that if you indicate an FSA as limited purpose, the application will store and display it properly.

### Updated Interface on Benefits Enrollment and Life Events/New Hires Screens

The Benefits Enrollment and Life Events/New Hires screens were updated to support framework changes for the expense processing. This includes updates to improve the application's usability.

## Costpoint Employee Self Service Enhancements

This Costpoint release applies the following enhancements to the Employee Self Service applications:

### Activate Pending ESS Benefit Elections (AOPESSUE)

A new flag for limited purpose FSA (LP\_FSA\_FL) was added to the Medical Care FSA Elections (HB\_MED\_FSA\_ELEC) table.

### Address/Phone (ESMADDRESSPHONE)

The subtask name changed from "Other Address" to "Add/Change Other Addresses."

### Benefits Enrollment (ESMBENENROLL)

The following are updates to the tabs on the Benefits Enrollment screen:

#### Beneficiaries Tab

- The subtask name changed from "New Benefit Plans" to "Select New Beneficiaries for Benefit Plans."
- The subtask name changed from "Current Benefit Plans" to "Benefit Plans - Current Beneficiaries."
- The Note subtask was removed and the instructions for saving dependent/beneficiary information were moved to the Instructions tab.

#### Current Elections Tab

- The Current Elections subtask was removed.
- The Current Elections tab now displays the **Rollover** check box as the first column in the table.

#### Dependent FSA Tab

- A new check box, **I do not want to enroll in a Dependent Flexible Spending Account (FSA)**, allows you to opt out of any deductions for a Dependent FSA. When you select this check box, the screen will populate the **New Contribution** amount fields with **0.00** which will eliminate the need to enter the amount manually.
- The instructions on this tab were removed.

#### Dependents and Beneficiaries Tab

- The Note subtask was removed and the information in it was transferred to the Instructions subtask.

#### Medical FSA Tab

- A new check box, **I do not want to enroll in a Medical Flexible Spending Account (FSA)**, allows you to opt out of any deductions for Medical FSA. When you select this check box, the

screen will populate the **New Contribution** amount field with **0.00** which will eliminate the need to enter the amount manually.

- A new **Limited Purpose** check box under Current Contribution indicates if the currently elected medical FSA has been designated as a limited purpose FSA.
- The label of check box for indicating limited purpose FSAs changed from “Limited Purpose FSA” to “I certify that this is a limited purpose FSA and will only be used to reimburse vision and dental expenses.”
- The label changed from “Annual” to “Annual Amount.”
- The word “Amount” was added to the label of the fields for the current and new contribution amounts based on pay frequency (for example, “Monthly Amount,” “Weekly Amount”).
- The instructions on the tab were updated.

## Medical HSA Tab

- A new check box, **I do not want to enroll in a Health Savings Account (HSA)**, allows you to opt out of any deductions for a health saving account. When you select this check box, the screen will populate the **New Contribution** amount fields with **0.00** which will eliminate the need to enter the amount manually.
- The label changed from “Annual” to “Annual Amount.”
- The word “Amount” was added to the label of the field for the current contribution amount based on pay frequency (for example, “Monthly Amount,” “Weekly Amount”).
- The field label changed from “Employee Yearly Contribution Limit” to “Employee.”
- The field label changed from “Employer Yearly Contribution Limit” to “Employer.”
- The screen displays a new heading, **Year Contribution Limit**, for the **Employee** and **Employer** fields.

## Other Benefits Tab

- The Other Benefits subtask and the instructions in it were removed.
- The subtask name changed from “Current Coverage Levels” to “Other Elections – Current Coverage Levels” which is similar to other tabs.
- The subtask name changed from “Select new Coverage Level” to “Select Plan.” This subtask also contains the following updates:
  - The **Coverage Option** and **Weekly Premium** columns were removed.
  - A new validation ensures that you can only select one coverage option per benefit plan.
  - When you select a plan, the application displays a subtask with the coverage options for that plan.
- A new Select Coverage Level subtask displays all the coverage options for the selected benefit plan instead of requiring a lookup. You can select a coverage level/premium on this table. You can only select one option per plan. Existing coverage option validations also apply on this table. When dependents are eligible for a selected coverage option, they are displayed in the Select Dependent Coverage subtask.
- The Select Dependents for Coverage subtask displays a label to indicate the plan and coverage option selected.

