



State of Louisiana
DIVISION OF ADMINISTRATION

OFFICE OF STATE UNIFORM PAYROLL

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GOVERNOR

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COMMISSIONER OF ADMINISTRATION

July 18, 2005

OFFICE OF STATE UNIFORM PAYROLL MEMORANDUM #2006-08

TO: All ISIS HR Paid and Non-paid Agencies

FROM: Jena W. Cary
Director

SUBJECT: House Concurrent Resolution 28 – Medicare Divided Vote Referendum
Mailing and Collecting of Referendum Ballots for Eligible Employees

As discussed in the June 2, 2005 Medicare Referendum meeting, attached are the official ballot and sample cover letter to be used in the Medicare Divided Vote Referendum. **The official ballot must not be modified except to include employee and agency specific information as indicated by the “merge” fields.** The letter should be modified to include any agency specific information or instructions. These documents must be distributed to eligible employees on September 15, 2005.

During the ballot process, agencies should take the following steps:

- Modify the cover letter to include the agency’s official letterhead.
- Add employee and agency specific information in the designated fields on the cover letter and ballot documents.
- Distribute the official ballot and cover letter to eligible employees on **September 15, 2005**. Note: these employees must have been sent the notification documents no later than June 15, 2005.
- Contact Linda Yelverton regarding employees who did not receive the notification documents by June 15, 2005.
- Document how the ballots were distributed, to whom, employee address information (if distributed through mail), date of distribution, ballot return dates and which option the employee selected.

The attached “Medicare Divided Vote Referendum – Ballot Process” procedures should be used by ISIS HR Paid agencies in completing the ballot process.

The effective date, for employees electing to participate in Medicare coverage, is October 1, 2005. It is imperative that agencies make every effort to obtain completed ballots by September 30, 2005. Refer to OSUP memoranda #[2005-46](#), [2005-50](#), [2005-51](#) and [2005-53](#) for additional information on the Medicare Referendum process.

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Questions regarding the referendum process should be directed to Linda Yelverton at (225) 342-0026. ISIS HR Paid agency questions regarding the attached procedures should be directed to Laura Odom at (225) 342-5332.

JWC/LAO

Attachments: [Official Medicare ballot](#)

[Sample cover letter](#)

[Procedures "Medicare Divided Vote Referendum-Ballot Process"](#)

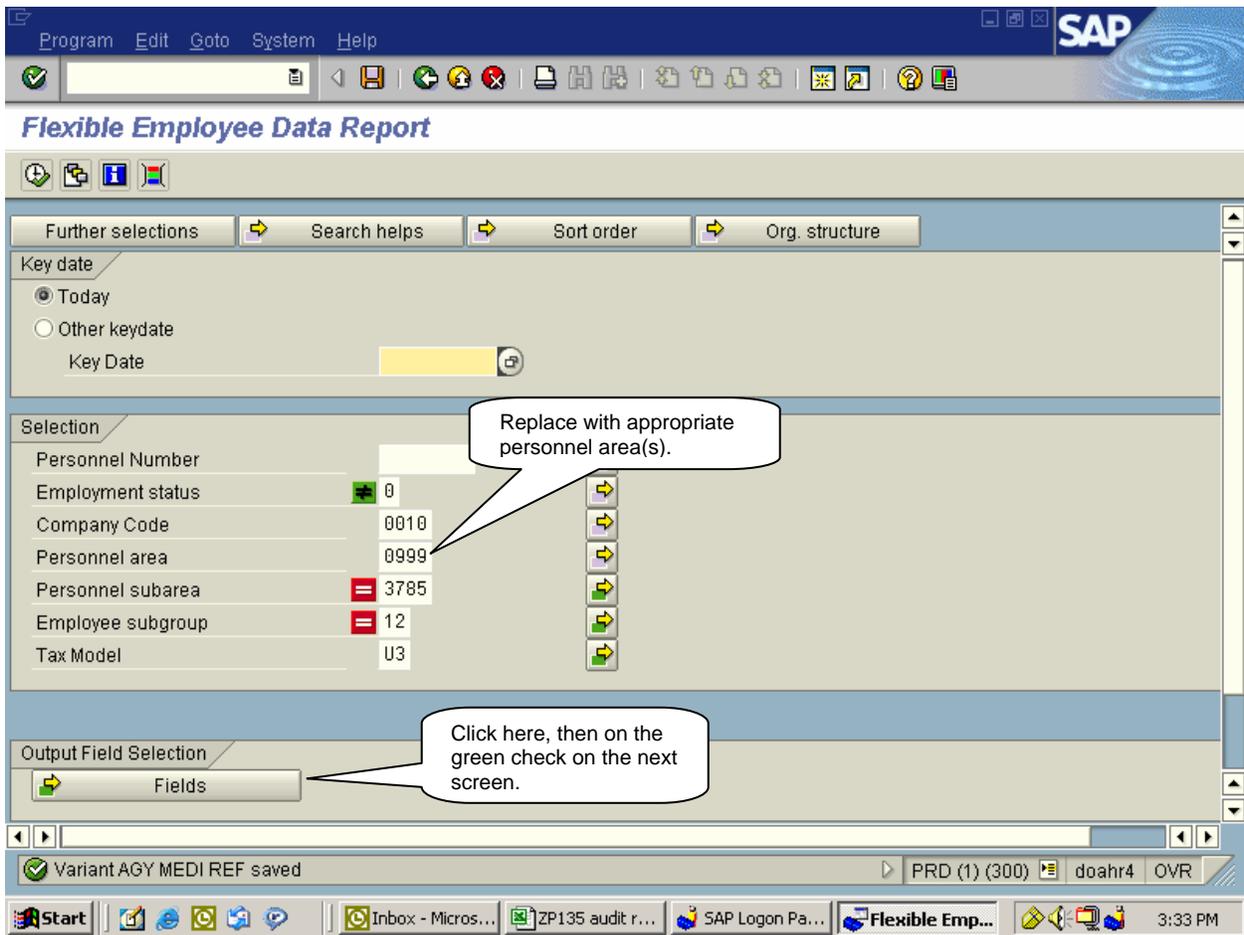
Medicare Divided Vote Referendum Ballot Process

