PERA/ERA & Retiree Health Care One Time Deduction and Refund Form – User Procedures

Business Purpose

- The **PERA/ERA & Retiree Health Care One Time Deduction Form** is used to deduct the employee and/or the state portion of the Retiree PERA/ERA and/or Retiree Health Care Benefit.
- The **PERA/ERA & Retiree Health Care One Time Refund Form** is used to refund the employee and/or the state portion of the Retiree PERA/ERA and/or Retiree Health Care Benefit that was incorrectly deducted.
- These are fillable forms. To complete the forms, use your mouse to navigate between the fields. We recommend you complete these forms electronically to avoid illegible entries.
- Forms are emailed to DFA-CentralPayrollForms@state.nm.us or faxed to 505-827-1223 by Noon on the Friday of the Pay Period End date.
- A copy of the applicable “Review Paycheck / Earnings or Deductions Benefit Screen” must be attached to the form.

Business Procedure

Please complete all fields in the top section of the form.

<table>
<thead>
<tr>
<th>State of New Mexico – Department of Finance and Administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>PERA/ERA &amp; RETIREE HEALTH CARE ONE TIME DEDUCTION REQUEST FORM</td>
</tr>
</tbody>
</table>

- **Today’s Date**: 7/17/2013
- **Requested By**: Esteban Terrazas
- **Pay Group**: CLS
- **Telephone Number**: 827-3676
- **Pay Period Ending**: 7/19/2013
- **Employee Name**: Jane Smith
- **EMPLID#**: 111233
- **Business Unit**: 53900 NM State Land Office

1. **Today’s Date** (the date you are filling out the form)
2. **Requested By** (the name of the person completing the form)
3. **Telephone Number** (the telephone number of the person completing the form)
4. **Pay Group** (choose the correct value from the “drop down menu”)
5. **Pay Period Ending** (this is the current pay period ending date)
6. **Employee Name** (full name of the employee)
7. **EMPLID#** (always include the employee’s state ID number)
8. **Business Unit** (choose the correct value from the “drop down menu”)

PERA ERA Form Instructions
The middle section of the form requires relevant information from the specific pay period for which you are making corrections. Refer to and print the “Review Paycheck” / Earnings or Deductions Benefit screen(s) in PeopleSoft to assist you in completing this section of the form.

Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck

Enter Employee ID > Go to the Pay Period you are correcting

Completing the middle section of form:

9. **Retirement Plan** (choose the retirement plan from the “drop down menu” that was in effect during the pay period in which the deduction/refund should have or did occur).

10. **Pay Period End Date** (this is the pay period in which the deduction should have occurred or in which the employee was incorrectly deducted) Note: this date cannot be the same as the Pay Period Ending Date in the top section of the One Time Deduction/Refund Form.
11. **Employee Share** (Calculate by multiplying Employee’s Gross Wage Subject to Retirement by the employee’s share percentage (8.92%)  
   **Note:** Make sure you are using the rate that was in effect for the period you are correcting.

12. **State Share** (Calculate by multiplying Employee’s Gross Wage Subject to Retirement by the state’s share percentage (16.59%)  
   **Note:** Make sure you are using the rate that was in effect for the period you are correcting.

13. **Gross Wage Subject to Retirement** (gross salary before deductions)

14. **Gross Wages NOT Subject to Retirement** (i.e. overtime wages)

15. **PERA/ERA Hours worked in Pay Period** (ordinarily this will be 80 hours)

16. **Hourly Pay Rate** (employee’s hourly wage rate for the applicable pay period)

17. **Totals** (if deducting or refunding for more than one pay period, add columns)

18. **Retiree Health Deduction Code** (choose the correct code from the “drop down” menu)

19. **Employee Share** (calculate by multiplying Employee’s Gross Wage Subject to Retirement by the Retiree Health Care percentage (i.e. 1%) for the employee)  
   **Note:** Make sure you are using the rate that was in effect for the period you are correcting.

20. **State Share** (calculate by multiplying the Employee’s Gross Wage Subject to Retirement by the Retiree Health Care percentage (i.e. 2%) for the state)  
   **Note:** Make sure you are using the rate that was in effect for the period you are correcting.

The bottom section of the form requires an explanation and a signature by the Human Resource Manager or a Human Resource Supervisor indicating that they have reviewed the form.  
**Note:** the person reviewing and signing the form cannot be the same as the one requesting.  
A copy of the applicable “Review Paycheck / Earnings or Deductions Benefit screen” must be attached in order for us to process your request.

<table>
<thead>
<tr>
<th>Explanation for the one time deduction:</th>
<th>(Required)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee was a wage subsidy employee.</td>
<td>was re-hired to permanent position effective 04/13/13. PERA was not deducted for the PPE: 05/10/13.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HR Manager Signature (Required)</th>
<th>HR Signature Here</th>
<th>Date: 7/17/2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR MANAGER Name: ______ Printed Name: ______</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This document must be reviewed and signed by the HR Manager or an HR Supervisor other than the requestor. If proper signature is not included the request will not be processed.

A copy of the applicable review paycheck screen deduction benefit tab must be attached to this request in order for the refund to be processed. Submit no later than 12 noon Friday to DEA-Central@pyrollForms@state.wa.us or fax to 505-827-1223.

Although you have until Friday of Pay Period End at 12:00PM to submit this form, we encourage you to submit it as soon as you have it completed. This allows Central Payroll more time to address any questions and/or to request any corrections.

**Document Control**

<table>
<thead>
<tr>
<th>Date</th>
<th>Author</th>
<th>Description</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/06/2013</td>
<td>Carol Ortiz</td>
<td>Draft</td>
<td>0.1</td>
</tr>
</tbody>
</table>