## Direct Deposit (ESMDIRDEP)

- The screen displays an updated warning message when you add a new account.
- The application now includes the functionality to require a minimum number of direct deposit accounts. The application displays the following message when you do not have the minimum number of accounts required: "You do not have (min #) account(s) which is the minimum number of accounts required by your company. Please enter them in the (pending accounts)."

## Dependents and Beneficiaries (ESMDEPBEN)

- The Note subtask was removed and the information in it was transferred to the Instructions subtask.

## Designate Beneficiaries (ESMDESBEN)

- The subtask name changed from "New Benefit Plans" to "Select New Beneficiaries for Benefit Plans."
- The subtask name changed from "Current Benefit Plans" to "Benefit Plans - Current Beneficiaries."
- The Beneficiaries subtask which contained instructions was removed.

## Federal Withholding (ESMFEDWH)

- The screen displays an informational message and disables data fields when the employee does not have a tax record. The screen no longer displays an error when the employee does not have a tax record.
- The application is now included in the life event user flow.
- The State Withholding and Federal Withholding tabs now perform the same actions when the user is exempt or does not yet have a tax record.
- The tab was updated so that applicable state withholding statuses and exemptions will sync with the state. This will occur for states that are set up in the Configure State Tax Settings screen to require the state filing status to be equal to the federal filing status (**Equal to Federal - Filing Status** check box is selected). Prior to this release, the application only synched with the home state.

## Life Events/New Hires (ESMLIFEEVENT)

The application populates the new field (HB\_EMPL\_CURR\_ELEC.lp\_fsa\_fl) when it recreates the table after you enter the application.

The following are updates to the tabs on the Life Events/New Hires Screen:

### Address Tab

- The subtask name changed from "Other Address" to "Add/Change Other Addresses."



## Beneficiaries Tab

- The subtask name changed from “New Benefit Plans” to “Select New Beneficiaries for Benefit Plans.”
- The subtask name changed from “Current Benefit Plans” to “Benefit Plans - Current Beneficiaries.”
- The Note subtask was removed and the instructions for saving dependent/beneficiary information was moved to the Instructions tab.

## Dependent FSA Tab

- A new check box, **I do not want to enroll in a Dependent Flexible Spending Account (FSA)**, allows you to opt out of any deductions for a Dependent FSA. When you select this check box, the screen will populate the **New Contribution** amount fields with **0.00** which will eliminate the need to enter the amount manually.
- The instructions on this tab were removed.

## Dependents and Beneficiaries Tab

- The Note subtask was removed and the information was transferred to the Instructions subtask.

## Direct Deposit Tab

- The screen displays an updated warning message when you add a new account.
- The application now includes the functionality to require a minimum number of accounts. The application displays the following message when you do not have the minimum number of accounts required: “You do not have (min #) account(s) which is the minimum number of accounts required by your company. Please enter them in the (pending accounts).”

## Federal Withholding Tab

- The screen displays an informational message and disables data fields when the employee does not have a tax record. The screen no longer displays an error when the employee does not have a tax record.
- The application is now included in the life event user flow.
- The State Withholding and Federal Withholding tabs now perform the same actions when the user is exempt or does not yet have a tax record.
- The tab was updated so that applicable state withholding statuses and exemptions will sync with the state. This will occur for states that are set up in the Configure State Tax Settings screen to require the state filing status to be equal to the federal filing status (**Equal to Federal - Filing Status** check box is selected). Prior to this release, the application only synced with the home state.