These procedures should be used to ensure that all eligible employees receive ballots to vote in the Divided Vote Medicare Referendum and to document the ballot process.

A. Report ZP135 Flexible Employee Report

The following steps will identify active employees that are currently set up in non-Medicare tax models.

1. Get variant AGY MEDI REF (See Variant Details at end of procedures for selection and output criteria of the variant). Enter the appropriate personnel area(s) in lieu of 0999.



2. Make sure that you click on the “Fields” button under “Output Field Selection”. The report will not output all of the data required if this isn’t selected each time the report is run.

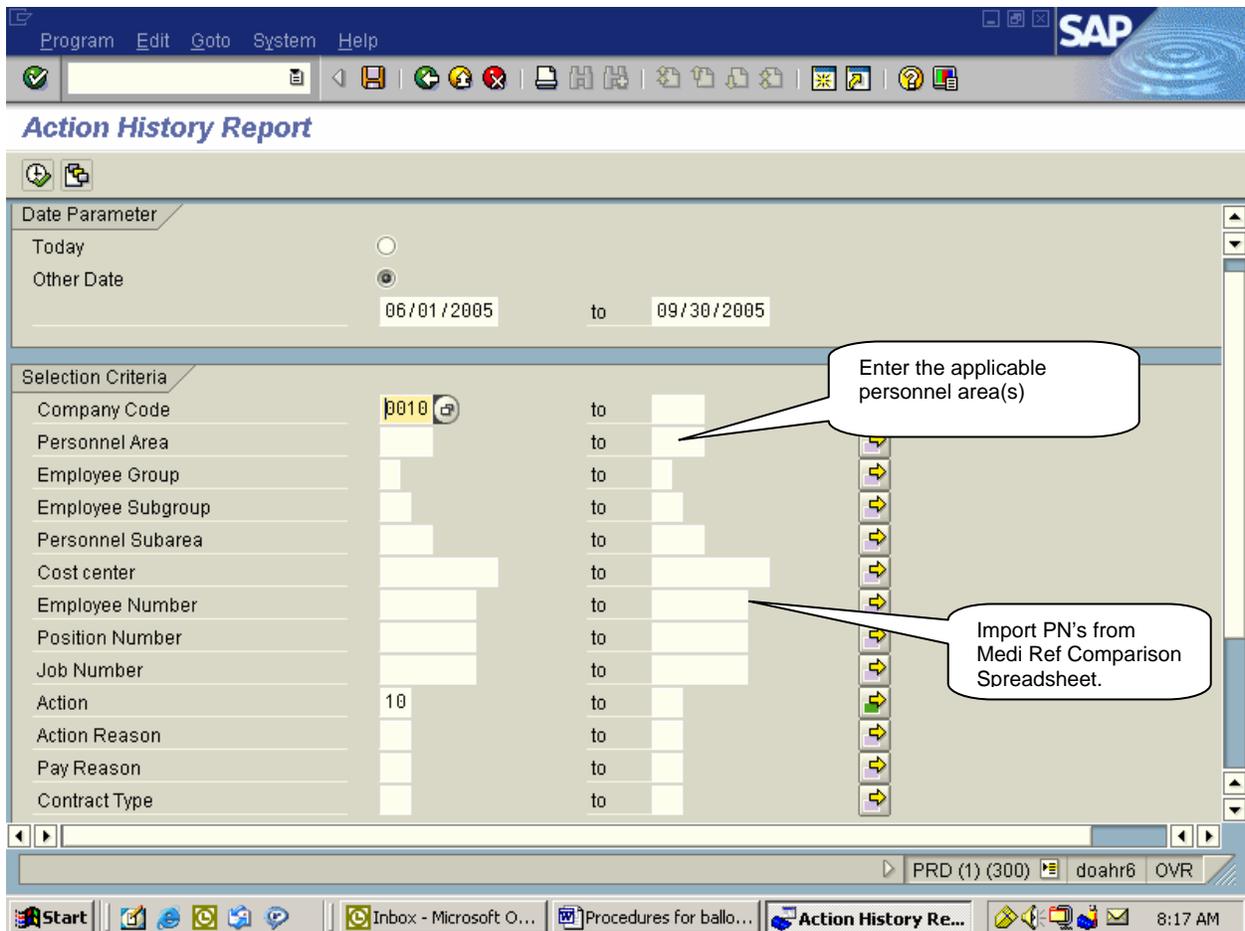
3. Sort the report by personnel number. Export the file to Excel following instructions found in State of Louisiana Help > HR-Reporting > ISIS HR Reports Manual > Exporting

