

PeopleSoft®

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Benefits Administration PeopleBook

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Benefits Administration PeopleBook
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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by 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.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, 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.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft 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 that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>O</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.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID 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.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, 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.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.

Report Manager	Click to access 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).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Benefits Administration Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or application.

PeopleSoft Application Fundamentals

The *PeopleSoft Benefits Administration PeopleBook* provides you with implementation and processing information for your PeopleSoft Benefits Administration system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*. Each PeopleSoft application has its own version of this documentation.

PeopleSoft Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS applications you are implementing, 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.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements that are used in the PeopleBook. For example, if a data field is used on multiple pages, it might be defined only once in this chapter rather than repeatedly throughout the book.
Getting Started With...	This chapter discusses application implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level guide to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Understanding...	This is an introductory chapter that broadly explains the application and the functionality within the product.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the application. For example, if functionality X is part of an application, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

Chapters	Description
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of an application, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Reports Appendix	(optional) This appendix contains an abbreviated list of all of the application's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started With PeopleSoft Benefits Administration

This chapter provides an overview of PeopleSoft Benefits Administration business processes and discusses:

- PeopleSoft Benefits Administration business processes.
- PeopleSoft Benefits Administration implementation tasks.

PeopleSoft Benefits Administration Business Processes

The following is a list of the PeopleSoft Benefits Administration business processes:

- Automated Benefits Enrollment.
- Cross Plan Validation.
- Canadian Flexible Credit Allocations.
- Individual Employee Processing.

We cover these business processes in the business process chapters in this PeopleBook.

Implementing PeopleSoft Benefits Administration

The PeopleSoft Benefits Administration table-loading implementation includes the following:

- Setting up HRMS fundamental tables.
- Setting up PeopleSoft Benefits Administration core tables.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation documentation and table-loading sequences.

Important! The order in which you set up the tables that are required to implement PeopleSoft Benefits Administration may vary. The order may depend on the features that you want to use and whether you are implementing more than one PeopleSoft application. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

PeopleSoft Benefits Administration requires the setup of fundamental HRMS tables that are common to multiple HRMS applications. The information defined in these tables is the basis for the PeopleSoft Benefits Administration setup.

Step	Reference
1. ☐ Set up the HRMS fundamental tables. ☐	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , “Getting Started With PeopleSoft HRMS”
2. Set up the HR foundation tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , “Getting Started With PeopleSoft HRMS”

Setting Up Core PeopleSoft Benefits Administration Tables

The steps discussed in this section suggest an order in which you define the information in your core PeopleSoft Benefits Administration tables. The information that you defined in your global tables lays the foundation for this setup.

Setting up these core tables prepares your system to support these business processes:

Step	Reference
1. Activate PeopleSoft Benefits Administration on the installation table.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , “Installing PeopleSoft HRMS”
2. Define eligibility rules.	Chapter 4, “Defining Eligibility Rules,” Setting Up Eligibility Rules, page 16
3. Define geographic eligibility rules.	Chapter 4, “Defining Eligibility Rules,” Setting Up Eligibility Rules, page 16
4. Define event rules.	Chapter 4, “Defining Eligibility Rules,” Setting Up Eligibility Rules, page 16
5. Define flexible credits.	Chapter 4, “Defining Eligibility Rules,” Setting Up Eligibility Rules, page 16
6. Build your automated benefit programs.	Chapter 6, “Building Automated Benefit Programs,” page 59
7. For Canadian users, define Canadian credit allocation rules.	Chapter 7, “(CAN) Handling Canadian Credit Allocations,” page 77

CHAPTER 2

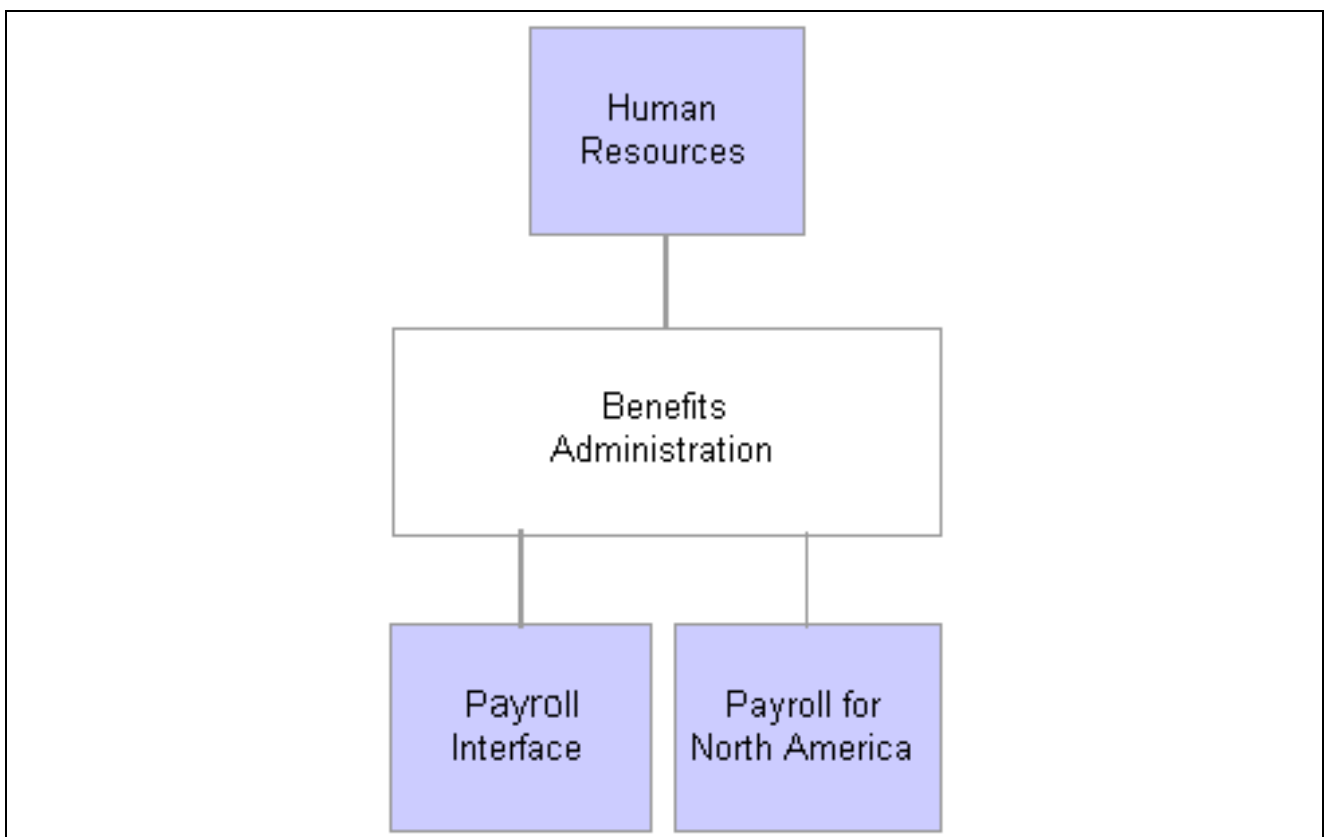
Working With PeopleSoft Benefits Administration

This chapter displays PeopleSoft Benefits Administration integrations, provides an overview of PeopleSoft Benefits Administration, and discusses how to:

- Automate benefit information.
- Work with PeopleSoft Benefits Administration business processes.

PeopleSoft Benefits Administration Integrations

PeopleSoft Benefits Administration integrates with the following PeopleSoft applications:



PeopleSoft Benefits Administration Integration Points

We cover integration considerations in the implementation chapters in this PeopleBook.

Understanding PeopleSoft Benefits Administration

When you build on Base Benefits by adding PeopleSoft Benefits Administration, you can do the following:

- Automate eligibility checking and respond to HR events that might impact benefits enrollment, based on your eligibility and event rules.
- Administer multiple, simultaneous plan years, according to enrollment rules that you define.
- Calculate benefit costs and coverage amounts independent of PeopleSoft Payroll for North America.
- Define and process a variety of flexible credits, both general and plan-based.
- For federal users, administer multiple, simultaneous Open Seasons for different benefit plan types.
- Establish the foundation for implementing self-service enrollment using PeopleSoft eBenefits.

Note. PeopleSoft Benefits Administration is designed to be a supplement to the Base Benefits business process in PeopleSoft Human Resources. You will not be able to run the processes and procedures detailed in this book until you set up the Base Benefits business process.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Understanding Base Benefits”

Common Elements Used in This Chapter

Benefit Program	A collection of benefit plans your company offers to a group of employees. For example, you might have one benefit program for hourly employees, another for salaried employees, and a third for executives.
Benefit Plan	Any benefit category, such as health, life, or savings. A benefit plan option is a specific benefit option within a plan type. For example, you might set up three benefit plan options for a plan type—one times salary, two times salary, and three times salary. Benefit plans are associated with benefit programs and can be linked to any number of benefit programs.
Event Maintenance	Process you use to enroll new employees and to track and react to employee benefit changes during the plan year, such as those resulting from a marriage or termination of employment.
Open Enrollment	Process you use to enroll or re-enroll participants in appropriate benefit programs and plans during the annual enrollment window or, for federal users, during the Open Season periods for Health Benefits, Life Plans, and Savings Plans.

Automating Benefit Information

When you implement PeopleSoft Benefits Administration, your first area of focus will be your benefit information. Using PeopleSoft terminology, benefit information includes programs, plan types, plans, rates, and calculation rules. All of this information is defined within the Base Benefits business process.

PeopleSoft Benefits Administration enables you to link eligibility and event processing rules to your benefit programs, plan types, and benefit plan options.

For benefit plan types, you can set up rates as age-graded, flat, percentage-of-salary, or service-related, depending on your requirements. Calculation rules include as-of dates for age, service, premium and coverage calculations, rounding rules, and minimum and maximum coverage amounts.

For benefit programs, these rules enable the system to automate benefits processing at the program level, meaning that the system can combine employee data with eligibility and event rules to determine whether to create, keep, or terminate employee benefit program assignments. With event maintenance, existing employees will have their benefit eligibility change in response to certain events that ordinarily require a revision of personal benefit information, such as divorce, a transfer in location, or a switch from part-time to full-time employment.

In addition to defining costs for benefit options (through the Base Benefits business process), PeopleSoft Benefits Administration enables you to attach your rates and calculation rules to flexible credits. These can include general program-level credits (granted when participating in a benefit program), general plan-level credits (granted when enrolling in any benefit option within the plan type), and option-level credits (granted when an employee elects a specific benefit option).

Use PeopleSoft Benefits Administration tables to set up and run your automated benefit system—the event maintenance, open enrollment, and flexible benefits processes that take the hard labor out of benefits information management. Once your event rules, eligibility rules, and flexible credits are defined, you can combine and recombine them with your current benefit information to produce the automated system that best fits the specific needs of your company.

Link eligibility and event processing rules to the benefit programs offered by your organization, thus automating your benefit system at the program level. The system can combine employee data with these rules to determine whether to create, keep, or terminate employee benefit program assignments. In this way, new hires and existing employees can be automatically enrolled, or their elections automatically solicited, both throughout the year and during periods of open enrollment (or for federal users, during Benefits Open Season).

When the time comes to redefine your PeopleSoft Benefits Administration system, you won't have to redefine your entire set of event rules, eligibility rules, and flexible credits. Modify the rules and credits in question with the same page that you used to create them.

It's possible that two plan types use the same set of event rules in one program and different event rules in another. Once you define the two sets of event rules, link the appropriate set of event rules with each benefit program and plan type combination.

Working with Benefit Administration Business Processes

In this section, we discuss working with PeopleSoft Benefit Administration business processes and how to:

- Use multiple currencies.
- Set up automated benefits.
- Prepare for Open Enrollment and Event Maintenance with PeopleSoft Benefits Administration.

Using Multiple Currencies

When you work with multiple currencies for an employee, be aware that PeopleSoft Benefits Administration doesn't support the multiple currency conversion required to perform premium calculations. For example, if you pay employees in Swiss francs and enroll them in a benefit program that uses U.S. dollars, PeopleSoft Benefits Administration cannot perform a currency conversion to any base currency. If you don't use multiple currencies, you can easily process them using PeopleSoft Benefits Administration.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Currencies”

Setting Up Automated Benefits

This section explains how to activate PeopleSoft Benefits Administration.

To activate PeopleSoft Benefits Administration:

1. Access the Installation Table - Products page by navigating to Set Up HRMS, Install, Installation Table.
2. Select the Benefits Administration check box.

The fields that you use to define flexible credits and automated enrollment processing will become available on the Benefit Program Table. In addition, all new benefit programs that you create after Benefits Administration is selected will be identified with a Program Type of *Automated* on the Benefit Program page of the Benefit Program Table.

3. Select the Product Specific tab.
4. Enter the Start Date for BenAdmin to set the “look-back” window for your benefits processing.

The start date is used for Event Maintenance and serves several purposes:

Start Date for	Purpose
Event Qualification	The system will only flag changes to job data, birthdate, service date, state, postal code, and union code if the job record that is being inserted, corrected, or deleted has an effective date greater than or equal to the PeopleSoft Benefits Administration Start Date. The system will also not trigger event flags for passive events that occur before the Start Date.

Start Date for	Purpose
Event Maintenance Scheduling	When scheduling Event Maintenance, PeopleSoft Benefits Administration will only review event records with an effective date greater than or equal to the PeopleSoft Benefits Administration Start Date. This review includes potentially flagging these event records for your review and determining the proper events to leave open for processing (BAS_PARTIC.EVENT_STATUS = 'O').
Pay Calendar Access	For Event Maintenance, while setting coverage and deduction begin dates, PeopleSoft Benefits Administration will load pay calendar data starting with pay period end dates greater than or equal to the PeopleSoft Benefits Administration Start Date.

Preparing for Open Enrollment and Event Maintenance with PeopleSoft Benefits Administration

PeopleSoft Benefits Administration automates Open Enrollment and Event Maintenance processing. PeopleSoft Benefits Administration for U.S. Federal Government automates Open Season and employee benefit changes with the Open Enrollment and Event Maintenance processes.

Using Eligibility Rules to Determine Benefit Program and Option Eligibility

To prepare for Open Enrollment and Event Maintenance, first define the eligibility rules that drive benefit determination. These eligibility rules can be based on job information (such as pay group or department) and geographic location (such as home or work address).

Because you define PeopleSoft table information using an effective date, you can easily define different eligibility rules for each plan year. Associate an effective date with each set of rules and the system will apply the correct rules according to the effective date.

Setting Up Event Rules to Determine What the Employee Can Choose

While your eligibility rules determine what programs and plan options your employees are inherently *eligible for*, you also need event rules to determine what your employees *can choose*, based on the type of event that has triggered the change in eligibility. For example, when an employee divorces their spouse, that act does not enable them to change *all* of their benefits elections—that's an opportunity most employees should only receive during Open Enrollment or for federal users, Open Season. Instead, you will probably want to design the system only to give them the opportunity to change their health and life plan enrollments and update their dependent and beneficiary information.

Designing Automated Benefits Programs

PeopleSoft Benefits Administration enables you to create benefit programs using the benefit plans and plan type options that you set up with the Base Benefits business process. Once the benefit program framework is defined, you can create eligibility rules, event rules, rates, calculation rules, and flexible credits. PeopleSoft Benefits Administration also enables you to set up automated cross-plan validation checking, which you can use to set up prerequisites for plan enrollment.

Preparing Your System for PeopleSoft Benefits Administration

PeopleSoft Benefits Administration provides a variety of tools to help you prepare your system for automated benefit processing, from audits to pages that enable you to set up specialized schedules of employees for processing.

See Also

Chapter 4, “Defining Eligibility Rules,” page 13

Chapter 5, “Creating Event Rules,” page 29

Chapter 6, “Building Automated Benefit Programs,” page 59

Chapter 8, “Preparing for Open Enrollment and Event Maintenance,” page 83

CHAPTER 3

Setting Up Flexible Credits

This chapter provides an overview of flexible credits and discusses how to define flexible credit earnings.

Understanding Flexible Credits

Many organizations offer their employees credits that can be applied towards their benefits. PeopleSoft Benefits Administration enables you to define three types of flexible credits:

- General Credits that apply when an employee is enrolled in a benefit program.
- Plan Based Credits that apply when an employee enrolls in a specific benefit plan type.
- Option Based Credits that apply when an employee enrolls in a specific benefit option.

After you have defined the flexible credit earnings, use the Benefit Program Table to link the credit to the benefit program, benefit plan type, or benefit option.

The PeopleSoft Benefits Administration process sums all credits for an employee and passes the totals by earnings code to payroll. The total credits are treated as additional earnings for employees.

Defining Flexible Credit Earnings

This section describes the procedure for setting up flexible credits.

To set up credits:

1. Establish the credit amount using one of the rate tables.
2. Set up the calculation rules for the credit.
3. Identify the earnings code that will define the credit in the earnings program.

Warning! If earnings codes for each plan type are not unique, flexible credits might not start and end correctly during open enrollment and event maintenance processing. For example, five medical benefit plans in a benefit program can use the same earnings code. However, dental, life, and general credits need their own earnings codes.

Note. (USF) Flexible credits are not generally used in the U.S. federal government.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Defining Earnings Codes and Earnings Programs”

Setting Up Credit Amounts

To set up the credit amount, use one of the four rate tables:

- Age-Graded Rate.
- Flat Rate Table.
- Service Rate Table.
- Salary Rate Table.

When defining a general credit using any of the rate tables, the Rate Per Unit field value must be *None*. Only the Employee Portion is picked up and reflected as the credit amount. Option based credits may have a Rate per Unit.

Note. If you have defined the credit amount based on age or salary percentage, you need to set up a calculation rule to define how the system determines age and benefit base salary amount.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Setting Up Core Human Resources Base Benefits Tables,” Setting Up Calculation Rules

Setting Up Excess Credit Calculations

During the calculation of benefits costs and credits, PeopleSoft Benefits Administration computes a value called “excess credits.” This is an important value, because an organization can choose to treat excess credits in a variety of ways. Excess credits can appear on the paycheck as net additional pay, they can simply be forfeited (“use it or lose it”), or they can be “rolled over” to automatically increase certain voluntary contributions such as Savings plan and Flexible Spending accounts. Normally, excess credits are calculated by:

Total of All Flexible Credits - Total of All Before Tax Costs

You can override the Total of All Before Tax Costs portion of the calculation with plan types and deduction codes of your choice. For U.S. based companies, normally you will not override this calculation. However, Canadian based companies may need to implement a more complex set of deductions.

Pages Used to Set Up Excess Credit Calculations

Page Name	Object Name	Navigation	Usage
Excess Credit Tbl (excess credit table)	EXCESS_CRDT_CALC	Set Up HRMS, Product Related, Automated Benefits, Flex Credit Management, Excess Credit Calculations	Define plan types and deduction codes to offset credits.

Entering Excess Credit Calculation Plan Types and Deductions

Access the Excess Credit Tbl page.

Excess Credit Tbl

Excess Credit Calculation Table Find | View All First 1 of 1 Last

Benefit Program: B06 ***Effective Date:** 09/10/2002 **Status:** Active

Plan Types / Deduction Classes to Include in Calculation Customize | Find First 1 of 1 Last

	*Plan Type	*Deduction Classification
1		

+ - Customize Find First 1 of 1 Last

Excess Credit Tbl page

Enter the Plan Types and Deduction Classifications you want the system to include in when calculating the excess credit amount.

CHAPTER 4

Defining Eligibility Rules

This chapter provides an overview of eligibility rules and discusses how to:

- Understand how changes in job data affect eligibility.
- Set up eligibility rules.
- Set up geographic location eligibility rules.

Understanding Eligibility Rules

You use eligibility rules to:

- Determine the benefit program for which each employee is eligible.
- Determine eligibility for each plan option within a benefit program.
- Set up your system so that a participant can be eligible for only one benefit program at a time.
- Define eligibility based on a wide range of personal and job information, as well as geographic location.

Once you've defined the eligibility rule, attach it to your benefit program at the program or plan option level using the Benefit Program Table.

Note. For federal users: For TSP plans, if you want to link an eligibility rule to a TSP option, create a separate eligibility rule to be used exclusively for TSP plans.

Never attach the same eligibility rule/geographic eligibility table combination to the program level of more than one benefit program; otherwise, employees will be eligible for more than one benefit program.

