

Benelogic Monthly Checklist

- Are there any drop-down menus missing PTAs?** If a PTA is missing, the department's Guarantee Account will be used for monthly postdoc health premium billing.
- Do you see any fields where PTAs were there but now missing?** This may mean that the PTA has "expired" and has been archived. You will need to update the end date of the archived PTA if you still want to use it for health premium charges.
- Is there a postdoc not listed that you think should be?** A postdoc will not show up on your screen until they have a record in Benelogic. In order for a postdoc to have a record in Benelogic they must have created their SUNet ID. Note: The drop-down menus to select a PTA will not be available until the postdoc has submitted their elections (which includes entering an SSN).
- Are there any missing End Dates for terminated postdocs?** Check the right hand side of the screen to see if there's an End Date entered. It is required that departments confirm that terminations have been processed in Benelogic for the month in which they are checking.
 - Terminations are processed in the month in which the postdoc is ending their appointment.
 - Any postdoc in active status on the 1st of the month will be on that month's bill. If you see a postdoc listed that you know should be terminated, please verify that the termination form has been submitted AND approved by OPA in the Postdoc WebForms System.
 - Terminating a pay line in GFS does not terminate a postdoc in Benelogic. Conversely, terminating a postdoc in Benelogic or PD WebForms does not end the GFS pay line.
- Was there a change in start date for any of your postdocs?** On the Monthly PTA Screen, verify that any changes in start dates were processed in Benelogic.
- Has anyone moved from stipend to salary or vice versa in this month and would warrant a change in Benefits Pool eligibility?**
 - Run a GFS Report at bi.stanford.edu. To check salary lines only, run GFS Postdoc 50 Salary Rep (PS-GFS013). To check both salary and stipend lines, run GFS Postdoc Pay Levels Report (PS_GFS020).
 - If the pool PTA is entered and your postdoc is not pool eligible, the department's guarantee account will be charged.
 - For a postdoc to be pool eligible, they must be paid a salary equal to 20hrs/month for a full month or 40hrs/month for a half a month, and ALL salary pay lines must be coded with Assist Type RAF.
- Have all of the GFS lines been entered and APPROVED?** A GFS salary report is run on the 1st of each month for the previous month. Salary lines adding up to at least 20 hours must be approved (Complete/Approved – C/A in GFS) by the last day of the month; otherwise the postdoc will not be Pool Eligible. Complete/Pending - C/P and Pending/Pending - P/P salary lines do not meet requirements for pool eligibility.
- Did you log in one last time on the last day of entry – usually the last day of the month?** Postdocs may elect benefits at any time within their 31-day enrollment window. If they made their elections closer to the end of the month and you don't log back in, you'll lose your opportunity to provide the correct PTA for that month.

Have you checked your Guarantee Account financials from the previous month and made the necessary changes in GFS and/or Benelogic for the current month? An Expenditure Details Report run in BI for your Guarantee Account is sufficient and will show if a postdoc's health premiums were charged to that account. If so, it may be that you need to update/correct a GFS pay line or provide a different PTA in Benelogic.