Reports. Select export options **Spreadsheet > Table > Microsoft Excel > Save the data in the spreadsheet > file > save copy as > ZP135 Ballot Spreadsheet**. Close the Excel file.

B. Comparison

The following steps should be used to identify employees that did not receive notification documents from your agency.

1. Open the ZP135 Notification Spreadsheet created in June. Highlight all of the spreadsheet and copy.
2. Open a blank worksheet in Excel.
3. From the menu choose **Edit > Paste Special > Values > OK**.
4. Save file as **Medi Ref Comparison Spreadsheet**. Close the ZP135 Notification Spreadsheet. All comparison work will be completed in the Medi Ref Comparison Spreadsheet.
5. Identify employees that have terminated, transferred out to another agency or had tax model corrections and are now withholding Medicare.
 - a. Run ZP14 Action History report to identify employees who received the notification documents and are now in withdrawn status or transferred out to another agency. Get variant MEDI REF TTSR (See Variant Details at end of procedures for selection and output criteria of the variant). Enter the applicable personnel areas and import personnel numbers from the Medi Ref Comparison Spreadsheet. Execute the report and print the results. Delete rows in the **Medi Ref Comparison Spreadsheet** for the employees listed on the ZP14 report. If necessary, document any pertinent information in the ZP135 Notification Spreadsheet for future reference.



b. Run ZP135 Flexible Employee Data report to identify employees who received the notification documents and are now paying Medicare due to a tax model correction. Get variant MEDI REF TX CH (See Variant Details at end of procedures for selection and output criteria of the variant). Insert the applicable personnel area(s) in lieu of 0999. Click on the “Fields” button under “Output Field Selection”. The report will not output all of the data required if this isn’t selected each time the report is run. Import personnel numbers from the Medi Ref Comparison Spreadsheet. Execute the report and print the results. In the **Medi Ref Comparison Spreadsheet**, delete the data for employees whose tax models have been corrected to withhold Medicare. If necessary, document any pertinent information in the ZP135 Notification Spreadsheet for future reference.

After completing steps 5a and 5b, the only discrepancies between ZP135 Notification Spreadsheet and ZP135 Ballot Spreadsheet should be employees that were hired by the agency during the notification period and those who had tax model corrections (paying Medicare and should not have been). These employees will need to be reviewed to determine if the employee received the 90 day notification. The following steps will identify these employees.