As you work with PeopleSoft Benefits Administration, there will occasionally be times when eligibility rules are improperly configured. You can troubleshoot eligibility problems by using Benefit Administration's Eligibility Debugging tool, which shows you exactly where an individual employee fails and passes program and plan option eligibility checks during the PeopleSoft Benefits Administration process.

See Also

[Chapter 9, "Running the PeopleSoft Benefits Administration Process," Understanding the PeopleSoft Benefits Administration Process, page 97](#)

Understanding How Changes in Job Data Affect Eligibility

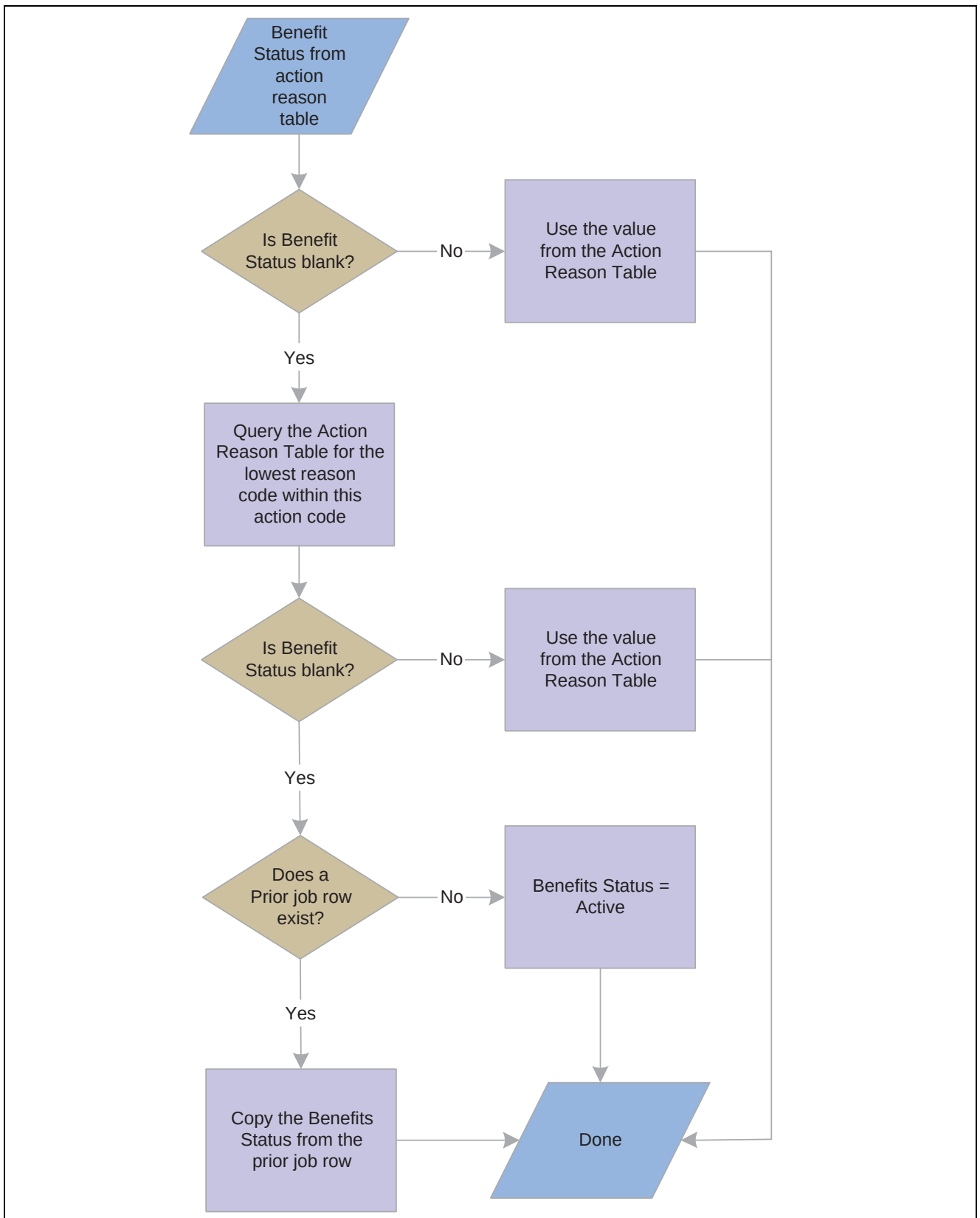
Actions occur that change an employee's job status and can affect their benefits eligibility, such as taking FMLA leave, being terminated, or changing from full-time to part-time employment.

When employee actions occur, two employee status values can be affected: Employee Status and Benefits Status. PeopleSoft Human Resources and PeopleSoft Payroll use Employee Status for a variety of functions. Benefits Status, on the other hand, is used only by PeopleSoft Benefits Administration and does not conflict with HR and Payroll (North American) operations. This enables you to define employee status in benefits terms without being constrained by HR or Payroll (North American) requirements.

Use the Action Reason Table to tell the system how to set Benefits Status through the Benefits Employee Status field. The Action Reason Table gives you the freedom to determine which status values you need and which action changes will trigger a change to Benefits Status values. Once you've defined your Benefits Employee Status values, you can use Benefits Status on the Eligibility Rules Table. You can also change the available Benefits Status values directly through the Translate Table.

The system sets Benefits Employee Status by matching the Action and Action Reason on the Job row to the Action and Action Reason in the Action Reason Table. If the Job row does not have an Action Reason, the system will match to the entry in the Action Reason Table that has a matching Action and the lowest Action Reason value within that Action.

The following diagram illustrates the process the system follows.



Process flow for Benefit Status

The system will carry Benefits Employee Status forward from the preceding Job row if the Benefits Employee Status field on the Action Reason Table is blank or if there are no entries in the Action Reason Table that match the Action on the Job row. Thus, certain Action values and Action Reason values, such as *Hire*, *Terminate*, and *Leave of Absence* can explicitly affect the Benefits Employee Status while others, such as *Transfer*, *Job Reclassification*, and *Demotion*, might not.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Setting Up the Administer Workforce Business Process,” Defining Duty Types and Reasons for Personnel Actions

Setting Up Eligibility Rules

In this section, we discuss setting up eligibility rules, and how to:

- Define PeopleSoft Benefits Administration eligibility parameters.
- Use modified eligibility parameters.
- Change eligibility flags.

Understanding Eligibility

PeopleSoft provides 27 different criteria fields (plus 2 federal-specific fields) that can be used to determine employee benefit eligibility. Nine of these criteria fields can be defined to meet your organizations needs. The criteria fields are:

Field Name	Field Name
Age	Officer Code
Benefit Status	Pay Group
Eligibility Config 1–9	Regular and Temporary
EmplID Override	Regulatory Region
Employee Class	Retirement Plan (Federal)
Employee Type	Salary Grade
FEHB Indicator	Service Months
FLSA Status	Standard Hours

Field Name	Field Name
FTE	State
Full/Part Time	Union Code
Location	

In order for an employee to be deemed eligible for participation in a plan or program covered by an eligibility rule, the employee must meet all of the parameters set for that rule. When defining an eligibility rule, you define the criteria, as well as an indicator that tells the system whether meeting the criteria makes the employee *eligible* or *ineligible*.

Let's suppose you want to define an eligibility rule for a program that is available to employees in the 48 contiguous states but not Hawaii or Alaska. Select the state criteria to set up the parameter. The system looks at each employee's home address, and makes them eligible for the benefit program if they live in one of the 48 contiguous states. A faster way to define this same rule would be to say that if the employee lives in Hawaii or Alaska, they are ineligible for the benefit program.

Page Used to Set Up Eligibility Rules

Page Name	Object Name	Navigation	Usage
BenAdmn Eligibility Parameters (benefits administration eligibility parameters)	BAS_ELIG_RULES1	Set Up HRMS, Product Related, Automated Benefits, Eligibility and Event Rules, Eligibility Rules Table	Use the BenAdmn Eligibility Parameters page to define the parameters that make up an eligibility rule.
BAS Eligibility Rules Table	RUNCTL_BAS703A	Set Up HRMS, Product Related, Automated Benefits, Reports, Eligibility Rules	For each Eligibility Rule definition, print the minimum/maximum criteria (standard hours, service months, and age) and the "membership" criteria (such as employee class, full or part time, company and paygroup, union code, state, etc.) along with the applicable grouping methods and evaluation rules.

Defining PeopleSoft Benefits Administration Eligibility Parameters

Access the BenAdmn Eligibility Parameters page.

BenAdmin Eligibility Parameters

Eligibility Rules ID: KFUL

Eligibility Parameters Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980 BT *Status: Active + -

*Description: Full-Time EEs (FTE, Hrs, F/P) Short Description: FullTime

Eligibility Field Customize | Find | View All First 1-10 of 27 Last

Age	☒
Benefits Status	☐
Eligibility Config 1	☐
Eligibility Config 2	☐
Eligibility Config 3	☐
Eligibility Config 4	☐
Eligibility Config 5	☐
Eligibility Config 6	☐
Eligibility Config 7	☐
Eligibility Config 8	☐

Benefits Status Customize | Find | View All First 1 of 1 Last

*Group Method: Primary **Consider Active Jobs Only** ☐

*Evaluation Method: 1 or More Eligible

Criteria Customize | Find | View All First 1 of 1 Last

*Benefits Employee Status + -

BenAdmin Eligibility Parameters page

Standard Field Definitions for Eligibility Field Group Boxes

Eligibility Field

Displays a list of all eligibility fields available that can make up this eligibility rule. Click an eligibility field button to display the associated eligibility field group box and criteria (the check box to the right of each field is simply an indicator of whether that field is currently being used by the eligibility rule).

Group Method

This field appears if you have activated Multiple Jobs. Choose which jobs to include when the system evaluates the employee's benefit eligibility. Select from the following values:

All Flagged: Group all jobs for all benefit record numbers.

Flagged BR: Group all jobs within the current benefit record number.

Primary: Only look at the primary job within the current benefit record number.

Consider Active Jobs Only

This field appears if you have activated Multiple Jobs. If selected, the system will not look at a job that has a terminated employee status when evaluating the employee's benefit eligibility.

If the value is *Primary* in the Group Method field, this check box is automatically selected and cannot be changed.

Evaluation Method

This field appears if you have activated Multiple Jobs. Define how the jobs selected from the grouping method will be evaluated against the eligibility field. Select from the following values:

One or More: At least one job must satisfy the rule.

All: All jobs must satisfy the rule.

Sum: The sum of the field values for all jobs in the group must satisfy the rule. This applies to numeric information such as standard hours or FTE.

Eligible or Ineligible

Tells the system how to interpret a match with the criteria. If the employee's data matches the criteria, the employee will be *eligible* or *ineligible* for benefits.

Age

Age As Of

Use an employee's age to define benefit eligibility. Select how the system will calculate the employee's age during eligibility processing. Select from the following values:

CurrentDate: The date on which the benefits event occurred.

This Year On: A specific day and month.

Last Year On: A specific day and month.

Minimum Age and Maximum Age

Enter the minimum age requirements for participation.

The system determines eligibility based on inclusive age ranges. For example, if the participant is eligible until they reach age 65, enter age *64* in the *Maximum Age* field. That way, participants are eligible through age 64, until their 65th birthday.

The system always looks at the age eligibility field. If you don't want age to be a factor in determining eligibility, leave the default values in place.

Benefits Status

Benefits Employee Status

Select the benefit status that the employee must have in order to meet the eligibility rule. Add more than one status by inserting a row.

Eligibility Config 1 – 9

Eligibility Config Field (eligibility configuration field)

Use the Eligibility Config 1 through 9 pages to define an employee's benefit eligibility based on a modified factor. You can create nine separate factors to meet your organizations needs.

To use these fields, you must set them up using People Tools and PeopleCode.

EmplID Override

Criteria

Enter specific employees who should pass the eligibility process regardless of whether they meet the eligibility rules. Enter more than one employee by adding a row.

Ben Rcd# (benefit record number)

Enter the benefit record number.

Employee Class

Criteria Define an employee's benefit eligibility based on the employee's employee class. Add more than one classification by inserting a row.

Employee Type

Criteria Define an employee's benefit eligibility based on whether the employee is salaried or hourly. Add more than one by inserting a row.

FLSA Status

Criteria Define an employee's benefit eligibility based the employee's FLSA Status. Add more than one by inserting a row.

FLSA Status Select the status from the list.

FTE

Minimum FTE and Maximum FTE Define an employee's benefit eligibility based on the employee's full time equivalency. Enter the minimum and the maximum amount the employee must meet to fulfill the requirement.

The system always looks at the FTE eligibility field. If you don't want full time equivalency to be a factor in determining eligibility, leave the default values in place.

Full and Part Time

Criteria Determine an employee's benefit eligibility based on the employee's full time or part time status.

Location

Criteria Define an employee's benefit eligibility based on the location of the employee's home or office. Enter more than one setID and location code by adding a row.

Officer Code

Criteria Define an employee's benefit eligibility based on the employee's position within the organization. Enter more than one officer code by adding a row.

Pay Group

Criteria Define an employee's eligibility based on the pay group associated with the employee. Enter more than one code by adding a row.

Regular and Temporary

Criteria Define an employee's benefit eligibility based on whether the employee is a regular or temporary employee.

Regulatory Region

Criteria Define an employee's benefit eligibility based on the regulatory region associated with the employee. Enter more than one region by inserting a row.

Salary Grade

Criteria Define benefit eligibility based on the employee's salary grade. Enter more than one salary grade by adding a row.

SetID Enter a setID.

Sal Plan (salary plan) Enter a salary plan.

Salary Grade Enter a salary grade.

Service Months

Service As Of Define an employee's benefit eligibility based on the employee's months of service. Select how the system will calculate years of service during eligibility processing. The starting date is the employee's Service Date, as defined on the Job Data: Employment Information page. Select from the following end date values:

Current Date: The date on which the benefits event occurred.

This Year On: A specific month and day that you enter in the current year.

Last Year On: A specific month and day that you enter in the previous year.

Minimum Service Months Enter the minimum and maximum service months for participation.

The system always looks at the Service Months eligibility field. If you don't want service to be a factor in determining eligibility, leave the default values in place.

Standard Hours

Minimum Standard Hours and Maximum Standard Hours Use standard hours to determine an employee's benefit eligibility based on the standard hours the employee works. Enter the minimum and maximum standard hours the employee must meet in order to fulfill the requirement.

The system always looks at the *Standard Hours* eligibility field. If you don't want hours to be a factor in determining eligibility, leave the default values in place.

State

Based On

This field is used to determine benefit eligibility based on where the employee works or lives. Select from the following locations that you want evaluated:

Home: The employee must live in the displayed postal codes or postal code ranges to be eligible.

Location: The employee must work in the postal codes or postal code ranges to be eligible.

Both: The employee must work and live in the displayed postal codes or postal code ranges to be eligible.

Either: The employee must either work or live in the displayed postal codes or postal code ranges to be eligible.

Criteria

Use this group box to define benefit eligibility based on the country and state associated with the employee. You can enter more than one by inserting a row.

Union Code

Criteria

Define an employee's benefit eligibility based on the union to which the employee belongs. You can enter more than one code.

Using Modified Eligibility Parameters

You can add modified eligibility parameters for your company. We offer nine configurable fields for your use. These fields are delivered blank. Set them up by using PeopleTools and PeopleCode.

The following are examples of ways to use the Eligibility Configuration Fields.

Grandfathering in Coverage

A company signs a new contract with the union. Under the new agreement, existing employees can continue their benefits at the existing rates. New employees hired after the signing date will pay higher premiums.

We start by copying the existing benefit program to create a program for the new employees. We put the new, higher rates on the new program. Existing employees will stay in the old program, and new employees will be in the new program. We could use months of service for eligibility, but we would have to keep adjusting the eligibility rules every month.

To solve this problem, we will make Eligibility Config Field 1 the grandfather flag. We set it to *Y* for all existing employees. New hires have the flag set to *N*. We can use the default on the record definition to make this work automatically.

We then set eligibility in the old benefit program to include only employees with *Y* in Eligibility Configuration Field 1. We set the new benefit program to include only employees with *N* in Eligibility Configuration Field 1. This enables us to segregate the populations and keep them separate going forward.

Handling Mergers

Company X buys Companies A, B, and C and merges the common departments. To make the merger easier on the newly merged employees, Company X enables them to retain their old benefits for the first three years.

We set up separate benefit programs that emulate the different companies' benefit offerings, and place the employees into the appropriate benefit programs. To differentiate between employees, we make Eligibility Configuration Field 1 the company flag and set it to *A* for former Company A employees, *B* for former Company B employees, and *C* for former Company C employees. We also set Eligibility Configuration Field 1 to *X* (or some other value) for all existing Company X employees, and make the default *X* for all future employees. The final step is to change the program eligibility in order for employees to fall into the appropriate benefit programs.

Configuring Eligibility Based on Values of a Single Field

This type of example refers to situations where the Eligibility Configuration Field emulates data that is not currently part of delivered eligibility.

A manufacturing company wants to use Shift in the determination of STD eligibility. People on the company's third shift do plant maintenance work that is more hazardous than the assembly work performed by employees on the first and second shifts. The company wants to offer third shift workers a plan with higher benefits.

Unfortunately, Shift is not part of the delivered eligibility process. We solve this problem by setting Eligibility Configuration Field 1 equal to the Shift value. We keep the fields in sync using Field Change PeopleCode. Anytime the Shift field value changes, the PeopleCode will move the new Shift value to Eligibility Configuration Field 1. Now the Shift value can participate in eligibility.

Configuring Eligibility Based on the Values of Multiple Fields

This type of example refers to situations where the Eligibility Configuration Field emulates data that is not currently part of delivered eligibility.

A company determines LTD eligibility using a combination of Salary Plan, Grade, and Shift. The calculation is complex, because the values of Salary Plan and Shift influence what grades will qualify for benefits. Even if we could get the fields into the eligibility process, we would then have to change the COBOL programs to evaluate the three fields together.

Instead, we will use PeopleCode to perform the evaluation. The PeopleCode we design looks at the three fields and places a *Y* in Eligibility Configuration Field 1 if the employee should have LTD. It places *N* in Eligibility Configuration Field 1 if the employee should not have LTD. We set the eligibility table for LTD to only include employees with *Y* in Eligibility Configuration Field 1. Now we have a complex eligibility formula in an easily maintained place with no changes to the COBOL programs.

Using Existing Fields to Reduce the Number of Values

A convenience store chain bases dental eligibility on an employee's location, but they have hundreds of locations across the country.

We can use PeopleCode to parse the location code and place the two relevant characters into Eligibility Configuration Field 1. We then base dental eligibility using Eligibility Configuration Field 1, not Location. This greatly reduces the number of entries in the eligibility table. It also simplifies maintenance of the tables since new locations will automatically fit right into the eligibility scheme.

Using Existing Eligibility Fields to Delay Job Data Changes

An organization uses both location and home postal code to determine medical eligibility. An employee transfers from one location to another in February, but does not want to move the family until summer, when school is out. During this time the employee wants to keep the old medical coverage. The organization will allow this and will not change the employee's home address until the summer, but the organization cannot delay the change of Location, and changing the location makes the employee ineligible for the old coverage.

To solve this dilemma, we do the following:

1. Add a new field to the Job Table called Manual Location Override. We put it on the Job pages near the Location field.
2. Add Save Edit PeopleCode to the Location field. The PeopleCode copies the value of Location to Eligibility Configuration Field 1 when Manual Location Override is *N*. It leaves the value in Eligibility Configuration Field 1 alone when Manual Location Override is *Y*. We then set eligibility to use Eligibility Configuration Field 1 instead of Location.
3. Change the location code to the new location and select the Manual Location Override option. The PeopleCode leaves Eligibility Configuration Field 1 alone, and the employee can remain in the old coverage.
4. When the employee finally moves the family, the user inserts a new row and clears the Manual Location Override check box. The PeopleCode copies the location to Eligibility Configuration Field 1. This changes eligibility and the system solicits the employee for the medical plans at the new location.

If you leave a field blank, the system will assume that all possible categories are eligible for that field and will not allow *Ineligible* to be selected.

