



PeopleSoft 8.3 eBenefits PeopleBook

PeopleSoft 8.3 eBenefits PeopleBook

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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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About the HRMS PeopleBooks

The HRMS PeopleBooks provide you with the information you will need for implementing and using PeopleSoft Human Resources Management System (HRMS) products.

This section describes information you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft HRMS product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in these books, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume you already know how to navigate the PeopleSoft system, much of the information in these books is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. These books expand on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals for HRMS PeopleBook

The individual HRMS PeopleBooks provide you with implementation and processing information for the individual HRMS products. However, there is additional, essential information describing the setup and design of each HRMS product contained in the companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*.

The *PeopleSoft Application Fundamentals for HRMS PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the HRMS product line. Whether you are implementing a single HRMS product, some combination of products within the product line, or the entire PeopleSoft HRMS system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as setting up control tables and administering security.

In the *PeopleSoft Applications Fundamentals for HRMS PeopleBook*, we've included common information pertinent to all applications in the HRMS product line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've

removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals for HRMS* and other PeopleBooks.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www4.peoplesoft.com/cc). We post updates, troubleshooting documentation, and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: <http://www4.peoplesoft.com/cc>

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.3 HRMS PeopleBooks*, SKU HR83PBR0, and *PeopleTools 8.14 PeopleBooks*, SKU PTB814R0.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section

of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft Internet site: http://www.peoplesoft.com .
Telephone	Contact Consolidated Publishing Incorporated (CPI) at 800 888 3559 .
Email	Email CPI at callcenter@conpub.com .

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages or panels. This section lists the most common fields and provides standard definitions.

Field	Definition
Address 1, Address 2, Address 3	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
As of Date	The last date for which a report or process includes data.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
City	Name of city for address.
Comment(s)	Freeflow text entry that enables you to add comments.
Company	A business organization. For US companies using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a business unit that has a unique federal Employer Identification Number (EIN) for payroll reporting purposes.

Field	Definition
Country	Country for address. Other address fields will be adjusted to reflect Country choice. Select a country from the list of valid values and press TAB to move through the field. The system automatically displays the appropriate address fields using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also Prefecture and Parish)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Empl Rcd# (Employee Record Number)	A system-assigned number that indicate an employee has more than one record in the system.
Fax (also Fax Number)	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.
House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee/applicant/non-employee.
Language or Language Code	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Last Run On	The date that a report or process was last run.
Locality	A tax location within an organization.
Name	Name of individual.

Field	Definition
National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone	The phone number for a person or organization.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2, or Telex.
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)
Process Frequency group box	Designates the appropriate frequency in the Process Frequency group box: Once executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run . Always executes the request every time the batch process runs. Don't Run ignores the request when the batch process runs.
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Regulatory Region	A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing.
Report ID	Identifies a report.
Report Manager	This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	A request identification that represents a set of selection criteria for a report or process.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Field	Definition
Run Control ID	Identifies specific run control settings for a panel.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.
SetID	An identification code that represents a set of control table information. SetIDs enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also Province)	State (Province) for address.
Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.

See Also

PeopleTools Development Tools: Application Designer PeopleBook, “Creating Field Definitions,” Understanding Effective Dates

PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes

The following group boxes and field groupings appear throughout PeopleSoft HRMS. We have documented them once here.

Entering Name Information

The following fields appear wherever you enter or display naming information:

Format Using

Select the country with name format appropriate for this employee. The system will display the appropriate fields for this format in the Person Name group box.

Refresh the Name Field

Click to refresh the Name field after you’ve edited any of the name fields. The system will refresh the name field when you save.

Person Name or Current Name

The following fields appear in the Person Name group box. You will not see all of the fields listed below at any one time. The system displays the fields necessary for the country you select in the Format Using field.

Title	Select a title. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Prefix and Name Prefix	Select a Prefix or Name Prefix, if applicable.
Royal Prefix	Select a Royal Prefix, if applicable.
First Name	Enter the employee's official first name.
Preferred First Name	For The Netherlands, enter the employee's preferred first name, if different from the First Name. The system will use the preferred name when you generate form letters or mailing labels for this employee.
Last Name Preference	For the Netherlands, choose this link to provide additional name information for married employees. The Last Name Preference page contains three fields: Last Name Partner, Prefix Partner and Last Name Preference.
Middle	Enter the employee's middle name, if applicable.
Last Name	Enter the employee's official last name.
Suffix	Select a suffix, if applicable.
Second Last Name	For Spanish employees, enter the second surname (mother's surname).
Alternate Character Name	Use this field to enter the employee's name using alternate characters (such as Japanese phonetic characters). Note. You can enter names using Japanese characters with or without a space between the surname and given name. Names using Roman alphanumeric characters require a comma delimiter. Warning! Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.
Royal Suffix	Select the appropriate royal suffix. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Name	The system displays the employee's name as it will appear in the system.

Displaying Japanese Names on Pages

Pages that display personal name fields usually display them in First Name, Last Name order. When the country is Japan, however (JPN in the Format Using field), those fields appear in the Last Name, First Name order.

Another difference is that the Name field displays “Last Name[space]First Name,” not “Last Name,First Name”; that is, a space separates the last and first names, not a comma.

Person Name	
Last:	津村
First:	友則
Alternate Character Name:	ツムラトモリ
Name:	津村 友則

Japanese name format on a page

See Also

PeopleSoft Applications Fundamentals for HRMS PeopleBook, “Setting Up PeopleSoft HRMS,” Working With Double-Byte Characters

Entering Address Information

The following fields appear in address group boxes throughout PeopleSoft HRMS. You may not see all of the fields listed below as the system displays only the fields necessary for the country in use. Determine which address fields are required for each country on the Country Table – Address Format page.

Country	Select the country with address format appropriate for this address. The system will display the appropriate fields for this format in the address group box.
Address 1, Address 2, Address 3, and Address 4	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
City	Enter the city.
County	Enter the county, if applicable.
State (State, Province, or other)	Enter the state or province.
Postal	Enter the postal, such as zip or postal code.
Number 1, and Number 2	Enter the number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.

House Type	Enter the house type, if applicable.
Postal Search	Click Postal Search to use international address formats.

Entering or Viewing Pay Components

Amounts Tab

Pay Components - Amounts

Rate Code	Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid. Note. If a seniority rate code is inserted as a default value on the Job Data - Compensation page, the values for these rate codes are unavailable for entry.
Seq (sequence)	The sequence number of the rate code if it is used more than once.
Details	Click the Details button to open the Comp Rate Code Secondary Panel page.
Comp Rate , (compensation rate) Currency , and Frequency	The compensation rate, its currency, and the frequency (for example, annually, weekly, or hourly) the comp rate will be paid.
Apply FTE	If selected, the system multiplies the rate code value by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for Percent rate codes.
Points	The salary points associated with this rate code, if any.
Percent	If the rate code rate type is Percent , the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.
Rate Code Group	A rate code group enables you to be more specific when calculating percentages based components as part of your employee compensation package.

Comp Rate Code Secondary Panel

Comp Rate Code: TSDFLT

Description: Salaried Default

Base Pay **Use Highest Rate**

Default Without Override

Rate Code Type: Flat Amount

Rate Code Class:

Comp Rate Code Secondary Panel

Access this page by clicking the Details link on the Amounts page. Displays additional information about the rate code.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Working With Multiple Components of Pay,” **Defining Rate Codes**

Changes Tab

Pay Components							First	1 of 1	Last
*Rate Code	Seq	Manually Updated	Change Amount	Change Points	Change Percent				
1	0	<input type="checkbox"/>	0.000000		0.000	<input type="button" value="+"/>	<input type="button" value="-"/>		

Pay Components – Changes page

This page displays the change in an employee’s salary.

- Manually Updated** The system selects this if you have manually updated the pay components.
- Change Amount** The overall change amount to this pay component rate.
- Change Points** The overall change amount (in points) to this pay component, if applicable.
- Change Percent** The overall percentage change to this pay component, if applicable.

Pay Components							First	1 of 1	Last
Amounts		Changes		Conversion					
*Rate Code	Seq	Source	Default Without Override	Apply FTE	Converted Comp Rate				
1		None	<input type="checkbox"/>	<input type="checkbox"/>		<input style="background-color: yellow;" type="button" value="+"/>	<input style="background-color: yellow;" type="button" value="-"/>		

Pay Components – Conversion

This page displays the conversion rates in an employee's salary.

Source	The system displays the source of the rate code, such as <i>Absorbing Premium</i> , <i>Seniority Pay</i> , <i>Job Code</i> , or <i>Manual</i> .
Default Without Override	Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.
Apply FTE	Indicates if the converted rate code value will be multiplied by the FTE factor for annualization and deannualization.
Converted Comp Rate	Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

Required Fields on Pages

When you see a field on a page with an asterisk (*) preceding the field name, it means the field is required. You can not save a page without entering data into all of the required fields on a page.

*Description:	This is a required field
----------------------	--------------------------

Example of a required field label

In some unique instances a field may be required even though there is no asterisk preceding the field name. In such cases, you will be prompted to enter data in these fields before saving the page.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

monospace font

Indicates PeopleCode.

Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as Save and Run).
<i>Italics</i>	Indicates a PeopleSoft or other book-length publication. We also use italics for <i>emphasis</i> and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: <i>field value</i> . We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
See Also	PeopleBooks provide cross-references under the heading “See Also.” Capitalized titles in italics indicate the title of a PeopleBook; titles in quotes indicate the title of a chapter; titles in normal font refer to sections within the PeopleBook. Here's an example:

See Also

About These HRMS PeopleBooks, PeopleSoft 8.3 HRMS PeopleBooks Preface

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!**, the note is crucial and includes information that concerns what you need to do for the system to function properly.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Process Introductory Table

In the documentation, each business process in the application is accompanied by an introductory table with pertinent information about the pages used in the process.

<i>Page</i>	<i>System Name</i>	<i>Navigation</i>	<i>Usage</i>
Name of the page.	Gives the system name of the page as specified in the PeopleTools Application Designer. For example, the system name of the Detail Calendar panel is DETAIL_CALENDAR1.	Provides the path for accessing the page.	Describes how you would use the page.

USF U.S. Federal Government Functionality

Any functionality that is specific to the U.S. Federal Government sector will be designated by a USF marker. Most often this will appear at the beginning of a section heading (such as with this section), but the USF designation might also appear in a note or within text, if appropriate.

E&G Education and Government Functionality

Any functionality that is specific to the Education and Government sector will be designated by an E&G marker. Most often this will appear at the beginning of a section heading (such as with this section), but the E&G designation might also appear in a note or within text, if appropriate.