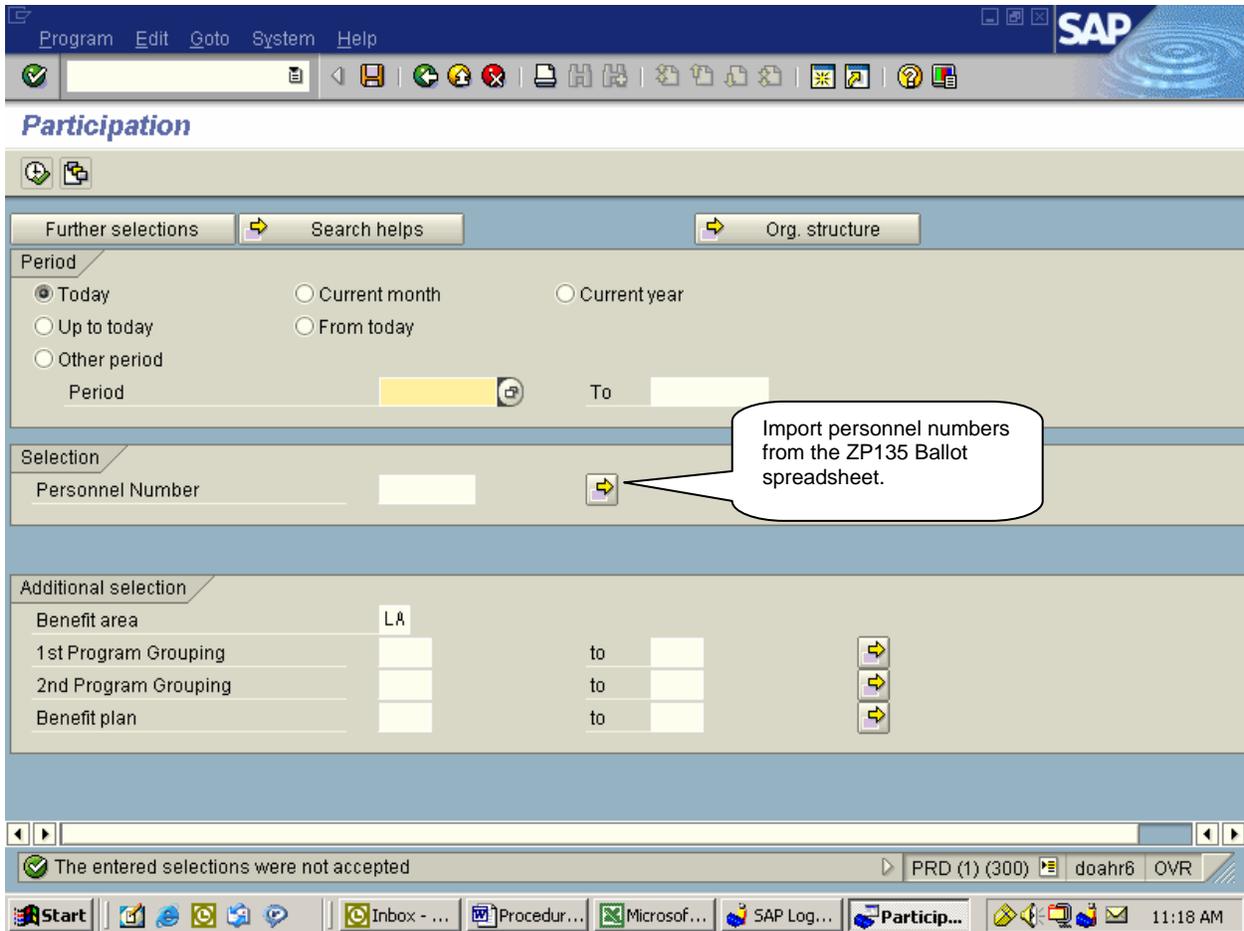
6. Insert **2** blank columns behind **PersNo** in the **Medi Ref Comparison Spreadsheet**.

7. Open ZP135 Ballot Spreadsheet. Copy the column labeled **PersNo** then paste the data into the Medi Ref Comparison Spreadsheet in **Column B**. Close the ZP135 Ballot Spreadsheet file.
8. In the first row of data in Medi Ref Comparison Spreadsheet **Column C, Row 2 (C2)** enter the formula: **=if(A2=B2,"OK","NoMatch")**
9. Copy the cell once the formula is completed and paste to all rows in **Column C** which contain data.
10. Review **Column C** for items that do not match (NoMatch) and make the necessary adjustments. **Note: the following steps may need to be completed several times during this process.**
 - a. Find the first cell with "NoMatch" in Column C.
 - b. Highlight data in Column B from the "NoMatch" line to the last PersNo in Column B. Cut > find the matching PersNo in Column A > Paste in the corresponding cell in Column B.
 - c. If there is no matching PersNo in Column A, insert a line in the spreadsheet and cut and paste from this point.
 - d. After each cut and paste action, click on the last cell in Column C with "OK". Copy and paste the formula in the remaining cells. This is necessary because the formula changes in the cells as you copy and paste from Column B or insert lines.
 - e. Once completed, the "NoMatch" entries will designate lines where either Column A or B is blank. Review each "NoMatch" and determine what action is necessary in the referendum process. Those in Column A and not Column B were given the notification documents but are not in the ZP135 Ballot spreadsheet. Those in Column B and not Column A should be reviewed to determine if the employee received the 90 day notification. **Note: In the ZP135 Ballot Spreadsheet, document which employees who were listed in the ZP135 Ballot Spreadsheet and were not listed in the ZP135 Notification Spreadsheet. These ballots must not be mailed until the 90 day notification period is over for that employee.**

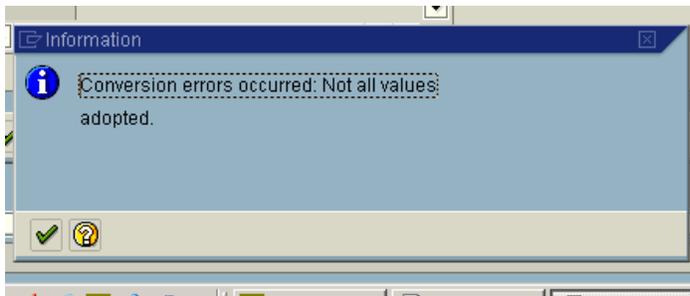
B. ZHRBEN0072 Participation Report

The following steps should be used to obtain employee retirement plan information. This information will be merged into the ZP135 Ballot spreadsheet and used in the creation of the ballot document.

1. Get variant AGY MEDI RT PL (See Variant Details at end of procedures for selection and output criteria of the variant). Import personnel numbers from the ZP135 Ballot spreadsheet into ISIS HR report ZHRBEN0072 Participation Report and run report. To import, copy the personnel numbers from the ZP135 Ballot spreadsheet onto your clipboard then open report ZHRBEN0072 and select multiple selections. Click on the "clipboard" icon at the bottom of the selection screen.