Changing Eligibility Flags

At the processing level, the Eligibility Rules Table is actually made up of a set of tables: a primary table and many secondary tables. The primary table is linked to the Eligibility Rules Table. It consists of the eligibility rule effective date, status, and descriptions. The secondary tables are linked to the eligibility field scroll bars list on the Eligibility Rules Table page. There is a separate subordinate table for each listed eligibility field.

The primary table has a hidden internal flag for each of the secondary tables. The flag tells the system whether there is data in the secondary table. The processing system uses this flag to tell whether or not to read the secondary table, thereby improving performance.

Let's suppose that all we need to define an eligibility rule is Benefit Status, Full and Part Time, and Regular and Temporary parameters. The system selects the Benefits Status, Full and Part Time and Regular and Temporary options and clear the rest. The system reads these flags and knows it only has to read three tables to get all the eligibility information for the BAS rule instead of checking 29 tables only to find data in three of them. The system properly maintains these flags when you use the supplied pages. Some customers, however, use modified programs and scripts to populate their eligibility rules. In cases like these the flags may be set incorrectly, resulting in slower performance or, even worse, inaccurate eligibility.

We supply a script that sets all the flags correctly. It is called BAELIGLD.DMS. Run this script in Data Mover anytime you update the eligibility rules outside of the delivered pages. You can run this script as often as you like.

Warning! If you plan to use modified programs and scripts to populate the tables linked from the Eligibility Rules Table, you will need to run BAELIGLD.DMS to reset the eligibility processing flags on the primary eligibility table.

Setting Up Geographic Location Eligibility Rules

You can define eligibility for a benefit program or plan according to the postal code of the employee's home and work location.

If the employee	The employee will
Lives within the postal range and works within the postal range.	Pass
Lives within the postal range but works outside the postal range.	Pass
Lives outside the postal range but works within the postal range.	Pass
Lives outside the postal range and works outside the postal range.	Fail

Note. Users can specify the outcome of the evaluation for each of the above scenarios. That is, whether “passing” the criteria means the employee is eligible or ineligible.

Page Used to Set Up Geographic Location Eligibility Rules

Page Name	Object Name	Navigation	Usage
Geographic Location Table	GEOG_LOCN_TABLE	Set Up HRMS, Product Related, Automated Benefits, Eligibility and Event Rules, Geographic Location Elig (Eligibility)Table	Define postal code ranges for employee home or work locations.
Geographic Loc Eligibility Tbl (geographic location eligibility table)	RUNCTL_BEN_LANG	Set Up HRMS, Product Related, Automated Benefits, Reports, Geographic Location	Print location IDs, effective dates, and from/to ranges for the U.S. ZIP code ranges and Canadian postal code ranges you’ve defined to determine benefit eligibility.

Entering the Geographic Location Rules

Access the Geographic Location Table page.

Geographic Location Table

Location Table ID: DF

Geographic Location Elig Table Find | View All First 1 of 1 Last

*Effective Date: 11/15/2002 *Effective Status: Active + -

*Description: Geo Loc Short Description: Location

Based On: Either *Eligible or Ineligible: Eligible

Group Method: Primary *Evaluation Method: 1 or More ☐ Consider Active Jobs Only

Location Range Customize | Find | View All | First 1 of 1 Last

*Beginning of Range	*End of Range		
		+	-

Geographic Location Table page

Based On

Select the location that you want evaluated by this set of postal code ranges. Select from the following values:

Home: The employee must reside in the displayed postal codes or postal code ranges to pass.

Location: The employee must work in the displayed postal codes or postal code ranges to pass.

Both: The employee must both work and live in the displayed postal codes or postal code ranges to pass.

Either: The employee must either work or live in the displayed postal codes or postal code ranges to pass.

Eligible or Ineligible

This flag tells the system how to interpret a match with the criteria. If the employee's data matches ("passes") the criteria, the system determines whether to make the employee eligible or ineligible for benefits.

Group Method

This field appears if you have activated Multiple Jobs. This enables you to choose which jobs to include when the system evaluates the employee's benefit eligibility. Select from the following values:

AllFlagged: Group all jobs for all benefit record numbers.

Flagged BR: Group all jobs within the current benefit record number.

Primary: Look at only the primary job within the current benefit record number.

Evaluation Method

This field appears if you have activated Multiple Jobs. This field enables you to define how the jobs selected from the grouping method will be evaluated against the eligibility field. Select from the following values:

One or More: At least one job must satisfy the rule.

All: All jobs must satisfy the rule.

Sum: The sum of the field values for all jobs in the group must satisfy the rule. This applies to numeric information such as standard hours or FTE.

Consider Active Jobs Only

This field appears if you have activated Multiple Jobs. If selected, the system will not look at a job that has a terminated employee status when evaluating the employee's benefit eligibility.

If the Group Method is *Primary*, this field is automatically selected and cannot be changed.

Location Range

Use the location range grid to define specific postal codes to be evaluated. Enter the beginning and end of range.

To specify a specific postal code, enter the same postal code in both fields. To specify a range, change the last postal code number.

In the United States, you can mix five digit codes with nine digit codes.

CHAPTER 5

Creating Event Rules

This chapter provides an overview of event rules and discusses how to:

- Define PeopleSoft Benefits Administration actions for event rules.
- Specify event classes.
- Define trigger events.
- Define event rules.
- Understand event rules evaluation.
- Define rules for Benefits Billing.
- Understand event processing for COBRA Administration.
- (USF) Set up multiple, concurrent Open Seasons.

Understanding Event Rules

You use event rules to:

- Take into account the type of event and your employees' benefit election history to determine which benefit options employees can choose.
- Determine how the system compensates when employees *neglect* to make certain benefit elections.
- Determine effective dates for coverage and premiums.
- Manage enrollments into Benefits Billing.

Event rules are not the same as eligibility rules. Eligibility rules help determine what benefit program and benefit plan options an employee can have. They tell the system that because of changes to employee data, Employee X is no longer eligible for certain plan options, but is eligible for others.

Event rules determine which eligible options Employee X can actually *choose*, based on the type of event that has occurred and when new coverage begins. The event rules also determine when the plans that Employee X is now ineligible for will be terminated and which plan options Employee X will be enrolled into if new enrollments are not specified.

Event Rules are linked to a benefit program on the Benefit Program page. You can have a different event rule for each plan type in a benefit program.

To set up event rules:

1. Use the Action Reason Table to link personal action/action reason combinations that affect benefits eligibility.
2. Use the Event Class Table to assign the types or classes of events you want the system to recognize, and to control how the system processes event classes.
3. Use the Event Rules Table to define the specific behavior that the system takes for each event classification.

Defining PeopleSoft Benefits Administration Actions for Event Rules

You link *personnel actions*, such as promotions, transfers, terminations, salary increases, and leaves of absence, with *action reasons* that explain why the action took place. Each defined action/reason combination enables the system to classify and track the events that cause changes to your employees' employment and benefit coverage status.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Setting Up the Administer Workforce Business Process," Defining Duty Types and Reasons for Personnel Actions

Specifying Event Classes

You use the Event Class Table to define the types, or classes, of events you want the PeopleSoft Benefits Administration system to recognize, and to control how event classes are handled.

Page Used to Specify Event Classes

Page Name	Object Name	Navigation	Usage
BenAdmin Event Class Table (benefits administration event class table)	BAS_EVENT_CLASS	Set Up HRMS, Product Related, Automated Benefits, Eligibility and Event Rules, Event Class Table	Define the classes of events the PeopleSoft Benefits Administration system recognizes, and control how event classes are handled.

Specifying Event Classes

Access the BenAdmin Event Class Table page.

BenAdmin Event Class Table

Event Class:

FSC

Status:

Active

*Description:

Family Status Change

Short Description:

Fam Status

Event Class Use

☒ Specific Event Class
 ☐ Open Enrollment Event Class

☐ Default Event Class
 ☐ Snapshot Event Class

*Event Priority:

300

☒ Manual Events Allowed

*Suppress Forms:

Print Both

☒ Available through Self Service

Enrl Forms/Days to Print:

0

BenAdmin Event Class Table page

The following table shows default values for the event classes delivered by PeopleSoft.

Event Class	Description	Event Class Use	Event Priority	Manual Events Allowed?
FSC	Family status change	Specific event class	300	Y
HIR	New hire	Specific event class	100	N
MSC	Miscellaneous	Default event class	400	Y
OE	Open Enrollment	Open Enrollment event class	900	N
SNP	Snapshot	Snapshot Event Class	50	N
TER	Termination	Specific event class	200	N

Event Class Use

Identify the processing category that defines your event class:

- *Specific Event Class*: Designates an event class that is designed to match with the PeopleSoft Benefits Administration action entered on the Action/Reason page in order to call specific processing rules.

- *Default Event Class:* The default class is used when no specific event classes apply. This default class is used when the PeopleSoft Benefits Administration action does not match any specific event class.
- For example, an employee undergoes a LOA/MIL (Leave of Action/Military Leave) action/action reason, and the PeopleSoft Benefit Administration action value for that combination is MIL. If you have not defined any additional event classifications beyond those delivered by PeopleSoft, the system processes the employee according to the event rules for the MSC class. It will not recognize MIL as a specific event class unless you define it that way.
- *Open Enrollment Event Class:* Open enrollment events are triggered for all employees associated with a particular Open Enrollment process.
- *Snapshot Event Class:* Snapshot events are triggered for all employees associated with a particular Snapshot process.

Event Priority

Enter the priority in which the system will process the event in situations when multiple events take place on the same date.

The system processes events associated with event classes with lower Event Priority values first.

Manual Events Allowed

Select if events associated with the event class can be inserted manually for an employee using the BenAdmin Activity page.

Available for Self Service

Linked to the Enroll In Benefits eBenefits application. Select to enable employees to elect or change benefit information based on the eligibility determinations that result from event processing in the selected class.

For example, you might not want employees to be able to enter or update election information after they experience a TER (termination) event.

Suppress Forms

Use this field to specify the printing of enrollment forms or confirmation statements. You may, at times, create event classifications, which are meant for administrative use only. Event classifications should never be "seen" by employees.

Enrl Forms/Days to Print (enrollment forms - days to print)

Use this field to set the number of days (prior to an event) that an enrollment form should print. This accommodates future-dated events by holding the form for a reasonable time period just before the event is processed.

Defining Trigger Events

This section describes how to:

- Automatically trigger events through employee data changes.
- Manually insert events into the BAS Activity Table.
- Define passive events.

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Scheduling Events and Assigning Benefit Programs, page 135

Pages Used to Define Trigger Events

Page Name	Object Name	Navigation	Usage
BenAdmin Activity (benefits administration activity)	BAS_ACTIVITY	Benefits, Manage Automated Enrollment, Events, Review Bas Activity	Manually insert events to be processed according to event rules that map to the BAS action you enter when you run the PeopleSoft Benefits Administration process. You can also delete unwanted, but automatically triggered, events.
Passive Event Definition	BAS_PASSIVE_EVENT	Set Up HRMS, Product Related, Automated Benefits, Eligibility and Event Rules, Passive Event Definition	Define events that are not initiated by data entry.

Automatically Triggering Events Through Employee Data Changes

An event of this type is triggered when:

- An administrator opens an employee data page, such as the Personal Data page, and enters a change to employee information.
- The employee enters a marital status or birth or adoption change through eBenefits.

To increase the efficiency of the Event Maintenance process, the system triggers "job" and "non-job" events from a variety of different tables. Job events are relevant to employment, such as hires, transfers and terminations. Non-job events cause changes in your employees' personal or demographic information that affect benefits eligibility or elections.

The following table describes the delivered non-job events triggers.

Non-Job Event	Cause	Processing Result
Date of birth change	Update to the non-effective-dated birthdate field on the Personal Data: Eligibility/Identity page.	Generates a workflow notice to benefits administrator.
Postal code change	Update to the effective-dated Postal Code field of the “Home” address on the Personal Data: Address History page. Also triggered if the effective date of the current “Home” address is changed.	Generates BAS_ACTIVITY trigger.

Non-Job Event	Cause	Processing Result
Service date change	Update to the non-effective-dated Service Date field on the Job Data: Employment Data page.	Generates a workflow notice to benefits administrator.
State code change	Update to the effective-dated State field of the “Home” address on the Personal Data: Address History page. Also triggered if the effective date of the current “Home” address is changed.	Generates BAS_ACTIVITY trigger.

Note. Changes to birth and service dates generate a workflow notice because they occur to fields that are not effective-dated under a *correction* action, and as such must be handled very carefully. The appropriate action, if applicable, may be to reprocess an existing event.

Event triggers based on the Job Table include changes to these fields in the Job Data component:

Job Data Field	Job Data Field	Job Data Field
Action/Action Reason	Eligibility Config Field 1 – 9	Paygroup
Benefits Status	Employee Status	Regular/ Temporary
Benefits System Flag	FLSA Status	Regulatory Region
Benefit Record Number	FTE	Salary Administration Plan
Business Unit/SetID	Full/Part-time Status	Standard Hours
Company	Grade	Union Code
Employee Class	Location	
Employee Type	Officer Code	

Manually Inserting Events into the BAS Activity Table

Access the BenAdmin Activity page.

BenAdmin Activity										
BAS Activity										
*EmpID	Name	*Action Source	All Jobs	Ben Rcd#	Empl Rcd#	*Event Date	Event Effseq	*BAS Action	Suppress Forms	COBRA Action
B-BC101	Neilson, Leslie	JobChg		0	0	01/01/1995	0 HIR			
B-BC102	Green, Lorne	JobChg		0	0	01/01/1995	0 HIR			
B-BC103	Carrey, Jim	JobChg		0	0	01/01/1995	0 HIR			
B-BC104	Twain, Shania	JobChg		0	0	01/01/1995	0 HIR			
B-BC105	McLachlan, Sarah	JobChg		0	0	01/01/1995	0 HIR			
B-BC106	Adams, Bryan	JobChg		0	0	01/01/1995	0 HIR			
B-BC107	Myers, Mike	JobChg		0	0	01/01/1995	0 HIR			
B-BC108	Dion, Celine	JobChg		0	0	01/01/1995	0 HIR			
B-BC109	Fox, Michael J. J.	JobChg		0	0	01/01/1995	0 HIR			
B-BC110	Morissette, Alanis	JobChg		0	0	01/01/1995	0 HIR			
B-BC111	Chong, Rae Dawn	JobChg		0	0	01/01/1995	0 HIR			
B-BC112	Green, Tom	JobChg		0	0	01/01/1995	0 HIR			
B-BC113	Mandell, Howie	JobChg		0	0	01/01/1995	0 HIR			
B-BC114	Gretzky, Wayne	JobChg		0	0	01/01/1995	0 HIR			
B-BC115	Henstridge, Natasha	JobChg		0	0	01/01/1995	0 HIR			
B-BC3101	Neilson, Leslie	JobChg		0	0	01/01/1995	0 HIR			

BenAdmin Activity page

You can only insert event classes into the BAS Activity table that have the Manual Event Allowed check box selected in the Event Class Table.

As delivered, you can insert two event classes manually: Family Status Change (FSC) and Miscellaneous Status Change (MSC). You can also review and delete any type of unprocessed event with this page.

Note. The BAS Activity Table only displays *unprocessed* events. As soon as PeopleSoft Benefits Administration successfully processes an event, the system *deletes* it from BAS Activity.

Action Source

This identifies whether the event is due to a change in job data, personal data, multiple job flags, or is a passive event. Possible action sources are:

- *Manual*: Manual event.
- *PasBirthDt*: Passive event - birthdate.
- *PasSvcDt*: Passive event - service date.
- *JobChg*: Job data change.
- *MJChg*: Multiple job indicator change.
- *AddressChg*: Address (state and postal) change.

All Jobs

Check this box if the manual event should trigger benefits processing for all possible jobs and not just the specific job (Employment Record number) entered for the event. For example, a manually entered FSC could impact benefits for all jobs.

Note. This option is available if multiple-jobs is enabled.

Event Date

If a job, address, or multiple job change triggers the activity, the event date is the effective date of the change.

If a passive event triggers the activity, the event date is the date on which the limit represented by the event (a limit related to age or years of service, for example) was reached.

The date for a manually entered event defaults when the activity record for the event was inserted into the table through the BenAdmin Activity page. You can change the event data if required.

Event Effseq (event effective sequence)

If there is more than one manual event for an employee for the same effective date, enter unique sequence numbers for each event.

BAS Action

Identifies the PeopleSoft Benefits Administration action associated with this event as defined on the Action Reason Table.

Events triggered by job, address, multiple job indicators, and passive events are assigned codes from the Action Reason table. Manual events are given a code that is selected by the user entering the manual event record.

COBRA Action

Identifies the COBRA action code associated with this event as defined on the Action Reason Table (not entered for a Manual event).

Defining Passive Events

Access the Passive Event Definition page.

Passive Event Definition

Passive Event ID: 1YR

Passive Event Definition

*Status: Active

*Description: One Year of Service

Short Description: 1 Yr Svc

*Passive Event Type: ServiceDt

*Event Classification: 1YR 1 YR of Service Passive Event

COBRA Event Class:

Event Limit - Months: 12 Event Limit - Days: 0

Passive Event Definition page

Note. (USF) Passive event processing functionality is not applicable to most U.S. federal government agencies.

Passive Event Type	Delivered event types include employee birthdate and events based on an employee's service date.
Event Classification	Of the delivered event classes, <i>OE</i> and <i>Snapshot</i> are not available.
Event Limit - Months and Event Limit - Days	Indicate how long after the birthday or service date the event will take place.

Example of Passive Event Definition

You might set up a passive event to determine which employees are eligible for certain benefits once they've worked for your organization for a year. To do this, you'd define a passive event with the service date event type and an Event Limit - Months value of *12*. The event classification for this example could be *MSC* (or it could be a new event classification created specifically to manage this passive event).

After you set up the passive event, the system calculates the difference between your employees' service dates and the process date, and it triggers the event for any employees with a difference of twelve months within the date range you specify on the PeopleSoft Benefits Administration process run control page. The system processes the passive event as an *MSC* event.

Note. Internally, when the PeopleSoft Benefits Administration process runs, it processes passive events by inserting a BAS Activity record for each individual who meets the passive event criteria. From this point, the Activity record is processed like any other event, which means you can extend the passive event concept beyond that which is delivered. Do this by creating your own modified processes that simply insert the required BAS Activity rows.

See Also

[Chapter 9, "Running the PeopleSoft Benefits Administration Process," Reviewing Passive Event Processing History, page 134](#)

Defining Event Rules

This section describes how to:

- Specify basic rules for event classes.
- Define start and end dates for coverage, deductions, and flex credits.

The Event Rules Table components define how events are managed for benefit programs and benefit plan types. You link an event rule ID to each benefit program and benefit plan type your organization offers through the Benefit/Deduction Program Table.

In general, you only link event rules to benefit programs to determine when the benefit program participation takes effect and when flexible credits begin and end.

Set up more complicated event rules up at the plan type level to help the system determine how to process the various classes of events for each plan type you offer.

Note. You set up event rules at the program level by setting up rules for Plan Type 01 (the program level).

See Also

Chapter 6, “Building Automated Benefit Programs,” page 59

Pages Used to Define Event Rules

Page Name	Object Name	Navigation	Usage
Event Rules	BAS_EVENT_RULES1	Set Up HRMS, Product Related, Automated Benefits, Eligibility and Event Rules, Event Rules Table	Specify basic event rules for event classes.
Event Rules - Date Rules	BAS_EVENT_RULES2	Set Up HRMS, Product Related, Automated Benefits, Eligibility and Event Rules, Event Rules Table Click the Date Rules tab to access the Event Rules: Date Rules page.	Define start and end dates for coverage, deductions, and flex credits.
BAS Event Rules Table	RUNCTL_BAS703B	Set Up HRMS, Product Related, Automated Benefits, Reports, Event Rules	Prints event rule definitions.

Specifying Basic Rules for Event Classes

Access the Event Rules page.