## Medical FSA Tab

- A new check box, **I do not want to enroll in a Medical Flexible Spending Account (FSA)**, allows you to opt out of any deductions for Medical FSA. When you select this check box, the screen will populate the **New Contribution** amount fields with **0.00** which will eliminate the need to enter the amount manually.

- A new **Limited Purpose** check box under Current Contribution indicates if the currently elected medical FSA has been designated as a limited purpose FSA.
- The label of check box for indicating limited purpose FSAs changed from “Limited Purpose FSA” to “I certify that this is a limited purpose FSA and will only be used to reimburse vision and dental expenses.”
- The label changed from “Annual” to “Annual Amount.”
- The word “Amount” was added to the label of the fields for the current and new contribution amounts based on pay frequency (for example, “Monthly Amount,” “Weekly Amount”).
- The instructions on the tab were updated.

## Medical HSA Tab

- A new check box, **I do not want to enroll in a Health Savings Account (HSA)**, allows you to opt out of any deductions for a health saving account. When you select this check box, the screen will populate the **New Contribution** amount fields with **0.00** which will eliminate the need to enter the amount manually.
- The label changed from “Annual” to “Annual Amount.”
- The word “Amount” was added to the label of the field for the current contribution amount based on pay frequency (for example, “Monthly Amount,” “Weekly Amount”)
- The field label changed from “Employee Yearly Contribution Limit” to “Employee.”
- The field label changed from “Employer Yearly Contribution Limit” to “Employer.”
- The screen displays a new heading, **Year Contribution Limit**, for the **Employee** and **Employer** fields.

## Other Benefits Tab

- The Other Benefits subtask and the instructions in it were removed.
- The subtask name changed from “Current Coverage Levels” to “Other Elections – Current Coverage Levels” which is similar to other tabs.
- The subtask name changed from “Select new Coverage Level” to “Select Plan.” This subtask also contains the following updates:
  - The **Coverage Option** and **Weekly Premium** columns were removed.
  - A new validation ensures that you can only select one coverage option per benefit plan.
  - When you select a plan, the application displays a subtask with the coverage options for that plan.
- A new Select Coverage Level subtask displays all the coverage options for the selected benefit plan instead of requiring a lookup. You can select a coverage level/premium on this table. You can only select one option per plan. Existing coverage option validations also apply on this table. When dependents are eligible for a selected coverage option, they are displayed in the Select Dependent Coverage subtask.
- The Select Dependents for Coverage subtask displays a label to indicate the plan and coverage option selected.

## State Withholding Tab

- The screen displays an informational message and disables data fields when the employee does not have a tax record. The screen no longer displays an error when the employee does not have a tax record.
- The application is now included in the life event user flow.
- The State Withholding and Federal Withholding tabs now perform the same actions when the user is exempt or does not yet have a tax record.
- The tab was updated so that applicable state withholding statuses and exemptions will sync with the state. This will occur for states that are set up in the Configure State Tax Settings screen to require the state filing status to be equal to the federal filing status (**Equal to Federal - Filing Status** check box is selected). Prior to this release, the application only synched with the home state.

## Manage Custom Text (ESMCUSTTXT)

When you select **Benefit Enrollment** from the **Screen/Application** drop-down list, you can select the new **Instructions** option from the **Page** drop-down list. When you select the **Information** option, the **Information Text** field loads the default text for this page. You also have ability to change the default **Information Text** value.

## Manage Employee HSA Elections (EMMEHSA)

The application performs new validations for limited purpose FSAs if the employee has an existing Medical FSA election where the dates overlap with the HSA election and the **Limited Purpose** check box was not selected. The application either displays an error, warning, or no message based on the selected **Enrollment Rules Edit Method** option on the Configure Benefit Settings screen.

## Manage Employee Medical Care FSA Elections (HBMMFSA)

The Medical FSA Election subtask contains a new **Limited Purpose FSA** check box which allows you to designate an FSA as limited purpose. When you select this check box, you may elect both a Medical FSA and HSA. You only submit reimbursement for vision and dental expenses if you select this check box.