Local Country Functionality

Any functionality that is specific to an individual country will be designated by the three-character ISO code for that country. For example, functionality specific to Germany would be indicated by a DEU designation at the beginning of a section heading. Most often this will appear at the beginning of a section heading (such as with this section), but the country designation might also appear in a Note or within text, if appropriate.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft HRMS Product Documentation Manager
 PeopleSoft, Inc.
 4460 Hacienda Drive
 Pleasanton, CA 94588

Or send comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

About the PeopleSoft 8.3 eBenefits PeopleBook

This book provides you with the information you will need for implementing and using PeopleSoft eBenefits.

This preface explains how to use the documentation for PeopleSoft eBenefits. General information you should know before you begin using PeopleSoft documentation is presented in About the HRMS PeopleBooks. It provides information about the following topics:

- Using related documentation such as the PeopleSoft 8.3 Application Fundamentals for HRMS PeopleBook.
- Ordering documentation on the Internet, on CD-ROM, and in hardcopy.
- PeopleBooks standard page element definitions.
- Required fields on pages.
- Typographical conventions and visual clues in the documentation.
- Process introductory table explanation.
- U.S. Federal Government functionality designation within the documentation.
- Education and Government functionality designation within the documentation.
- Local country functionality designation within the documentation.
- Comments and suggestions about the documentation.

Note. We strongly recommend that you read About the HRMS PeopleBooks. In particular, the PeopleSoft HRMS Application Fundamentals section explains where you can find information about topics that apply to many PeopleSoft applications across the HRMS product line. For example, you can find information about setting up control tables, administering security, and setting language and currency preferences in the *PeopleSoft 8.3 Application Fundamentals for HRMS PeopleBook*.

See Also

PeopleSoft HRMS PeopleBooks Preface, “About the HRMS PeopleBooks”

CHAPTER 2

Introducing PeopleSoft eBenefits

This chapter explains the components of PeopleSoft eBenefits and how to:

- Move around eBenefits.
- Understand roles and security.

Understanding eBenefits Components

PeopleSoft eBenefits comprises self-service Web transactions that interface with the PeopleSoft Human Resources system. Employees use eBenefits to review, add, and update their benefits information.

- eBenefits Home is the starting place for employees to access their benefit 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 account by navigating from summary level pages to more detailed information.
- eBenefits Life Event pages are designed for employees to use to enter information about a birth or adoption of a child, or recent marriage.

Moving Around eBenefits

There are two ways to access self-service transactions:






- Home pages.
- Standard menu navigation path.

Home Pages

The home page presents a simple user interface design and more direction navigation for the end user.

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

Human Resources Home

-  **My Personal Information**
Review and edit your contact information, including name and marital status changes.
-  **Benefits**
Review health, insurance, savings, and flexible spending accounts plans in addition to dependent and beneficiary information.
-  **Payroll, Taxes and Salary**
Access your online paycheck, direct deposit accounts, deductions, and exemptions. Request a reissue of your W-2. Review your job, salary, and compensation information.
-  **Stock Activity**
Review stock options and purchase activity, report sales, and update your share issuance instructions.
-  **Training and Personal Development**
Enroll in training or review your enrollment status. View your training history, accomplishments, and competencies.

The Human Resources Home page

Benefits

 <p>Benefits Summary Review your current and historical benefits information.</p>	 <p>Health Plans Review medical, dental, and vision plan information.</p>
 <p>Insurance Plans Review life insurance and disability plan information.</p>	 <p>Savings Plans Review savings and retirement plan information.</p>
 <p>Flexible Spending Accounts Review dependent care and health care spending account plan information.</p>	 <p>Dependents and Beneficiaries Review personal information and benefits coverage for your dependents and beneficiaries.</p>
 <p>Birth/Adoption Add your new dependent to your benefit plans and update your payroll and personal information.</p>	 <p>Marriage Add your new spouse to your benefit plans and update your payroll and personal information.</p>
 <p>Benefits Enrollment Enroll in benefits.</p>	

Go To: [Human Resources Home](#)

The Benefits Home page

Standard Menu Navigation

The standard menu driven navigation path is the traditional PeopleSoft access method users of PeopleSoft applications are familiar with.

[Home](#) > [Self Service](#) > **eBenefits**

<ul style="list-style-type: none"> + Develop Workforce + Administer Workforce + Compensate Employees + Monitor Workplace + Define Business Rules - Self Service + Global Payroll Australia + Global Payroll France + Global Payroll Germany 	<ul style="list-style-type: none"> + Administer Self Service + Applicant + Employee + Faculty + Manager + Optionee - eBenefits 	<ul style="list-style-type: none"> + Home + Health + Savings + Insurances + Dependents + Enrollment + Flex Spend + Life Event
--	---	---

Standard self-service navigation path

Understanding 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 an employee can access.
- The information 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 access control lists. Each access control list identifies the pages that users can access. To modify access to specific Web pages for each role, you modify the access control list.

User profiles also control the data each employee can access.

See Also

PeopleTools PeopleBook: Security, “Understanding PeopleSoft Security”

CHAPTER 3

Setting Up eBenefits

This chapter explains how to:

- Set up display fields.
- Set up text.

Setting Up Page Display Information

With the exception of text tables used by Benefits enrollment, all controls for how and what the PeopleSoft eBenefits pages display have been added to existing setup tables within the 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 displays on the eBenefit plan summary and detail pages and on the enrollment form are located on either the:

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

See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, “Building Base Benefit Programs”

PeopleSoft Human Resources PeopleBook: Base Benefits, “Setting Up Benefit Plans”

PeopleSoft Benefits Administration PeopleBook, “Creating Event Rules”

Displaying Dependent and Beneficiary Information

The Collect Dep/Ben check box displays on both 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 benefits and displays that information on the eBenefit Summary and the 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 1x plans on the enrollment form, the system collects elections at the plan level. The employee selects which dependents should be covered 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 clear, the system hides the dependent or beneficiary sections and does not collect dependent or beneficiary elections. For 1x plans on the enrollment form, the system collects elections at the coverage code level when the check box is clear.

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

See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, “Building Base Benefit Programs”

PeopleSoft Benefits Administration PeopleBook, “Creating Event Rules”

Displaying Savings Plan Fund Allocations

The Collect Funds Allocations check box displays 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 Allocation 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 Allocation 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 event rules' Ignore Investment Edits check box. If the Collect Funds check box is selected, then the Ignore Investment Edits check box should not be selected.

Setting Up Domestic Coverage Information

On the enrollment form it may be necessary to display information about two health plans on one page. These can occur in situations where the employee qualifies for a health plan that is linked to a nonqualified health plan.

The Domestic Coverage for field determines whether plan types can be combined on the enrollment form. This field displays on the:

- Benefit Program - Plan Type and Option page for plan type 15,16, and 17.

To set up domestic coverage information:

1. Access to the Benefit Program - Plan Type and Option page.
2. Display the plan type level information for the nonqualified health plan.
3. In the Self-Service Confirmation section, enter the number of the plan type that controls the cross-plan validation in the Domestic Coverage field.

For example, for plan type 15, which is the nonqualified medical plan, you would enter 10 in the Domestic Coverage field. That's because plan type 10 controls the cross plan validation for plan type 15. For plan type 10, the Domestic Coverage field is blank.

Suppressing Plan Type Information

The Show if no choice field is located on the:

- Benefit Program Table - Plan Type and Option page for all plan types.

This check box controls whether a plan type is displays 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 cleared, the system will not display the plan type.

Displaying Costs

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

Displaying Credits

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

Self-Service Plan Descriptions Field

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

Setting Up URLs

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

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

The specific URL address, description, and identifier are entered on the URL table. Once the address, description, and identifier are entered in the URL table, then only the identifier is entered in the Benefit Program table, Vendor table, and Benefit Plan table.

The SPD URL ID on the Benefit Plan table has priority over the General Policy URL ID on the Vendor table when displaying one or the other next to plan provider.

The rules that determine which URL appears next to plan name on benefit plan review pages are:

- If a URL identifier is connected to the SPD URL ID on the Benefit Plan table, this is the link that appears on the benefit plan review page.
- If a URL identifier is connected to General Policy URL ID on the Vendor Policy table and no SPD URL ID is defined, this is the link that appears on the benefit plan review page.
- If Authoria PS is installed, there is no link to the SPD or General Policy URL IDs.
- If GeoAccess is installed, the Find a Health Care Provider link goes to the GeoAccess Provider Finder search and the Authorized Providers URL ID is not enabled.

The Authorized Providers URL ID on the Vendor Policy table is independent of the links listed above. If an URL identifier is connected to the Authorized Providers URL ID, 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 will appear for the other plan types.

A group number is required in order for the General Policy URL ID and Authorized Providers URL ID links to work because group number is a key field.

It is recommended that you use a prefix naming convention, such as the one shown below:

- 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

PeopleTools PeopleBook: Integration Tools, “Merchant Integration”, Managing URLs

Setting Up Handbook Links

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

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.

There can be one URL 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 Vendor table.

Setting Up Authorized Provider Links

These URL identifiers provide links to the provider’s PCP finder, and are only applicable for 1x plan types. The fields are defined on the Vendor table.

Setting Up SPD (Summary Plan Description) Links

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

Setting Up Text Blocks

The text blocks are a collection of paragraphs, sentences, phrases, and words that are used when displaying the enrollment pages. All wording on the pages will come from this collection, with the exception of error and warning messages, which use Message Catalog 4001.

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 1/1/1900 and is defined as system data in Peoplesoft HRMS database. It is important to use a later effective date when you add new text entries. Any customized text should use a later date.

Pages Used to Set Up Text Blocks

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
eBenefits Text Entry	W3EB_TEXT	Define Business Rules, Define Automated Benefits, Setup, Self-Service Text Entry	This page is used to enter text and link the text to benefit programs, plan-types, and event classes on eBenefits enrollment pages.

Entering eBenefits Text

Access the eBenefits Text Entry page.

eBenefits Text Entry

Text Id: 1XCOVRG

Long Description: 1x plan current coverage: Where %1 = benefit plan name, %2 = cove

View All First 1 of 1 Last

Effective Date: 01/01/1900

View All First 1 of 1 Last

Benefit Program:

Plan Type:

Event Classification:

%1 with %2 coverage

eBenefits Text Entry page

Text ID	This is the unique code assigned to the text ID.
Benefit Program	This is the benefit program that uses this text. If Benefit Program is left blank, the text will apply to all benefit programs.
Plan Type	This is the plan type that uses this text. If Plan Type is left blank, the text will apply to all plan types within the benefit program selected
Event Classification	This is the event classification that uses this text. If Event Classification is left blank, the text will apply to all event classifications within the benefit program and plan type selected.
Text Entry box	This box is used to enter the text that appears on the eBenefits enrollment pages.