Event Rules | **Date Rules** | **Billing Rules**

Event Rules ID: KU1X

Event Rules Find | View All First 1 of 1 Last

***Effective Date:** 01/01/2000 **Status:** Active

***Description:** Medical/Dental/Vision Rules **Short Descr:** Med/Den

Event Class Find | View All First 1 of 5 Last

Event Classification: FSC Family Status Change

☐ Ignore Plan ☒ Pre-enter ☐ Elect Required

☐ Ignore Dep/Ben Edits ☐ Ignore Investment Edits ☒ Provide FlexCR Upon Default ☐ Use History

***Default Method:** Assign Cur Covrg Else Low Opt ***Select Allowed:** Coverage Code + Waive

If currently Enrolled, or not participating

Max Number of Change Levels: 99

Levels of Change w/o Proof: 99

Proof Required at Plan Level: 99

Amt. Proof Required: 99,999,999

If currently Waived

Max Number of Change Levels: 99

Proof Required at Plan Level: 99

Amt. Proof Required: 99,999,999

Self-Service Configuration

☒ Collect Dep/Ben ☐ Collect Fund Allocations

☒ Allow Dep/Ben Additions

Event Rules page

Event Classification

You can have more than one event classification for an event rule to cover all expected contingencies and usages. If the Event Classification is left blank, that row becomes a “wildcard” and is used to manage any event processed by this rule for which no specific event classification behavior has been defined. This wildcard is difficult to troubleshoot because the system provides no indication as to when it was invoked, and thus can lead to unanticipated results. Use the wildcard feature cautiously.

Ignore Plan

When selected, the plan types linked to this event rules ID/event classification combination are unaffected by PeopleSoft Benefits Administration processing.

Use to make changes to plan information without restrictions as to how often or when the changes are made. You can use this option to arrange for specific plan types to have automatic event processing only for major event classifications such as hires, terminations, and open enrollment, while leaving them unaffected by lesser event classifications.

When you select *Ignore Plan*, the system selects and locks Ignore Dependent/Beneficiary Edits and Ignore Investment Edits. The system will also set Select Allowed to *None*, and all Participate and Waive level values to 99.

Ignore Plan does not interfere with eligibility rule processing. It will not enable employees to stay in or enroll in plans for which they are no longer eligible.

If participant plan eligibility does not change, the system simply gives employees their current coverage. But if participant plan eligibility does

change—if employees lose eligibility to their current plan—you need to set a Default Method of *Assign Current Coverage Else Option*, *Assign Current Coverage Else Low Option*, or *Assign Current Coverage Else None*.

With Ignore Plan, the system ignores:

- Change level maximums and proof required for changing levels.
- Plan-specific edits (life insurance settings, individual FSA maximums, vacation limits, and so on).
- Edits on dependent or beneficiary information.
- Edits on investment elections.

The system still:

- Flags errors generated due to invalid setup, such as missing table entries or pay calendars.
- Requires that the option code entered through data entry be a valid choice from the eligible plans on the program.
- Considers the coverage amount for all life and AD/D plans when evaluating coverage group maximums.
- Includes the annual pledge on all FSA plans when evaluating total FSA maximums.

Use Ignore Plan when your automatic benefits processing responsibility has to share (or completely abdicate) responsibility for the processing of certain plan types with an outside or manual process. Don't use it just to suppress the entry of elections. A Select Allowed value of *None*, an appropriate Default Method setting, and the Use History rule are generally sufficient to control employee involvement in benefit elections.

Ignore Dep/Ben Edits (ignore dependent/beneficiary edits)

Skips all checks for the presence of dependents or beneficiaries. It also bypasses all edits on dependents or beneficiaries already present or entered with elections.

Pre-Enter

Populates the PeopleSoft Benefits Administration data entry pages with the participant's current elections for the plan type associated with the event rule. As a result, you can view current elections during data entry and change them as necessary.

Current elections include the option code of the enrolled benefit plan and the coverage code—as well as dependent, beneficiary, and 401(k) investment elections. The system only pre-enters current elections if the participant's current option is in the participant's current eligible list of options.

You should avoid selecting Pre-Enter for plan types 4x (Savings), 6x (FSA), and 9x (Vacation Buy/Sell) during Open Enrollment, since these plans types may legally require positive annual re-enrollment (for example, passively defaulting to an employee's current election is not applicable).

Ignore Investment Edits	Skips all checks for the presence of investments on savings plans. It also bypasses all edits on investment elections already present or entered with elections.
Elect Required (election required)	Notes the absence of elections for this plan type as an error in the Benefits Administration Messages Table.
Provide FlexCR Upon Default (provide flex credit upon default)	Select this check box if you want participants that default into a plan type to still receive credits that are tied to the default plan type. When this check box is cleared for plan types 1x through 3x—plan types 1x through 2x for federal user participants who default into their elections do not receive any credits for those plan types—both general plan type credits and option-based credits. For employees who elect to have excess credits applied to an FSA plan type and who are not enrolled in an FSA plan type and the Default Method field is set to <i>Default Option for Excess Credit</i>, the system will create an enrollment for the employee with a contribution amount equal to the excess credits.
Use History	Reviews the participant's benefit plan option eligibility history and the participant's current benefit plan option eligibility to determine if the employee can change an election. If the lists of eligible options are the same, the participant is not allowed to make plan option changes. This setting is used to "filter out" events that do not result in an opportunity for an employee to change elections. If, after processing, the participant is eligible for new options, PeopleSoft Benefits Administration prepares the event for further processing and enables new enrollment elections. If the participant has lost eligibility for one or more current elections, he or she can make a new election.
Default Method	Indicates what happens when an employee does not choose an election for a given plan type. • <i>Assign Cur Covrg Else Option</i> (assign current coverage else option): Select to assign and continue the participant's current coverage. If participants do not have current coverage, or have lost eligibility to current coverage, they are assigned to the default for the specific plan type, as defined in the Benefit/Deduction Program Table. The participant must be eligible for the current election in order for it to be used as the default. • <i>Assign Cur Covrg Else None</i> (assign current coverage else none): If the employee loses eligibility for the current plan, another plan is not set up to replace the old one. • <i>Assign Cur Covrg Else Low Opt</i> (assign current coverage else low option): Assigns and continues the participant's current coverage. If there is no current coverage, or if the participant has lost eligibility to current coverage, the system assigns the lowest-level option available, as defined on the Benefit/Deduction Program Table. Not recommended for Savings, FSA, and Vacation Buy/Sell plan types.

- *Default to Lowest Elig Option* (default to lowest eligible option): Assigns the lowest level option for which the employee is eligible. Not recommended for Savings, FSA, and Vacation Buy/Sell plan types.
- *Default to Option and Coverage*: Assigns the option marked for default on the Benefit Program Definition page. The participant must be eligible for the option in order for it to be used as the default. Not recommended for Savings, FSA, and Vacation Buy/Sell plan types.
- *Default Option for Excess Credit*: Applicable only to FSA plan types. If the employee has indicated that excess credits should be directed to an FSA enrollment, this rule assigns the option marked for default on the Benefit Program Definition page and sets the annual pledge to the amount of the excess credits. The participant must be eligible for the option in order for it to be used as the default, and excess credits must exist.

Note. During enrollment, the system does not create a zero-dollar annual pledge enrollment when excess credits do not exist and any current FSA enrollment is terminated if not re-elected by the employee.

- *Terminate Coverage*: Inserts a termination entry for the plan type covered by this event rule. Commonly used for FSA and Vacation Buy/Sell plan types, as employees are usually required to re-enroll in them each year or lose coverage.

Select Allowed

Indicates which options an employee may elect from among all available eligible options.

- *All Options*: Select to allow employee to select from any options within the list of eligible options for the event.
- *Coverage Code Only*: Select to allow employees to only change coverage levels (eligible options) within their currently-enrolled benefit plan. (Applies only to the 1x series of plans). If an employee loses eligibility for their current benefit plan, the system automatically overrides this setting and allows “All Options”.

For U.S. users, an FSC event is typically configured Select Allowed with “Coverage Code Only” to ensure that the employee can change the level of coverage, but not change plans. (This is consistent with the IRS section 125 regulations regarding life events.) Typical examples of an FSC event include marriage, birth of a child, death of a spouse, and divorce. In each of these cases, the employee may need to raise or lower their coverage in their current health plan. For example, if an employee gets married, and wants to cover the new spouse, a change of coverage code from “Single” to “Employee + Spouse” is required.

- *Coverage Code + Waive*: Select to allow employees to only change coverage levels (eligible options), including electing *Waive*, within their currently-enrolled benefit plan. However, if the employee’s current election is a waive of the plan type, they may elect any eligible option within any benefit plan.

For example, suppose that an employee has “Single” coverage and gets married. The new spouse has health coverage through their employer, but the employee and spouse decide that covering both individuals under the spouse’s benefit plan is a better choice. In this case, the employee is allowed to waive their current coverage because their spouse will be adding them to their coverage.

Suppose that our example employee is married, and at the last Open Enrollment he waived health coverage because he was covered under his spouse’s plan. Now suppose that the spouse terminates employment, thereby losing eligibility for the plan that covered both the spouse and the employee. In this situation (which is also considered an FSC event by most customers), the employee is allowed to enroll in any eligible option in the plan type.

- *None*: Select to disallow employees from making any changes to their elected option (unless eligibility for their current option or plan has been lost, in which case the system automatically overrides this setting and will allow “All Options”).

Participate and Waive

Enter rules that apply to an employee’s participation in a benefit option following an event. These rules commonly apply to Life & AD/D and Disability plan types and are used to indicate the types of changes an employee can make. Two related sets of rules are available, depending on whether the employee is currently (or newly) participating in a plan, or is currently waived (“opted out”) and wants to now elect.

- *Max Number of Change Levels*: Indicates how many levels a participant can change, or “jump.”
- *Levels of Change w/o Proof*: Indicates how many levels a participant can change without proof of good health or insurability.
- *Proof Required at Plan Level*: Indicates the initial level at which proof of good health or insurability is required.
- *Amt Proof Required*: Enter the amount of coverage above which proof of good health or insurability is required.

Self-Service Configuration

Define rules for the information displayed on the PeopleSoft eBenefits application pages.

- *Collect Dep/Ben* (collect dependent/beneficiary coverage): Displays dependent/beneficiary grids and collects dependent/beneficiary elections. For 1x Health plans on the enrollment form, the system collects elections at the plan level. The system then derives the coverage code based on the dependents covered.

When cleared, the system collects elections at the coverage code level for 1x Health plans on the enrollment form.

- *Allow Dep/Ben Additions* (allow dependent/beneficiary additions). Determines whether an employee can add new dependents through the eBenefits enrollment process.

- *Collect Fund Allocations*: Displays investments and collects fund allocations for savings plans.

Applying Defaults

The system applies defaults during the PeopleSoft Benefits Administration process as it validates, loads, or finalizes participant elections. When you post a participant's election information for Open Enrollment and other events, you might not have elections for all plan types. Plan type defaults are used as substitutes for a participant's election when you finalize the event.

If you select *Finalize* for the participant, election defaults are validated and loaded for the plan types without elections and the plan types that are still in error.

Participants who have reached a process status of at least *Prepared* are finalized unless PeopleSoft Benefits Administration encounters major errors in the final preparation. The finalizing of the process would be prevented, for example, if PeopleSoft Benefits Administration encounters pay calendar issues while attempting to determine deduction end dates.

Defining Start and End Dates for Coverage, Deductions, and Flex Credits

Access the Date Rules page.

The screenshot displays the 'Date Rules' page in the PeopleSoft interface. At the top, there are tabs for 'Event Rules', 'Date Rules', and 'Billing Rules'. The 'Event Rules' tab is selected, showing details for Event Rules ID 'KU1X'. The 'Effective Date' is '01/01/2000' and the 'Status' is 'Active'. The 'Description' is 'Medical/Dental/Vision Rules'. Below this, the 'Event Class' section shows 'Event Classification' as 'FSC'. The 'Coverage Begins' section includes a dropdown menu set to 'On the Event Date', a checkbox for 'Use Exist?' which is unchecked, and input fields for 'Days' (0) and 'Months' (0). The 'Coverage Ends' section includes a dropdown menu set to 'On the Event Date', and input fields for 'Grace Period Days' (0) and 'Grace Period Months' (0). The 'Deduction + Flex Credits Begin' section has a dropdown menu set to 'On CovgBegin Date'. The 'Deduction + Flex Credits End' section has a dropdown menu set to 'On Covg End Date'.

Date Rules page

Coverage Begins

Indicate when coverage will begin following an event.

- *Month-Begin After Event Dt* (month begin after event date): Coverage begins on the first day of the following month. If the event date is equal to the first of the month, coverage still begins on the first day of the following month.

- *Month-Begin On/Aft Event Dt* (month begin on/after event date): If the event date equals the first of the month, coverage begins on the event date; otherwise, coverage begins on the first day of the following month.
- *On Pay Pd Begin after Event Dt* (on pay period begin after event date): Coverage begins on the first day of the pay period following the event date. If the event date equals the first day of the pay period, coverage begins on the event date.
- *On the Event Date*: Coverage begins on the day of the event.

Waiting Period

To calculate the date that coverage begins when there is a waiting period, the system:

1. Begins with the event date.
2. Adds the number of months.
3. Adds the number of days.
4. Applies the Coverage Begins rule to the resulting date.

Use Exist?

Looks for any waiting periods on prior events. If selected, and a waiting period is found, the system honors the prior event's waiting period if the prior event's coverage begins date is later than the coverage begins date normally associated with the current event.

For example, new hires have a three-month period before their benefits become effective. Under this rule, an employee hired on 11/1 has a health benefit election with a coverage begin date and deduction begin date of 2/1.

Now, let's say you've scheduled an Open Enrollment for January 1. During that time, the employee was processed for an Open Enrollment event. If the event rules for the Open Enrollment specify that the coverage begin date equals the event date, January 1, the employee would have a health benefit election posted with a coverage and deduction begin date that is earlier than the health benefit coverage and deduction begin date the employee originally received when hired.

Selecting Use Exist? for the OE event rule would prevent this from happening: the system would preserve the waiting period from the employee's previous HIR (Hire) event.

Coverage Ends

The Coverage End Date is really only used when an existing election, within a plan type, is truly terminating and not simply being superseded by another election (benefit option). In this case, the system inserts a new election row with *Coverage Election* set to 'Terminated.' If you use either the *On Month - End After Event Date* or the *On Pay Pd - End After Event Date* rules, the Coverage Begin Date of this new row is one day after the calculated Coverage End Date for the current election. This occurs because this is the first date for which coverage no longer exists.

Grace Period

To establish a grace period before coverage is terminated, enter the appropriate number days and months that the system uses to calculate the resulting end date in a manner similar to Waiting Period.

**Deduction + Flex Credits
Begin**

Indicate when deductions and flexible benefit credits should be taken:

- *1st Full PayPd After Covg BgDt* (first full pay period after coverage begin date): Credits and deductions begin on the first day of the pay period following the coverage begin date—regardless of when the coverage begin day occurs within the pay period.
- *On CovgBegin Date* (on coverage begin date): Credits and deductions begin on the date that benefit coverage for the plan type begins.
- *Pay Pd Containing Covg BgDt* (pay period containing coverage begin date): Credits and deductions begin on the first day of the pay period containing the coverage begin date—regardless of when the coverage begin date occurs within the pay period.
- *Pay Pd Preceding Covg BgDt* (pay period preceding coverage begin date): Credits and deductions begin on the first day of the full pay period that precedes the coverage begin date.

**Deduction + Flex Credits
End**

When the system ends deductions and flexible credits for a participant's benefit plan options, a new row is inserted with Coverage Election set to *Terminated*.

Understanding Event Rule Evaluation

PeopleSoft Benefits Administration processes all participant events using the appropriate event rule/event classification rules for each covered plan type. Depending on the results of this evaluation, PeopleSoft Benefits Administration either sets the participant event up for further processing or closes the event.

To evaluate events, the system runs through the following sequence for each plan type:

1. PeopleSoft Benefits Administration uses the eligibility rules you have defined to determine the participant's eligibility as of the effective date of the event. For example, if a participant has moved from full-time to part-time status, he or she might be ineligible for current elections and need to select from part-time plan options.
2. If the event causes the participant to lose eligibility for current elections, the event is prepared for further processing, regardless of how you defined your event rule. At a minimum, the system terminates the participant's newly ineligible elections. If the participant selects a new election within the plan type, the prior election is replaced as of the new election coverage and deduction begin dates.
3. If the event rule has Use History selected, the eligible options as of the event date are compared to the prior eligible options. If the participant has *gained* eligibility to new options, PeopleSoft Benefits Administration prepares the event for further processing and enables new enrollment elections.

If the event rule does not have Use History selected, the Selection Allowed setting controls further processing of the event. For example, for a family status change, plan type 10 (Medical), Select Allowed could be set to change the coverage code only. The options prepared by the system are only those within the same benefit plan as the current enrollment.

Loss of eligibility to a current election takes priority over event rule selection for both Use History and Selection Allowed. The system's selection for Use History takes priority over Selection Allowed.

Recommended Event Rule Definitions for FSC and HIR Events

Fields	FSC Event Class (Commonly used for plan types 1x-3x, 6x)	HIR Event Class
Pre-Enter	Yes	No
Use History	No—You typically want the event to be controlled by Selection Allowed.	No If your organization uses multiple jobs processing, the HIR event typically set up as a Use History event, and the default method is set to one of the Current/Else settings.
Elect Required	Depends on company policy.	Depends on company policy.
Provide Flex Credits Upon Default	Depends on company policy.	Depends on company policy.
Default Method	Assign Cur Covrg Else Option or Assign Cur Covrg Else Low Option are typical selections.	Default to Lowest Elig Option or Default to Option and Coverage are typical selections. If your organization processes employees with multiple jobs, use Current Else Low or Current Else Option.
Selections Allowed	Coverage Code Only is the typical selection for plan type 1x. For plan types 2x, 3x, and 6x, you use All Options.	All Options
Participate Max Number of Change Levels	Try following the same setting as Open Enrollment. This maximum number varies by plan type and defaults to 99.	Not applicable for new hires—no current elections. Defaults to 99. You can set levels for hire; the system restricts what employees can choose.
Levels of Change without Proof	You might follow the same setting as Open Enrollment. This value varies by plan type and defaults to 99.	Not applicable for new hires—no current elections.
Proof Required at Plan Level	You might follow the same setting as Open Enrollment. This value varies by plan type and defaults to 99. Proof required at plan level is typically be used for life & AD/D plans.	Follow the same setting as Open Enrollment.

Fields	FSC Event Class (Commonly used for plan types 1x-3x, 6x)	HIR Event Class
Amt. Proof Required	Used for life & AD/D plans—limit is linked to coverage amounts. The same limit by plan type is used across all event classes.	Same as Open Enrollment.
Waive Max Number of Change Levels	Follow same selection as Open Enrollment.	Not applicable for new hires—no current elections (including waive).
Proof Required at Plan Level	Follow same selection as Open Enrollment.	Follow same selection as Open Enrollment.
Amt. Proof Required	Follow same selection as Open Enrollment.	Follow same selection as Open Enrollment.
Coverage Begins On Event Dt / On Month Begin After Event Dt / On Pay Pd Begin After Event Dt	Depends on company policy. For FSC events, On Event Dt is a common selection.	Depends on company policy.
Wait Period Days / Wait Period Months	On Event Dt is a common selection.	Depends on company policy.
Coverage Ends On Event Date / On Month Begin After Event Date / On Pay Pd Begin After Event Date	Depends on company policy.	Not applicable for new hires. Defaults to On Event Date.
Grace Period Days / Grace Period Months	Depends on company policy.	Not applicable for new hires. Defaults to 0 (zero).

Fields	FSC Event Class (Commonly used for plan types 1x-3x, 6x)	HIR Event Class
Deduction + Flex Credits Begin First Full Pay Pd After Covg BgDt / Pay Pd Containing Covg BgD On Coverage Begin Date	Depends on company policy.	You should not use Pay Period Containing for HIR events. This can result in enrollments where the benefits coverage begin date precedes the hire date. Use On the Coverage Begin Date instead.
Deduction + Flex Credits End First Full Pay Pd After Coverage Event Dt / Pay Pd Containing Event Date	Depends on company policy.	Depends on company policy.

Recommended Event Rule Definitions for MSC, OE, and SNP Events

Fields	MSC Event Class	OE Event Class	SNP Event Class
Pre-Enter	Yes—common for MSC events, saves data entry effort.	Yes—common for OE events, saves data entry effort.	No
Use History	Yes—common for MSC events.	No	No
Elect Required	Depends on company policy.	Depends on company policy.	No
Provide Flex Credits Upon Default	Depends on company policy.	Depends on company policy.	Yes
Default Method	Assign Cur Covrg Else Option or Assign Cur Covrg Else Low Option are common selections.	Assign Cur Covrg Else Option or Assign Cur Covrg Else Low Option are common selections, except for plan types 6x and 9x, which use Terminate Coverage.	Assign Current Coverage else Low Option.
Selections Allowed	None—Use History controls whether the enrollment is allowed for event.	All options.	All options.

