



## FREQUENTLY ASKED QUESTIONS

# YERDI Eligibility Tracking

### Q. How does YERDI Eligibility Tracking Work?

YERDI Eligibility Tracking (YERDI ET) tabulates your employees' hours in the payroll files and notifies you when an employee should be enrolled in the Retirement Plan. If your YMCA pays on a lag, YERDI ET was enhanced in July 2017 to credit hours based on when they were worked, instead of the YMCA's pay dates, although the latter was an acceptable method.

For example, an employee was hired on 12/26/2015 and has hours uploaded for pay date 1/15/2017, but these hours reflect days worked from 12/24/2016 to 1/7/2017. Since their anniversary date (12/26) falls within this pay period, YERDI ET will credit these hours to anniversary year 12/26/2015-12/25/2016.

### Q. How do I process a Regular Transmittal?

1. Upload your pay file in the **Upload and Process** section of YERDI ET
2. Go to YERDI → **Financial** → **Regular Transmittal**
3. Click **Continue**. (As long as the date in column AC of the pay file matches the date of your transmittal, all of your participant's compensation amounts will load)
4. Check the amount to be sure everything is correct
5. **Validate** the transmittal by fixing any *Errors* and reviewing any *Warnings*
6. **Close** your Transmittal

### Q. I noticed an error log after I uploaded my pay file to YERDI ET. Do I need to do anything?

Yes. You should check the *Error Log* and make any corrections to your file and re-upload. *If you do not fix your errors, certain employees' hours will not be saved.*

### Q. Why can't I open my Transmittal after I upload my pay file to YERDI ET?

The pay date in YERDI must match the pay date in the last column of your pay file (**column AC**). If it does not match, you must adjust the date in column AC prior to uploading to YERDI ET. Contact the Fund if your pay schedule has changed.

*Please note:* if the pay file is uploaded with a date that does not match YERDI ET and then you change the date and upload the file again, every employee will receive hours twice—once for the hours on the first file and again for the hours on the second file. If this happens, make sure to delete the wrong file in YERDI ET (**Payroll Processing** → **Review Last Upload**).

### Q. If my salaried employees do not have hours on the pay file, how will they receive hours when they are paid?

As long as the value "S" for "salaried" or "A" for "annual" appears in the pay file (**Column T**), YERDI ET will check the *Salaried* box and the employee will always receive 173.3 hours per month. If the employee's value in the pay file

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changes to “H” for “hourly” in the pay file, the *Salaried* box will be un-checked and YERDI ET will count the hours according to what is on the pay file.

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**Q. If I have employees who do not have hours on the pay file because we pay them a stipend (example: camp staff), how can I ensure they will receive hours each time they are paid?**

In the **Employees** section → **View/Edit Employees**, you must check the *Equivalency* box. These employees are automatically given 190 hours per month. However, if there are hours on the pay file, the equivalency box will be overridden and the employee will receive the actual hours they worked.

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**Q. Can I manually add hours for an employee?**

Yes. Go to **Employees** → **View/Edit Employees** and click on the most recent anniversary range in the employee’s record. At the bottom of the screen is a section where you can add a new pay record.

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**Q. YERDI ET shows that an employee is eligible, but after reviewing their record I realize they are not. What do I do?**

You can correct their record in the **Employees** → **View/Edit Employees** section and then click on **Manually Determine Eligibility** in the **Upload and Process** section to uncheck the *Eligible* box.

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**Q. How do I handle terminated employees in YERDI ET?**

If an employee is not on the pay file for 55 days, YERDI ET will automatically terminate their account. If they return to employment and are listed on the pay file, they will be unchecked as terminated. If an employee was enrolled in YERDI and they terminate their employment, you will need to terminate them in the **Non-Financial** section.

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**Q. Why can’t I find an employee in YERDI ET?**

If YERDI ET marks an employee as *Terminated*, they will not appear in your reports and lists unless you go to: **Utilities** → **Options** and check *Show terminated employees in lists and reports*.

### **Where Can I Get More Information?**

Call the YMCA Retirement Fund at 800-RET-YMCA or send an email to [info@ymcaret.org](mailto:info@ymcaret.org)