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PeopleSoft Enterprise eBenefits 9.1 PeopleBook

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PeopleSoft Enterprise eBenefits 9.1 PeopleBook
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Chapter 6

Appendix A

PeopleSoft Enterprise eBenefits Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise eBenefits.

PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook.* Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in PeopleSoft eBenefits operate in deferred processing mode. Deferred processing is described in the preface of the *PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook.*

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.

- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with PeopleSoft Enterprise eBenefits

This chapter provides an overview of PeopleSoft eBenefits and discusses:

- eBenefits transactions.
- eBenefits integrations.
- eBenefits implementation.

Understanding PeopleSoft eBenefits

This section discusses:

- eBenefits components.
- eBenefits roles and security.

eBenefits Components

eBenefits comprises self-service web transactions that interact with the PeopleSoft Human Resources system. Employees use eBenefits to review, add, and update their benefits information. This list summarizes the pages that employees use in eBenefits:

- The Self Service, Benefits page is the starting place for employees to access their eBenefits information.
- eBenefits Enrollment pages enable employees to communicate their benefit choices to the organization.
- eBenefits Health pages enable employees to review their health-related benefit information by navigating from summary level pages to more detailed information.
- eBenefits Savings pages enable employees to review their savings plan information by navigating from summary-level savings plan pages to more detailed information.
- eBenefits Insurances pages enable employees to review the life insurance information by navigating from summary level pages to more detailed information.
- eBenefits Dependents/Beneficiaries pages enable employees to review information about their dependents and beneficiaries by navigating from summary-level pages to more detailed information.
- eBenefits Flexible Spending Accounts pages enable employees to review information about their health or medical spending accounts by navigating from summary-level pages to more detailed information.

- eBenefits Life Event pages are designed for employees to enter information about a birth or adoption of a child or a recent marriage.

eBenefits Roles and Security

Self-service transactions are targeted to specific roles, such as applicant, employee, faculty, manager, and optionee. These roles help determine:

- The transactions that an employee can access.
- The information that an employee can view.

User profiles determine default access to transactions. You create user profiles on the Maintain Security page in the User Profile component. You assign a role to each user profile.

Profiles are linked to permission lists. Permission lists identify the pages that users can access. To modify access to specific web pages for each role, you modify the permission list.

User profiles also control the data that each employee can access.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

eBenefits Transactions

eBenefits transactions include:

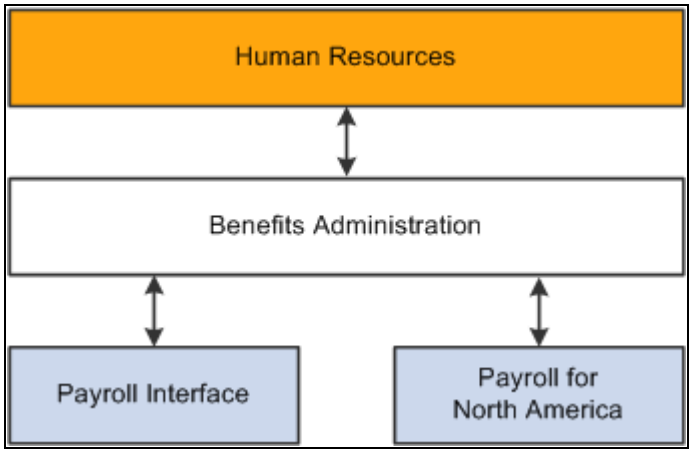
- Benefits enrollment.
- Health plan information.
- Insurance information.
- Savings plan information.
- Flexible spending account information.
- Dependent and beneficiary information.
- Life events management.

eBenefits Integrations

eBenefits integrates with the following PeopleSoft applications:

- Human Resources.
- Payroll Interface.

- Benefits Administration.
- Payroll for North America.



eBenefits integration flow with other PeopleSoft applications

eBenefits Implementation

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, and business process maps.

Chapter 2

Setting Up eBenefits

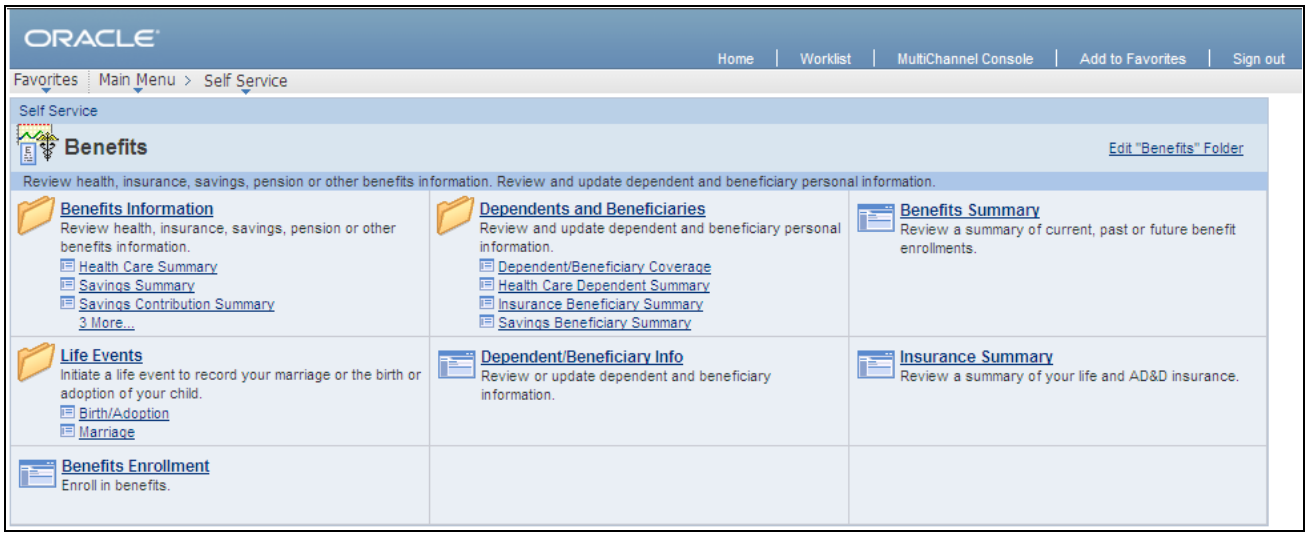
This chapter discusses how to:

- Use PeopleSoft eBenefits pages.
- Set up page display information.
- Set up uniform resource locators (URLs).
- Establish text catalog data.
- Set up dependent workflow.
- Set up suppliers.

Using PeopleSoft eBenefits Pages

The standard menu-driven navigation path for PeopleSoft eBenefits is the traditional PeopleSoft access method that users of PeopleSoft applications are familiar with. The Benefits page presents a simple user interface design for end users. You access it by selecting Self-Service, Benefits.

The links that appear on the Benefits page depend on which collaborative applications have been purchased and whether the application has been selected on the Installation table.



The self-service Benefits page

Setting Up Page Display Information

With the exception of text tables used by benefits enrollment, all controls for how and what the eBenefits pages display have been added to existing setup tables within the Manage Base Benefits business process in PeopleSoft Human Resources.

Before implementing eBenefits, you must define the organization's benefit programs, plans, and plan types.

The fields that control how benefit plan information appears on the eBenefits plan summary and detail pages and on the enrollment form are located in one of the following pages or components:

- Benefit Program - Plan Type and Option at the plan level.
- Benefit Plan Table.
- Event Rules.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits, "Building Base Benefit Programs"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits, "Setting Up Benefit Plans"

PeopleSoft Enterprise Benefits Administration 9.1 PeopleBook, "Creating Event Rules"

Displaying Dependent and Beneficiary Information

The Collect Dep/Ben check box appears on these pages:

- Benefit Program - Plan Type and Option at the plan level.

- Event Rules.

Benefit Program - Plan Type and Option

When the Collect Dep/Ben check box is selected on the Benefit Program-Plan Type and Option page, the system collects the information pertaining to dependents and beneficiaries and displays that information on the eBenefit Summary and eBenefit Detail Information pages.

Event Rules

When the Collect Dep/Ben check box is selected on the Event Rules page, the system displays the dependent and beneficiary information on the eBenefits Enrollment pages.

For health plans on the enrollment form, the system collects elections at the plan level. The employee selects which dependents to cover under the plan by selecting a check box next to each individual's name. The system derives the coverage code based on the dependents that are selected.

When the check box is deselected, the system hides the dependent or beneficiary sections and does not collect dependent or beneficiary elections. For health plans on the enrollment form, the system collects elections at the coverage code level when the check box is deselected.

The Collect Dep/Ben field works with the Ignore Dep/Ben Edits field for the event rule. If the Collect Dep/Ben check box is selected, the Ignore Dep/Ben Edits check box should not be selected.

Self-Service Group Box

To indicate that an employee can add new dependents through the eBenefits enrollment process, select Allow Dep/Ben Additions (allow dependent or beneficiary additions).

As the administrator, you can specify a certificate to be presented to the employee when he or she elects the specified plan type within eBenefits; enter this value in the Certification ID field.

Dependent Workflow

Each time a user of eBenefits modifies dependent data, the benefits administrator can monitor certain fields. If a participant changes a particular field value, then you are notified via email. The Dependent Workflow page enables you to select which fields trigger an email to be sent to the benefits administrator.