If the following error message appears, click on the green check mark and the personnel numbers will import.



2. Change the report layout so that the personnel numbers are listed first and retirement plans in the second column. Use “click and drag” method to change the report layout.
3. Sort the report by personnel number. Minimize the report and open file ZP135 Ballot Spreadsheet.

C. Merge Files – Retirement Plan

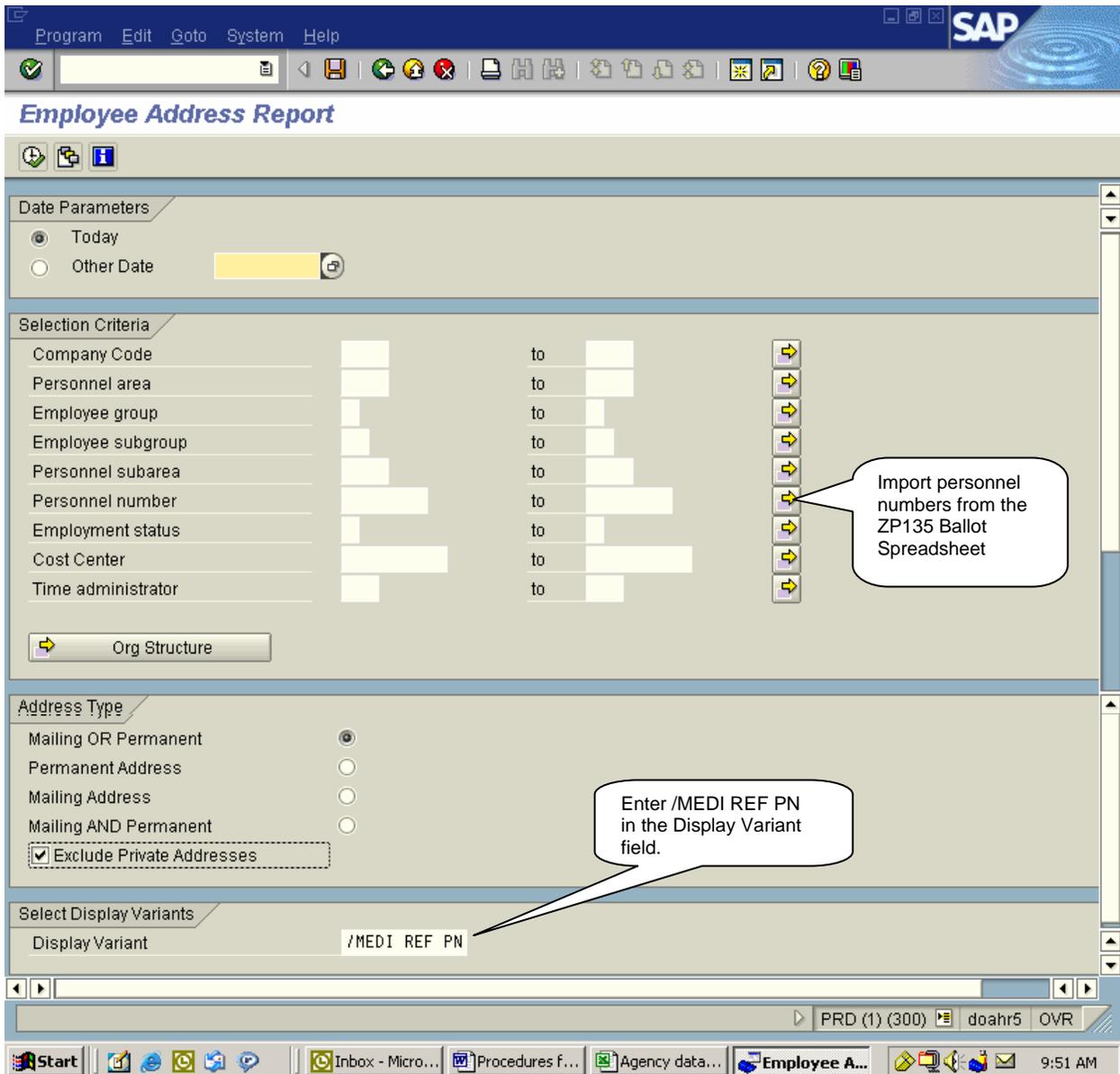
The following steps merge the retirement plan information into the ZP135 Ballot spreadsheet.