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 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 have a blank 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 have a blank 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 has a blank 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 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 may include up to five substitution variables.

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 1/1/1900 and is defined as system data in Peoplesoft HRMS database. It is important to use a later effective date when you add new text entries. Any customized text should use a later date.

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 as follows:

&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 – Where the function returns the text.

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

The calling function fills in 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 do not change.

CHAPTER 4

Enrolling in eBenefits

This chapter provides an overview of the enrollment process and the pages used in the process.

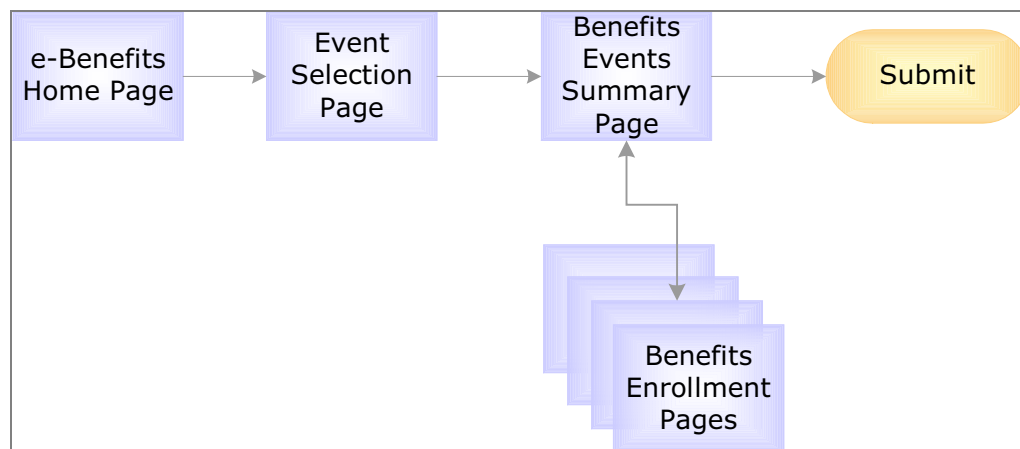
Overview of Enrollment Pages

PeopleSoft eBenefits enrollment pages are used to:

- Communicate to employees their benefit choices.
- Notify human resources employees' benefit elections.

The enrollment process begins when the system creates an enrollment event. Once employees are notified of an event, they can link to the Open Benefit Events page from the eBenefits home page. From the Open Benefit Events page, they are automatically taken to the Benefits Summary page, where they can review eligible benefit elections, as well as link to all plan-type pages where elections can be made.

After any plan-type election has been made, the employee is returned to the Benefits Summary page to continue the selection process, and the process is repeated for each available benefit. After completing all elections, employees submit their choices to the system.



Enrollment process

Understanding Benefit Enrollments

Information about an individual's current coverage comes from the base benefit tables. The system will 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 batch process will consider 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 there is no entry, the system goes to the BAS_PARTIC_OPTN rows to find the default value. If there is no election and no default, the system displays the phrase "No Coverage".

The plan-types (medical, vision, savings, FSA, and so on) display in the top row of the Coverage and Election Summary section. There is one multiline entry for every plan type in the event. The plan types list 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 if there is the option of waiving coverage. However, the setup tables can be modified so that the system suppresses the plan types if the employees have no choice available.

See Also

"Setting Up eBenefits," Suppressing Plan Type Information

Pages Used to Enroll in Benefits

Page Name	Object Name	Navigation	Usage
Open Benefit Events	W3EB_ENR_SELECT W3	Self Service, eBenefits, Enrollment, Benefits Enrollment	Use this page to display 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	W3EB_ENR_INFO	Click Info on the Open Benefit Events page.	This page provides enrollment information to the employee.
Open Enrollment	W3EB_ENR_SELECT WRN	Click Select on the Open Benefit Events page.	This page provides enrollment information to the employee.

Page Name	Object Name	Navigation	Usage
Enrollment Summary	W3EB_ENR_SUMMARY	Click Select on the Event Selection page.	Use the Benefits Event Summary page to review benefit plan elections.
Benefits Enrollment - Medical	W3EB_ENR_1X_ELECT	Click the Edit button on any Health line of the Enrollment Summary page.	Employees use this page to review or elect health plan-type benefits.
Benefits Enrollment - Medical	W3EB_ENR_1X_SUMMARY	Click Overview of All Plans on the Health Plan enrollment page.	Use the condensed Summary page to view all plans, coverage levels, and costs condensed into a single grid.
Benefits Enrollment - Life	W3EB_ENR_2X_ELECT	Click the Edit button on any insurance line of the Enrollment Summary page.	Employees use the Life Insurance Enrollment page to enroll in life insurance benefits.
Benefits Enrollment - Supplemental Life	W3EB_ENR_2X_ELECT	Click the Edit button on the Supplemental Life line of the Enrollment Summary page.	Employees use the Supplemental Life Insurance Plan Enrollment page to enroll in supplemental life insurance benefits.
Benefits Enrollment - Dependent Life	W3EB_ENR_2X_ELECT	Click Edit on the Dependent Life line of the Enrollment Summary page.	This page is used to enroll dependents in life insurance plans.
Benefits Enrollment - Long Term Disability Life	W3EB_ENR_357X_ELECT	Click the Edit button on the Disability line of the Enrollment Summary page.	Employees use the Long Term Disability Plan Enrollment page to enroll in disability benefits.
Benefits Enrollment - Savings Plans	W3EB_ENR_4X	Click the Edit button on the 401(k) line of the Enrollment Summary page.	Employees use the Savings Plan Enrollment page to enroll in savings plan benefits.
Benefits Enrollment - Leave Plans	W3EB_ENR_357X_ELECT	Click the Edit button on the Sick line of the Enrollment Summary page.	Employees use the Leave Plan Enrollment page to enroll in leave plan benefits.
Flex Spending Accounts	W3EB_ENR_6X_ELECT	Click the Edit button on any FSA line of the Enrollment Summary page.	Employees use the FSA Enrollment page to enroll in FSA plan benefits.

Page Name	Object Name	Navigation	Usage
Flex Spending Health – U.S. Worksheet	W3EB_ENR_6X_WK SHT	Click the Worksheet link on the Flex Spending Accounts page.	Employees use the Worksheet page to estimate per-pay-period contributions.
Benefits Enrollment - Retirement Plan	W3EB_ENR_357X_E LCT	Click the Edit button on any retirement line of the Enrollment Summary page.	Employees use the Retirement Plan Enrollment page to enroll in retirement plan benefits.
Benefits Enrollment - Pension Plan	W3EB_ENR_8X_ELE CT	Click the Edit button on any Pension line of the Enrollment Summary page.	Employees use the Pension Plan Enrollment page to enroll in pension plan benefits.
Benefits Enrollment - Vacation Buy/Sell	W3EB_ENR_9X_ELE CT	Click the Edit button on any Vacation line of the Enrollment Summary page.	Employees use Vacation Enrollment pages to enroll in vacation plan benefits.
Submit Benefit Choices	W3EB_ENR_SUBMIT	Click the Submit button on Enrollment Summary page.	Employees use the Submit Benefit Choices page to submit their benefit choices to the system.
Submit Confirmation	W3EB_ENR_CONFIR M	Click the Submit button on Submit Benefit Choices page.	Employees use the Submit Confirmation page to confirm that their benefit choices have been submitted to the system.

CHAPTER 5

Managing Health Plans

This chapter explains the self-service pages used to review health plan information.

Understanding Health Plan Pages

Employees enter the health plan pages from the Benefits Summary page by clicking on any health plan link that they are interested in reviewing, 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

“Enrolling in Benefits”

Pages Used to Review and Edit Health Plan Information Page

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Health Care Summary	W3EB_GRID	Self Service, eBenefits, Health, Health Care Summary	Use the Health Care Summary page to review health plan coverage.
Medical	W3EB_HEALTH_PLANS	Select Medical from the Benefits Enrollment Summary page.	Use the Medical page to review medical plan coverage.
Dental	W3EB_HEALTH_PLANS	Select Dental from the Benefits Enrollment Summary page.	Used to review dental plan coverage.
Vision	W3EB_HEALTH_PLANS	Select Vision from the Benefits Enrollment Summary page.	Used to review vision plan coverage

Page Name	Object Name	Navigation	Usage
Domestic Partner Medical	W3EB_HEALTH_PLANS	Select Domestic Partner Medical from the Health Plan Summary page.	Used to review domestic partner medical plan coverage.
Health Care Dependent Summary	W3EB_DEPSMRYBYNM	Self Service, eBenefits, Health, Health Care Dependent Summary	Used to review dependents covered under health plans.
Health Plan Dependents Coverage	W3EB_DEPENDENTS	Clicking Review Covered Dependents on the following pages takes users to the Dependents Summary pages: <ul style="list-style-type: none"> • Medical Plan summary page • Dental Plan summary page • Vision Plan summary page • Domestic Partner Medical Plan summary page 	Used to review dependents covered under health plans.

CHAPTER 6

Managing Insurance Plans

This chapter provides an overview of insurance plan information and explains how to review insurance information.

Understanding Insurance Plan Pages

This chapter assumes that the employee has completed the enrollment process, and is accessing insurance plan pages to review insurance plan information or to modify their 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 on the appropriate insurance plan links.

See Also

“Enrolling in Benefits”

Using Insurance Plan Pages

The following sections describe the pages that the employee encounters when viewing or modifying insurance plan elections.

When navigating to a given page, the current effective-dated row(s) are displayed. To change the coverage date shown, enter the desired coverage date and click the Go button. The system displays the coverage information for that date.