See Chapter 2, "Setting Up eBenefits," Setting Up Dependent Workflow, page 12.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits, "Building Base Benefit Programs"

PeopleSoft Enterprise Benefits Administration 9.1 PeopleBook, "Creating Event Rules"

Displaying Savings Plan Fund Allocations

The Collect Funds Allocations check box appears on three pages:

- Benefit Program Table - Program.
- Benefit Program Table - Plan Type and Option at the plan level.
- Event Rules.

Benefit Program - Plan Type and Option

When the Collect Funds Allocations check box is selected on the Benefit Program-Plan Type and Option page, the system collects the information pertaining to savings plans and displays that information on the eBenefit Savings Summary and the Detail Information pages.

Event Rules

When the Collect Funds Allocations check box is selected on the Event Rules page, the system displays the dependent and beneficiary information on the eBenefits Enrollment pages.

This field works in concert with the Ignore Investment Edits check box for the event rule. If the Collect Funds Allocations check box is selected, then the Ignore Investment Edits check box should be deselected.

Suppressing Plan Type Information

The Show if no choice check box is located on the Benefit Program Table - Plan Type and Option page for all plan types.

This check box controls whether a plan type appears on the enrollment when the employee has no option to choose and cannot waive out of the option. A good example is paid vacation. Employees receive the benefit, but you don't display it on the enrollment form.

If the check box is selected, the system displays the plan type in the enrollment form summary. When the check box is deselected, the system does not display the plan type.

Displaying Costs

The Cost Freq on Enrollment Form field is located on the Benefit Program Table - Benefit Program page at the program level. This field controls whether the annual costs or the per-period costs (deductions) appear on the enrollment form.

Displaying Credits

The Show Credits on Enrollment Form check box is located on the Benefit Program Table - Benefit Program page at the program level. If selected, this check box specifies that the system display total cost and credits on the pages.

Setting Up the Self-Service Plan Descriptions Field

When setting up benefit plans for health, disability, leave, or retirement benefit plan types, you can enter a description about the plan on the Benefit Plan Table that appears on the enrollment pages.

Setting Up Uniform Resource Locators

The enrollment form and other benefit transaction pages are designed to display links to:

- Employee handbooks.
- Benefit provider websites.
- Service provider websites.

You enter the specific uniform resource locator (URL) address, description, and identifier on the URL table. When you have done this, enter only the identifying code in the Benefit Program, Vendor, and Benefit Plan tables.

The SPD URL ID field on the Benefit Plan Table page has priority over the General Policy URL ID field in the Provider/Vendor Table - Policy Information page when the system displays one or the other next to the plan provider.

The following rules determine which URL appears next to the plan name on benefit plan review pages:

- If a URL identifier is associated with the SPD URL ID field on the Benefit Plan Table page, it is the link that appears on the benefit plan review page.
- If a URL identifier is associated with the General Policy URL ID field on the Provider/Vendor Table - Policy Information page and *no*SPD URL ID value is defined on the Benefit Plan Table page, it is the link that appears on the benefit plan review page.

The Authorized Providers URL ID value on the Provider/Vendor Table - Policy Information page is independent of the links listed previously. If a URL identifier is connected to the Authorized Providers URL ID field, then that link appears on the Review page next to Find a Health Care Provider under the Additional Information section. This link is for health plan types only; no link appears for the other plan types.

For the General Policy URL IDs and Authorized Providers URL ID links to work, a group number is required on both the Provider/Vendor and Benefit Plan tables.

Oracle recommends that you use a prefix naming convention in the PeopleSoft application, such as the one shown here:

- Use *SPD* as a prefix when defining Summary Plan Description URL IDs (SMRYPLNDOC_URL_ID): SPD_AETNAPPO.
- Use *GEN* as a prefix when defining the General Policy URL ID (POLICY_URL_ID): GEN_AETNA.
- Use *PRV* as a prefix when defining the Authorized Providers URL ID (VENDOR_URL_ID): PRV_AETNA.

See Also

Enterprise PeopleTools PeopleBook: System and Server Administration,"Using PeopleTools Utilities"

Setting Up Handbook Links

These URLs provide links to the enrollment handbook. A link to the entire handbook can exist and a link to each of the plan-type sections can exist.

Because the handbooks may vary by benefit program, the keys are benefit program and plan type. The URL identifiers are on the benefit program definition at both the program and plan-type levels.

One URL can exist for the entire handbook or separate URLs for each plan type.

Setting Up General Policy Links

These URL identifiers provide links to the provider home pages or to a company intranet site. The fields are defined on the Provider/Vendor table.

Setting Up Authorized Provider Links

These URL identifiers provide links to the provider's PCP finder and are applicable only for health plan types. The fields are defined on the Provider/Vendor table.

Setting Up Summary Plan Description Links

These URL identifiers provide links to the plan summary plan descriptions (SPDs). The fields are defined on the Benefit Plan table.

Establishing Text Catalog Data

eBenefits uses the text catalog to maintain the wording used on its self-service pages. Text blocks are a collection of paragraphs, sentences, phrases, and words that eBenefits uses when displaying the enrollment pages.

Use the Maintain Text Catalog page to update eBenefit text blocks. Enter HEB (eBenefits) as the object owner when searching for the available text catalog items.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring the Text Catalog.

Defining Text for Flexible Keys

Some page text is the same for all situations. Some of the text varies from benefit program to benefit program. Other text varies from plan type to plan type. Text can vary by plan type within benefit program and can vary by the type of event. To accommodate this, the system keys the text pieces by benefit program, plan type, and event class.

The system uses the following rules when matching text to a text block:

- The system looks for a match on the benefit program. It uses only those rows that match the benefit program or, lacking any rows that match the benefit program, uses the rows that do not have a benefit program.
- Within this set of rows, the system looks for a match on plan type. It uses only those rows that match the plan type or, lacking any rows that match the plan type, uses the rows that don't have a plan type.
- Within this set of rows, the system looks for a match on event class. It uses only the row that matches the event class or, lacking a match on event class, uses the row that does not have an event class.

Identifying Field Lists

This is a list of the fields on the following tables: W3EB_TEXT, W3EB_TEXT_EFFDT, and W3EB_TEXT_MSGID

- Text ID − A character field that uniquely identifies the text block.
- Language Code − The language for this text block.
- Description − A description of this text block.
- Effective Date − The date on which this text block takes effect.
- Benefit Program − A distinct benefit program or blank.
- Plan Type − A distinct plan type or blank.
- Event Class − An event class or blank.
- Text − A long field containing the text block itself. The text can include up to five substitution variables.

Setting Up Delivered Text and Effective Dating

This text is effective-dated, which allows it to be changed from one plan year to the next. The delivered text has an effective date of January 1, 1900 (1/1/1900) and is defined as system data in the HRMS database. You should use a later effective date when you add new text entries. Any configured text should use a later date.

Setting Up Enrollment Form Technical Information

Inside the enrollment form, the system uses a common function to access the text blocks. The format of this function is:

```
GetText(&TextID, &PlanType, &TextArea, &Sub1, &Sub2, &Sub3, &Sub4, &Sub5)
```

The parameters are:

&TextID − A character string that uniquely identifies the text string.

&PlanType − The plan type. 01 is used for the event picker, summary, and other non-plan type pages.

&TextArea − For situations in which the function returns the text.

&Sub1,2,3,4,5 − Up to five character fields that hold substitution variables. The function updates the text with the substitution values.

The calling function supplies the &TextID, &PlanType, and &Sub parameters.

On return, the calling function takes the text returned in &TextArea and puts it into HTML areas on the page.

The function does not have to supply the benefit program or event class because these values can be derived from the event itself and they do not change.

Setting Up Dependent Workflow

An employee can modify characteristics about a dependent at any time on the Dependent/Beneficiary Personal Information page.