1. Merge the personnel number and retirement benefit plan information from ZHRBEN0072 into the ZP135 Ballot Spreadsheet using the following steps:
 - a. Open the ZP135 Ballot Spreadsheet.
 - b. Highlight **Column A** and select **Format > Cells > Number > General > OK**. In each cell of **Column A**, hit **F2** then **Enter**. This will remove the lead zeros from the PersNo and allow the match formula to work.
 - b. Insert **3** blank columns behind **PersNo**.
 - c. In ZHRBEN0072, highlight columns "**PersNo**" and "**Benefit plan text**". Right click and select "copy text". Then paste data into ZP135 Ballot Spreadsheet in **Column B and C (in first row with PersNo data)**. Expand column width to allow proper viewing of data. Verify that all records import into ZP135 Ballot Spreadsheet. If not, you must copy and paste the records that didn't export.
 - d. Highlight **Column B** and select **Format > Cells > Number > General > OK**.
 - e. Cut data in **Column C** and then paste it into **Column D** on ZP135 Ballot Spreadsheet.
 - f. In the first row of data in ZP135 Ballot Spreadsheet Column C, row 2 (C2) enter the formula: **=if(A2=B2,"OK", "NoMatch")**
 - g. Copy the cell once the formula is completed and paste to all rows in **Column C** which contain data.
 - h. Review **Column C** for items that do not match and make the necessary adjustments.

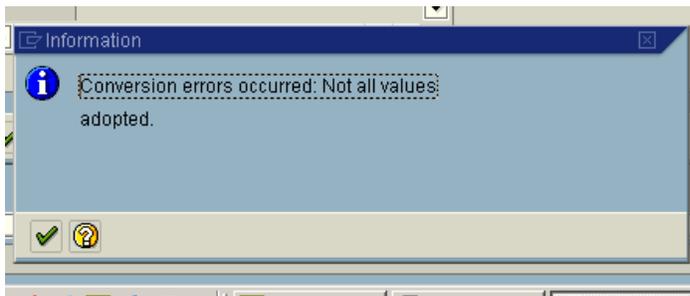
D. ZP120 Employee Address Report

The following steps should be used to obtain employee address information. This information will be merged into the ZP135 Ballot spreadsheet and used in the creation of the ballot document and ballot cover letter.

1. Enter /MEDI REF PN in the Display Variant field. Import personnel numbers from the ZP135 Ballot Spreadsheet into ZP120 Employee Address Report and execute the report. To import, copy the personnel numbers from the ZP135 Ballot Spreadsheet onto your clipboard then open report ZP120 and select multiple selections. Click on the "clipboard" icon at the bottom of the selection screen.



If the following error message appears, click on the green check mark and the personnel numbers will import.



2. Sort the report by personnel number.

E. Merge Files – Employee Addresses

The following steps merge the employee address information into the ZP135 Ballot spreadsheet.

1. Merge the personnel number and addresses from ZP120 Employee Address Report into the ZP135 Ballot Spreadsheet using the following steps:

- a. Open the ZP135 Ballot Spreadsheet.
- b. Insert **6** blank columns behind **Column C**.
- c. In ZP120, highlight all columns. Right click and select “copy text” Then paste data into ZP135 Ballot Spreadsheet in **Column D (in first row with PersNo data)**. Expand width of columns to allow proper viewing of data. Verify that all records import into ZP135 Ballot Spreadsheet.
- d. Highlight **Column D** and select **Format > Cells > Number > General > OK**.
- e. Insert a blank column behind **Column D**.
- f. In the first row of data in ZP135 Ballot Spreadsheet **Column E, row 2 (E2)** enter formula: **=if(A2=D2,”OK”,”NoMatch”)**
- g. Copy the cell once the formula is completed and paste to all rows in **Column D** which contain data.
- h. Review **Column D** for items that do not match and make the necessary adjustments.

Add the following headers in ZP135 Ballot Spreadsheet:

Column B	PN from RT Plan
Column C	Match Code
Column D	PN from Address File
Column E	Match Code
Column F	Employee Address 1
Column G	Employee Address 2
Column H	City
Column I	State
Column J	Zip
Column K	Name of Retirement System

Note: All columns must have headers in order for the merge process to work properly.

F. Ballot Cover Letter

The cover letter is included in OSUP memo #2006-08. This cover letter must be modified to include the agency’s letterhead and agency specific information prior to completing the merge process. Information in the ZP135 Ballot spreadsheet will be used to insert the employee specific data into the cover letter. The following steps outline this process.

1. Save the cover letter in Word and add the agency's letterhead.
2. Add agency specific information to the cover letter. This includes the address the completed ballot should be mailed to (next to last paragraph), an agency contact name and phone number (last paragraph) and the agency representative name and title. Note: After adding the letterhead, it may be necessary to modify font size and/or margins on the cover letter to reduce the cover letter to one page. Save document to local file. Note: the following merge steps were created using Microsoft Word 2000.
3. In cover letter document (main document), click **Tools > Mail Merge**. In the "Mail Merge Helper" pop up box, under "Main Document", select **Create > Form Letters > Active Window**. Under "Data Source" select **Get Data > Open Data Source**. Change "files of types" to MS Excel Worksheets (*.xls). Double click on ZP135 Ballot spreadsheet. Pop up box should appear with "Entire Spreadsheet" highlighted. Click "OK".
4. Pop up box "Edit Main Document" appears, click on Edit Main Document button. Using the "Insert Merge Field" button on the toolbar, insert merge fields and delete text from the letter document as follows:

<u>Replace Letter Text</u>	<u>With Merge Field</u>
<Insert First Name>	First_name
<Insert Last Name>	Last_name
<Insert PersNo>	PersNo
<Insert Employee Address 1>	Employee_Address_1
<Insert Employee Address 2>	Employee_Address_2
<Insert City>	City
<Insert State>	State
<Insert Zip>	Zip
<Insert First Name>	First_name
<Insert Last Name>	Last_name

Verify that all spacing and punctuation remain correct in the ballot where fields were inserted and save the document.