Pages Used to Review Insurance Information

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Insurance Summary	W3EB_GRID	Self Service, eBenefits, Insurances, Insurances Summary	Used to display summary information about all insurance plan types for which you are enrolled. Includes links to plan-type detail pages, and a link to the enrollment page.
Life	W3EB_LIFEADD_M AIN	Click Life on the Insurances Summary page.	Used to display information about your life insurance plan, and a link to associated plan beneficiaries.
Dependent Life	W3EB_LIFEADD_M AIN	Click Dependent Life on the Insurances Summary page.	Used to review dependent life insurance information.
Dependent AD/D	W3EB_LIFEADD_M AIN	Click Dependent AD/D on the Insurances Summary page.	Used to review dependent AD/D insurance information.
Insurances Beneficiary Summary	W3EB_LIFINSALLB YNM	Self Service, eBenefits, Insurances, Insurances Beneficiary Summary	Used to review beneficiary insurance information.
Covered Beneficiaries – Life	W3EB_PRIM_SEC_B EN	Click Review Covered Beneficiaries on the Insurance page.	Used to review beneficiary allocations.
Change Current Beneficiaries and Allocations	W3EB_LFE_CHG_AL LOC	Click Change Current Beneficiaries and Allocations on the Insurance Review Covered Beneficiaries page.	Used to change beneficiary allocations.

CHAPTER 7

Managing Savings and Pension Plans

This chapter provides an overview of savings plan information and explains how to review savings information.

Understanding Reviewing Savings Plans Information

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

Pages Used to Review Savings Plan Information

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Savings Summary	W3EB_GRID	Self Service, eBenefits, Savings, Savings Summary.	Review summary information about savings plans.
Savings Plan	W3EB_VIEWSAVINGS	On the Savings Summary page, click a Type of Benefit savings plan link.	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 and savings plans contributions.
Fund Allocations	W3EB_SAVEVWFUND	Click Fund Allocations on the Savings Plan page.	Review savings plans fund allocations, and to link to pages enabling 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.

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Savings Contribution Summary	W3EB_VWALLSAVC ONTR	Self Service, eBenefits, Savings, Savings Contribution Summary	View savings contributions for all plans.
View Beneficiary Allocations	W3EB_SAVEVWBEN EF	Click the Review Covered Beneficiaries link on the Savings Plan page.	View savings plan beneficiary allocations.
Change Current Beneficiary Allocations	W3EB_SAVPLAN4_ WRK	Click Change Current Beneficiaries and Allocations on the View Beneficiary Allocations page.	Change savings plan beneficiary allocations.

Calculating Pension Estimates

Employees use the Estimate Pensions self-service transaction to calculate and view their Pension Benefit estimates. Separate estimates may be created to illustrate how different retirement dates could affect the pension benefit amount.


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

Pages Used to Set Up Pension Estimates

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Self Service Calculation Default Values	PA_SSV_DEFAULTS 2	Define Business Rules, Maintain Pension Parameters, Rules, Self Serv Calc Defaults	Use the Self-Service Calculation Defaults page to define parameters for the Estimate Pension self-service transaction.

Setting Up the Estimate Pensions Self-Service Transaction

Access the Self Service Calculation Default Values page.

Default Values	
As Of Date:	<input type="text"/> 
Web Results Retention Months:	<input type="text" value="14"/>
Maximum BCD Age.YY.MM:	<input type="text"/>
Wage Base Escalation Rate:	<input type="text"/>
Salary Increase	<input type="text"/> %
CPI Percent Increase:	<input type="text"/>

Assumptions	
<input checked="" type="checkbox"/> Calculate All Plans	<input checked="" type="checkbox"/> Detailed Worksheet
<input type="checkbox"/> Grant Full Service Credit	<input type="checkbox"/> Load External Employee Data
<input checked="" type="checkbox"/> Allow User Salary Increase	Maximum Salary Increase: <input type="text" value="10.00"/> %

Self-Serv Calculation Default page (1 of 3)

Instructions for Users
<p>Instructions to User:</p> <p>Fill in the fields below to enter information for your estimated pension benefit and click the "Estimate Pension" button to see the results. Please note that any information entered on this page is used only for the purposes of creating estimates so that you may see how your pension benefits may be affected by choosing different</p>
<p>Disclaimer:</p> <p><input type="text"/></p>
<p>Optional Forms Description:</p> <p><input type="text"/></p>

Self-Serv Calculation Default page (2 of 3)

Plan Information		Find	First	1 of 1	Last	
Plan:	<input type="text"/>	<input type="button" value="Q"/>	<input type="button" value="+"/>	<input type="button" value="-"/>		
Pension Type:						
Assumed Contributions Pct:	<input type="text" value="0.00"/>	<input type="checkbox"/> Use Process Selection				
Processes		Find	View All	First	1 of 1	Last
Process Name	Process Type					
		<input type="checkbox"/> Execute				

Self-Serv Calculation Default page (3 of 3)

Default Values

As Of Date

Because your plan rules are effective-dated, you need to enter and **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.

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	If you select the Calculate All Plans check box the system uses all Pension plans that have been defined in your Pensions Administration system.
Detailed Worksheet	Select the Detailed Worksheet check box to preserve these intermediate results for reporting purposes.
Grant Full Service Credit	If you select the Grant Full Service Credit check box, the calculation gives the employee full credit for all the service that was forfeited because of a withdrawal of contributions.
Load External Employee Data	If you select the Load External Employee Data check box the system runs 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 this check box to enable the user to choose their own projected salary increase for use in the Estimate Pension calculation.
Maximum Salary Increase	If you have selected the Allow User Salary Increase check box, enter a Maximum Salary Increase limit.

Instructions for Users

Instructions to User	Use the Instructions to User text box to enter any instructions that you would like the user to read. These instructions appear at the top of the Estimate Pension page.
Disclaimer	Use the Disclaimer text box to enter information that appears to the user at the top of the Disclaimer page.
Optional Forms Description	Use the Optional Forms Description text box to enter payment descriptions that users access by clicking on 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 are displayed to the user.
Pension Type	System 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 the **Use Process Selection** check box to single out specific processes to run. Scroll to the desired plan and select the **Use Process Selection** check box. Then select the **Execute** box for each process you want to execute. If you select a process that depends on values obtained from previous processes, be sure you execute those previous processes as well.

Plan Information – Processes**Process Name**

The **Process Name** is the name 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 the **Execute** check box for every process you want to execute.

Pages Used Calculate Pension Estimates

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Estimate Pension	PA_I_ESTIMATE	Self Service, eBenefits, Savings, Pension Estimates	Enter information to run the Estimate Pension calculation.
Pension Plan Estimates – Payment Options Summary	PA_I_RESULTS	To access the Pension Plan Estimates – Payment Options Summary page the user must click Accept on the Disclaimer page.	Displays a summary of the plans for which the user qualifies. This page is only displayed if the user is eligible for more than one plan.
Pension Plan Estimates – Payment Options Details	PA_I_RESULTS_PLA N	To access the Pension Plan Estimates – Payment Options Details page the user must select a hyperlink from the Payment Options Summary page.	Displays a list of all the estimated benefit payment options for a specified plan. If the user is only eligible for one plan, the system will bypass the Pension Plan Estimates – Payment Options Summary page and direct the user to the Pension Plan Estimates – Payment Options Details page.

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Optional Forms Description	PA_I_OPFORM_DISP	To access the Optional Forms Description page click the Descriptions of Options for Forms of Payment link on the Pension Plan Estimates – Payment Options Details page.	Displays a description of the payment options the company has defined for the available Pension plans.

CHAPTER 8

Managing Flexible Spending Accounts

This chapter provides an overview of flexible spending account information and lists pages used to review FSA account information.

Understanding Flexible Spending Accounts

This chapter 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 on the appropriate plan links.

Flexible Spending Accounts (FSA) are plans that enable employees to save money on out-of-pocket health or dependent care expenses by enabling them to pay with pre-tax dollars. There are two types of accounts:

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

Pages Used to Review FSA Accounts

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Flexible Spending Accounts	W3EB_FSA_ACCT_L IST	Self Service, eBenefits, Flex Spend, Flexible Spending Accounts	Review flexible spending accounts activity.
Flexible Spending Account Review	W3EB_FSA_ACCT_D TLS	Click any Spending Account link on the Flexible Spending Accounts page.	Review details of flexible spending account.
Flexible Spending Account Claim Details	W3EB_FSA_CLAIM_ DTL	Select any Service Start Date link under Claim History on the Flexible Spending Account Review page.	Review details of flexible spending account.

Page Name	Object Name	Navigation	Usage
Flexible Spending Account Payment Details	W3EB_FSA_CLAIMP YMT	Click the Payment History link on the Flexible Spending Account Claim Details page.	Review details about FSA claim payments.
Flexible Spending Account Payment Details	W3EB_FSA_PYMTC LAIM	Select any Check Date link under Payment History on the Flexible Spending Account Review page.	Review details about FSA payments.

CHAPTER 9

Managing Dependent and Beneficiary Information

This chapter explains the pages used to review dependent and beneficiary information.

Understanding 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 Manage Dependent and Beneficiary Information

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Dependent/Beneficiary Coverage Summary	W3EB_DEPBEN_SUM	Self Service, eBenefits, Dependents, Dependent/Beneficiary Coverage	Display summary dependent/beneficiary benefit information.
Dependent/Beneficiary Summary	W3EB_PERS_DTA_SUMRY	Self Service, eBenefits, Dependents, Dependent/Beneficiary Summary	Display a summary of dependent/beneficiary personal information.
Dependent/Beneficiary Personal Information	W3EB_DEPBEN_DETAILED	Click any name in the information section of the of the Dependent/Beneficiary Summary page.	Review and update detailed dependent/beneficiary personal information.

CHAPTER 10

Managing Life Events

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

- Set up the life event rules.
- Change your marital status.
- Add a new dependent.

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.

Setting Up Life Event Rules

PeopleSoft eBenefits supports two Life Event transactions:

- Marital Status Change
- Birth/Adoption

Organizations may 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.

These rules are used to:

1. Determine whether an employee can automatically update the HR database.
2. Identify the pages 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 rules that are defined on the Life Events Rules page, what products 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	<ul style="list-style-type: none"> • Benefits Administration selected on Installation page • Create Event is selected on Life Event Rules page • Employee has at least one job managed by Benefits Administration as of the Life Event effective date. • The employee enters the transaction within the period described by the “days to Notify” parameter. • Allow Event Creation check box is selected.
Create COBRA_ACTIVITY trigger	<p>If an employee is managed by Base Benefits, a COBRA activity is triggered when:</p> <ul style="list-style-type: none"> • COBRA Administration is selected on Installation page • Benefits Administration is not selected on Installation page • Proof Required is not selected on the Life Events Rules page <p>If the employee is managed by Benefits Administration, a COBRA Activity is triggered when:</p> <ul style="list-style-type: none"> • Benefits Administration is selected on Installation page • The employee has at least one job managed by 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 • Benefits Administration event finalizes
Employee’s marital status is updated in PERS_DATA_EFFDT table	<ul style="list-style-type: none"> • For marital status change only • Proof Required field in Life Event Rules page is not selected

Update to HR Database	Requirement
Current spouse’s marital status is changed to Divorced and relationship is changed to Ex Spouse in DEPENDENT_BENEF table	<ul style="list-style-type: none"> • Proof Required field in Life Event Rules page is not selected. • 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 you set for the marital status transaction on the Workflow Configuration page.