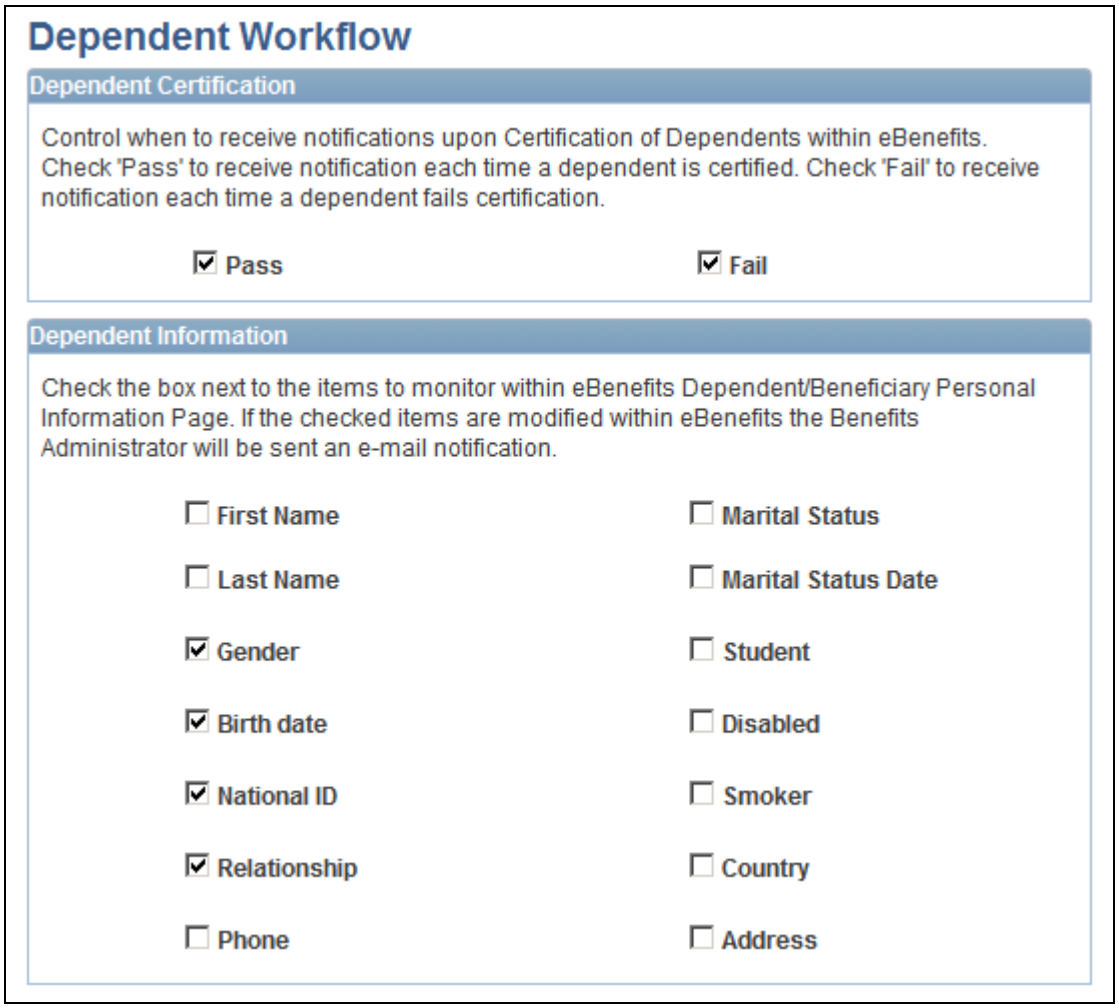
An administrator can configure the Dependent Workflow page to trigger a notification of changes within eBenefits for validating both a benefits certification and dependent data.

Page Used to Set Up Dependent Workflow

Page Name	*Definition Name*	*Navigation*	*Usage*
Dependent Workflow	W3EB_DEP_WF	Set Up HRMS, Product Related, eBenefits, Dependent Workflow	Identify which fields from the Dependent/Beneficiary Personal Information page trigger an email to the administrator.

Setting Up Dependent Workflow

Access the Dependent Workflow page (Set Up HRMS, Product Related, eBenefits, Dependent Workflow).



Dependent Workflow page

Setting Up Suppliers

This section provides an overview of how to set up suppliers and describes how to

- Activate the supplier.
- Define supplier FTP parameters.
- Define carrier reporting schedules.

Understanding How to Set Up Suppliers

eBenefits integrates with eBenX, which enables companies to use eBenX benefits data management and distribution services to distribute benefit enrollment data to their benefit providers.

To set up eBenX as a supplier:

1. Activate eBenX as a supplier using the Merchant Profile page.
2. Enter the supplier's FTP information on the Define Supplier FTP Parameters page.
3. Create a schedule for sending data to the supplier using the Define Carrier Rpt Schedule page.

Pages Used to Set Up Suppliers

Page Name	*Definition Name*	*Navigation*	*Usage*
Merchant Profile	MERCHANTID	Set Up HRMS, Common Definitions, Supplier Administration, Merchant Profile	Activate the supplier.
Define FTP Parameters	BN_M_SUPPLIER_FTP	Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Define FTP Parameters, Define FTP Parameters	Define supplier FTP parameters, such as FTP address and password, that the system needs to communicate with the supplier.
Define Carrier Rpt Schedule	BN_M_SCHEDULE	Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Define Carrier Rpt Schedule, Define Carrier Rpt Schedule	Define carrier reporting schedule information that the system needs to send the correct information to the supplier.

Activating the Supplier

Access the Merchant Profile page (Set Up HRMS, Common Definitions, Supplier Administration, Merchant Profile).

Select the Merchant Enabled check box.

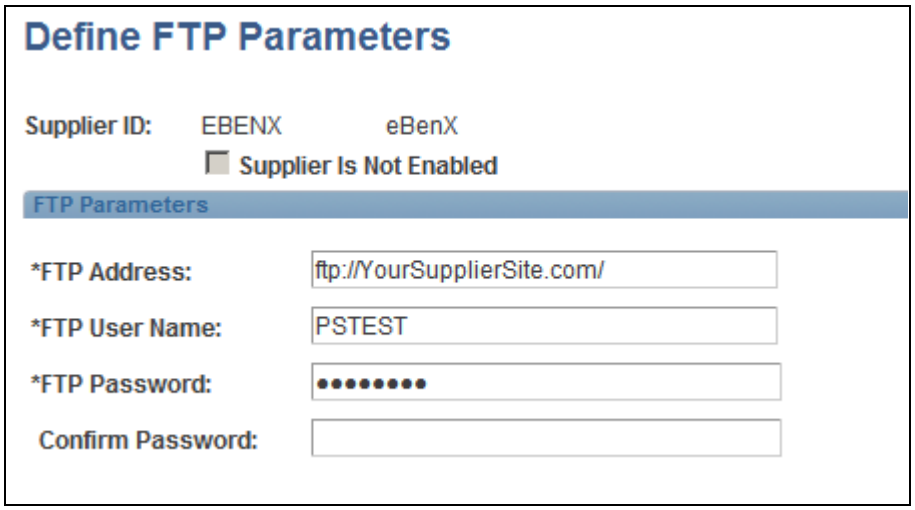
If this check box is deselected, you won't be able to transmit data to the supplier.

See Also

Enterprise PeopleTools PeopleBook: System and Server Administration

Defining Supplier FTP Parameters

Access the Define FTP Parameters page (Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Define FTP Parameters, Define FTP Parameters).

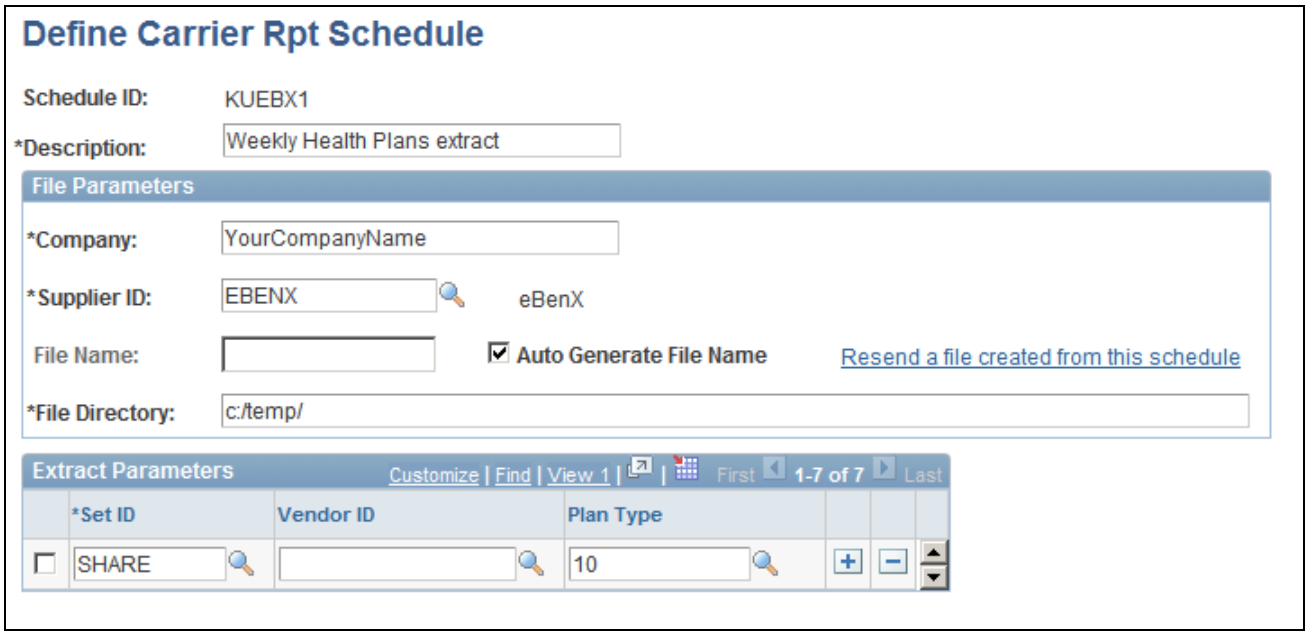


Define FTP Parameters page

Supplier ID	Displays the identification number that the system assigned to the supplier when the supplier was entered in the Merchant Profile page.
Supplier Enabled	Select to indicate whether you can transmit data to the supplier. If you deselect this check box, you must access to the Merchant Profile page and select the Merchant Enabled check box.
FTP Address	Enter the supplier's FTP address.
FTP User Name	Enter your logon name. The eBenX representative will provide this information.
FTP Password	Enter the password that is assigned to you to access the supplier's site. The eBenX representative will provide this information.

Defining Carrier Reporting Schedules

Access the Define Carrier Rpt Schedule page (Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Define Carrier Rpt Schedule, Define Carrier Rpt Schedule).



Define Carrier Rpt Schedule page

Schedule ID Displays the unique identification code that is assigned to this schedule. It can be up to six characters long.

Company Enter the name of your company. This information is included in the header section of the files that are sent to the supplier.