Fields	MSC Event Class	OE Event Class	SNP Event Class
Participate Max Number of Change Levels	You might follow the same setting as Open Enrollment. This maximum number varies by plan type and defaults to 99.	This maximum varies by plan type and defaults to 99.	This maximum number varies by plan type and defaults to 99.
Levels of Change Without Proof	You might follow the same setting as Open Enrollment. This value varies by plan type and defaults to 99.	This value varies by plan type and defaults to 99.	This value varies by plan type and defaults to 99.
Proof Required at Plan Level	You might follow the same setting as Open Enrollment. This value varies by plan type and defaults to 99. Proof required at plan level is commonly used for life & AD/D plans.	This value varies by plan type and defaults to 99. Proof required at plan level is commonly used for life & AD/D plans.	This value varies by plan type and defaults to 99.
Amt. Proof Required	Used for life & AD/D plans—limit is linked to coverage amounts. The same limit by plan type is commonly used across all event classes.	Used for Life & AD/D plans—limit is linked to coverage amounts. The same limit by plan type is commonly used across all event classes.	Used for life & AD/D plans—limit is linked to coverage amounts. The same limit by plan type is commonly used across all event classes.
Waive Max Number of Change Levels	Follow same selection as Open Enrollment.	This maximum varies by plan type and defaults to 99.	This maximum varies by plan type and defaults to 99.
Proof Required at Plan Level	Follow same selection as Open Enrollment.	This value varies by plan type and defaults to 99. Proof required at plan level is typically used for life & AD/D plans.	This value varies by plan type and defaults to 99. Proof required at plan level is typically used for life & AD/D plans.
Amt. Proof Required	Follow same selection as Open Enrollment.	Used for life & AD/D plans—limit is linked to coverage amounts. The same limit by plan type is typically used across all event classes.	Used for life & AD/D plans—limit is linked to coverage amounts. The same limit by plan type is typically used across all event classes.

Fields	MSC Event Class	OE Event Class	SNP Event Class
Coverage Begins On Event Date / On Month Begin After the Event Dt / On Pay Pd Begin After the Event Dt	Depends on company policy. For MSC events, On Event Date is the common selection.	On Event Date is the common selection for OE events. The event date for OE events is equal to the period begin date for the Open Enrollment definition.	On Event Date is the common selection for SNP events. The event date for SNP events is equal to the period begin date for the Snapshot definition.
Wait Period Days / Wait Period Months	On Event Date is a common selection for FSC events.	On Event Date is a common selection for OE events.	Zero days and months.
Coverage Ends On Event Date / On Month Begin After the Event Dt / On Pay Pd Begin After the Event Dt	Depends on company policy.	Depends on company policy.	Depends on company policy.
Grace Period Days / Grace Period Months	On Event Date is a common selection for FSC events.	On Event Date is a common selection for OE events.	On Event Date is a common selection for SNP events.
Deduction + Flex Credits Begin First Full Pay Pd After Covg BgDt / Pay Pd Containing Covg BgDt On Coverage Begin Date	Depends on company policy.	Depends on company policy.	First full pay period after Coverage Begin Date.
Deduction + Flex Credits End First Full Pay Pd After Covg BgDt / Pay Pd Containing Covg BgDt	Depends on company policy.	Depends on company policy.	First Full Pay Period After Coverage Begin Date.

Recommended Event Rule Definitions for TER Events

Fields	TER Event Class (Assuming the participant is not eligible for any benefit programs. COBRA enrollment, in this example, is managed outside of PeopleSoft Benefits Administration.)
Pre-Enter	No
Use History	No
Elect Required	No
Provide Flex Credits Upon Default	No
Default Method	Terminate Coverage
Selections Allowed	None
Participate Max Number of Change Levels	Not applicable, default to 99.
Levels of Change without Proof	Not applicable, default to 99.
Proof Required at Plan Level	Not applicable, default to 99.
Amt. Proof Required	Not applicable, default to 99,999,999.
Waive Max Number of Change Levels	Not applicable, default to 99.
Proof Required at Plan Level	Not applicable, default to 99.
Amt. Proof Required	Not applicable, default to 99,999,999.

Fields	TER Event Class (Assuming the participant is not eligible for any benefit programs. COBRA enrollment, in this example, is managed outside of PeopleSoft Benefits Administration.)
Coverage Begins On Event Date / On Month Begin After the Event Dt / On Pay Pd Begin After the Event Dt On Coverage Begin Date	Not applicable, default to On Event Date.
Wait Period Days / Wait Period Months	Not applicable, default to 0 (zero).
Coverage Ends On Event Date / On Month Begin After the Event Dt / On Pay Pd Begin After the Event Dt	Depends on company policy. Selection is typically based on benefit claims processing agreements with carriers and participants.
Grace Period Days / Grace Period Months	Depends on company policy.
Deduction + Flex Credits Begin First Full Pay Pd After Covg BgDt / Pay Pd Containing Covg BgDt	Not applicable; default to 1st Full Pay Pd After Covg BgDt.
Deduction + Flex Credits End First Full Pay Pd After Covg BgDt / Pay Pd Containing Covg BgDt	Depends on company policy.

See Also

Chapter 5, “Creating Event Rules,” Pages Used to Define Event Rules, page 38

Defining Rules for Benefits Billing

This section describes how to:

- Set up Benefits Billing enrollments.
- Understand event processing for Benefits Billing.
- Remove participants from Benefits Billing.

Page Used to Define Rules for Benefits Billing

Page Name	Object Name	Navigation	Usage
Billing Rules	BAS_EVENT_RULES3	Set Up HRMS, Product Related, Automated Benefits, Eligibility and Event Rules, Event Rules Table Click the Billing Rules tab to access the Event Rules: Billing Rules page.	Define rules for Benefits Billing enrollments.
Billing Event RLs (billing event rules)	RUNCTL_BAS703B	Set Up HRMS, Product Related, Automated Benefits, Reports, Event Rules Billing	List the parameters in which billing enrollments are created or updated during the PeopleSoft Benefits Administration process.

Setting Up Benefits Billing Enrollments

Access the Billing Rules page.

The screenshot displays the 'Billing Rules' page in a web-based application. At the top, there are three tabs: 'Event Rules', 'Date Rules', and 'Billing Rules', with 'Billing Rules' being the active tab. Below the tabs, the 'Event Rules ID' is set to 'KU1X'. The 'Event Rules' section contains fields for 'Effective Date' (01/01/2000), 'Status' (Active), and 'Description' (Medical/Dental/Vision Rules). The 'Event Class' section shows 'Event Classification' as 'FSC'. The 'Rate Qualifier' section has two main options: 'Percent Calculation' (selected) and 'Flat Amount of' (0.00). The 'Billing Takes Effect' section has two options: 'On the Event Date' (selected) and '1st Full Bill Pd After Event'. The page also includes navigation links like 'Find', 'View All', 'First', 'Last', and '1 of 1'.

Billing Rules page

Event Classification	You can define a different set of Benefits Billing enrollment event rules for each event classification.
Rate Qualifier	Determines how to modify the deduction calculation for billing purposes. If you enter both a percent calculation and a flat amount, the system adds them together to determine the total charge.
Billing Takes Effect	If you selected <i>Start Billing</i> or <i>End Billing</i> , tell the system when the billing action takes effect.

Understanding Event Processing for Benefits Billing

The application of event rules for Benefits Billing enrollment is overridden in certain situations.

- The system does not start billing if the employee is not enrolled in a plan or has waived coverage.
- The system does not insert a billing termination if the employee is not actively enrolled in billing to begin with.
- The system terminates active billing if the employee loses or waives coverage, regardless of the settings on this page.

If none of these situations applies, the system inserts a record into the Billing Enrollment tables and sets the:

- EmplID field to the employee's ID.
- Employee Record Number field to the employee's employment record number.
- Plan Type field to the plan type to bill.
- COBRA Event ID field to zero.
- Billing Status field to Active.
- Billing Reason field to Ben Admin.

The system overlays existing billing enrollments if it encounters duplicate effective dates and inserts new active billing records even if the employee is already being billed. The system will carry forward a hold status from a previous billing enrollment.

Billing records are inserted during the close and finalization of the event. The system backs out billing records if PeopleSoft Benefits Administration reprocesses an event to a point prior to the insertion of the billing enrollments. Billing records *are not* inserted for general deductions, benefit programs, leave plans, or vacation buy/sell plans (plan types 00, 01, 5x and 9x).

The system inserts flat amount billing rows for Savings, FSA, Retirement, and Pension plans (plan types 4x, 6x, 7x and 8x). The way the system calculates deductions for these plans is not compatible with billing where there are no gross wages and no updating of payroll deduction balances. The system issues a message to update the billing enrollments.

Removing Participants from Benefits Billing

The system deactivates Billing Enrollment records if:

- The Effect on Billing field on the Billing Rules page is End Billing.
- The employee loses eligibility for the plan type.

- The employee waives or terminates coverage.

The system inserts a new enrollment row for the participant when the billing status is set to *Inactive* and the effective date is based on the date set for the Billing Ends field. If eligibility is lost or coverage waived, the system sets the billing end date to be the date coverage ends, unless there are specific instructions not to do so.

The system does not insert an inactive Benefits Billing enrollment record if the employee is already designated inactive for billing.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Setting Up Additional Human Resources Base Benefits Features,” Setting Up Benefits Billing

Understanding Event Processing for COBRA Administration

COBRA Administration uses the PeopleSoft Benefits Administration processes to identify and process:

- Initial COBRA events, which provide *initial* COBRA coverage to qualified COBRA participants and their dependents.
- Secondary COBRA events, which *extend coverage* for COBRA participants and their dependents.

The initiation of a COBRA event differs according to your current implementation:

- If you are currently working only with the Base Benefits business process, the COBRA event is initiated by online PeopleCode.
- With PeopleSoft Benefits Administration, the COBRA event is initiated by PeopleSoft Benefits Administration when a recognized COBRA action event is finalized.

The only exception to this rule is the Overage Dependent event, which is initiated by the COBRA process for both the Base Benefits business process and PeopleSoft Benefits Administration.

The following table describes:

- Qualified COBRA events delivered by PeopleSoft.
- Actions that trigger PeopleSoft Benefits Administration to recognize them as qualified COBRA events.
- Potential COBRA beneficiaries of the events.

Qualifying COBRA Event	User Action Trigger	Potential COBRA Beneficiaries
Loss of eligibility due to termination	Employee status changes to terminated or suspended.	Employee and dependents
Loss of eligibility due to reduction in hours	Employee status remains active; Standard Hours decreases.	Employee and dependents

Qualifying COBRA Event	User Action Trigger	Potential COBRA Beneficiaries
Loss of eligibility due to retirement	Employee Status changes to retired.	Employee and dependents
Loss of eligibility due to military leave	Leave of Absence/Military Leave action/action reason entered for employee.	Employee and dependents
Death of employee	Employee status changes to deceased or FSC/DEA entered as action/reason code on Job Table.	All dependents
Divorce	Change in marital status of employee to divorced; change in status of spouse to ex-spouse. Family Status Change/Divorce action/action reason entered for employee.	Spouse
Marriage of dependent	Marital status of dependent changes to married. Family Status Change/Married Dependents action/action reason entered for employee.	Individual dependent
Dependent reaches coverage age limit (overage dependent)	Not identified by PeopleSoft Benefits Administration. (Benefits Administration does not automate “passage of time” events for dependents.) You must run the COBRA process to identify overage dependents.	Individual dependent
Employee becomes entitled to Medicare	Medicare Entitlement Date is reached. Family Status Change/Medicare Entitlement action/action reason is entered.	All dependents

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Understanding Event Maintenance and COBRA Administration, page 172

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Understanding the PeopleSoft Benefits Administration Process, page 97

(USF) Setting Up Multiple, Concurrent Open Seasons

In the federal government, Open Seasons for various plan types are usually scheduled independently of each other, and their solicitation periods often overlap. In other words, a FEGLI Open Season may begin after a FEHB Open Season solicitation period has started.

In PeopleSoft Benefits Administration for U.S. Federal Government, the ability to successfully run multiple, concurrent Open Enrollment processes depends upon two fields: Event Class and Event Rules ID.

To set up multiple, concurrent open seasons:

1. Define Open Enrollment event classes for each open season scheduled for your employees on the BenAdmin Event Class Table Page.
2. Define Open Enrollment processes for each scheduled open season and link to them the appropriate Open Season Event Classes. Use the Open Enrollment Definitions page.
3. Define individual event rule IDs for each plan type available to your employees. Use the Event Rules page.
4. To each event rule ID, associate the *entire set* of Open Enrollment event classes you defined in Step 1 using the Date Rules page.
5. For each event rule ID, use Ignore Plan and Default Method functionality to disable PeopleSoft Benefits Administration processing for all event classes linked to open seasons for plan types other than the one linked to the event rule ID.

For example, if an event rule ID is associated with the FEHB plan type, select Ignore Plan for all event classes *not* associated with FEHB open season events. Use the proper default method to ensure that your employees are not automatically moved in and out of plans that are not part of the open season. The suggested default method is Assign Current Coverage Else None.

6. Once you've finished defining your event rule IDs, link them to their corresponding plan types using the Benefit Program page. Place FEHB event rule IDs with FEHB plan types, TSP event rule IDs with TSP plan types, and so on.
7. Run Open Enrollment processes as planned for your various open season events.

If you set up the system correctly, Open Enrollment for a FEGLI open season only processes plan types linked to the FEGLI event rule ID, Open Enrollment for a TSP open season only processes plan types linked to a TSP event rule ID, and so on. Your Open Enrollment processes can run concurrently as long as each process is associated with a different plan type or set of plan types.

CHAPTER 6

Building Automated Benefit Programs

This chapter provides an overview of benefits programs and discusses how to:

- Build benefit programs with the Benefit Program Table.
- Work with flexible credits.
- Set up cross-plan validation.

Understanding Benefit Programs

Use the Benefit Program Table to bring together all of the information that relates to a benefit program and to set up your benefit programs for automatic enrollment processing.

First, build the foundation by setting up base benefit information:

1. Define benefit deductions using the Deduction Table - Setup page.
2. Identify benefit plans using the Benefit Plan Table page.
3. Identify benefit providers using the Provider and Vendor Table - Vendor Information page.
4. Define benefit coverage using the Coverage Codes - Coverage Code Tbl page.
5. Establish rate tables using the Age-Graded Rate Table page, the Salary Rate Table page, the Service Rate Table page, and the Flat Rate Table page.
6. Establish calculation rules using the Calculation Rules Table - Calculation Rules page.

Next, build your Automated Benefits program:

1. Define the benefit program using the Benefit Program Table pages.
2. Link your plan types and options.
3. Attach event and eligibility rules.
4. Define costs and credits.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Setting Up Core Human Resources Base Benefits Tables,” Setting Up Deduction Codes

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Setting Up Benefit Plans”

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Setting Up Core Human Resources Base Benefits Tables,” Setting Up Rates and Premium Limits

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Setting Up Core Human Resources Base Benefits Tables,” Setting Up Calculation Rules

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Vendors”

Building Benefit Programs with the Benefit Program Table

In this section, we discuss building benefit programs and how to:

- Define benefit programs.
- Set up plan types and options.
- Calculate costs and credits.

Understanding Building Benefit Programs With the Benefit Program Table

Building benefit programs through PeopleSoft Benefits Administration is the same process as with the base benefit process. When you create a benefit program through PeopleSoft Benefits Administration, the program type will be *Automated* and a number of fields will be available for use that would otherwise (in the case of a *Manual* benefit program) be closed to the entry of data.

Important! If you’re planning to set up an Automated benefit program that will be used for automatic benefits eligibility and enrollment processing, you must go to Installation Table - Products and select PeopleSoft Benefits Administration before creating the program. You can’t create an Automated benefits program until Benefits Administration is selected.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Building Base Benefit Programs”

Pages Used to Build the Benefit Program Table

Page Name	Object Name	Navigation	Usage
Benefit Program Table - Benefit Program	BEN_PROG_DEFN1	Set Up HRMS, Product Related, Base Benefits, Program Structure, Benefit Program Table	Define basic benefit program information.
Benefit Program Table - Plan Type and Option	BEN_PROG_DEFN2	Set Up HRMS, Product Related, Base Benefits, Program Structure, Benefit Program Table Click the Plan Type and Option tab.	Link plan types to the benefit program and add important information about plan types, including event and eligibility rules.
Benefit Program Table - Cost	BEN_PROG_DEFN3	Set Up HRMS, Product Related, Base Benefits, Program Structure, Benefit Program Table Click the Cost tab.	Link a benefit program and plan type to rate and calculation rules.
Benefit Program (Options) Table	RUNCTL_BAS_PGM	Set Up HRMS, Product Related, Automated Benefits, Reports, Benefit Program/Plan/Options	For a specified benefit program, print program-level information (effective date and status, program type, age criteria, COBRA, FMLA, and FSA parameters and self-service configuration) along with the plan- and option-level structure (event rules, eligibility rules, coverage levels and deduction codes).
Benefit Program (Cost) Table	RUNCTL_BAS_PGM	Set Up HRMS, Product Related, Automated Benefits, Reports, Benefit Program Costs	For a specified benefit program, prints the program description along with the cost and credit structure for all of the offered options (deduction and earnings codes, rate information, and calculation rules).

Defining the Benefit Program

Access the Benefit Program Table - Benefit Program page.

Benefit Program		Plan Type and Option		Cost	
Benefit Program:	KU1		Status as of Effective Date:	Active	
Effective Date:	01/01/2000		Program Type:	Automated	
*Description:	GBI US Fulltime Benefit Pgm		Currency Code:	USD	
Short Description:	GBI US FT				
Dependent Limits Dependent Age Limit: 19 Student Age Limit: 24 ☒ Exclude Disabled from Age Lmt. ☒ Dep Ineligible if Married			Benefits Administration Apply Excess Credits to: C Cash		
COBRA COBRA Surcharge %: 2 COBRA Disabled Surcharge %: 50			FSA Flexible Spending Acct Run ID: KU1 FSA US FSA Minimum Check Amount: 5.00 FSA Maximum Annual Pledge: 7000.00		
FMLA FMLA Plan ID: KUF Roll-Fwd			Self-Service Configuration ☒ Show Credits on Enrollment Form ☐ Include Can Sales Tax on Form Cost Freq on Enrollment Form: Annual Handbook URL ID:		

Benefit Program Table — Benefit Program page

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Building Base Benefit Programs”

Setting Up Plan Types and Options

Access the Benefits Program Table — Plan Type and Options page.

Benefit Program: KU1 Effective Date: 01/01/2000

Plan Type Find | View All First 12 of 25 Last

*Plan Type: 25 Dependent Life Minimum Annual Contribution: 0.00 + -

DispPlnSeq: 25 Maximum Annual Contribution: 0.00

Event Rules ID: KU2X Life and ADD Event Rules ☐ HIPAA Plan

Waive Coverage: Y Always Allowed ☐ COBRA Plan Load Cross Plan Values

Self-Service Configuration

Option Customize | Find | View All First 1-5 of 5 Last

Eligibility Cross Plan

Optn ID	*Optn Type	Benefit Plan	Covrg Code	Deductn Cd	Option Code	Default Option	Opt Level	Option Seq	Geog Locn	Elig ID		
1	W				W	☒		1				+ -
2	O	KUDLF4		KUDLF9	1	☐	1	2		KNUL		+ -
5	O	KUDLFE		KUDLFE	2	☐	2	3		KNUL		+ -
62	O	KUDLFS		KUDLFS	3	☐	2	4		KNUL		+ -
76	O	KUDLFP		KUDLFS	4	☐	2	5		KNUL		+ -

Benefits Program Table — Plan Type and Option page

Use the Benefit Program Table - Plan Type and Option page to set up the basic plan types for your benefit program.

The table below displays the field requirements for the Plan Type level of the Plan Type and Option page for the Benefit Program Row (*Plan Type 01*) and the Benefit Plan rows (*Plan Types 1x-9x*).