See Also

PeopleSoft eProfile PeopleBook, “Defining Workflow for Self-Service Transactions”

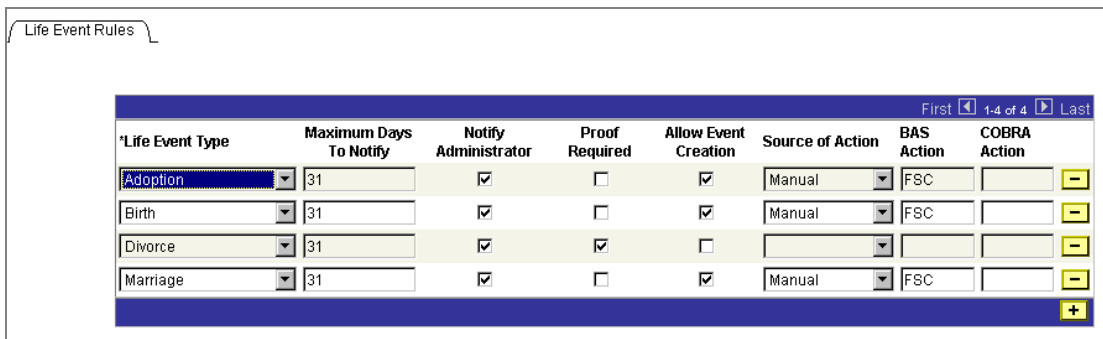
PeopleSoft eProfile Manager Desktop PeopleBook, “Defining Workflow for Self-Service Transactions”

Pages Used to Define Life Event Rules

Page Name	Object Name	Navigation	Usage
Life Event Rules	W3EB_LE_RULES	Define Business Rules, Define eBenefits, Setup, Life Event Rules	Create rules that impact how data and information is processed for changes in marital status or birth or adoptions

Defining Life Event Rules

Access the Life Events Rules page.



Life Event Rules page

Maximum Days To Notify	This identifies the maximum number of days that can elapse between the date of the event and date the transaction is entered by the employee through the self-service transaction. Exceeding this time period will 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 them their benefit elections cannot be changed.
Notify Administrator	If selected, an email is sent to the benefits administrator when this type of life event occurs informing them 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	This field 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 via e-mail.
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 allow 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. In order for a BAS Activity trigger to be created, you must enter <i>Manual</i> 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 will be 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 only used when the life event is for an employee managed by Benefits Administration, Create Event is selected, and when the resulting Benefits Administration event should create a COBRA Activity trigger when it finalizes.

Changing Your Marital Status

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

Once within the transaction, the employee is presented with a series of pages that will lead them through the life event process. Which pages the system displays is determined by the rules set on the Life Event page and by the Activity List for the Change Marital Status transaction.

See Also

PeopleTools PeopleBook: Workflow, “Defining Worklist Records”

Pages Used to Change Your Marital Status

Page Name	Object Name	Navigation	Usage
Marriage Life Event	W3EB_MARR_STAT	<ul style="list-style-type: none"> Self Service, eBenefits, Home Self Service, eBenefits, Life Events, Marriage 	Initiate a change your marital status.
Request Marital Status Change	HR_EE_MAR_STAT	Click Start from the Marriage Life Event page.	Enter changes in marital status.
Benefits Summary	W3EB_GRID	Click Next on the Marital Status Change page.	Review current benefits.
Personal Information	HR_EE_PERS_INFO	Click Next on the Review Benefits page.	Review and change personal information.
Tax Information	PY_IC_W4_DATA	Click Next on the Personal Information page	Review and change tax information.

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Direct Deposit	PY_IC_DD_LIST	Click Next on the 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_FINIS H	Click Finish on the Enrollment Information page.	Provide confirmation life events process completed and provide other relevant event information.

Adding a New Dependent

Employees begin by accessing the Birth/Adoption transaction by navigating to Birth/Adoption transaction.

- Self Service, eBenefits, Home, Benefits Home
- Self Service, Employee, Home, Benefits
- Self Service, eBenefits, Life Events, Birth/Adoption

Note. You can also add a new spouse and other dependents from the Marriage Life Event.

Once within the transaction, the employee is presented with a series of pages that will lead them through the life event process. Which pages the system displays is determined by the rules set on the Life Event page and by the Activity List for the Birth/Adoption transaction.

Pages Used to Add a Dependent

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Birth and Adoption	W3EB_BRTH_START	<ul style="list-style-type: none"> • Self Service, eBenefits, Home, Benefits Home • Self Service, Employee, Home, Benefits • Self Service, eBenefits, Life Events, Birth/Adoption 	Initiate the birth or adoption of a dependent life event process.
Birth/Adoption Event Form	W3EB_BRTH_ADPT_EVT	Click Continue on the Birth Adoption page.	Enter the detailed information about the birth or adoption.

Page Name	Object Name	Navigation	Usage
Birth/Adoption Date	W3EB_BRTH_ADPT_DT	Click Next on the Birth Adoption Event page	Enter the date of the birth or adoption.
Dependent/Beneficiary Coverage Summary	W3EB_DEPBEN_SUM	Click Next on the Birth/Adoption Date page.	Review dependent/beneficiary benefits coverage summary information.
Benefits Summary	W3EB_GRID	Click Next on the Dependent Information page.	Review benefit summary information.
Tax Information	PY_IC_W4_DATA	Click Next on the Benefits Summary page.	Review and change W-4 tax information.
Direct Deposit	PY_IC_DD_LIST	Click Next on the 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 birth/adoption event process.
Congratulations	W3EB_BRTH_FINISH	Click Finish on the Enrollment Information page.	Confirms the completion of the life events process and display other relevant event information.

CHAPTER 11

Integrating With Authoria HR

This chapter provides an overview of the Authoria HR integration and explains how to:

- Set up Authoria HR.
- Connect with Authoria HR.
- Use the Authoria HR Bridge.

Understanding Authoria HR Integration

In order for employees to make informed decisions about their benefit elections, it's imperative that employers provide benefit information in a timely manner. Authoria enables employers to communicate this vital information to employees through the internet.

Authoria, Inc. has a product called Authoria HR. Authoria HR delivers personalized, dynamically generated, benefit and policy information to employees. Authoria HR personalizes the information using employees' benefit elections and indicative data from PeopleSoft.

To access information in Authoria HR, a user clicks a link on various pages within PeopleSoft eBenefits, the system connects with Authoria HR, and Authoria HR finds the information that corresponds to the link and displays that information on an Authoria HR page.

Understanding Enterprise Integration Points

When connecting to AuthoriaHR, the system uses an EIP called PSAUTHORIA_1 - Knowledgebase API.

To research the technical details of any Enterprise Integration Point (EIP) used by PeopleSoft applications, refer to the online EIP Catalog database that can be found under Open Integration Framework in the Documentation section of the Customer Connection website.

Setting Up Authoria HR

To set up Author HR:

1. Activate Authoria as a supplier in the Merchant Profile table.

2. Identify the Authoria's external IDs.
3. Map the external IDs to PeopleSoft benefit plans.

Pages Used to Set Up Authoria HR

Page Name	Object Name	Navigation	Usage
Merchant Profile	MERCHANTID	Define Business Rules, Administer Suppliers, Use, Merchant Profile	Activate supplier.
Merchant Authentication	MERCHANTAUTH	Define Business Rules, Administer Suppliers, Use, Merchant Profile	Enter supplier information.
Merchant BI Overrides	MERCHANTBIPARMS	Define Business Rules, Administer Suppliers, Use, Merchant Profile	Enter supplier information.
Merchant Category	MERCHANTCAT	Define Business Rules, Administer Suppliers, Use, Merchant Profile	Enter supplier information.
Authoria External Page IDs	AUTH_KEYWORDS1	Define Business Rules, Administer Suppliers, Authoria, Authoria External Page Ids	Identify the identification codes that will be used to link information between PeopleSoft and Authoria HR.
PeopleSoft/Authoria Mapping	AUTH_KEYWORDS	Define Business Rules, Administer Suppliers, Authoria, PeopleSoft/Authoria Mapping	Link external page IDs to specific benefit plan information within Authoria HR.

Activating Authoria HR as a Supplier

To activate Authoria HR:

1. Navigate to the Merchant Profile page.
2. Make sure the Merchant Enabled check box is selected. If this check box is not selected, links to the plan provider, flexible benefit overview, and Search Authoria will not be available within eBenefits.
3. Select the Merchant Authentication tab.
4. In the Merchant User ID Type field, select *Company Identifier* from the list of available options.

5. In the Company ID Type field, enter the identification number provided by your Authoria representative.
6. In the Company Authentication Token field, enter the “Shared Secret” password provided by your Authoria representative. You will have to enter the password again as a confirmation.
7. In the Merchant Website URL field, enter Authoria’s full-path URL address. Obtain this information from your Authoria representative.
8. Select the Merchant BI Overrides tab.
9. In the Business Interlink field, select *PSAUTHORIA_1* from the list of available options.
10. Select the Sign-On Business Interlink check box.
11. Enter the following overrides:

Override	Parameter Name	Parameter Value
X	Merchant URL	Enter the Merchant URL address. Obtain this information from your Authoria representative.
X	Metatag	Enter <code><!DOCTYPE HRContentXML SYSTEM "HRContentXML.DTD"></code> .
X	URL	Enter <code>File://pshttpenable.dll</code> .
X	Method	Enter <code>POST</code> .
X	SSL	Enter <code>YES</code> .

12. Select the Merchant Category tab.
13. In the Merchant Category field, select *Knowledge* from the list of available options.
14. In the Merchant Website URL field, enter the Authoria URL for transactions. Your Authoria representative will provide this information.

See Also

PeopleTools PeopleBook: Integration Tools, “Merchant Integration”

Mapping Benefit Plans to Authoria HR

Access the Authoria External Page IDs page.

Authoria External Page IDs

[PeopleSoft/Authoria Mapping](#)

External Page ID		External Page ID Type			
401K	P	Benefit Plan	+	-	
CHILDOVERAGE	O	Other	+	-	
DEPCAREFSA	P	Benefit Plan	+	-	
DEPLIFE	P	Benefit Plan	+	-	
ESOP	P	Benefit Plan	+	-	

Authoria External Page IDs page

PeopleSoft/Authoria Mapping

Click this link to display the PeopleSoft/Authoria Mapping page.