Supplier ID Select the supplier ID from the list of valid options.

File Name The name of the file sent to the supplier. You can create your own name or have the system generate a name for you.

When creating your own name, make sure that it is a name that helps you easily identify the contents. If you run the Carrier Interface Schedule process more than once using the same name and directory, a sequence number is placed in front of the file name. For example, if you send a file with the name eBenX twice, the first and second file names will be eBenX.txt and 2eBenX.txt, respectively.

To have the system generate a name, leave *File Name* blank and select *Auto Generate File Name.*

Auto Generate File Name Select to create a file name for yourself. When you select this check box, the File Name field becomes unavailable for entry. The system creates the name using the following format: <Schedule ID name>_YYYY-MM-DD-HH.MM.SS.txt.

Resend a file created from this schedule This link appears only if a file was created by this schedule. Click it to display the Resend File page.

File Directory Enter the name of the directory located on the application server where the extract file is to be stored.

Extract Parameters This group box enables you to select only the information that you want to extract from the BN_SNAP files for this supplier. You can enter more than one row of parameters.

Set ID If you want enrollment information for a specific setID, select a setID from the list of available options. You must enter at least one setID.

Vendor ID If you want enrollment information for a specific benefit provider, select a vendor ID from the list of available options. If you want information for all benefit providers, leave this field blank.

Plan Type If you want enrollment information for a specific benefit plan type, select a plan type from the list of available options. If you want information for all plan types, leave this field blank.

Chapter 3

Enrolling in eBenefits

This chapter provides an overview of the eBenefit enrollment process and lists the pages employees use to enroll in benefits.

Understanding the eBenefit Enrollment Process

Use the eBenefits enrollment pages to:

- Communicate to employees their benefit choices.
- Communicate additional information that is necessary to process the benefits enrollment through the Benefits Certification form.
- Notify human resources of employees' benefit elections.

Communicate Benefit Choices

The enrollment process begins when the system creates an enrollment event and notifies the employee of the event. You can link to the Benefits Enrollment page from the Benefits page. From the Benefits Enrollment page, you can then access the Enrollment Summary page, where employees review eligible benefit elections, and link to all plan-type pages where elections can be made.

Information about an individual's current coverage comes from the base benefit tables. The system does not use the event date when pulling current coverage. It uses the deduction begin date on the BAS_PARTIC_PLAN rows. This date has been adjusted for grace and waiting periods. Using this date gives a more accurate current election and more closely matches what the background process considers current.

Information about new coverage comes from the employee's election or the default coverage. If the BAS_PARTIC_PLAN row has an election, either entered by the employee or pre-entered by the system, the system uses that entry as the basis for formatting the new coverage. If no entry exists, the system goes to the BAS_PARTIC_OPTN rows to find the default value. If no election and no default exist, the system displays the phrase *No Coverage.*

The plan-types (medical, vision, savings, and so on) appear in the top row of the Coverage and Election Summary section. One multiline entry exists for every plan type in the event. The plan types are listed in order based on the display plan sequence value in the benefit program definition. The name of the plan type comes from the long name in the Translate table.

For all plan types, the system always shows the plans available and indicates whether the option of waiving coverage is available. However, you can modify the setup tables so that the system suppresses the plan types if the employees have no choice available.

Note. Calculation amounts that appear on the benefit enrollment pages are only estimated amounts. These amounts are estimated based on the event date and do not take the pay period date into account; actual amounts are calculated in batch for each pay period.

Note. Because the system validates the relationship of a person to an employee, you cannot perform a benefit enroll for a dependent unless their relationship is defined as a qualified dependent relationship type.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits*, "Setting Up Base Benefits Core Tables," Setting Up Dependent Relationships.

Communicate Additional Information

The benefits administrator can decide whether a benefit plan has certain criteria that an employee needs to meet prior to enrolling. If so, a Benefits Certification appears when the employee clicks the EDIT button. The Benefits Certification contains a series of statements or questions presented to the employee. The administrator assigns a value for each certificate ID defined, and decisions are made regarding the participant's benefits based on the resulting scores. When you view the Enrollment Summary section of the Benefits Enrollment page, you can select a benefit plan in which to enroll.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits*, "Setting Up Base Benefits Core Tables," Setting Up Benefits Certifications.

Notify Human Resources of Elections

After any plan-type election has been made, the employee is returned to the Enrollment Summary page to continue the selection process, and the process is repeated for each available benefit. After completing all elections, employees submit their choices and a notification is sent to the Human Resources administrator.

See Also

Chapter 2, "Setting Up eBenefits," Suppressing Plan Type Information, page 8

Pages Used to Enroll in Benefits

Page Name	*Definition Name*	*Navigation*	*Usage*
Benefits Enrollment - Open Enrollment - Information	W3EB_ENR_INFO	Self Service, Benefits, Benefits Enrollment Click the Information icon on the Benefits Enrollment page.	View enrollment information. After your initial enrollment, the only time you can change your benefit choices is during open enrollment or a qualified family status change. This page provides you with additional information about your enrollment.

Page Name	*Definition Name*	*Navigation*	*Usage*
Benefits Enrollment - Open Enrollment	W3EB_ENR_SELECT	Self Service, Benefits, Benefits Enrollment Click the Select button on the Benefits Enrollment page.	View enrollment information and information about an enrollment event. The enrollment process is initiated when eligibility and event rules have been processed to produce a list of valid benefit choices.
Benefits Enrollment - Open Enrollment (summary)	W3EB_ENR_SUMMARY	Click the Select button on the Benefits Enrollment page.	Review benefit plan elections. This page displays which benefit options are open for edits. All of your benefit changes are effective as of the date of the benefit change event. Your enrollment is not complete until you submit your choices to the Benefits Department.
Benefits Enrollment - Medical	W3EB_ENR_1X_ELECT	Click the Edit button for a Medical plan on the Benefits Enrollment - Open Enrollment pages.	Review or elect health (medical) plan-type benefits.
Benefits Enrollment - Medical (summary)	W3EB_ENR_1X_SMRY	Click the Overview of All Plans link on the Benefits Enrollment - Medical page.	View all plans, coverage levels, and costs condensed into a single grid.

Page Name	*Definition Name*	*Navigation*	*Usage*
Benefits Enrollment - Life Benefits Enrollment - Supplemental Life Benefits Enrollment - Dependent Life Benefits Enrollment - AD and D Benefits Enrollment - Dependent AD and D	W3EB_ENR_2X_ELECT	• Click the Edit button for a Life plan on the Benefits Enrollment - Open Enrollment pages. • Click the Edit button for a Supplemental Life plan on the Benefits Enrollment - Open Enrollment pages. • Click Edit button for a Dependent Life plan on the Benefits Enrollment - Open Enrollment pages. • Click Edit button for an AD and D plan on the Benefits Enrollment - Open Enrollment pages. • Click Edit button for a Dependent AD and D plan on the Benefits Enrollment - Open Enrollment pages.	Enroll dependents in life insurance plans.
Benefits Enrollment - Long Term Disability Benefits Enrollment - Short Term Disability	W3EB_ENR_357X_ELCT	• Click the Edit button for a Long-Term Disability plan on the Benefits Enrollment - Open Enrollment pages. • Click the Edit button for a Short-Term Disability plan on the Benefits Enrollment - Open Enrollment pages.	Use the disability pages to enroll in disability benefits.
Benefits Enrollment - 401(k) Benefits Enrollment - Profit Sharing Benefits Enrollment - Employee Stock Purchase	W3EB_ENR_4X_ELECT	• Click the Edit button for a 401(k) plan on the Benefits Enrollment - Open Enrollment pages. • Click the Edit button for a Profit Sharing plan on the Benefits Enrollment - Open Enrollment pages. • Click the Edit button for an Employee Stock Purchase plan on the Benefits Enrollment - Open Enrollment pages.	Enroll in savings plan benefits.

Page Name	*Definition Name*	*Navigation*	*Usage*
Benefits Enrollment - Leave Plans	W3EB_ENR_357X_ELECT	Click the Edit button for an leave plan on the Benefits Enrollment - Open Enrollment pages.	Enroll in leave plan benefits.
Flex Spending Health Flex Spending Dependent Care	W3EB_ENR_6X_ELECT	Click the Edit button for a flexible spending account plan on the Benefits Enrollment - Open Enrollment pages.	Enroll in FSA plan benefits.
Flex Spending Health (worksheet) Flex Spending Dependent Care (worksheet)	W3EB_ENR_6X_WKSHT	Click the Worksheet link on the Flex Spending Health or Flex Spending Dependent Care page.	Estimate per-pay-period contributions.
Benefits Enrollment - Pension Plan	W3EB_ENR_8X_ELECT	Click the Edit button on any Pension line on the Benefits Enrollment - Open Enrollment pages.	Enroll in pension plan benefits.
Benefits Enrollment - Vacation Buy Benefits Enrollment - Vacation Sell	W3EB_ENR_9X_ELECT	Click the Edit button for a vacation buy or sell plan on the Benefits Enrollment - Open Enrollment pages.	Enroll in vacation plan benefits.
Submit Benefit Choices	W3EB_ENR_SUBMIT	Click the Submit button on the Benefits Enrollment - Open Enrollment or Benefit Enrollment Summary page.	Submit your benefit choices to the system.
Submit Confirmation	W3EB_ENR_CONFIRM	Click the Submit button on Submit Benefit Choices page.	Confirm that your benefit choices have been submitted to the system.