Field	Values	Values	Values
Plan Type	01	1-5x, 7-9x	6x
Display Sequence	Required, will default to <i>Plan Type</i> . Must be unique within the benefit program.	Required, will default to <i>Plan Type</i> . Must be unique within the benefit program.	Required, will default to <i>Plan Type</i> . Must be unique within the benefit program.
Event Rules ID	Required	Required	Required
Min Annual Contribution	Not available for selection	Not available for selection	Allowed

Field	Values	Values	Values
Max Annual Contribution	Not available for selection	Not available for selection	Allowed
Waive Coverage	Not available for selection	Allowed, but will default to <i>N</i> —Not allowed.	Allowed, but will default to <i>N</i> —Not allowed.

After you set up a plan type on the Plan Type and Option page, select the plan options that you want to associate with the Plan Type.

Associating Plan Options With Plan Types

Use the Benefit Program Table - Plan Type and Option page, and the Eligibility tab on the Options grid, to set up the options within a plan type.

When you create a new option row using the Insert Row button, the system automatically assigns the option a unique Option ID value. You may not update this value.

The first value that you enter for a new option row is the Option Type. Choose from one of the following valid values:

Values	Plan Type
P (program)	Required for automated benefit programs. It is allowed for the Benefit Program Row (plan type <i>01</i>) only, and only one is allowed per benefit program.
G (general credit)	Optional, allowed for most plan types except 4x-9x. Only one allowed per plan type.
O (option)	At least one is required per plan type except for the Benefit Program Row (plan type <i>01</i>), where it is not allowed.
W (waive)	Only one allowed per plan type. Follows the waive coverage rule setup at the plan type level.

Note. The manner in which you fill out the rest of a given option row depends upon the plan type the row belongs to and the Option Type of that row.

Field Requirements for the Option Grid by Plan and Option Type

Field	Values	Values	Values	Values
Option Type	<i>P</i> -Program	<i>G</i> -General Credit	<i>W</i> - Waive Controlled by waive coverage.	<i>O</i> -Option
Plan Type	01	01–3x	1x–9x	1x–9x
Benefit Plan	Not allowed	Required for plan types 2x–3x.	Required for plan types 2x–3x, when you want a credit for the waive election. Not allowed for other plan types.	Required
Coverage Code	Not allowed	Not allowed	Not allowed	Required for plan type 1x. Not allowed for other plan types.
Default Option Indicator	Not allowed	Not allowed	Allowed	Allowed for plan types 1x–3x, 5x, 7x, and 8x. For 2x, you cannot define options that require coverage to be specified at the employee level as default options. Only the Waive option is allowed as default for plan types 4x, 6x, and 9x. Options requiring proof are not allowed as defaults.
Deduction Code	Not allowed	Required	Required for plan types 1x–3x, if you want a credit for the waive election. Not allowed for other plan types.	Required
Option Sequence	Required	Required	Required	Required

Field	Values	Values	Values	Values
Option Code	Not allowed	Not allowed	Required	Required
Option Level	Not allowed	Not allowed	Not allowed	Required
Geographic Location Table ID	Allowed	Not allowed	Not allowed	Allowed
Eligibility Rules ID	Required	Not allowed	Not allowed	Required

Option Type Designations Allowed Per Plan Type

Plan Type	Option Type Allowed
01 (Benefit Program)	<i>G, P</i>
1x - 3x	<i>G, W, O</i>
4x - 9x	<i>W, O</i>

Setting Up the Benefit Program Row (Plan Type 01)

Access the Benefit Program Table - Plan Type and Option: Eligibility page.

A Benefit Program Row is required for all automated Benefit Programs. The eligibility rules established for plan type 01 govern the entire benefit program.

Calculating Costs and Credits

Access the Benefit Program Table - Cost page.

The screenshot displays the 'Cost' page within the PeopleSoft Benefits Administration interface. At the top, there are tabs for 'Benefit Program', 'Plan Type and Option', and 'Cost'. The 'Benefit Program' is set to 'KU1' and the 'Effective Date' is '01/01/2000'. Below this, the 'Plan Type' section shows '10 Medical'. The 'Option' section shows 'Option ID: 1' and 'Option Type: G'. The 'Cost' section contains a table with the following data:

Cost Type	Cost ID	Rate Type	Rate TblID	Earn Code	Calc TblID
Credit	3	Flat	KFMX	C10	Med Cred

Navigation controls for each section include 'Find', 'View All', 'First', and 'Last' buttons. The 'Cost' section also includes '+' and '-' buttons for adding or removing rows.

Benefit Program Table — Cost page

Cost Type

Each Option can have one price element defined, while Options and General Credits can have multiple credit elements defined. Select from the following values:

Price: The system calculates deductions for employees who select this option according to the Deduction Code that you identify for this benefit option.

Credit: The system calculates earnings for employees who select this option according to the Earnings Code that you identify for this benefit option. The system assigns the frequency of the additional pay based on the Deduction Code that you identify for this benefit option.

Note. You can also go to the Benefit Program Row (plan type 01) and use the Cost page to define general flexible credits for the Benefit Program.

Rate Type

Enter to specify which table should be used to determine rates for the cost or credit entry.

Rate TblID (rate table ID)

Use to indicate the appropriate rate table, since multiple tables may exist. In the case of credits, only the *Employee Portion* will be picked up and reflected as the credit amount.

Earn Code

Tells the system how to calculate the flexible credit earnings for a participant. This option is not applicable for Price rows.

Calc Tbl ID (calculation rules table ID)

Indicates an applicable calculation rule. For example, the rule should supply the Service-As-Of date and rounding rules when the Service Rate Table is used; supply the Age-As-Of date and rounding rules when the Age-Graded Rate Table is used; Supply the Salary-As-Of date, salary basis, and rounding rules when the Percent-of-Salary Table is used; and supply the Combine-Salary rules, coverage limits, and rounding rules when the Flat Rate Table is used.

Warning! The Earn Code for each benefit plan type within a benefit program *must* be unique. Otherwise, flexible credits might not start and end correctly during PeopleSoft Benefits Administration processing.

Rate and Calculation Rules Requirements

Plan Type	Rates Type Required	Rates Available	Calculation Rules
01	Yes	Flat Rate Age Graded Service Rate Percent of Salary	Dependent on rate type. Age Graded, Salary, and Service rates require calculation rules. Flat Rate mounts do not require calculation rules.
1x	Yes	Flat Rate Age Graded Service Rate Percent of Salary	Dependent on rate type.
2x	Yes	Flat Rate Age Graded Service Rate Percent of Salary	Dependent on rate type.
3x	Yes	Flat Rate Age Graded Service Rate Percent of Salary	Dependent on rate type
4x	Not Used	Not Used	Required (Savings plans require a Calculation rule even though the current rule is not applied during deduction calculations. This “dummy” rule is required to support future enhancements)
5x – 9x	Not Used	Not Used	Not Used

Note. In almost all cases, agencies in the U.S. Federal Government do not use general credits, and do not use the cost type of credit when designing benefit programs.

See Also

Chapter 6, “Building Automated Benefit Programs,” Working with Flexible Credits, page 69

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Building Base Benefit Programs”

Chapter 5, “Creating Event Rules,” page 29

Working with Flexible Credits

In this section, we discuss working with flexible credits and how to use flexible credits to achieve your PeopleSoft Benefits Administration goals.

Understanding Flexible Credits

Define three kinds of credits for your employees:

- General credits that apply to all participants in a benefit program.
- General plan-based credits that apply to individual plan types.
- Option-based credits that employees receive because they have chosen a specific benefit plan option.

When you run the Open Enrollment and Event Maintenance processes, the system calculates the value of the credits using the earnings codes that are associated with them. It will sum all the credits by earnings type for each employee, regardless of whether the credits are general credits or option-based credits, and pass the total credits by earnings type to payroll. PeopleSoft Payroll treats these credits as additional earnings for an employee.

Note. Be aware that you must associate the earnings types you set up with the earnings program to which an employee belongs before they can be processed by your payroll system.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Defining Earnings Codes and Earnings Programs,” Establishing Earnings Programs

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Understanding Base Benefits,” Setting Up Support Tables and Benefit Plans

Pages Used with Flexible Credits

Page Name	Object Name	Navigation	Usage
Benefit Program Table - Plan Type and Option	BEN_PROG_DEFN2	Set Up HRMS, Product Related, Base Benefits, Program Structure, Benefit Program Table Click the Plan Types and Options tab.	Link plan types to the benefit program and to add important information about plan types.
Benefit Program Table - Cost	BEN_PROG_DEFN3	Set Up HRMS, Product Related, Base Benefits, Program Structure, Benefit Program Table Click the Cost tab.	Link a benefit program and plan type to rate and calculation rules.

Using Flexible Credits to Achieve Your PeopleSoft Benefits Administration Goals

In this section, we discuss flexible credits and provide examples of how to:

1. Define credit for employees who enroll in a particular plan type.
2. Encourage employees to elect employee-only coverage.
3. Define credits for participants who waive coverage.
4. Define credit amounts based on employee health coverage.
5. Set up life or disability plan-based credits according to level of life coverage.
6. Set up life plan credits based on a flat dollar amount.

Example 1: Defining a Credit for All Employees Who Enroll in the Plan Type

Suppose you want to give all of your employees a general plan-type credit to help offset the cost of coverage, regardless of the benefit plan option within that plan type in which they elect to enroll. Start by adding a new rate schedule to specify the credit amount on the Flat Rate Table, and enter a *G* row for the plan type credit.

1. Access the Flat Rate Table page. Add a new rate schedule for the credit amount.
2. Access the Benefit Program Table - Plan Type and Option page. Enter a *G* row for the plan type credit.
3. Access the Benefit Program — Cost page and enter *Credit* as your cost type and reference the new rate schedule created for plan type general option.

Example 2: Encouraging Employees to Elect Employee-Only Coverage

Suppose that you want to encourage employees to elect employee-only coverage in a medical benefit option. One way to do this is to give your employees an option-based credit equal to the cost of coverage, effectively making the benefit plan employer-paid.

1. Access the Benefit Program Table — Cost page, insert a new row, and enter *Credit* as the cost type value.

2. You must also enter the same rate type and rate table ID that you used for the *Price* row. The system calculates the credit using the same rates and calculation rules it used for the *Price* row; therefore, the amount credited is equal to the amount deducted.

Example 3: Defining Credits for Participants Who Waive Coverage

Suppose that you want to give a credit to your employees who waive coverage in any health benefit plan.

1. Access the Flat Rate Table. Define the amount of the credit for waived coverage.
2. Access the Benefit Program Table - Cost page. Insert a row for the waived coverage credit.
3. Enter *Credit* as the cost type value on the Benefit Program - Cost page. This is the flexible credit that employees will receive when taking the waive option.

Example 4: Defining Credit Amounts Based on Employee Health Coverage

Suppose that your company offers employee-only medical coverage at a cost of 50 USD per month and family coverage at a cost of 100 USD per month. You want to give all employees, regardless of whether they choose employee only or family coverage, a credit equal to the cost of employee only coverage.

Follow the process outlined in example 2. When you set up the option-level flexible credit for the family coverage, use the rate table designed for the employee-only benefit.

Example 5: Setting Up Life or Disability Plan-Based Credits According to Level of Life Coverage

Suppose you have three Life benefit plans: a basic life plan, a one times salary plan, and a two times salary plan. Define option-based credits that will provide the same credit as the one times salary option regardless of the coverage level the employee chooses.

Use the option type General Credit to set up flexible credits for Life and Disability plan types that provide the same credit no matter which coverage level an employee chooses.

1. Access the Benefit Program Table - Plan Type and Option page. Set up an option type row with a *General* value. Give it the same deduction code as the other life plans.
2. Access the Benefit Program Table - Cost page. Enter a *Credit* cost row for the general credit. Give it the same Rate Type and Rate Table ID as the one times salary life plan option.

Example 6: Setting Up Life Plan-Based Credits According to Flat-Dollar Amounts

Suppose that you want to define a plan-based credit equivalent to 50,000 USD of coverage regardless of the life coverage level that the employee selects.

1. Access the Benefit Plan Table. Define a special 50,000 USD Basic Life Benefit Plan.
2. Access the Life/Accidental page. Complete the life plan definition of the 50,000 USD Life Benefit Plan.
3. Access the Benefit Program Table - Plans and Options page. Create a General row for the 50,000 USD Life Benefit plan. Give it the same Deduction Code as the other benefit plan options.
4. Access the Benefit Program Table - Cost page. Enter *Credit* as the cost type for the General credit. The *Credit* cost row should reference the appropriate rate schedule, earnings code, and set of calculation rules.

Setting Up Cross-Plan Validation

You use the Benefit Program Table to set up cross-plan validation. In this section, we discuss setting up cross-plan validation and how to:

- Set up cross-plan validation checks for plan types.
- Use the load cross-plan values page.
- Set up and add cross-plan validation for domestic partners.

Note. The system will not allow you to enter Cross-Plan Validation rules for the Benefit Program (plan type 01).

Page Used to Set Up Cross-Plan Validation Checks

Page Name	Object Name	Navigation	Usage
Benefit Program Table - Plan Type and Option	BEN_PROG_DEFN2	Set Up HRMS, Product Related, Base Benefits, Program Structure, Benefit Program Table Click the Plan Type and Option tab.	Link plan types to the benefit program and add important information about plan types.
Load Cross Plan Values	BEN_PROG_XLOAD	Click the Load Cross Plan Values link on the Plan Type and Option page.	Create codes that will automatically populate the Cross-Plan Type, Coverage Limit (Pct), and Check Dependents fields on the Benefit Program Table - Plan Type and Option page.

Setting Up Cross-Plan Validation Checks for Plan Types

Access the Benefit Program Table - Plan Type and Option page.

Benefit Program | Plan Type and Option | Cost

Benefit Program: KU1 Effective Date: 01/01/2000

Plan Type Find | View All First 12 of 25 Last

*Plan Type: 25 Dependent Life Minimum Annual Contribution: 0.00 + -

DispPlnSeq: 25 Maximum Annual Contribution: 0.00

Event Rules ID: KU2X Life and ADD Event Rules ☐ HIPAA Plan

Waive Coverage: Y Always Allowed ☐ COBRA Plan

Load Cross Plan Values

Self-Service Configuration

Option Customize | Find | View All First 1-5 of 5 Last

Eligibility | Cross Plan

Optn ID	*Optn Type	Benefit Plan	Covrg Code	Deductn Cd	Option Code	Default Option	Opt Level	Option Seq	Geog Locn	Elig ID		
1	W				W	☒		1				+ -
2	O	KUDLF4		KUDLF9	1	☐	1	2		KNUL		+ -
5	O	KUDLFE		KUDLFE	2	☐	2	3		KNUL		+ -
62	O	KUDLFS		KUDLFS	3	☐	2	4		KNUL		+ -
76	O	KUDLFP		KUDLFS	4	☐	2	5		KNUL		+ -

Benefits Program Table — Plan Type and Option page: Cross Plan tab

Cross Plan Type

Identifies the "controlling" plan that the employee or dependent must be enrolled in before they are eligible for enrollment in the option being defined. This field is required for all other cross-plan validations.

Cross Benefit Plan

The "controlling" benefit plan that is required for an employee to elect this option. If this field is blank, then any election in a benefit plan within the Cross Plan Type field meets the criteria for cross plan validation.

Coverage Limit Pct
(coverage limit percentage)

Used primarily for life plan options to place a limit on the amount of the coverage the enrollee (employee or dependent) can receive. This field becomes available after you attach a cross-plan type to a benefit plan.

Note. During PeopleSoft Benefits Administration validation processing, the system will check to ensure that the coverage elected or afforded under this benefit plan does not exceed the specified percentage of the coverage elected or afforded under the Cross Benefit Plan.

Check Dependents

When selected, this option informs the system to check that potential dependents (for the specified benefit plan or option) are also enrolled as dependents for the specified Cross Benefit Plan. This only available to 1x plan types and becomes available after you associate a cross-plan type with a benefit plan.

Using the Load Cross Plan Values Page

Access the Load Cross Plan Values page. This page is a data entry aid to enable you to replicate common cross-plan validation criteria to a large number of options, rather than individually specifying the criteria for each option row.

Cross Plan Type	Identifies the benefit plan the employee or dependent must be enrolled in before they are eligible for enrollment in the specified benefit plan or option. This field is available to all plan types.
Cross Limit (Pct) (percent)	Places a limit on the amount of the coverage the dependent can receive. This is available to only 2x plan types.
Check Dependent	When selected, this tells the system to check that potential dependents for the specified benefit plan or option are also enrolled as dependents for the specified Cross Benefit Plan. This is only available to 1x plan types.
OK	Click to save the information and close the page. This option copies the criteria to each underlying option row.
Cancel	Click to close the page and not save any information.

Note. Use Load Cross Plan Values to *clear* the Cross-Plan Validation values for a plan type. Simply bring up the Load Cross Plan Values page, select blank values for the fields that you want to clear from Cross-Plan Dependent Enrollment, and click OK. The system clears the fields you selected.

Setting Up and Adding Cross-Plan Validation for Domestic Partners

Access the Benefit Program Table - Plan Type and Option page and click the Cross Plan tab in the Option group box.

Setting Up Non-Qualified Dependent Plans

In order to create a benefits system that accommodates and processes benefits for non-qualified dependents, set up separate health plan types and identify them as non-qualified health plans. PeopleSoft delivers the following three sample non-qualified dependent plans:

Plan Type	Description
15	NQ Medical (Non-Qualified Medical)
16	NQ Dental (Non-Qualified Dental)
17	NQ Vision (Non-Qualified Vision)

If you're setting up a life plan for domestic partners and other non-qualified dependents, use a Dependent Life plan type.

Note. Keep in mind that the IRS considers all of the benefits received by “non-qualified” dependents to be taxable income. This means that the IRS will tax employees for the employer-paid portions of non-qualified health benefits, and it will also tax all of the benefits that non-qualified dependents receive from dependent life plans. In both cases, the system will perform imputed income calculations.

Employees can enroll both qualified and non-qualified beneficiaries into a dependent life plan. However, when non-qualified beneficiaries are mixed with qualified beneficiaries in a dependent life plan, the IRS will tax all of the beneficiaries as if they were non-qualified, which means that they will all lose the “2000 or less” *de minimus* fringe benefit.

Adding Cross-Plan Validation Rules to Domestic Partner Plans

When you design a benefit program that will allow employees to offer health and life benefits to domestic partners and other non-qualified dependents or beneficiaries, set up rows for non-qualified dependent health plan types—such as NQ Medical and NQ Vision. Your employees must elect both an ordinary health plan type to provide health coverage for themselves and their qualified dependents and a complimentary NQ health plan type to provide health coverage for their non-qualified dependents.

Use the Cross-Plan Validation feature to set up a Cross-Plan Type check on your *NQ Medical*, *NQ Vision*, and *NQ Dental* plan types that prevents employees from enrolling in an *NQ* health plan type if they are not enrolled in a regular health plan type.

CHAPTER 7

(CAN) Handling Canadian Credit Allocations

This chapter provides an overview of Canadian credit allocations and discusses how to:

- Create deductions.
- Set up the Credit Allocation Table.
- Review taxable benefits for tax alteration deduction codes.
- Review payroll calculations for variable taxation benefit plans.

Understanding Credit Allocations

Under Canadian rules, some common benefit plans have a premium cost tax status under which all employer-paid portions are nontaxable and all employee-paid portions are taxable. We refer to these types of benefit plans as variable taxation plans, because the tax status depends upon who pays the premium.

With PeopleSoft Benefits Administration, you can set up benefit plans that automatically provide the best tax advantage to employees by allocating flexible credits to those benefits that would be taxable unless paid for by credits. To set this up:

1. Define your employer-paid flexible credits for each plan type and link them to taxable earnings codes. Use the Benefit Program Table to define these flexible credits.
2. Define the premium deductions for each of your variable taxation benefit plans as before-tax deductions, used when there are sufficient flexible credits to pay for the benefit premium. Use the Deductions Codes Table to define these premium deductions.
3. Create a set of taxable benefit deductions (the tax alteration deductions) that complement the variable taxation benefit plan deductions, used only when there aren't sufficient credits to pay for the benefit premium. Use the Deductions Codes Table to create a set of taxable benefit deductions.
4. Set up the tax alteration deductions. Every variable taxation benefit plan deduction (not taxed) should have a corresponding tax alteration general deduction (taxed). Use the General Deductions Table to set up these tax alteration deduction codes.
5. Add your tax alteration general deductions to the list of all general deductions for each applicable company. Use the Company General Deductions Table to add these deductions.
6. Link your variable taxation benefit plan deduction codes to your tax alteration general deduction codes through the Credit Allocation Table, to prepare them for PeopleSoft Benefits Administration and Payroll for North America processing.