## Manage ESS Life Event Benefit Elections (AOMESSBL)

The Medical FSA Election subtask contains a new **Limited Purpose FSA** check box which allows you to designate an FSA as limited purpose. When you select this check box, you may elect both a Medical FSA and HSA. You only submit reimbursement for vision and dental expenses if you select this check box.

## Manage ESS Open Enrollment Elections (AOMESSBE)

The Medical FSA Election subtask contains a new **Limited Purpose FSA** check box which allows you to designate an FSA as limited purpose. When you select this check box, you may elect both a Medical FSA and HSA. You only submit reimbursement for vision and dental expenses if you select this check box.

## Manage Taxable Entity Settings (AOMESSCS)

A new **Minimum Accounts** field for direct deposit allows you to have both a maximum and minimum number of bank accounts for employees in ESS Direct Deposit.

## State Withholding (ESMSTATEWH)

- The screen displays an informational message and disables data fields when the employee does not have a tax record. The screen no longer displays an error when the employee does not have a tax record.
- The application is now included in the life event user flow.
- The State Withholding and Federal Withholding tabs now perform the same actions when the user is exempt or does not yet have a tax record.
- The tab was updated so that applicable state withholding statuses and exemptions will sync with the state. This will occur for states that are set up in the Configure State Tax Settings screen to require the state filing status to be equal to the federal filing status (**Equal to Federal - Filing Status** check box is selected). Prior to this release, the application only synched with the home state.

## Update Benefit Option/Election Tables (AOPESSDB)

A new **Limited Purpose FSA** flag was added to the Employee Current Benefit Elections table (HB\_EMPL\_CURR\_ELEC).

## Known Issues

This section includes summaries of the issues that exist in this Costpoint release. These issues will be resolved in future releases.

### Deltek Defect Tracking Number: 993279

**Description:** When you save the record in either the ESS Benefits Enrollment screen or ESS Life Events/New Hires screen, the subtasks on the **Other Benefits** tab display in the wrong order. This issue only occurs if you have several options in the Other Benefits tab.

**Customers Impacted:** This defect affects Costpoint Employee Self Service users that offer Other Benefits to their employees.

**Workaround Before Fix:** None.

**Additional Notes:** None.

### Deltek Defect Tracking Number: 1009663; 1010510

**Description:** When your system's display settings are set to use a low screen resolution and/or a text size greater than 100%, the fields in the following tabs on the ESS Benefits Enrollment screen and ESS Life Events/New Hires screen may not display:

- Dependents and Beneficiaries
- Medical FSA
- Dependent FSA
- Medical HSA
- State Withholding (applies to Life Events/New Hires screen only)
- Federal Withholding – Allowances Worksheet (applies to Life Events/New Hires screen only)

**Customers Impacted:** This defect affects Costpoint Employee Self Service users that use a low screen resolution and/or a text size greater than 100% in their system's display settings. A smaller laptop or monitor size may also result in this issue. Note that this issue does not occur on a tablet screen.

**Workaround Before Fix:**

- **For those using a higher resolution (1440x900 or higher) in their display settings**  
Change text size to 100% or 125% if you're using a higher resolution. If changing the text size to 100% or 125% does not work, you may need to increase the resolution.
- **For those using a lower resolution (1450x1050 or lower) in their display settings**  
Change text size to 100% if you're using a lower resolution. If changing the text size to 100% does not work, you will need to increase the screen resolution.

**Additional Notes:** None.

### Deltek Defect Tracking Number: 1011512

**Description:** If the **Missing Election Method** is set to **Extend Current Elections**, the Activate Pending Benefit Elections application should verify the employee's current medical election is a high-deductible plan—if he/she elected an HSA during benefits enrollment, but skipped making a medical election.