Chapter 4

Reviewing Benefit Information

This chapter discusses how to:

- Review and edit health plan information.
- Review insurance plan information.
- Review savings plan information.
- Calculate pension estimates.
- Review flexible spending account information.
- Review dependent and beneficiary information.

Reviewing and Editing Health Plan Information

Employees enter the health plan pages from the Benefits Summary page by clicking any health plan link that they want to review, such as medical, dental, vision, and so on. Each of these pages displays more detailed information about the specific plan type, and includes links to provider pages, employee handbooks, and dependent information pages.

This chapter assumes that the employee has completed the enrollment process and is accessing the Health Plan pages to review health plan information.

See Also

Chapter 3, "Enrolling in eBenefits," page 19

Pages Used to Review and Edit Health Plan Information

Page Name	*Definition Name*	*Navigation*	*Usage*
Health Care Summary	W3EB_GRID	Self Service, Benefits, Benefits Information, Health Care Summary, Health Care Summary	Review health plan coverage.

Page Name	Definition Name	Navigation	Usage
Medical Dental Vision Domestic Partner Medical	W3EB_HEALTH_PLANS	• Select Medical on the Health Care Summary page. • Select Dental on the Health Care Summary page. • Select Vision on the Health Care Summary page. • Select Domestic Partner Medical on the Health Care Summary page.	Use the Medical page to review medical plan coverage. Use the Dental page to review dental plan coverage. Use the Vision page to review vision plan coverage. Use the Domestic Partner Medical page to review domestic partner medical plan coverage.
Health Care Dependent Summary	W3EB_DEPSMRYBYNM	Self Service, Benefits, Dependents and Beneficiaries, Health Care Dependent Summary, Health Care Dependent Summary	Review dependents covered under health plans.

Reviewing Insurance Plan Information

This section assumes that the employee has completed the enrollment process and is accessing insurance plan pages to review insurance plan information or to modify his or her beneficiary allocations.

Pages displaying employee insurance plans are presented in a manner that enables the user to navigate from summary level pages to more detailed information by clicking the appropriate insurance plan links.

Pages Used to Review Insurance Plan Information

Page Name	Definition Name	Navigation	Usage
Insurance Summary	W3EB_GRID	Self Service, Benefits, Insurance Summary, Insurance Summary	Display summary information about all insurance plan types for which you are enrolled. This page includes links to plan-type detail pages and a link to the enrollment page.

Page Name	Definition Name	Navigation	Usage
Life Supplemental Life AD and D Dependent AD and D Dependent Life Supplemental AD and D	W3EB_LIFEADD_MAIN	Click Type of Benefit link for the appropriate insurance on the Insurance Summary page.	Use the Life page to display information about your life insurance plan and access associated plan beneficiaries. Use the Dependent Life page to review dependent life insurance information. Use the Dependent Life AD/D page to review dependent AD/D insurance information.
Change Current Beneficiaries and Allocations	W3EB_LFE_CHG_ALLOC	Click Edit button on the appropriate insurance page.	View and update allocation information.
Short-Term Disability Long-Term Disability	W3EB_DISAADD_MAIN	Click Type of Benefit link for the appropriate disability insurance on the Insurance Summary page.	Use the disability pages to display information about your disability insurance plan.
Insurance Beneficiary Summary	W3EB_LIFINSALLBYNM	Self Service, Benefits, Dependents and Beneficiaries, Insurance Beneficiary Summary, Insurance Beneficiary Summary	Review beneficiary insurance information and allocations.

Reviewing Savings Plan Information

Savings plan pages enable employees to access information about their savings plans. They can view information about their benefit selections, and then make any changes that are allowed by an organization's program rules.

Pages Used to Review Savings Plan Information

Page Name	Definition Name	Navigation	Usage
Savings Summary	W3EB_GRID	Self Service, Benefits, Benefits Information, Savings Summary, Savings Summary	Review summary information about savings plans.

Page Name	*Definition Name*	*Navigation*	*Usage*
401(k) Profit Sharing Employee Stock Purchase Pension Plan	W3EB_VIEWSAVINGS	Click a Type of Benefit savings plan link on the Savings Summary page.	Review information about your savings plan, review covered beneficiaries, and change fund allocations
Change Current Savings Plan Contributions	W3EB_SAVPLAN1	Click the Edit button in the Current Contributions section of the savings plan page.	Change current plans contributions.
View Savings Allocations Change Current Fund Allocations	W3EB_SAVEVWFUND	• Click Fund Allocations on the savings plan pages. • Click Change Current Fund Allocations on the savings plan pages.	Review savings plans fund allocations and access pages that enable changes to fund allocations.
Change Current Fund Allocations	W3EB_SAVPLAN3_WRK	Click the Change Current Fund Allocations link on the Fund Allocations page.	Change fund allocations.
Savings Contribution Summary	W3EB_VWALLSAVCONTR	Self Service, Benefits, Benefits Information, Savings Contribution Summary, Savings Contribution Summary	View savings contributions for all plans.
Change Current Beneficiaries and Allocations	W3EB_SAVPLAN4_WRK	Click the Edit button in the Covered Beneficiaries section of the specific savings plan page.	Change savings plan beneficiary allocations.

Calculating Pension Estimates

Employees use the Pension Estimates self-service transaction page to calculate and view their pension benefit estimates. They can create separate estimates to illustrate how different retirement dates could affect the pension benefit amount.

This section discusses how to enter pension estimate parameters.

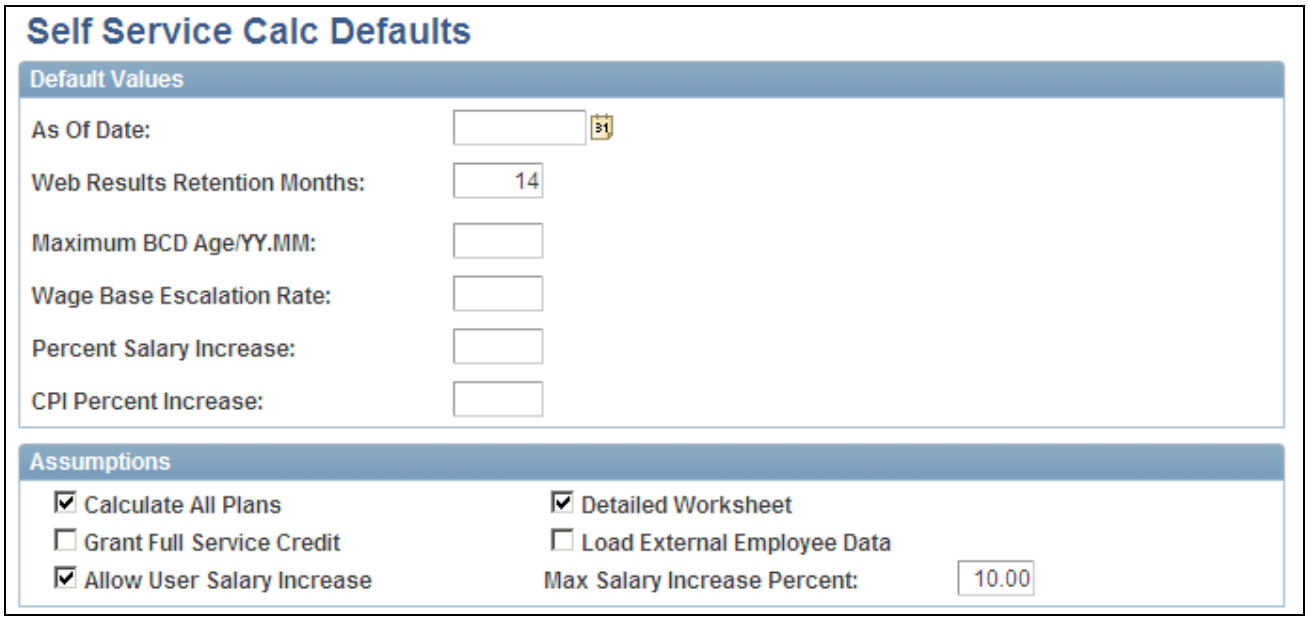
Note. Only customers who have licensed PeopleSoft Pension Administration can access the transactions described in this section.