Creating Deductions

This section discusses how to:

- Set up the deduction classifications.
- Define general deduction rules for tax alteration deductions.
- Link tax alteration deductions with company general deductions.

Page Used to Create Deductions

Page Name	Object Name	Navigation	Usage
Deduction Table	DEDUCTION_TABLE1	Set Up HRMS, Product Related, North American Payroll, Deductions, Deduction Table	Create deductions for the variable taxation benefit plans, and create the tax alteration deduction codes.
General Deduction Table	GENL_DEDUCTION_TBL	Set Up HRMS, Product Related, North American Payroll, Deductions, General Deduction Table	Set up general deductions for the tax alteration codes.
Company Deduction Table	GDED_COM_TBL	Set Up HRMS, Product Related, North American Payroll, Deductions, Company General Deductions	Add the tax alteration deductions to the list of general deductions for each company.

Setting Up the Deduction Classification

Access the Deduction Table page.

For a variable taxation benefit plan deduction, select *Before-Tax*. For a tax alteration deduction, select *Taxable Benefit*.

Tax alteration deductions should be easily identifiable as designed for use with variable taxation benefit plans. You can create an individual deduction for each benefit plan or create a single deduction to be used for all plans.

For example, a tax alteration deduction for a dental plan might be given a deduction code of *DENTAX* to identify it as a taxable benefit for dental plan premiums, while a tax alteration deduction code representing all benefit plans might be named *BENTAX*.

Defining General Deduction Rules for Tax Alteration Deductions

Access the General Deduction page.

For each tax alteration deduction, you need to create a matching entry on the General Deduction Table with a matching deduction code.

From the General Deduction table, you'll be prompted to enter the deduction code for the tax alteration deduction, as defined through the Deduction Table. The deduction calculation routine will default to Flat Amount, which is the correct routine for the tax alteration deduction.

To indicate that the tax alteration deduction is a taxable benefit general deduction for use with the Credit Allocation Table, select *Ben Admin Taxable Ben (Canada)* (benefits administration taxable benefit).

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Defining Deductions”

PeopleSoft 8.8 Payroll for North America PeopleBook, “Defining Earnings Codes and Earnings Programs”

Linking Tax Alteration Deductions With Company General Deductions

Access the Company General Deductions page.

For each applicable company, add the tax alteration general deductions that you create to the overall list of general deductions.

Setting Up the Credit Allocation Table

You use the Credit Allocation Table to:

- Identify your variable taxation benefit plans.
- Associate variable taxation benefit plan deductions with their corresponding tax alteration deductions.
- Create a credit allocation hierarchy that the system will use to prioritize the allocation sequence of credits to your employees’ benefit plans.

Page Used to Set Up the Credit Allocation Table

Page Name	Object Name	Navigation	Usage
Canadian Benefits Hierarchy	CAN_BA_HIER_TBL	Set Up HRMS, Product Related, Automated Benefits, Flex Credit Management, Credit Allocation Table	Enter credit allocation hierarchy records and assign the priority sequence order of the allocation of flexible credits to benefit plans; link benefit plan deduction codes with their corresponding tax alteration deduction codes.

Setting Up the Credit Allocation Table

Access the Canadian Benefits Hierarchy page.

Canadian Benefits Hierarchy

Credit Allocation Table Find | View All First 1 of 1 Last

Benefit Program: CNB *Effective Date: 01/01/1996

Tax Application Hierarchy Customize | Find | View All First 1-5 of 5 Last

*Seq No.	*Plan Type	*Deduction Code		Tax Alteration Deduction Code		
1	Flex Spending Health	CFSAHC	Q FSA Health Care Can		+	-
2	Retirement Counselor	CFSARC	Q FSA Retire Counsel Can		+	-
3	Dental	CDEN	Q Dental Premiums B/Tax	CTAXBN	+	-
4	Major Medical	CEHB	Q Extended Health Premiums B/Tax	CTAXBN	+	-
5	AD/D	CADD2	Q AD&D Premiums B/Tax	CTAXBN	+	-

Canadian Benefits Hierarchy page

Seq No. (sequence number) The system's tax optimization feature will assess the credit usage of the deductions in the order they are listed here.

For example, credits are applied first to Seq No 1 (perhaps the variable taxation plan type Dental), second to Seq No 2 (perhaps the variable taxation plan type Medical/Dental), third to Seq No 3 (perhaps the variable taxation plan type AD/D), and so on. If there are insufficient credit earnings available during payroll processing to cover the entire premium costs of the Dental, Medical/Dental, or AD/D plan types, taxable benefit deduction amounts are automatically processed for the amounts of the shortages, using the applicable Tax Alteration Deduction Code.

Deduction Code Specify one of the before-tax variable taxation benefit plan deduction codes that you defined on the Deduction Table: Tax Class page.

Tax Alteration Deduction Code Specify a taxable benefit general deduction that you defined on the General Deduction Table.

Reviewing Taxable Benefits for Tax Alteration Deduction Codes

When the PeopleSoft Benefits Administration Open Enrollment or Event Maintenance process finalizes an employee's elections, the system creates a taxable benefit General Deduction Data record for each individual tax alteration deduction code specified on the Credit Allocation Table.

The Review General Deduction page is used to review taxable benefit deduction data. On the page there are no amounts specified on this record; it exists solely to facilitate payroll processing of taxable benefit deduction amounts to the paysheets if credit earnings do not cover the entire cost of variable taxation benefit plans.

Pages Used to Review Taxable Benefits for Tax Alteration Deduction Codes

Page Name	Object Name	Navigation	Usage
Review General Deductions	GENL_DED_DATA	North American Payroll, Employee Pay Data CAN, Deductions, Create General Deductions	Review the general deductions created by PeopleSoft Benefits Administration for tax alteration management.

Reviewing Payroll Calculations for Variable Taxation Benefit Plans

During the payroll calculation process, taxable benefit deduction amounts are calculated and applied to employees' paychecks. The system performs the following actions:

- Pays flexible credit earnings amounts.
- Calculates and applies benefit plan premiums.
- Determines if there are sufficient credits to cover the entire cost of variable taxation benefit premiums.
- If sufficient credits are not available, calculates taxable benefit deduction amounts to cover the portion of the benefit premium not paid for by credits.
- This information is displayed on the Paycheque Deduction page.

Note. Some benefit deductions are subject to sales tax (GST, HST, PST, PSTI, or PPT) and can be defined on the Deduction Table. If your benefit deduction is paid for by credits and also attracts sales tax, the sales tax amount for that deduction is included when calculating the amount of credits used.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, "Defining Deductions"

CHAPTER 8

Preparing for Open Enrollment and Event Maintenance

This chapter provides an overview of the PeopleSoft Benefits Administration preparation process and discusses how to:

- Review your benefit program architecture.
- Build pay calendars.
- Run the base benefits audit.
- Identify PeopleSoft Benefits Administration groups.
- Define open enrollment and snapshot IDs.
- Establish a processing schedule.

Understanding the PeopleSoft Benefits Administration Preparation Process

The following chart outlines the steps you'll need to follow to prepare your system for Open Enrollment and Event Maintenance processing. Follow these steps only after you have designed your eligibility and event rules and created your benefit programs.

Step	Purpose	Go To
Double-check benefit program setup.	Look over the benefit programs. Ensure that your event rules and eligibility rules are configured.	Building Automated Benefit Programs Setting Up Eligibility Rules Creating Event Rules
Build pay calendars.	Build pay calendars for the new plan year.	Building Pay Calendars (if needed)
Run the base benefit audit.	Ensure that benefit information is accurate.	BEN733 Base Benefit Audit Report

Step	Purpose	Go To
Define PeopleSoft Benefits Administration group IDs.	Determine which groups of participants are processed by a particular Open Enrollment or Event Maintenance schedule.	Identifying PeopleSoft Benefits Administration Groups
Define open enrollment IDs and Snapshot IDs (only used for open enrollment and snapshot processing).	Identify the benefit programs to be included in open enrollment or snapshot processing.	Defining Open Enrollment and Snapshot IDs (use if defining Open Enrollment process) Setting Up Snapshot ID (use if defining Snapshot process)
Create schedules for PeopleSoft Benefits Administration processes.	Define schedules for your Open Enrollment and Event Maintenance processes and associate a group ID and a company with each one to define the groups of employees they will process. If you are defining an open enrollment or a snapshot process, associate an appropriate open enrollment or snapshot ID to the processing schedule.	Establishing a Processing Schedule

Reviewing Your Benefit Program Architecture

Check your system for setup errors now in order to save time troubleshooting later. Check the design of your benefit programs, along with the setup for all of the related benefit plans, event rules, and eligibility rules.

Note. Although this step is especially important when you are starting out with PeopleSoft Benefits Administration, or when you've updated the architecture of your benefits system, it's a good idea to follow it whenever you are preparing to run a PeopleSoft Benefits Administration process.

Building Pay Calendars

PeopleSoft Payroll uses a pay calendar to determine when employees are paid. If your organization has produced a payroll, you've already set up a table with pay calendar information for the current year.

Even if you do not use PeopleSoft Payroll, PeopleSoft Benefits Administration needs the pay calendar information to calculate flexible credits and benefit costs by participant pay frequency. It also uses the pay calendars to calculate coverage and deduction begin and end dates.

Before starting open enrollment, pay calendars must be set up for an entirely new plan year, and must include each pay group. If you decide to run Event Maintenance, set up pay calendars for the specific event processing period. As you near the end of the year, set up next year's calendar well in advance to avoid waiting periods or date rules that can cause coverage or deduction begin dates to be calculated in the future.

See Also

PeopleSoft North American Payroll 8.8 PeopleBook

Running the Base Benefits Audit

Use this audit during implementation, before you enroll participants and then, periodically during the plan year at the appropriate time in order to catch any errors.

Below are the Base Benefits business process audits and their corrective actions. Perform these audits regardless of whether you use the Base Benefits business process or PeopleSoft Benefits Administration to enroll participants.

Base Benefits Audit	Audit Functions	Corrective Actions
Benefit Tables	Identifies health plans on the Benefit and Deduction Program Table with rate per unit not set to <i>None</i> on the Flat Rate Table.	Correct the information on the Flat Rate Table.
Employee Data	Identifies employees with personal data but with no employment data.	Enter employee employment data.
	Identifies employees with personal and employment data but with no job data.	Enter employee job data.
	Identifies employees with birth dates less than or equal to 16 years from the current date.	Verify that employee is 16 years old or less or correct the error.
	Identifies employees or dependent spouses who have the wrong marital status. This can include married employees that have no spouse on file, or employees that are marked as single, but a spouse was entered into the system as dependent data.	Correct the employee's marital status or correct the dependent information (add or remove a spouse).
	Identifies dependents with the wrong gender. This can include a female son, a male daughter, or a spouse (as opposed to a domestic partner) with the same gender as the employee.	Correct the dependent's gender information.

Base Benefits Audit	Audit Functions	Corrective Actions
Enrollment Data	Identifies participants with a nonstandard dependent—not a spouse, son, daughter, father, or mother—enrolled in standard health benefits.	Verify that the person should be a dependent or correct the error.
	Identifies participants that work in the same company as their dependents, elect the same health coverage in the same plan type as their dependents, and cover the health benefits of their dependents. This audit assumes that Social Security numbers have already been entered on employee personal data and dependent data.	Verify that the enrollments are correct or correct the error.
	Identifies participants with dependents enrolled in health benefits where the dependent is older than 25 (or older than 19 and not a student), not a spouse, and not handicapped. These people are not typically considered dependents.	Correct the dependent information.

Identifying PeopleSoft Benefits Administration Groups

In this section, we discuss identifying PeopleSoft Benefits Administration groups, and how to:

- Assign participants to a benefits group.
- (USF) Assign participants to a benefits group.

Understanding PeopleSoft Benefits Administration Groups

Use PeopleSoft Benefits Administration groups to control which groups of participants are processed when you run a specific Open Enrollment or Event Maintenance schedule. With PeopleSoft Benefits Administration groups, you can place your entire participant population into a single benefits group, or you can process specific groups of participants. You can associate only one PeopleSoft Benefits Administration group with a scheduled PeopleSoft Benefits Administration process. If you do not specify a PeopleSoft Benefits Administration group when defining a schedule, all employees will be processed by that schedule.

PeopleSoft Benefits Administration groups are not required for the operation of PeopleSoft Benefits Administration processes, but they are helpful. They allow you to have more control over how you manage Open Enrollment and Event Maintenance for your workforce.

Note. PeopleSoft Benefits Administration group and company codes work together to define the population of employees PeopleSoft Benefits Administration group, a company, both, or neither with any schedule.

Pages Used to Identify PeopleSoft Benefits Administration Groups

Page Name	Object Name	Navigation	Usage
BenAdmin Group ID Table (benefits administration group ID table)	BAS_GROUP	Set Up HRMS, Product Related, Automated Benefits, Processing Controls, Group Identification Table	Define BAS group IDs.
Benefit Program Participation	JOB_DATA_BENPRG	Workforce Administration, Job Information, Job Data Click the Benefits Program Participation link on the Job Data page.	Assign participants to a benefit group.
Benefits/FEHB Data	GVT_JOB1	Workforce Administration, Job Information, 1st Rqst Authorization USF	Assign employees to a benefits group during the PAR hire process.

Assigning Participants to a Benefits Group

Access the Benefit Program Participation page.

Benefit Program Participation			
Santos, Antonio		Employee	EmplID: KU0010 Empl Rcd#: 0
Benefit Record Number: 0	Deductions Taken: NoOverride	Deduction Subset ID:	
Benefit Status Find First 1 of 2 Last			
Effective Date: 07/01/1998	Effective Sequence: 1		
Action / Reason: Pay Rate Change	Current		
*Benefits System:	Benefits Administration	Benefits Employee Status: Active	
Annual Benefits Base Rate:	USD		
Benefits Administration Eligibility			
BAS Group ID: KU1	Basic US BAS Group		
Elig Fld 1:	Elig Fld 2:	Elig Fld 3:	
Elig Fld 4:	Elig Fld 5:	Elig Fld 6:	
Elig Fld 7:	Elig Fld 8:	Elig Fld 9:	
Benefit Program Participation Find View All First 1 of 2 Last			
*Effective Date: 01/01/1999	*Benefit Program: KU1	Currency Code: USD	
Job Data Employment Data Earnings Distribution Benefits Program Participation			

Benefit Program Participation page

To assign a participant to a benefits group, enter the appropriate ID in the BAS Group ID field. Later, when you want to process benefits for an employee within a specific BAS group, enter the BAS group ID in the Open Enrollment or Event Maintenance processing schedule and then run the PeopleSoft Benefits Administration process for that schedule.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce,” Specifying Benefit Program Enrollment

(USF) Assigning Participants to a Benefits Group

Access the Benefits/FEHB Data page.

This same page is present in many of the Federal PAR-related components. Pages in this component deal with the initial assignment of an employee to a BAS Group ID, and with the maintenance of that assignment.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “(USF) Hiring Employees,” Specifying Benefit Programs

Defining Open Enrollment and Snapshot IDs

This section discusses open enrollment and snapshot IDs, and also how to:

- Use Open Enrollment definitions to set up parameters.
- (USF) Define multiple, concurrent Open Enrollment IDs.
- Set up a Snapshot ID.
- Use Snapshot ID to run the Snapshot process.

Understanding Open Enrollment and Snapshot IDs

The system uses the OE (Open Enrollment) event rule to process employees through Open Enrollment and give them their re-enrollment opportunities. The coordination of open enrollments by open enrollment IDs allows the PeopleSoft Benefits Administration system to classify open enrollment as an event. You'll associate the open enrollment IDs you define with an Open Enrollment processing schedule; every employee associated with that processing schedule (through a group ID) will be processed according to the associated OE event rule, resulting in the opportunity to re-enroll or change their benefit elections.

In Event Maintenance, employees will only undergo event rule processing for the unprocessed events that are associated with them. Employees that have no unprocessed events will not be affected by Event Maintenance.

Those starting out with PeopleSoft Benefits Administration will want to set up a snapshot ID through the Snapshot Definition page. When you first begin using PeopleSoft Benefits Administration for daily process, if you are not planning to run Open Enrollment as your first PeopleSoft Benefits Administration process, then run the Snapshot process to set baseline eligibility information.

See Also

[Chapter 8, "Preparing for Open Enrollment and Event Maintenance," Setting Up a Snapshot ID, page 93](#)

Pages Used to Define Open Enrollment and Snapshot IDs

Page Name	Object Name	Navigation	Usage
Open Enrollment Definition	BAS_OE_DEFINITION	Set Up HRMS, Product Related, Automated Benefits, Processing Controls, Open Enrollment Definition	Set up the parameters of the open enrollment.
BenAdmin Snapshot Definition	BAS_SNAP_DEFINITN	Set Up HRMS, Product Related, Automated Benefits, Processing Controls, Snapshot Definition	Set up the system up to run the Snapshot process.

Using Open Enrollment Definitions to Set Up Parameters

Access the Open Enrollment Definition page.

Open Enrollment Definition	
OE Defn ID:	KC00
*Period Begin Date:	01/01/2000
*Period End Date:	12/31/2000
*Description:	Canadian Open Enrollment 2000
Short Description:	CAN OE2000
Self-Service Configuration	
Enrollment Begin Date:	
Enrollment End Date:	
Benefit Programs Customize Find View All First 1 of 1 Last	
*Benefit Program	Description
KC1	GBI Master CAN Benefit Program + -

Open Enrollment Definition page

- Period Begin Date** Equals the first day that coverage becomes effective for this Open Enrollment or Snapshot process.
- Period End Date** Defines the end of the plan year and is for information purposes only.
- Benefit Programs** Select benefit programs that will participate in this open enrollment event.

When establishing an open enrollment ID, it is not possible to specify plan types associated with a particular benefit program.

(USF) Defining Multiple, Concurrent Open Enrollment IDs

With PeopleSoft PeopleSoft Benefits Administration for the Federal Government, you define open enrollment for each scheduled open season benefits solicitation period offered to your employees. When open seasons for different benefit plan types overlap, set up the system to run their corresponding open enrollments concurrently with each other.

The coordination of open enrollments by open enrollment IDs is part of the structure that allows the system to classify Open Enrollment as an event. This simplifies the integration of open enrollment with event maintenance. As a result, open enrollments (re-enrollments) for programs and plan types can be processed on a flexible schedule.

For example, suppose the TSP Open Season has a benefits solicitation period that extends past the point when elections become effective. When this occurs, the employee's election becomes effective with the next pay period and the employee is not retro-enrolled back to the normal start date.

Setting Up Floating Event Dates for TSP Open Seasons

Define the floating event date that marks the start of the solicitation period for a TSP Open Season with the Open Season Begin Date and Open Season End Date fields, which should correspond to the actual begin and end dates of the open season for the open enrollment ID. The open season begin date is used mainly for documentation purposes and does not come into play during any system processing. The open season end date, on the other hand, is used as an upper boundary when determining the effective dates for coverage and deductions.

Note. The floating event date takes the place of the normal event date in the calculation of coverage begin dates for TSP Open Season events and when the system is getting the current elections from the Base Benefit Tables. The system defines this event date either by the elect date in the Data Entry - Option Election page or the system date. See the chart below for more information.