External Page ID

This is the name that identifies an Authoria HR page.. When you add a new ID, you select an ID from a list of available IDs. The name of the ID that you select is automatically displayed in the **External Page ID** field.

External Page ID Type

Select the type of external page. If this is a page with information for a specific benefit plan type, 1X - 9X plan types, select **P**. If this is a page with other information, such as a life event, select **O**.

Linking Page Ids to Benefit Plan Information

Access the PeopleSoft/Authoria Mapping page.

PeopleSoft/Authoria Mapping

[Authoria External Page IDs](#)

401K

Mapping Find | View All First 1 of 3 Last

External Page ID: 401K **Active Flag** + -

Plan Type: 40 401(k)

Include All Benefit Plans

Specific Benefit Plans: Include Plans

Included Benefit Plans Find | View All First 1 of 1 Last

Benefit Plan

Save Return to Search Add Include History Correct History

PeopleSoft/Authoria Mapping page

- External Page ID** The system displays the ID that you selected on the search page.
- Active Flag** This check box is selected by default. Selecting this check box activates the link for this plan type throughout the eBenefits. To inactivate the plan type link, clear the check box.
- Plan Type** This field appears only if the External Page ID Type field on the Authoria External Page IDs page is set to *P*. Select the plan type that you want linked to this external page ID.
- Plan ID** This field appears only if the External Page ID Type field on the Authoria External Page IDs page is set to *O*. If this field is already populated, do not change the entry. *BI* is assigned if this is a birth life event. *MA* is assigned if this is a marriage life event.
- Include All Benefit Plans** This field appears only if the External Page ID Type field on the Authoria External Page IDs page is set to *P*. Select this check box if you want all benefit plans within this plan type to be linked to this external page ID. If all benefit plans are not to be linked to this external page ID, do not select this check box; you can specify which benefit plans you want linked or not linked to the ID.

Specific Benefit Plans

This field appears only if the External Page ID Type field on the Authoria External Page IDs page is set to *P* and if you have not selected the **Include All Benefit Plans** check box. You have the choice of selecting one of the following values:

Include Plans: The list of benefit plans in the **Included Benefit Plans** group box will be linked to the external page ID. Anything not listed is excluded.

Exclude Plans: The list of benefit plans in the **Excluded Benefit Plans** group box will not be linked to the external page ID. Anything not listed is included.

Included/Excluded Benefit Plans

This group box appears only if the External Page ID Type field on the Authoria External Page IDs page is set to *P* and if the **Include All Benefit Plans** check box is not selected. The title of the group box depends on what you selected in the **Specific Benefit Plans** field. This group box enables you to specify which plan types you want linked or not linked to the external page ID.

Connecting to Authoria HR

Once Authoria HR is set up, you can connect to Authoria from one of the following sources:

- Benefits Summary page within PeopleSoft eBenefits.
- Specific benefit plan type pages.

Benefits Summary Link

From the Benefits Summary page you can click the Search Authoria link. This link enables you to enter questions pertaining to your benefit coverage and search Authoria's knowledge base for related information. To return to the Search Authoria page, click the Return to Search Authoria link located in the top right-hand corner.

Specific Benefit Plan Links

From specific benefit plan type pages, such as Medical, Dental, and Vision, click the name of the benefit plan provider or the Plan Overview link to display benefit plan information from Authoria HR.

If an employee enters a date that is in the past or in the future, the system connects directly to the benefit plan provider's specific pages using the URL entered in the Vendor/Provider table. If a URL is not found in the Vendor/Provider Table the link does not appear.

The Plan Overview link connects to Authoria HR and provides general information about the medical plan.

Using the Authoria HR Bridge

In order to facilitate Authoria HR's ability to provide employees with information specific to their enrollments, Authoria provides an SQR. The SQR creates a series of flat files that must be loaded into the Authoria HR Database. The sample SQR takes a snapshot of benefit enrollments by collecting benefit and personal information.

Authoria provides documentation that explains when and how to run this SQR. To access the SQR, select Define Business Rules, Administer Suppliers, Authoria, Process Bridge Data.

CHAPTER 12

Integrating With eBenX

This chapter provides an overview of integrating with eBenX and how to:

- Set up eBenX as a supplier.
- Send enrollment data.

Understanding eBenX Integration

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

To send enrollment data to eBenX, you need to:

1. Set up eBenX.
2. Run the Carrier Interface process located in the PeopleSoft Human Resources, Base Benefits application.

This process takes a snapshot of your enrollment data and writes it to four records: BN_SNAP_PER, BN_SNAP_JOB, BN_SNAP_PLAN, BN_SNAP_HIST.

3. Run the Carrier Interface Report process located within eBenefits.

See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, "Managing Carrier Interfaces"

Setting Up eBenX

To set up a supplier:

1. Activate eBenX as a supplier using the Merchant Profile page.
2. Enter the supplier's file transfer protocol (FTP) information on the Define Supplier FTP Parameters page.

3. Create a schedule for sending data to the supplier using the Define Carrier Reporting Schedule page.

See Also

Activating eBenX as a Supplier

Defining the Supplier FTP Parameters

Defining Carrier Reporting Schedules

Pages Used to Set Up eBenX

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Merchant Profile	MERCHANTID	PeopleTools, Utilities, Merchant Profile	Use this page to activate the supplier.
Define Supplier FTP Parameters	BN_M_SUPPLIER_FTP	Business Rules, Administer Suppliers, CarrierRpt, Define FTP Parameters	This page defines the information the system needs to communicate with the supplier.
Define Carrier Reporting Schedule	BN_M_SCHEDULE	Define Business Rules, Administer Suppliers, CarrierRpt, Define Carrier Rpt Schedule	This page provides the information the system needs to send the correct information to the supplier.

Activating eBenX as a Supplier

To activate eBenX:

1. Navigate to the Merchant Profile page.
2. Select the Merchant Enabled check box. If this check box is not selected, you won't be able to transmit data to the supplier.

See Also

PeopleTools PeopleBook: Integration Tools, "Merchant Integration"

Defining the Supplier FTP Parameters

Access the Define the Supplier FTP Parameters page.

Define Supplier FTP Parameters

Supplier ID: EBNX eBenX **Supplier Enabled**

FTP Parameters

FTP Address:

FTP User Name:

FTP Password:

Confirm Password:

Define Supplier FTP Parameters page

Supplier ID	This is the identification number assigned to the supplier by the system when the supplier was entered in the Merchant Profile page.
Supplier Enabled	This check box indicates whether you can transmit data to the supplier. If it isn't selected, you must go to the Merchant Profile page and select Merchant Enabled.
FTP Parameters	This section enables you to enter the file transfer protocol, FTP, parameters specific to the supplier.
FTP Address	Enter the supplier's FTP address.
FTP User Name	Enter your logon name. The eBenX representative will give you this information.
FTP Password	Enter the password assigned to you in order to access the supplier's site. The eBenX representative will provide this information.
Confirm Password	Enter the FTP password again.

Defining Carrier Reporting Schedules

Access the Define Carrier Reporting Schedule page.

Define Carrier Reporting Schedule

Schedule ID: KUEBX1
***Description:** /Weekly Health Plans extract

File Parameters

***Company Descr:** YourCompanyName
***Supplier ID:** EBENX eBenX
File Name: **Auto Generate File Name** [Resend a file created from this schedule](#)
***File Directory:** c:/temp/

Extract Parameters			View All	First	1-4 of 6	Last
*SetID	Vendor ID	Plan Type				
SHARE <input type="checkbox"/>	<input type="checkbox"/>	10 <input type="checkbox"/>				+ -
SHARE <input type="checkbox"/>	<input type="checkbox"/>	11 <input type="checkbox"/>				+ -
SHARE <input type="checkbox"/>	<input type="checkbox"/>	14 <input type="checkbox"/>				+ -
SHARE <input type="checkbox"/>	<input type="checkbox"/>	15 <input type="checkbox"/>				+ -

Define Carrier Reporting Schedule page

- Schedule ID** This is a unique identification code assigned to this schedule. It can be up to six characters long.
- Description** This is a detailed description for this schedule. It can be up to 30 characters long.
- Company Name** Enter the name of your company. This information is included in the header section of the files sent to the supplier.
- Supplier ID** Select the supplier ID from the list of valid options.
- File Name** This is 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 it is a name that helps you easily identify the contents. If you run the Carrier Interface Schedule more than once using the same name and directory, a sequence number will be placed in front of the file name. For example, if you send a file with the name eBenX twice, the first file name will be eBenX.txt and 2eBenX.txt.

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

Auto Generate File Name	Select this check box to create a file name for you. When selected, 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 this schedule before. Click this link to display the Resend File page.
File Directory	This is 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 have more than one row of parameters.
SetID	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.

Sending Enrollment Data

To send data to a supplier:

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

This process uses the parameters defined on the Define Carrier Reporting Schedule page to collect the appropriate information and write it to a text file. Next, the system 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, it may be necessary 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 Reporting Schedule page.

Important. Resend File assumes 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 Enterprise Integration Points

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

To research the technical details of any Enterprise Integration Point (EIP) used by PeopleSoft applications, refer to the online EIP Catalog database that can be found under Open Integration Framework in the Documentation section of the Customer Connection website.

See Also

PeopleSoft Human Resources: Base Benefits PeopleBook, “Managing Carrier Interfaces”

Pages Used to Send Data

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Run Carrier Reporting Schedule	BN_M_RUN_CNTRL	Define Business Rules, Administer Suppliers, CarrierRpt, Run Carrier Rpt Schedule	Use the Carrier Interface Supplier Extract page to extract and send data to a supplier.
Resend File	BN_M_REFTP_FILE	Business Rules, Administer Suppliers, CarrierRpt, Define Carrier Rpt Schedule	Use the Resend File page to send a file to a supplier again.

Running the Extract Process

Access the Run Carrier Reporting Schedule page.

Run Carrier Reporting Schedule

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) Run

Enrollment Reporting Snapshot

The Enrollment Reporting Snapshot ran successfully on 2001-06-25 with an As Of Date of 2001-02-28.

Carrier Interface Schedule

*Schedule ID:

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 the BN_SNAP tables are empty, a message appears in this group box stating that the tables are empty and the remaining fields and buttons are unavailable.

Carrier Interface Schedule

This group box enables you to select a **Schedule ID**. Schedules are created using the Define Carrier Interface Schedule page.