Pages Used to Set Up and Calculate Pension Estimates

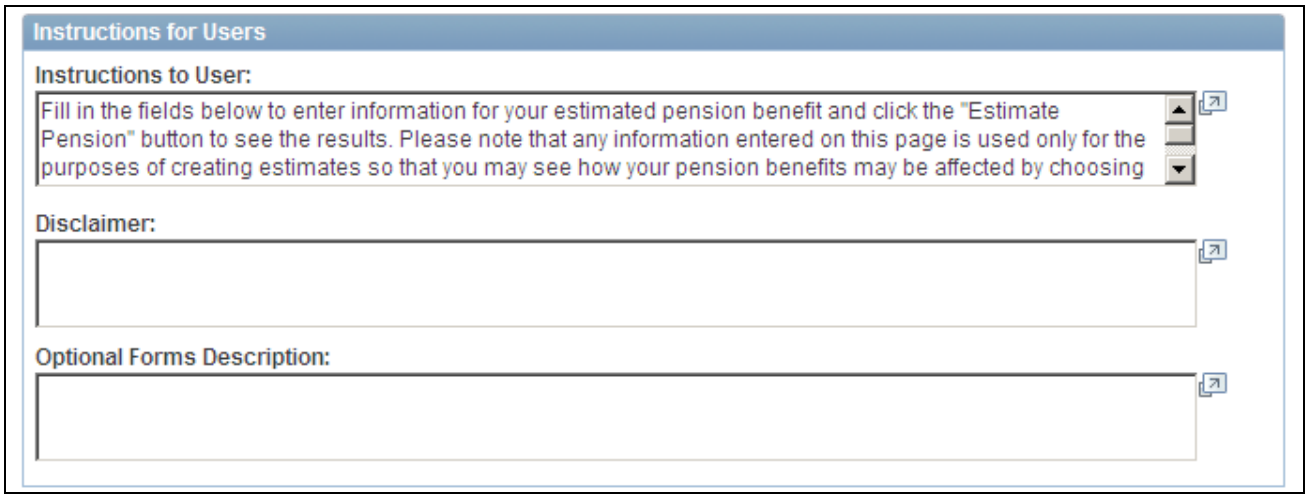
Page Name	*Definition Name*	*Navigation*	*Usage*
Self Service Calc Defaults	PA_SSV_DEFAULTS2	Set Up HRMS, Product Related, Pension, Self Service Calc Defaults, Self Service Calc Defaults	Define parameters for the Estimate Pension self-service transaction.
Pension Estimates	PA_I_ESTIMATE	Self Service, Benefits, Benefits Information, Pension Estimates, Pension Estimates	Enter information to run the Estimate Pension calculation.
Pension Plan Estimates - Payment Options Summary	PA_I_RESULTS	After you have calculated the estimated pension, click Accept on the Disclaimer page.	Display a summary of the plans for which you qualify. This page appears only if you are eligible for more than one plan.
Pension Plan Estimates – Payment Options Details	PA_I_RESULTS_PLAN	Click the link on the Payment Options Summary page.	Display a list of all the estimated benefit payment options for a specified plan. If you are eligible only for one plan, the system bypasses the Pension Estimates - Payment Options Summary page and directly accesses the user to the Pension Plan Estimates – Payment Options Details page.
Optional Forms Description	PA_I_OPFORM_DISP	Click the Descriptions of Options for Forms of Payment link on the Pension Estimates - Payment Options Details page.	Display a description of the payment options the company has defined for the available pension plans.

Entering Pension Estimate Parameters

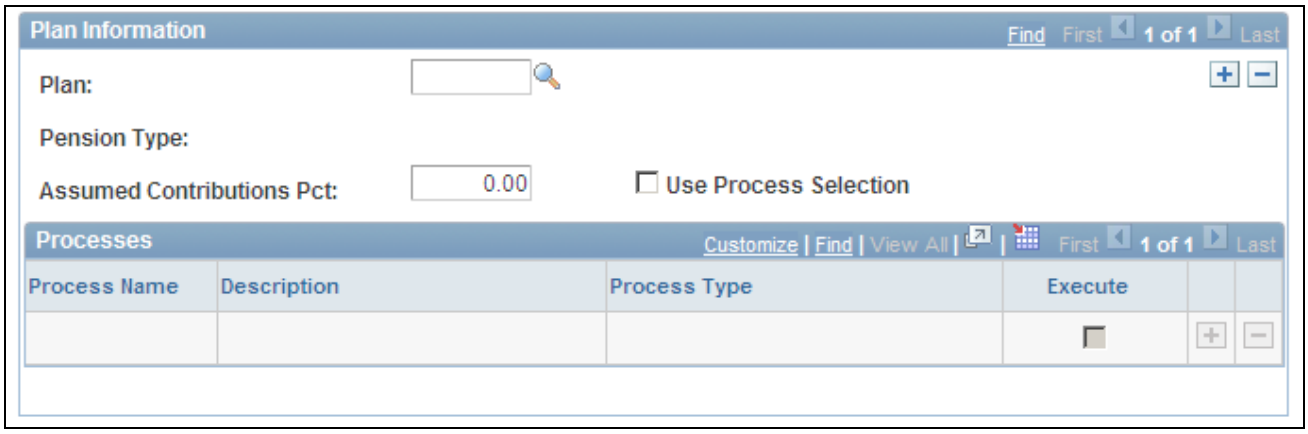
Access the Self Service Calculation Defaults page (Set Up HRMS, Product Related, Pension, Self Service Calc Defaults, Self Service Calc Defaults).



Self Service Calc Defaults page (1 of 3)



Self Service Calc Defaults page (2 of 3)



Self Service Calc Defaults page (3 of 3)

Default Values

As Of Date Because your plan rules are effective-dated, you need to enter an as of date for the rules. If you are reproducing a past estimate, this date ensures that you use only the data that was available at the time.

Web Results Retention Months Enter the number of months that you want the database to retain the user's calculation results. Every time the user runs this Estimate Pensions calculation, it replaces the previous calculation results.

Maximum BCD Age/YY.MM (maximum benefit commencement date age) Enter the maximum BCD age in YY.MM format.

Wage Base Escalation Rate Enter the wage base escalation rate. The wage base escalation rate is the assumed rate of increase in the taxable wage base. This is used for Social Security calculations and it can also affect other calculation components, depending on the plan rules.

Percent Salary Increase Enter the salary increase percentage. The salary increase percentage is the assumed rate of increase in periodic earnings.

CPI Percent Increase (consumer price index percent increase) Enter the CPI percent increase. The CPI percent increase is the assumed rate of increase in the CPI-W table. This is used for Social Security benefit increases.

Assumptions

Calculate All Plans Select to have the system use all pension plans that have been defined in your Pensions Administration system.

Detailed Worksheet Select to preserve intermediate results for reporting purposes.

Grant Full Service Credit	Select to have the calculation give the employee full credit for all the service that was forfeited because of a withdrawal of contributions.
Load External Employee Data	Select to have the the system run your own process to bring relevant employee data into the calculation linkage, where it is available to all the pension functions.
Allow User Salary Increase	Select to enable the user to select his or her own projected salary increase for use in the Estimate Pension calculation.
Maximum Salary Increase Percent	If you selected the Allow User Salary Increase check box, enter a maximum salary increase percent limit.

Instructions for Users

Instructions to User	Enter any instructions that you want the user to read. These instructions appear at the top of the Estimate Pension page.
Disclaimer	Enter information that appears to the user at the top of the Disclaimer page.
Optional Forms Description	Enter payment descriptions that users access by clicking the Descriptions of Options for Forms of Payment button on the Pension Plan Estimate - Eligible Plans page.

Plan Information

Plan	Enter the pension plans that your organization wants to make available to the users of the Estimate Pensions calculation. Only eligible plans appear to the user.
Pension Type	Displays the pension type.
Assumed Contributions Pct (assumed contributions percentage)	Enter the assumed contributions pct. When the calculation projects contributions, the system applies this percentage to projected earnings to arrive at future contribution amounts.
Use Process Selection	Select to single out specific processes to run. Scroll to the desired plan and select this check box. Then select the Execute box for each process you want to run. If you select a process that depends on values obtained from previous processes, be sure that you run those previous processes as well.

Plan Information - Processes

Process Name	The process name is the name that your organization has assigned to the specific process; the description follows.
Process Type	The process type tells you how your organization defined the processing rules; you can disregard this field.

Execute Select for every process that you want to run.

Reviewing Flexible Spending Account Information

This section assumes that the employee has completed the enrollment process and is accessing FSA plan pages to review plan information. Pages displaying employee FSA plans enable the user to navigate from summary level pages to more detailed information by clicking the appropriate plan links.

Flexible spending accounts (FSAs) are plans that enable employees to save money on out-of-pocket health or dependent care expenses by enabling them to pay with pretax dollars. Two types of accounts exist:

- Health Care Spending Account (HCSA). Employees can elect to contribute money on a pretax basis to this type of account and later reimburse themselves for certain qualifying medical expenses.
- Dependent Care Spending Account (DCSA). Employees contribute pretax dollars into this account and use it to reimburse themselves for day care expenses.

Pages Used to Review FSA Account Information

Page Name	*Definition Name*	*Navigation*	*Usage*
Flexible Spending Accounts	W3EB_FSA_ACCT_LIST	Self Service, Benefits, Benefits Information, Flexible Spending Accounts, Flexible Spending Accounts	Review flexible spending accounts activity.
Flexible Spending Account Review	W3EB_FSA_ACCT_DTLS	Click any Spending Account link on the Flexible Spending Accounts page.	Review details of flexible spending accounts.
Flexible Spending Account Claim Details	W3EB_FSA_CLAIM_DTL	Select any Detail link under Claim History on the Flexible Spending Account Review page.	Review details of flexible spending accounts.
Flexible Spending Account Payment Details	W3EB_FSA_CLAIMPYMT	Click a link under Claim History on the Flexible Spending Account Review page.	Review details about FSA claim payments.
Flexible Spending Account Payment Details	W3EB_FSA_PYMTCLAIM	Click the Detail link under Payment History on the Flexible Spending Account Review page.	Review details about FSA payments.

Reviewing Dependent and Beneficiary Information

Dependent/beneficiary pages that are specific to a given plan type are discussed in their respective chapters. Employees use these pages to view and edit information about their dependents and beneficiaries.