5. Click **Tools > Mail Merge**. In the "Mail Merge Helper" pop up box, click "merge". The "Merge" pop up box appears. Select "Don't print blank lines when data fields are empty" and click "merge". Note: A Microsoft Word message may appear (There are too many spelling or grammatical errors in -----). Click "OK" if this message appears. This step creates the cover letters with the employee data populated. Print letters and pull any letters that are for employees who have not met the 90 day notification requirement for voting in the Medicare referendum. Save the document.

G. Ballot Document

The Official Ballot is included in OSUP memo #2006-08. Information in the ZP135 Ballot spreadsheet will be used to insert the employee specific data into the ballot document. The following steps outline this process.

1. Save the ballot in Word.
2. Add agency specific information to the ballot. This includes the agency name, identification number and address located at the bottom of the ballot. Note: the following merge steps were created using Microsoft Word 2000.
3. In the ballot document (main document), click **Tools > Mail Merge**. In the “Mail Merge Helper” pop up box, under “Main Document”, select **Create > Form Letters > Active Window**. Under “Data Source” select **Get Data > Open Data Source**. Change “files of types” to MS Excel Worksheets (*.xls). Double click on ZP135 Ballot spreadsheet. Pop up box should appear with “Entire Spreadsheet” highlighted. Click “OK”.
4. Pop up box “Edit Main Document” appears, click on Edit Main Document button. Using the “Insert Merge Field” button on the toolbar, insert merge fields and delete text from the letter document as follows:

<u>Replace Ballot Text</u>	<u>With Merge Field</u>
<Insert Name of Retirement System>	Name_of_Retirement_System
<Insert First Name>	First_name
<Insert Last Name>	Last_name
<Insert EE Identification Number>	PersNo
<Insert Name of Retirement System>	Name_of_Retirement_System

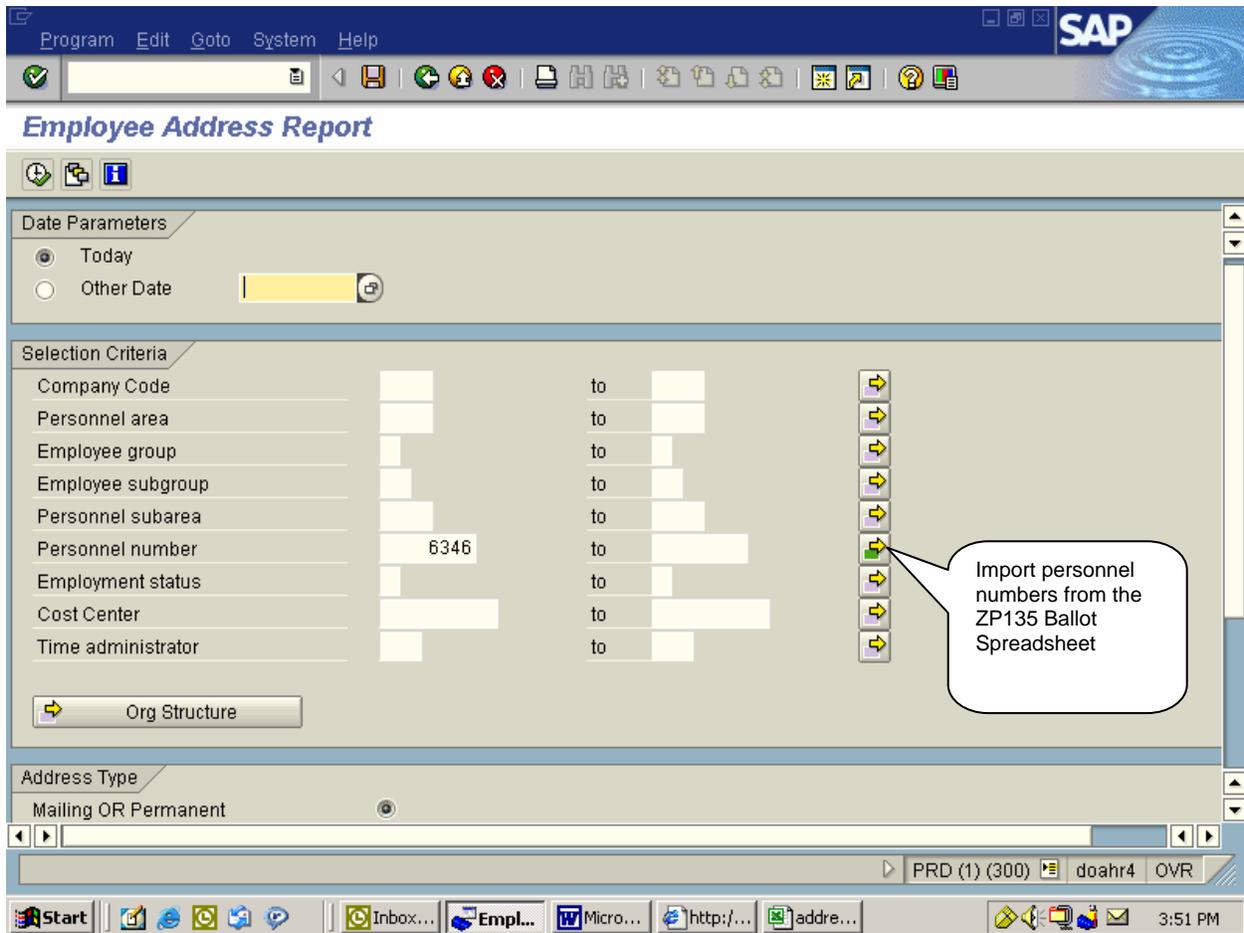
Verify that all spacing remains correct in the ballot where fields were inserted and save the document.