Resending Extract Files

Access the Resend File page.

Resend File

Schedule ID: KUEBX1
Description: Weekly Health Plans extract

Below is a list of files that currently exist in the directory for this Schedule ID. To resend a file, select one from the list and press the Resend button.

File Name	Run Date	Pub/Sub Timestamp	Select
1 c:/temp/KUEBX1_2001-07-26-10.04.31.000000.bt	07/26/2001	07/26/2001 10:06:12.000000AM	<input type="checkbox"/>

[Resend File](#)

Resend File page

File Name	This is the name of the file created by the extract process.
Run Date	This is the date and time that the file was transmitted to the supplier.
Pub/Sub Timestamp	This is 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.

Integrating With GeoAccess ProviderSearch

This chapter provides an overview of the GeoAccess ProviderSearch integration and explains how to set up GeoAccess ProviderSearch.

Understanding GeoAccess ProviderSearch Integration

As employees enroll in benefits for the first time or make their annual open enrollment elections, it is a common requirement that employees select a primary care physician (PCP) at the time that they enroll in a medical plan.

GeoAccess ProviderSearch enables employees to search for health care providers based on information such as specialty, location, and health plan affiliation within the PeopleSoft eBenefits application. The integration also allows for prepopulation of fields leading the search, such as the user's address information.

The provider database includes physicians and other health care facilities in the employer's contracted health plan's networks and is updated continuously. The integration also allows for prepopulation of the provider's ID into the PeopleSoft eBenefits online enrollment form

Understanding Enterprise Integration Points

When connecting to GeoAccess ProviderSearch, the system uses a two EIPs:

- GA_PRV_SRCH
- GA_PRV_CODE

To research the technical details of any Enterprise Integration Point (EIP) used by PeopleSoft applications, refer to the online EIP Catalog database that can be found under Open Integration Framework in the Documentation section of the Customer Connection website.

Setting Up GeoAccess ProviderSearch

To integrating with GeoAccess ProviderSearch:

1. Set up GeoAccess ProviderSearch.

2. Load GeoAccess ProviderSearch codes.
3. Map plan types to GeoAccess ProviderSearch.


Pages Used to Set Up GeoAccess ProviderSearch

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Provider Search Enable/Disable	GA_PRV_CMPID_IN ST	Define Business Rules, Administer Suppliers, Providers, Activate GeoAccess	Activate supplier.
Load GeoAccess Codes	GA_CODE_SETUP	Define Business Rules, Administer Suppliers, Providers, Load GeoAccess Codes	Load GeoAccess ProviderSearch codes and provider names used by the system when mapping benefit plans and searching for providers.
PeopleSoft/GeoAccess Plan Matching	GA_PRV_PS_GA_SY NC	Define Business Rules, Administer Suppliers, Providers, Plan Mapping	Link GeoAccess ProviderSearch product codes to your plan type and benefit plans combinations. You might need assistance from GeoAccess ProviderSearch for the mapping process.

Activating GeoAccess ProviderSearch

Access the Provider Search Enable/Disable page.

Provider Search Enable / Disable



Check the box next to Merchant Enabled to activate GeoAccess. A company ID number is required.

Merchant ID: GEOACCESS

Merchant Enabled

***Company ID:**


Provider Search Enable/Disable page

Merchant ID	The system displays the ID associated with the supplier.
Company ID	Enter the identification number provided by your GeoAccess ProviderSearch representative.
Merchant Enabled	This check box must be selected. If this check box is not selected, you won't be able to transmit data to the supplier.

Loading GeoAccess ProviderSearch Codes

Access the Load GeoAccess Codes page.

Load GeoAccess Codes



Click Load GeoAccess Codes to begin the Application Engine process. This process will load necessary GeoAccess codes and provider names that will be used for provider search input and plan mapping.

Since GeoAccess updates their codes and provider names every two weeks, we recommend that you schedule the Application Engine process to run biweekly.

Note: You must run this process in order to map your benefit plans to the GeoAccess product codes.

Load GeoAccess Codes

Load GeoAccess Codes page

Click the Load GeoAccess Codes button.

Mapping Plan Types to GeoAccess ProviderSearch

Access the PeopleSoft/GeoAccess Plan Matching page.

PeopleSoft / GeoAccess Plan Matching Powered by **GeoAccess**

You will need to match a plan type and benefit plan to a GeoAccess product code.

Map your plan types and benefit plan to a GeoAccess product code.

*Plan Type	*Benefit Plan	*Effective Date	*Product Code		
10 <input type="text" value="Medical"/>	KUHMO3 <input type="text" value="Medical HMO Plan 3"/>	01/01/1999 <input type="text"/>	39 <input type="text" value="Blue Shield of California - HMO"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
10 <input type="text" value="Medical"/>	KUMED <input type="text" value="Enhanced Medical Plan"/>	01/01/1999 <input type="text"/>	202 <input type="text" value="Blue Cross of California - PPO"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
10 <input type="text" value="Medical"/>	KUMED1 <input type="text" value="Basic In-Network Medical"/>	01/01/1999 <input type="text"/>	230 <input type="text" value="Aetna U.S. Healthcare - PPO"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
10 <input type="text" value="Medical"/>	KUMED2 <input type="text" value="Basic Out-of-Network Medical"/>	01/01/1999 <input type="text"/>	231 <input type="text" value="Aetna U.S. Healthcare - POS"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

PeopleSoft/GeoAccess Plan Matching page

- Plan Type** Select a plan type from the list of available options.
- Benefit Plan** Select a benefit plan from the list of available options.
- Effective Date** Enter the effective date for this mapping.
- Product Code** Select a product code from the product code list or product name list recommended for each benefit plan offered by the organization.

CHAPTER 14

Integrating With Discounts and Perks Suppliers

This chapter discusses the integration with discount and perk suppliers and explains how to:

- Set up discount and perks suppliers.
- Send eligibility data to discounts and perks suppliers.
- Set up supplier links.

Understanding Discounts and Perks Suppliers Integration

Many companies make special discounts and perks available to their employees as part of an overall total compensation program. However, most Human Resource departments have limited resources and do not have the ability to administer every voluntary benefit or perk program in-house.

By contracting with a supplier, a company gains a robust benefit offering, while reducing their administration and cost.

Understanding Enterprise Integration Points

When connecting to discounts and perks suppliers, the system uses an EIP called DISCOUNT_AND_PERKS.

To research the technical details of any Enterprise Integration Point (EIP) used by PeopleSoft applications, refer to the online EIP Catalog database that can be found under Open Integration Framework in the Documentation section of the Customer Connection website.

Before You Begin

Companies may want to control which suppliers an employee can access through a self-service transaction. The Group Build feature in Human Resources gives you a standardized way to create groups of eligible employees.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Working With Groups”

Setting Up Discounts and Perks Suppliers

To set up a Discounts and Perks supplier:

1. Activate the supplier so the PeopleSoft application can sign on to the supplier's website.
2. Enter the parameters that the application needs to communicate with the supplier and to define the information being sent to the supplier.

Pages Used to Set Up Suppliers

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Merchant Profile	MERCHANTID	Define Business Rules, Administer Suppliers, Use, Merchant Profile	Activate supplier.
Application Designer	NODE	(In windows client) PeopleTools, Application Designer	Create a node for the supplier and attach it to the channel.
Merchant Authentication	MERCHANTAUTH	Define Business Rules, Administer Suppliers, Use, Merchant Profile	Enter supplier information.
Discounts and Perks Supplier Setup - Eligibility File	CO_DPK_SUPP_TBL	Define Business Rules, Administer Suppliers, Discounts, Supplier Setup	Enter additional supplier parameters and eligibility data.
Discounts and Perks Supplier Setup - Eligibility Fields	CO_DPK_SUPP_TBL 2	Define Business Rules, Administer Suppliers, Discounts, Supplier Setup	Enter eligibility data.

Activating Discounts and Perks Suppliers

Since most of the information about the supplier comes loaded in the system, all you do is enter specific data using the following steps.

To activate a supplier:

1. Navigate to the Merchant Profile page.
2. Select the supplier's name from the list of available suppliers.
3. Select the Merchant Enabled check box.
4. Select the Merchant Authentication tab.

5. In the Company ID field enter the identification number provided by the supplier's representative.
6. In the Company Authentication Token field enter the *Shared Secret* password provided by the supplier's representative.
7. Select the Merchant BI Overrides tab.
8. In the Metatag parameter field enter the domain name to the address provided by the supplier's representative.
9. In the MerchantURL parameter field enter the domain name to the address provided by the supplier's representative.

See Also

PeopleTools PeopleBook: Integration Tools, "Merchant Integration"

Creating the Merchant Node

You must first establish a node for the supplier in order to send eligibility information. You only need to do this if you are sending eligibility information as an XML message. After you create the node, you need to attach it to the message channel used in the eligibility process.

To create a node:

1. In the windows client, navigate to the Application Designer.
2. Select File, New, Message Node and click OK.
A new message node object appears.
3. Select Insert, Location from the menu.
A location dialog box appears.
4. Enter the address of the supplier's application message handler.
The supplier's representative should provide this information.
5. Select File, Save As from the menu and give this node a name.
6. Press OK.

To add the node to the message channel:
--

1. Select File, Open from the menu.
The Open Object dialog box appears.

2. Set the Object Type to Message Channel.
3. Set the Name to CO_DPK_ELIG and click Open.

The message channel object appears.

4. Click the Routing Rules tab.
5. Select Insert, Insert Message Node from the menu.

The Insert Message Node dialog box appears.

6. In the Name field enter the name of the node you just created and click Insert.
7. Select File, Save from the menu.

See Also

PeopleTools PeopleBook: Application Messaging

Setting Up Eligibility Information

Access the Discounts and Perks Supplier Setup page.

Eligibility File
Eligibility Fields

Discounts and Perks Supplier Setup

BeyondWork

View All
First ◀ 1 of 1 ▶ Last

***Effective Date:** + -

Supplier Logo: 🔍

Eligibility File

Send: **Changes Only** **All Employees**

File Format: **XML Message** **Flat File**

Msg Node: 🔍

File Name: Auto Generate File Name

File Directory:

Eligibility Criteria

Group ID: 🔍

Eligible Employee Statuses

View All
First ◀ 1-2 of 2 ▶ Last

1	Active	▼	+	-
2	Leave of Absence	▼	+	-

Discounts and Perks Supplier Setup page

Supplier Logo

The system displays the image name of the supplier's logo.