Pages Used to Review Dependent and Beneficiary Information

Page Name	*Definition Name*	*Navigation*	*Usage*
Dependent and Beneficiary Coverage Summary	W3EB_DEPBEN_SUM	Self Service, Benefits, Dependents and Beneficiaries, Dependent/Beneficiary Coverage	Display summary dependent/beneficiary benefit information.
Dependent and Beneficiary Information	W3EB_PERS_DTA_SMRY	Self Service, Benefits, Dependent/Beneficiary Info, Dependent and Beneficiary Information	Display a summary of dependent and beneficiary personal information.
Dependent/Beneficiary Personal Information	W3EB_DEPBEN_DETAIL	Click any name in the information section of the Dependent and Beneficiary Summary pages.	Review and update detailed dependent and beneficiary personal information.

Chapter 5

Managing Life Events

This chapter provides an overview of life events and discusses how to:

- Define life event rules.
- Change marital status.
- Add new dependents.

Understanding Life Events

Two major life events that have an immediate impact on benefit enrollments are:

- Getting married or divorced.
- Giving birth to or adopting a child.

The Life Events transactions can streamline this process for employees by enabling them to update their personal data and then change their benefit enrollments, all from one self-service transaction.

Defining Life Event Rules

To set up life event rules, use the Life Event Rules (W3EB_LE_RULES) component.

This section provides an overview of life event rules and discusses how to set up life event rules.

Understanding Life Event Rules

PeopleSoft eBenefits supports two Life Event transactions:

- Marital Status Change.
- Birth/Adoption.

Organizations might want to control whether an employee can automatically update the HR database. You will establish life event rules according to the practices established by the organization.

You use these life event rules to:

1. Determine whether an employee can automatically update the HR database.

2. Identify the pages that the employee will see when using the Marital Status Change and Birth/Adoption self-service transactions.

The following table summarizes how the database is updated using the life event rules that are defined on the Life Events Rules page, what applications are selected on the Installation table, and other flags that are set in the HR database.

Update to HR Database	***Requirement***
Create BAS_ACTIVITY trigger	• Benefits Administration is selected on Installation page. • Create Event is selected on the Life Event Rules page. • The employee has at least one job managed by PeopleSoft Benefits Administration as of the Life Event effective date. • The employee enters the transaction within the period described by the Days to Notify parameter. • The Allow Event Creation check box is selected.
Create COBRA_ACTIVITY trigger	If an employee is managed by PeopleSoft Base Benefits, a COBRA activity is triggered when: • COBRA Administration is selected on the Installation page. • Benefits Administration is not selected on the Installation page. • Proof Required is not selected on the Life Events Rules page. If the employee is managed by PeopleSoft Benefits Administration, a COBRA Activity is triggered when: • Benefits Administration is selected on the Installation page. • The employee has at least one job managed by PeopleSoft Benefits Administration as of the Life Event date. • Proof Required is not selected on the Life Event Rules page. • Create Event is selected on the Life Event Rules page. • A COBRA action code is entered on the Life Event Rules page. • The Benefits Administration event finalizes.

Update to HR Database	*Requirement*
Employee's marital status is updated in the PERS_DATA_EFFDT table	• For marital status change only. • The Proof Required field in the Life Event Rules page is not selected.
Current spouse's marital status is changed to Divorced and relationship is changed to Ex Spouse in the DEPENDENT_BENEF table	• The Proof Required field in the Life Event Rules page is not selected. • The Life Event Type is *Divorce.*

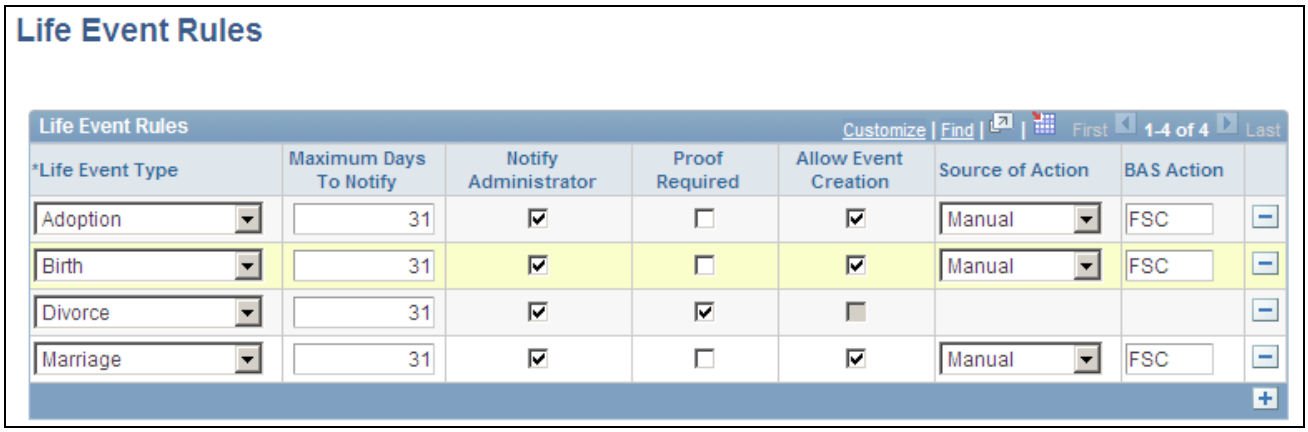
Note. If you have purchased PeopleSoft eProfile or PeopleSoft eProfile Manager Desktop and have set up the Workflow Configuration for self-service transactions, setting these life event rules will override the rules that you set for the marital status transaction on the Workflow Configuration page.

Page Used to Define Life Event Rules

Page Name	*Definition Name*	*Navigation*	*Usage*
Life Event Rules	W3EB_LE_RULES	Set Up HRMS, Product Related, eBenefits, Life Event Rules, Life Event Rules	Set up live event rules that affect how data and information is processed for changes in marital status, birth, or adoptions.

Setting Up Life Event Rules

Access the Life Event Rules page (Set Up HRMS, Product Related, eBenefits, Life Event Rules).



Life Event Rules page

Maximum Days To Notify

Identifies the maximum number of days that can elapse between the date of the event and the date that the transaction is entered by the employee through the self-service transaction. Exceeding this time period does not prevent the employee from entering basic information, but a BAS Activity trigger will not be created even if Allow Event Creation is selected. If the employee enters the event after the maximum days allowed, the system displays a message on a self service page notifying the employee that his or her benefit elections cannot be changed.

Notify Administrator

Select to send an email to the benefits administrator when this type of life event occurs informing him or her of the event.

The administrator is automatically notified of the event if Proof Required is selected, regardless of the setting of Notify Administrator.

Proof Required

Determines whether this type of life event requires proof before it is processed. If this field is selected, the HR database is not updated, BAS Activity and Cobra Activity triggers are not generated, and the administrator is notified of the event by email.

Allow Event Creation

This field is available if Benefits Administration is selected on the Installation table and Proof Required is not selected. A BAS Activity trigger is created only if the employee has at least one job managed by Benefits Administration as of the life event effective date.

Selecting this field indicates that you want the system to trigger a BAS Activity for this type of life event and allows the employee to change benefit election through the eBenefit election pages.

Source of Action

This field is available and is required if Benefits Administration is selected on the Installation table and Allow Event Creation is selected. For a BAS Activity trigger to be created, you must enter *Manual* in the field.

BAS Action

This field is available and required if Benefits Administration is selected on the Installation table and Allow Event Creation is selected. Enter a BAS action code that is appropriate for this life event. Typically, this is *FSC* - Family Status Change.

COBRA Action

This field is available if both COBRA Administration and Benefits Administration are selected on the Installation table. This field is used only when the life event is for an employee managed by PeopleSoft Benefits Administration, Create Event is selected, and the resulting Benefits Administration event should create a COBRA Activity trigger when it finalizes.

Changing Marital Status

Employees begin the Marital Status Change transaction by navigating to the Life Event, Marriage transaction.

After the employee accesses the transaction, the system displays a series of pages that direct him or her through the life event process. Rules that are set on the Life Event page and the Activity List for the Marital Status Change transaction determine which pages the system displays.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Pages Used to Change Your Marital Status

Page Name	*Definition Name*	*Navigation*	*Usage*
Marriage Start	W3EB_MARR_START	Self Service, Benefits, Life Events, Marriage, Marriage Start	Initiate a change in your marital status.
Marital Status Change	HR_EE_MAR_STATUS	Click Start on the Marriage Start page.	Enter changes in marital status.
Benefits Summary	W3EB_GRID	Click Next on the Marital Status Change page.	Review current benefits.
Personal Information Summary	HR_EE_PERS_INFO	Click Next on the Benefits Summary page.	Review and change personal information.
W-4 Tax Information	PY_IC_W4_DATA	Click Next on the Personal Information Summary page	Review and change tax information.
Direct Deposit	PY_IC_DD_LIST	Click Next on the W-4 Tax Information page.	Review direct deposit information.
Voluntary Deductions	PY_IC_DED_LIST	Click Next on the Direct Deposit page.	Review and change voluntary deduction information.
Congratulations	W3EB_MARR_FINISH	Click Finish on the Enrollment Information page.	View confirmation that the life events process has finished and view other relevant event information.

Adding New Dependents

Employees begin the Birth/Adoption transaction by navigating to the Life Events, Birth/Adoption transaction.

Note. An employee can also add a new spouse and other dependents from the life event for Marriage.