5. Click **Tools > Mail Merge**. In the “Mail Merge Helper” pop up box, click “merge”. The “Merge” pop up box appears. Select “Don’t print blank lines when data fields are empty” and click “merge”. Note: A Microsoft Word message may appear (There are too many spelling or grammatical errors in -----). Click “OK” if this message appears. This step creates the cover letters with the employee data populated. Print letters and pull any letters that are for employees who have not met the 90 day notification requirement for voting in the Medicare referendum.

H. Address Labels

Agencies have the option of mailing employee ballot documents in window envelopes or producing address labels. The following steps can be used to create address labels or the agency can create a merge file using the address information already in the ZP135 Ballot spreadsheet.

1. Import personnel numbers from the ZP135 Ballot Spreadsheet into ISIS HR report ZP120 Employee Address Report and run report. Execute the report.



2. Export the report by clicking the export icon then select **Spreadsheet > Table > Microsoft Excel > Save the data in the spreadsheet**. In Excel, select **File > Save copy as > Ballot addresses.xls**. Close file.
3. In Excel, open the file just saved and verify that records exported correctly.
4. Open a new Word document. Click **Tools > Mail Merge > Create > Mailing Labels > Active Window > Get Data > Open Data Source**. File of Type = All files. Open the Excel Ballot addresses file. A pop-up box displays the "Entire Spreadsheet" – click **OK**.
5. Click **Set up main document**. At Labels Options, select product number for label to be used. Click **OK > Insert Merge Field > Employee_Name > hit enter > Insert Merge Field > Address_Line_1 > hit enter > Insert Merge Field > Address_2 > hit enter > Insert Merge Field > City > Insert Merge Field > State > Insert Merge Field > Zip_Code > OK > Merge > Merge > Save**.
6. Print labels.

I. Files to be retained

Notification Process = ZP135 Notification Spreadsheet and Notification Addresses file in Word

Comparison Process = ZP135 Comparison Spreadsheet

Ballot Process = ZP135 Ballot Spreadsheet and address label file if created

J. Variant Details

AGY MEDI REF

Selection Criteria: Employment status = excludes 0 (withdrawn)
Company Code = 0010
Personnel Area = (agency specific)
Personnel subarea = excludes 3785, 2250 and 2300 (clients)
Employee subgrp = excludes 12 and 13 (students)
Tax models = U3, UH, UJ, V3 and U6

Output Display: Personnel Number
Employment Status
Company Code
Personnel Area
Personnel SubArea
Employee Sub Group
Tax Model
Last Name
First Name
Contract Type
Birthday
Agency Hire Date
Adj Lv Svc Date
Adj Svc Date

MEDI REF TTSR

Selection Criteria: Date Parameter = Other Date - 06/01/2005 to 09/30/2005
Company Code = 0010
Action = 08, 10, 12, 14, 18, 25, 40, S5, S9, Z1, Z2, Z4, Z6 and Z8
Personnel Area = applicable agency(s)
Personnel Number = Import from Medi Ref Comparison Spreadsheet

Display Variant: /Medi Ref

MEDI REF TX CH

Selection Criteria: Personnel Number = Import from Medi Ref Comparison Spreadsheet

Personnel Area = Applicable agency(s)

Tax Model = U4, U5, U9, UA, UI, UK, UM and UO

Display Variant: /Medi Ref TC

AGY MEDI RT PL

Selection Criteria: Personnel Number = Import from ZP135 Ballot Spreadsheet

Benefit area = LA

Benefit plan = LA40, LAMP, LAOG, LASD, LASE, LASG, LAST, LASW, LC01, LC02, LDAD, LDAR, LE35, LSED, LSER, LSPD, LSPR, LT33, NORT, ORPA, ORPT, ORPV, PARB, PARD, RET3, ROVD, ROVR, SPRF, TR40, TRSD, TRSL and TRSN