Send

Use this field to define the data that will be sent to the supplier. If you want to send a complete file containing information on all the eligible employees, select **All Employees**. If you want to send only the changes since the last file was sent, select **Changes Only**.

File Format

Select either **XML Message** or **Flat File** as the type of file format the supplier wants to receive.

Msg Node

If you selected XML Message as the type of file format, select the node to which the system publishes the messages.

File Name

If you selected Flat File as the type of file format and did not select Auto Generate File Name, enter the name of the file.

When creating your own name, make sure it is a name that helps you easily identify the contents. If you run the extract process more than once using the same name and

directory, a sequence number will be placed in front of the file name.

For example, if you send a file with the name XYZ twice, the first file name will be XYZ.txt and 2XYZ.txt.

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

Auto Generate File Name

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

File Directory

If you selected Flat File as the type of file format, enter the directory in which the system creates the flat file.

Eligibility Criteria

If you want to specify that only certain employees are eligible to participate with this supplier, select a Group ID. If you leave the field blank, all employees are eligible for participation.

If you want to further refine employee eligibility, you can specify that only employee's with certain employee statuses can participate.

Setting Up Eligibility Fields

Access the Eligibility Fields page.

Eligibility File
Eligibility Fields

Discounts and Perks Supplier Setup

BeyondWork

View All
First ◀ 1 of 1 ▶ Last

*Effective Date:

+
-

Eligibility Fields

Personal Information

<input checked="" type="checkbox"/> EmpID	<input type="checkbox"/> Middle Initial	<input type="checkbox"/> Date of Birth	<input type="checkbox"/> Marital Status
<input checked="" type="checkbox"/> Last Name	<input type="checkbox"/> Name Suffix	<input type="checkbox"/> Language Code	<input type="checkbox"/> Smoker
<input checked="" type="checkbox"/> First Name	<input type="checkbox"/> Gender		

Address

<input checked="" type="checkbox"/> Address Line #1	<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> Postal Code	<input type="checkbox"/> County
<input checked="" type="checkbox"/> Address Line #2	<input checked="" type="checkbox"/> State	<input type="checkbox"/> Country	Address Type: <input type="text" value="Home"/>

Job Information

<input type="checkbox"/> Employee Status	<input type="checkbox"/> Department	<input type="checkbox"/> Employee Type	<input type="checkbox"/> Company
<input type="checkbox"/> Full/Part Time	<input type="checkbox"/> Job Title	<input type="checkbox"/> Standard Hours	<input type="checkbox"/> Pay Group
<input type="checkbox"/> FICA Status	<input type="checkbox"/> Union Code	<input type="checkbox"/> Currency Code	<input type="checkbox"/> Comp Freq
<input type="checkbox"/> Location Code			

Discounts and Perks Supplier Setup - Eligibility Fields page (1 of 2)

Dates			
<input type="checkbox"/> Hire Date	<input type="checkbox"/> Leave Date	<input type="checkbox"/> Termination Date	<input type="checkbox"/> Job Change Date
<input type="checkbox"/> Rehire Date	<input type="checkbox"/> Leave Reason	<input type="checkbox"/> Term Reason	<input type="checkbox"/> Retirement Date
Phone Numbers			
<input type="checkbox"/> Phone 1	Type: <input type="text"/>	<input type="checkbox"/> Phone 2	Type: <input type="text"/>
E-Mail Address			
<input checked="" type="checkbox"/> Email	Type: <input type="text" value="Business"/>		
National ID			
<input type="checkbox"/> National ID	Source: <input type="radio"/> Country <input type="radio"/> Primary	Country: <input type="text"/>	NID Type: <input type="text"/>
Compensation			
<input type="checkbox"/> Comp Rate 1	Source: <input type="radio"/> Regular Salary <input type="radio"/> Annual Benefits Base Rate	Frequency: <input type="text"/>	<input type="text"/>
<input type="checkbox"/> Comp Rate 2	Source: <input type="radio"/> Regular Salary <input type="radio"/> Annual Benefits Base Rate	Frequency: <input type="text"/>	<input type="text"/>

Discounts and Perks Supplier Setup page (2 of 2)

Eligibility Fields

Select the fields that you want included in the extract file that is sent to the supplier. The employee ID is always included.

Sending Eligibility Data to Discounts and Perks Suppliers

The Discounts and Perk Eligibility process enables you to create a file that contains information on employees who you designated as eligible participants and to send this information to the supplier. The application uses the information you defined on the Discounts and Perks Supplier Setup page to build the file.

When you send the file, you have the option of sending data for all employees that are eligible or only those employees who are new or have changed information. The first time you send the eligibility file to the supplier you want to select all employees to send a complete file. After that you can send either the changes only for all employees or all the data for all employees. You'll want to set up a schedule with the supplier for sending the eligibility file on a regular basis.

Pages Used to Send Eligibility Data

Page Name	Object Name	Navigation	Usage
Discounts and Perk Eligibility	RUN_CNTL_DPK_EL IG	Define Business Rules, Administer Suppliers, Discounts, Eligibility File	Use this page to send data to the supplier.

Sending Eligibility Data to Discounts and Perks Suppliers

Access the Discounts and Perks Eligibility page.

Discounts and Perks Eligibility page

Supplier ID

Select the supplier for whom you want to create an eligibility file. The fields are already populated with the supplier information entered on the Discounts and Perks Supplier Setup page. If you want to override the information for this run, you may do so.

Setting Up Supplier Links

Now that you have established the links between the application and the supplier, the next step is to establish the links between your employees and the supplier.

Links can be placed on:

- Self-service transaction pages.
- Category pages.

Links can take you to:








- The supplier's website.
- A category within the supplier's website.
- A category page.

Category pages are pages that you create. These pages are used to group or organize related supplier information and may contain links that go to another category page or directly to the supplier's website.

Categories are major areas located on the supplier's website. Examples are Tickets, Health, Travel, or Finance. Technically, categories are nothing more than a URL address to the supplier's website.

The following page is an example of a category page with links to supplier categories located on the supplier's website.

Discounts and Perks Home Page

 <p>BeyondWork Home Come on in and browse a while. You'll be amazed at the ways we can help you save time and money. Just one click and you're there!</p> 	 <p>Tickets Get discount tickets to movies, sporting events, theme parks and more.</p> 
 <p>Gifts Need a gift for that special someone? Have a special event coming up? Don't go to the store, go on-line and save time.</p> 	 <p>Travel Let us help you plan for your next trip. Business or Pleasure, we have the resources to make putting together the perfect trip easy.</p> 

Example of a category page.

To set up links to a supplier:

1. Discuss with the supplier the categories or locations available on the supplier's website.
2. Decide which categories you want to use.
3. Set up those categories using the Define Categories page.

4. If you want a page that contains nothing but links to discounts and perks suppliers, create a category page.
5. Add links to self-service transaction pages or category pages.

Pages Used to Set Up Supplier Links

Page Name	Object Name	Navigation	Usage
Discounts and Perks Category Setup	CO_DPK_CAT_TABLE	Define Business Rules, Administer Suppliers, Discounts, Supplier Categories	Use this page to define the areas you want employees to access on the supplier's website.
Discounts and Perks Category Page Definition	CO_DPK_PAGE_TABLE	Define Business Rules, Administer Suppliers, Discounts, Category Pages	Use this page to create a category page.
Discounts and Perks Links	CO_DISPRK_LINKS	Define Business Rules, Administer Suppliers, Discounts, Links	Use this page to add links to self-service transaction pages.

Defining Category Codes

Access the Discounts and Perks Category Setup page.

Discounts and Perks Category Setup

BeyondWork

View All First 1 of 1 Last

*Category Code: + -


View All First 1 of 1 Last

*Effective Date: *Status: + -

Group ID:

*Description:

*Link Text:

Image Name: 

Link Descr:

Discounts and Perks Category Setup page

Category Code	Enter the supplier's category code.
Group ID	This controls the display of the supplier link on a page. If you want to limit access to this supplier category to specific groups of employees, select a group ID. This overrides the group ID entered on the Discounts and Perks Supplier Setup page.
Description	Enter a general description of the Category Code. This text does not display on any page.
Link Text	Enter the text that you want displayed as the actual link. This text can be up to 30 characters in length.
Image Name	If you want an icon to appear on the page next to the link text, select an image name. This image displays on Category pages, the Benefit Enrollment Confirmation page, and the Life Event Confirmation page.
Link Description	This description displays on category pages, the eBenefits enrollment confirmation page, or a life event confirmation page. Use this field if you want text to display below the Link Text. This text can be as long as you want.

Creating Category Pages

Access the Discounts and Perks Category Page Definition page.


Discounts and Perks Category Page Definition

Page ID: DISCOUNTS

Page Definition View All First 1 of 1 Last

*Effective Date: *Status:

*Page Title:

Image Name: 

Link Descr:

Page Links View All First 1 of 1 Last

*Sequence Nbr:

Page ID:

Merchant ID: BeyondWork

Category Code:

Discounts and Perks Category Page Definition page

Page Title	Enter the name of the page exactly as you want it to appear on the page.						
Image Name	Select the logo you want displayed on the page.						
Link Description	Enter a description of the page exactly as you want it to appear on the page.						
Page Links	You can add as many links as you want. Links are placed on the page in the following ordering scheme: <div style="margin-left: 40px;"> <table border="0"> <tr><td>1</td><td>2</td></tr> <tr><td>3</td><td>4</td></tr> <tr><td>5</td><td>6</td></tr> </table> </div>	1	2	3	4	5	6
1	2						
3	4						
5	6						
Sequence Number	Enter the order in which you want this link to appear on the page.						
Page ID	If this link is to a self-service transaction, home page, or category page, select the ID from the list of valid page IDs.						
Merchant ID	If this link is to a category on the supplier's website, select a supplier ID from the list of available IDs.						
Category Code	If this link is to a category on the supplier's website, select a category code from the list of valid codes.						

Adding Links to Self Service Transactions

Access the Discounts and Perks Links page.

Discounts and Perks Links

HR Employee Home Page

View All First ◀ 1 of 1 ▶ Last

*Effective Date:

View All First ◀ 1 of 1 ▶ Last

*Sequence Nbr:

Page ID:

Merchant ID:

Category Code:

Discounts and Perks Links page

Sequence Number

Enter the order in which you want this link to appear on the page.

Page ID

If this link is to a self-service transaction, home page, or category page, select the ID from the list of valid page IDs.

Supplier ID

If this link is to a category on the supplier's website, select a supplier ID from the list of available IDs.

Category Code

If this link is to a category on the supplier's website, select a category code from the list of valid codes.

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