After the employee accesses the transaction, the system presents the employee with a series of pages that direct him or her through the life event process. Rules that are set on the Life Event page and the Activity List for the Birth/Adoption transaction determine which pages the system displays.

Pages Used to Add a Dependent

Page Name	*Definition Name*	*Navigation*	*Usage*
Birth/Adoption Start	W3EB_BRTH_START	Self Service, Benefits, Life Events, Birth/Adoption, Birth/Adoption Start	Initiate the birth or adoption of a dependent life event process.
Birth/Adoption Event Form	W3EB_BRTH_ADPT_EVT	Click Start on the Birth/Adoption Start page.	Enter detailed information about the birth or adoption.
Birth/Adoption Date	W3EB_BRTH_ADPT_DT	Click Next on the Birth/Adoption Event Form page.	Enter the date of the birth or adoption.
Benefits Summary	W3EB_GRID	Click Next on the Birth/Adoption Date page.	Review benefit summary information.
Dependent and Beneficiary Coverage Summary	W3EB_DEPBEN_SUM	Click Next on the Benefits Summary page.	Review summary information about dependent/beneficiary benefits.
W-4 Tax Information	PY_IC_W4_DATA	Click Next on the Dependent and Beneficiary Coverage Summary page.	Review and change W-4 tax information.
Direct Deposit	PY_IC_DD_LIST	Click Next on the W-4 Tax Information page.	Review and change direct deposit information.
Voluntary Deductions	PY_IC_DED_LIST	Click Next on the Direct Deposit page.	Review and change voluntary deduction information.
Enrollment Information	W3EB_BIRTH_FINAL	Click Next on the Voluntary Deductions page.	Display information about the birth/adoption event entries.
Congratulations	W3EB_BRTH_FINISH	Click Finish on the Enrollment Information page.	View the completion of the life events process and other relevant event information.

Chapter 6

Working with Suppliers

This chapter describes how to integrate eBenefits with eBenX.

Integrating eBenefits with eBenX

This section provides an overview of eBenX integration and discusses how to send enrollment data.

Understanding eBenX Integration

Integrating with eBenX enables companies to use the eBenX benefits data management and distribution services to distribute benefit enrollment data to their benefit providers.

To send enrollment data to eBenX:

1. Set up eBenX.
2. Run the Carrier Interface process located in the Manage Base Benefits business process.

   This process writes your most current enrollment data to four records: BN_SNAP_PER, BN_SNAP_JOB, BN_SNAP_PLAN, BN_SNAP_HIST.
3. Run the Carrier Interface Report process within eBenefits.

See Chapter 2, "Setting Up eBenefits," Setting Up Suppliers, page 13.

Sending Enrollment Data

Use this procedure to send enrollment data.

Sending Data to Suppliers

To send data to a supplier:

1. Run the Carrier Interface process in the Manage Base Benefits business process.
2. Run the Carrier Reporting Schedule process.

   This process uses the parameters defined on the Define Carrier Rpt Schedule page to collect the appropriate information and write it to a text file. The system then uses the FTP parameters entered on the Define Supplier FTP Parameters page to send the data to the supplier.

Resending Data to Suppliers

If a supplier does not receive a file, you might need to send the file again. The Resend page enables you to select a file from a list of previously sent files for a particular schedule and send it again.

If you don't see the file listed, two things might have happened:

- The file was deleted.
- The name of the directory was changed on the Define Carrier Rpt Schedule page.

Important! Resend File assumes that the Process Scheduler and Application Server are on the same machine. If they are not on the same machine, the application cannot find the file.

Understanding Integration Points

When sending enrollment information to eBenX, the system uses a background publish process called Supplier_Carrier_Interface.

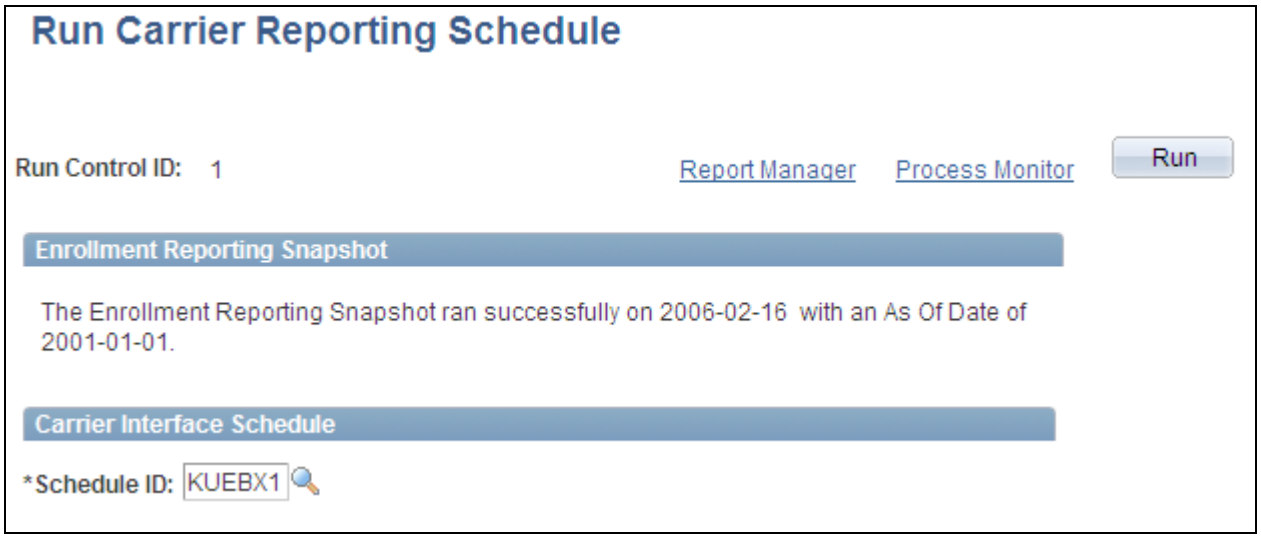
To research the technical details of any integration point used by PeopleSoft applications, refer to the online Interactive Services Repository on the My Oracle Support website.

Pages Used to Send Enrollment Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Run Carrier Reporting Schedule	BN_M_RUN_CNTL	Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Run Carrier Reporting Schedule	Extract and send data to a supplier.
Resend File	BN_M_REFTP_FILE	Click theResend a file created from this schedule link on the Define Carrier Rpt Schedule page.	Resend a file created from this schedule.

Running the Extract Process

Access the Run Carrier Reporting Schedule page (Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Run Carrier Reporting Schedule).



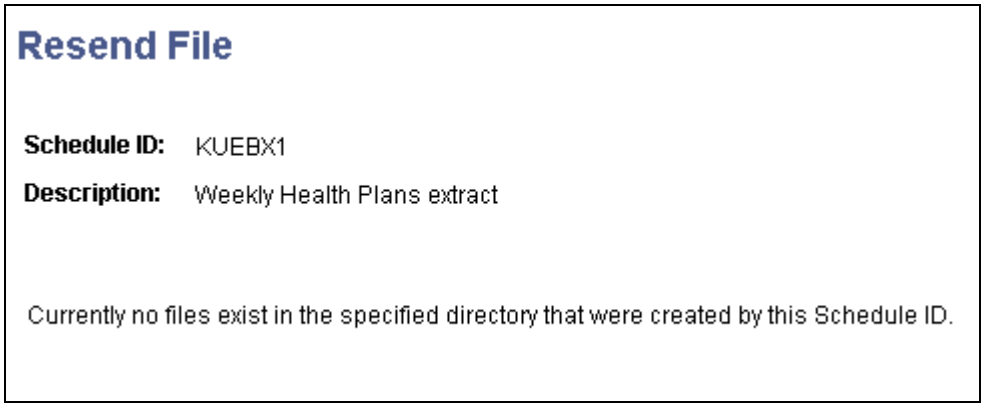
Run Carrier Reporting Schedule page

Enrollment Reporting Snapshot This group box specifies the date on which the Enrollment Reporting Snapshot process was last run and the as of date entered for that run. These dates are taken from the BN_SNAP_HIST_TBL table. If the BN_SNAP_HIST_TBL or BN_SNAP table is empty, a message appears in this group box stating that the table is empty and the remaining fields and buttons are unavailable.

Carrier Interface Schedule This group box enables you to select a schedule ID. You create schedules using the Define Carrier Interface Schedule page.

Resending Extract Files

Access the Resend File page (Click the Resend a file created from this schedule link on the Define Carrier Rpt Schedule page).



Resend File page

File Name Displays the name of the file created by the extract process.

Run Date	Displays the date and time that the file was transmitted to the supplier.
Pub/Sub Timestamp	Displays the date and time on which the report ran.
Select	Select if you want to send this file again.
Resend File	Click this link to send the file.

Appendix A

eBenefits Delivered Workflow

This appendix discusses the delivered workflow for PeopleSoft Enterprise eBenefits.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Delivered Workflow for PeopleSoft eBenefits

This section discusses PeopleSoft eBenefits workflow.

Dependent

This section lists the components of dependent workflow.

Description

Event Description	Dependent enrollments.
Action Description	The system notifies the benefits administrator of dependent enrollments.
Notification Method	Worklist.

Workflow Objects

Event	W3EB_DEP_WF
Workflow Action	Automatic
Role	Benefits administrator
Notification Form	Worklist

Business Process	Benefits WF Dependents Notification CI
Business Activity	Find dependent enrollments.
Business Event	Notification

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Numerics/Symbols

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