

Payroll Deduction (PRD) Change Tracker

Use this tracker along with your payroll schedule and a calendar so that you can meet deadlines for payroll deduction changes. Use your email calendar or a calendar app to set reminders for yourself.

Member name	Change notice source	Reason for change	Date PRD changed	PRD change made to		PRD amount	Paydate PRD change made to	Effective E-bill month	Will another change be needed? If yes add PRD change cutoff date.
				One-time	Re-curring				
E. John	Member email	Cancel PAC	1/20/20		X	125.00	2/10/20	March	No
T. Brady	Change report	UTUIA increase	1/20/20		X	200.00	2/10/20	March	No
B. Joel	Variance Report	Negative variance	1/20/20		X	225.00	2/10/20	March	Yes – 2/25/20 (April eBill)

Payroll Deduction Management Best Practices:

- Do not just login to TD-Connect when the billing is ready. Login at least once a week to check for new notices on the **Member Billed Amount Changes Report**.
- Make changes to PRDs as soon as possible so that you do not miss the PRD change cutoff date set by the carrier/company.
- Always strive to keep members' PRDs in balance with their monthly billed amounts. UTUIA and VLTD amount changes will always be at least 45 days in advance of the eBill effective date.
- Keep record of any correspondence you receive from members requesting changes to voluntary benefits (DIPP, PAC, VSTD).
 - Note the date you received the notice, the date the change takes effect and the date you should change the payroll deductions by.
- Keep record of any correspondence you receive from members regarding their membership status (Moving to BLET, retirement, etc.)
 - Note the date you received the notice, the date the change takes effect and the date you should change the payroll deductions by.
 - When a member moves to the BLET, you will need to zero out the payroll deduction for the effective month. Then on the eBill for the effective month you will move the member from Active/Exempt status to Inactive status.
- If you flag a member with an incorrect PRD on the eBill, if you have not already done so, update the PRD as soon as possible.
 - An important thing to remember: PRD changes that are made after the cutoff date for the effective eBill will result in the member being out of balance on the eBills up until the eBill the PRD change applies to.
 - There is no record in TD Connect that tracks when you make PRD changes.
 - New deduction amounts will not show up right away. You must be aware of the eBill month that the new amount will show on.
 - The variance will continue to grow until the member's billed amount and PRD are in balance.
- If the carrier's payroll system allows for one-time deduction changes/pick-ups/arrears files – use that method to adjust PRDs to clear out member variances. If you use the recurring PRD, you will need to remember to change the PRD amount back to the regular amount.