When you run the application after benefits enrollment with the **Missing Election Method** set to **Extend Current Elections**, the error report should generate an error message if the employee:

- Has a current non-high deductible medical plan with election dates that overlap the HSA dates
- Skipped the Medical Insurance election in the ESS Benefits Enrollment or does not go through Open Enrollment
- Elected an HSA in the ESS Benefits Enrollment; or an HSA is manually added by the Administrator

In this scenario, the error report should list the medical plan with the following error message: "The medical plan cannot be extended, the employee elected an HSA. An HSA can only be elected with a high deductible medical plan."

**Customers Impacted:** This defect affects Costpoint Employee Self Service users that offer both Medical and Medical HSA coverage to their employees and allow employees to extend current elections if a medical election is not made in the ESS Benefits Enrollment screen.

**Workaround Before Fix:** Prior to processing the employee in the Activate Pending Benefit Elections application, you could discuss the options with the employee and update his/her medical or HSA election in the Manage Open Enrollment Elections screen. If the employee wants to elect an HSA, his/her medical plan must be a high-deductible plan. If the employee does not want to elect a high-deductible medical plan, he/she may not elect an HSA.

If you find this issue after you have already processed the Activate Pending Benefit Elections application, you may update the employee's medical election in Manage Employee Benefit Elections or the employee's HSA election in the Manage Employee HSA Elections screen.

**Additional Notes:** None.

## Deltek Defect Tracking Number: 1013760

**Description:** A system error displays in the Manage Open Enrollment Elections screen if a record is manually added in the HSA Election subtask and the employee does not also have a Medical FSA Election record.

**Customers Impacted:** This defect affects Costpoint Employee Self Service users that manually enter Medical HSA elections in the Manage Open Enrollment Elections screen.

**Workaround Before Fix:** Add the employee's Medical HSA election in the Manage Employee HSA Elections screen.

**Additional Notes:** This issue does not occur if the Medical HSA election is processed through the ESS Benefits Enrollment screen.

## Deltek Defect Tracking Number: 1016521

**Description:** The following error message displays on the Manage Open Enrollment Elections screen when the **Enrollment Rules Edit Method** is set to **Hard Edit** on the Configure Benefit Settings screen and you attempt to save a record after manually entering a Medical FSA election for an employee that does not have an HSA election: "An HSA and medical FSA can only be elected together if the FSA is limited purpose (used for vision and dental only)."

**Customers Impacted:** This defect affects Costpoint Employee Self Service users that have the **Enrollment Rules Edit Method** set to **Hard Edit** on the Configure Benefit Settings screen and manually enter a Medical FSA election into the Manage Open Enrollment Elections screen for an employee that did not elect an HSA.

**Workaround Before Fix:** After adding the Medical FSA election, add an HSA record with an amount and save the record. Next, change the HSA amount to **0.00**, change the HSA **Election Type** to **None**, and save the record. This will allow you to save the manually entered Medical FSA election for an employee that did not elect an HSA.

**Additional Notes:** See the following notes:

- This issue does not occur if the Medical HSA election is processed through the Benefits Enrollment screen.
- A warning message displays under the same conditions if the **Enrollment Rules Edit Method** is set to **Soft Edit** on the Configure Benefit Settings screen.

## Deltek Defect Tracking Number: 1007774

**Description:** A system error occurs when the employee attempts to open the Life Events/New Hires or Manage Open Enrollment Elections screen if benefit options are part of the user flow but the employee does not yet have a record set up in Manage Employee Taxes.

**Customers Impacted:** This defect affects employees that attempt to elect benefits in Life Events/New Hires or Manage Open Enrollment Elections before an employee tax record is established for that employee.

**Workaround Before Fix:** Add an employee tax record for the employee. If you do not have complete payroll information for the employee, you need to assign only the **Pay Cycle** to the employee in Manage Employee Taxes.

**Additional Notes:** None.

## Appendix A: For Additional Information

### Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

**Attention:** For more information regarding Deltek Support Center, refer to the online help available from the Web site.

### Access Deltek Support Center

**To access the Deltek Support Center:**

1. Go to <http://support.deltek.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

**Note:** If you forget your username or password, you can click the **Need Help?** button on the login screen for help.



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