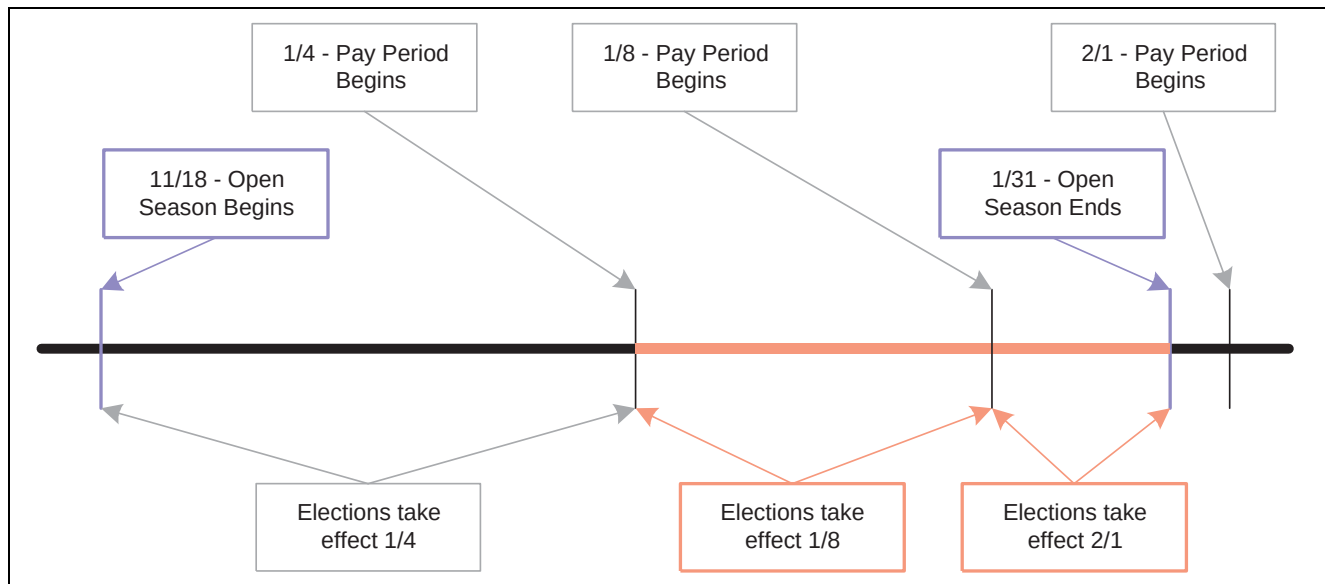
During open enrollment processing, the system calculates the floating event date according to the following rules:

Open Season Processing Setup	Floating Event Date Outcome
System date or elect date is less than the period begin date.	Floating event date is the period begin date.
System date or elect date is greater than the open season end date.	Floating event date is the open season end date.
System date or elect date is between the period begin start date and open season end date.	Floating event date is the first day of the next pay period.
You are in the final run of open enrollment (the Finalize and Apply Defaults check box on the Open Enrollment Run Control page is selected).	Floating event date is the open season end date.

The system uses the elect date on the Data Entry - Option Election page instead of the system date if the event is in *Elections Entered* or later status. The Elect Date field only appears on the Data Entry - Option Election page for open enrollment events. The Elect Date field is used to enter the date that employees return elections.

Floating Event Dates: An Example

For example, suppose that the first pay period of the new year starts January 4. The open season solicitation period runs from November 18 to January 31.



Floating Event Dates Process

When open season begins, the system uses the period begin date, January 1, as the floating event date and provides current coverage as of January 1. Here are the results of elections received between or by certain dates:

If Elections are Received...	...the Event Date is...	...and Coverage Starts...
Between November 18 and January 1	January 1 (the period begin date)	January 4
On January 4	The date elections are received (the system date)	January 4
Between January 5 and January 18	The date elections are received (the system date)	January 18, the second full pay period
Between January 19 and January 31	The date elections are received (the system date)	February 1, the third full pay period
After January 31	January 31 (the open season end date)	February 1, the start of the last full pay period

In this example, when the user finalizes open season, the system uses January 31 as the floating event date. Coverage starts for any remaining employees effective February 1.

Defining Multiple, Concurrent Open Enrollments

The Event Classification field on the Open Enrollment Definition Table is used to associate the open enrollment ID with an open enrollment event classification that has been defined specifically for a particular open season. Set up open enrollments for plan-specific open seasons that you can then run concurrently with each other if the need arises. Concurrent open enrollment periods have overlapping begin and end dates.

See Also

[Chapter 5, “Creating Event Rules,” page 29](#)

Setting Up a Snapshot ID

Use the snapshot ID to run the Snapshot process which takes a snapshot of the current benefits eligibility of your employees. Do not run this process if you are planning to go live with the Open Enrollment process; however, it is essential if you plan to go live with Event Maintenance.

The snapshot definition ID is linked to the Snapshot event rule (or SNP event rule) in the same way that the open enrollment definition ID is linked to the open enrollment event rule. When you process an employee through the Snapshot process, the SNP event is triggered for that employee, just as OE events are automatically triggered for employees going through an open enrollment.

Using Snapshot ID to Run the Snapshot Process

Access the BenAdmin Snapshot Definition page.

BenAdmin Snapshot Definition

Snap Defn ID: KU01

***Period Begin Date:** 01/01/1999

***Description:** US Snapshot Definition

Short Description: US Snap

☒ **Validate Current Elections** ☒ **Calculate Option Prices** ☐ **Allow Finalization**

Benefit Programs		Customize Find View All		First	◀	1 of 1	▶	Last
*Benefit Program	Description							
KU1	GBI Master US Benefit Program							

BenAdmin Snapshot Definition page

Validate Current Elections Select during snapshot processing to find out whether employees are eligible for their current elected options.

Presumably, the employee elections were entered through the PeopleSoft HR Base Benefits application or were imported from another system. This validation determines whether these current elections are supported by the new eligibility rules that you create.

Calculate Option Prices Select in order for the system to calculate the prices and credits for benefit plan options. This option enables you to validate your cost definitions and rate table setup against the premiums currently being charged to your participants.

If this check box is not selected, the system will bypass price and credit calculation for all employees.

Allow Finalization

Select to make the Snapshot process behave exactly like Open Enrollment.

Use the Data Entry page group for last minute corrections and changes. When you finalize the snapshot, the system will update the Base Benefit Tables appropriately.

Note. If elections are already current in the HR Base Benefits application, and your eligibility rules are also current and correct, do not expect the Snapshot process to write any rows to the HR Base Benefits application table (because enrollments have not changed). If, however, updated elections are inserted into the HR Base Benefits application by the Snapshot process, be sure to research this occurrence to confirm the reason.

Benefit Program Description

Enter the benefit programs that will participate in the Snapshot process. In most cases, you will want to include all of your benefit programs.

Note. Snapshot will work fastest if Validate Current Elections, Calculate Option Prices, and Allow Finalize are not selected. Although, the Open Enrollment process will give you the same results as the Snapshot process, you might want to use the Snapshot process when going live with PeopleSoft PeopleSoft Benefits Administration to avoid changing open enrollment event rules. For a snapshot run, there is no need to set proof levels; instead, set the default as the current election. Because this might not always be the case with Open Enrollment, use the Snapshot process to keep your rules separate.

Establishing a Processing Schedule

All PeopleSoft PeopleSoft Benefits Administration processes are grouped and identified by schedules. This includes the Run Control process, enrollment statements, data entry, and confirmation statements.

You will need to define at least one schedule for open enrollment and another for event maintenance. Define only one schedule for open enrollment, although you might set up more open enrollment schedules to enhance system performance or to split up processing by location, regulatory region, or a similar differentiator.

Page Used to Establish a Processing Schedule

Page Name	Object Name	Navigation	Usage
BenAdmin Schedule Table (benefits administration schedule table)	BAS_SCHEDULE	Set Up HRMS, Product Related, Automated Benefits, Processing Controls, Schedule Table	Control your processing schedule.

Using the BenAdmin Schedule to Control Your Processing Schedule

Access the BenAdmin Schedule Table page.

BenAdmin Schedule Table			
Schedule ID:	KC00		
*Description:	Canadian Open Enrollment 2000		
Short Description:	CAN OE2000		
*Ben Admin Type:	Open Enrollment		
Company:	GBI	Global Business Institute	☐ No New Events
BAS Group ID:	KC1	Basic Canadian BAS Group	☒ Available through Self Service
Open Enrollment Only			
Open Enrollment Definition ID:	KC00	Canadian Open Enrollment 2000	
Open Enrollment Status Flag:	S	Scheduled	
Snapshot Only			
Snapshot Definition ID:			
Snapshot Status Flag:	U	Unprocessed	

BenAdmin Schedule Table page

Ben Admin Type

(PeopleSoft Benefits Administration type)

Select from the following valid values: *Open Enrollment*, *Event Maintenance*, or *Snapshot*.**Company**

Enter the name of the company. If this field is left blank, all companies will qualify.

BAS Group ID

(PeopleSoft Benefits Administration schedule group identification)

Enter the BAS group ID. If this field is left blank, all benefits groups will qualify.

No New Elections

Select if you don't want any new events assigned to the schedule. Existing events assigned to the schedule will continue to be processed.

For example, if you want event maintenance to begin assigning new events to a new schedule that has the same attributes as an existing schedule, you can create a new schedule and select this check box on the old schedule. New events will be assigned to the new schedule and you can continue to run the old schedule until all events are finalized.

Available Through Self Service

Select if employees will be allowed to enter elections for this PeopleSoft PeopleSoft Benefits Administration process through the PeopleSoft eBenefits application.

If this check box is not selected, benefits administrators will have to update the employee elections resulting from this process through the Data Entry pages.

Open Enrollment Definition ID	Enter the open enrollment definition ID, if this is to be an Open Enrollment processing schedule.
Open Enrollment Status Flag	Displays the current processing status of the Open Enrollment process represented by the Open Enrollment Definition ID.
Snapshot Definition ID	Enter the snapshot definition ID, if this is to be a Snapshot processing schedule.
Snapshot Status Flag	Displays the current processing status of the Snapshot process represented by the Snapshot Definition ID.

Note. If you are using the PeopleSoft PeopleSoft Benefits Administration for U.S. Federal Government product and this is for an open season period, the Schedule ID should match the Open Enrollment Definition ID for that open season period.

See Also

Chapter 8, “Preparing for Open Enrollment and Event Maintenance,” Defining Open Enrollment and Snapshot IDs, page 89

CHAPTER 9

Running the PeopleSoft Benefits Administration Process

This chapter provides an overview of the PeopleSoft Benefits Administration process, process flow, and process status and also discusses how to:

- Manage multiple event scheduling.
- Set up the PeopleSoft Benefits Administration run control process.
- Review PeopleSoft Benefits Administration process results.
- Schedule events and assign benefits programs.
- Analyze disconnected events.
- Perform options processing.
- Investigate participant eligibility.
- Print enrollment statements.
- Enter participant benefit elections.
- Validate and load elections.
- Print confirmation statements.
- Reprocess events.
- Understand Event Maintenance and COBRA Administration.

Understanding the PeopleSoft Benefits Administration Process

You use the PeopleSoft Benefits Administration process to perform:

- Open Enrollment.
- Event Maintenance.
- The Snapshot process.

Both Open Enrollment and Event Maintenance involve a similar cycle of procedures:

- Determination of participant benefits eligibility.
- Calculation of benefit costs and flexible credits.

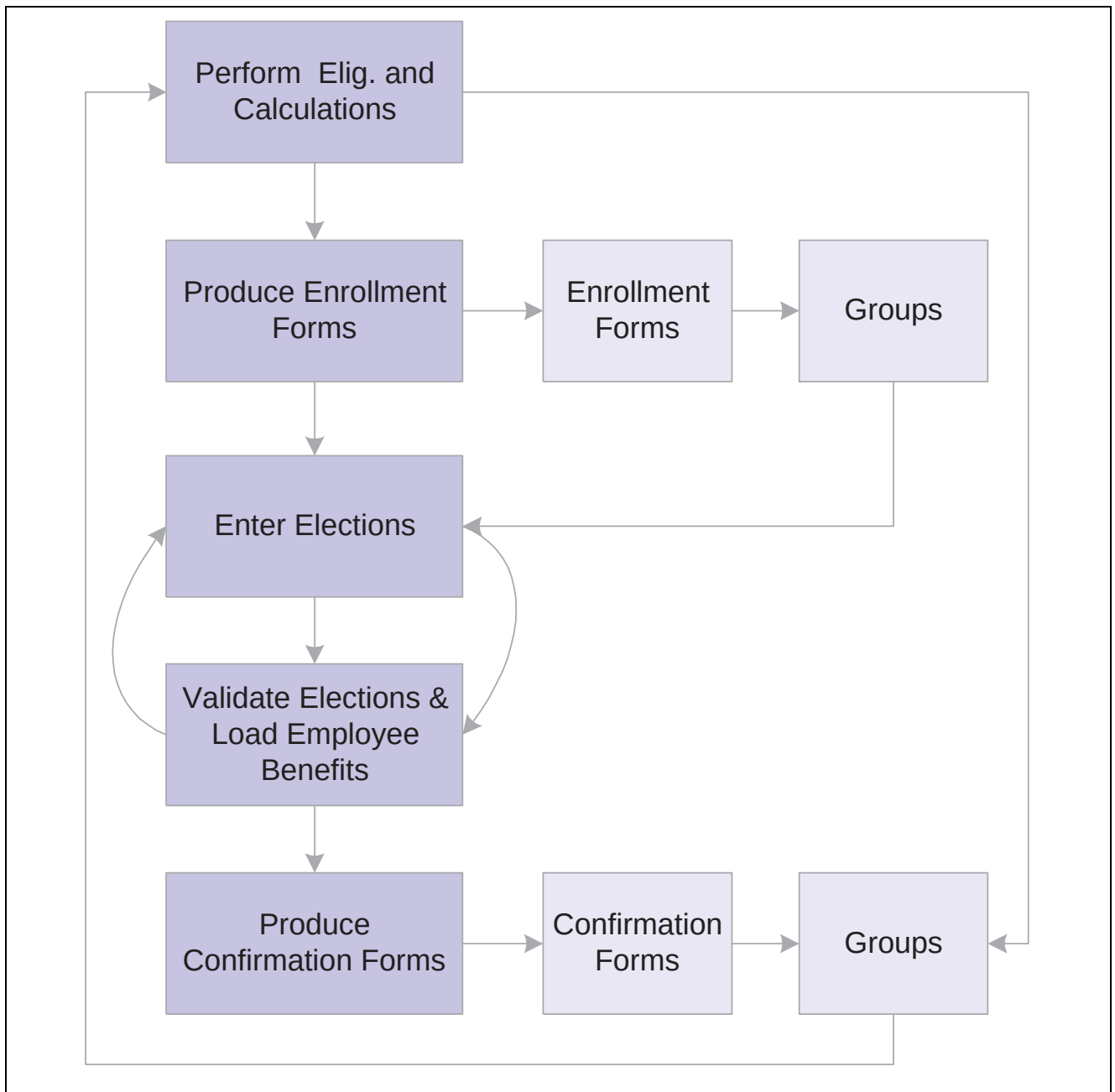
- Creation and delivery of participant enrollment forms.
- Data entry of participant election choices.
- Validation of employee elections.
- Analysis of processing, enrollment, and election data.
- Loading of elections to the database.
- Creation and delivery of election confirmation forms.

Using Open Enrollment

You use Open Enrollment for periodic benefits re-enrollment across your employee population.

Open Enrollment begins by determining the benefit program each participant should be managed under, and the benefit options available to participants, including associated prices and flexible credits. It also identifies default enrollments for participants, such as new hires, who have no current elections, but who are eligible for a benefit program.

Elections are loaded as they are successfully validated. If there are problems or errors, individual participant elections can be rolled back, updated, and reloaded as necessary until the process is finalized.



Open Enrollment

Using Event Maintenance

You use Event Maintenance to process changes during the plan year and the enrollment of new hires. You might perform Event Maintenance every day, twice a week, or three times a month—whatever is necessary to properly react to changes in employee eligibility, process new hires, and update payroll benefit deductions.

Event Maintenance identifies participant events that have occurred since the last run of the process that may change the benefits eligibility of the participant associated with the event. These events can include:

- Family status events (such as divorce).
- Job-related information changes (such as changes to pay frequency).

- Passive events (like the reaching of the age of retirement).
- The hiring and termination of employees.

After Event Maintenance identifies employees who are associated with these events, it determines their current benefits eligibility according to the event and eligibility rules you've defined (defaulting them into new programs or plans as appropriate) and calculates benefit prices and flexible credits for their eligible options.

From this point on, the Event Maintenance follows the same track as Open Enrollment.

See Also

Chapter 5, "Creating Event Rules," page 29

Using the Snapshot Process

Before you begin using PeopleSoft Benefits Administration, you should establish an initial snapshot of your employees' current benefits eligibility. You can use Open Enrollment for this purpose. But if your first process is Event Maintenance, you need to use the Snapshot process first to establish a basis for managing subsequent changes in eligibility.

Essentially, the Snapshot:

- Compares employees' current data to the defined eligibility rules.
- Records the options participants are currently eligible for, and flags instances where employees are ineligible for their current enrollments.

The process completes in a single run of the PeopleSoft Benefits Administration background process and does not calculate costs or change current benefit enrollment information. It assigns all employees a snapshot event that it closes with a finalized status at the end of processing.

Other Uses of the Snapshot

Because the Snapshot process looks at your entire workforce, you can also use the Snapshot to:

- Test your eligibility rule setup, to find employees considered ineligible for their current benefits.
- Establish default coverages and credits, where employee input isn't necessary (because the Snapshot process can optionally update employee election data).
- Perform a final check of cost calculations by randomly selecting participants and coverages to track.
- Validate the loading of legacy benefits data by comparing current enrollments established by your old system against eligible options determined by PeopleSoft PeopleSoft Benefits Administration.

Provided extensions to the Snapshot process can help accomplish these tasks. You can specify the features you want on the Snapshot Definition page. If you have limited time for your conversion activity, then you can use these features on a test database and go to the basic version when you make your actual conversion to PeopleSoft PeopleSoft Benefits Administration.

Understanding PeopleSoft Benefits Administration Process Flow

Running PeopleSoft Benefits Administration can be complex, because the events you process can follow a variety of different paths. Some employees will have number of events that require processing, others will have events that don't change their benefits eligibility, and in the case of Open Enrollment, many employees won't be picked up for event processing at all. In addition, you'll run into situations where events process erroneously, which means that you'll need to reprocess them until you get the right result.

Remember that PeopleSoft Benefits Administration processes *events*, not *participants*. At any given time, a participant may be associated with several unprocessed events that are of different event classes on different event dates. During a particular run of the PeopleSoft Benefits Administration process, the system uses a set of rules to decide which event to process first and then processes that event from scheduling to finalization before continuing with the next one.

Ideally, you would run the PeopleSoft Benefits Administration two to three times to complete the processing of a participant event:

1. During the first run, the system assigns participant events to a PeopleSoft Benefits Administration processing schedule, and scheduled events are, in turn, assigned to a benefit program. In addition, PeopleSoft Benefits Administration determines benefit program eligibility, options, and defaults, and calculates credits and rates for the participant associated with the event.
2. During the second run, after you've generated enrollment statements for your participants and entered their election choices into the system through the data entry pages—the system validates and loads updated participant plan, dependent, and investment election information.
3. During the final run, PeopleSoft Benefits Administration finalizes elections for participants who did not return their enrollment statements and for participants with errors in their records.

More realistically, errors will occur, resulting from incomplete rule setup, inconsistent HR data, or invalid election entry by the employee. After you review and correct the errors and run PeopleSoft Benefits Administration again, the system moves the participants who had errors further along in the process.

Each time you run PeopleSoft Benefits Administration, the participant events you process are assigned a process status designation, so you can determine status and correct errors.

See Also

[Chapter 9, "Running the PeopleSoft Benefits Administration Process," Understanding Process Status and Benefit Program Assignment, page 107](#)

[Chapter 9, "Running the PeopleSoft Benefits Administration Process," Scheduling Events and Assigning Benefit Programs, page 135](#)

[Chapter 9, "Running the PeopleSoft Benefits Administration Process," Reviewing PeopleSoft Benefits Administration Process Results, page 123](#)

Process Flow Details

The following set of tables describe the general flow of the PeopleSoft Benefits Administration process, broken up into three parts.

Before Running PeopleSoft Benefits Administration

This table lists the steps you should take before running PeopleSoft Benefits Administration.

Step	Description	Details	Pages or Processes Used
1	Build your benefits administration benefit programs.	Create benefit plan options, calculations rules, rate tables, event rules, eligibility, and flexible credits. Link these building blocks to your benefit program.	See PeopleSoft Human Resources PeopleBook: Base Benefits, Building Benefit Programs and Building Automated Benefit Programs for information on building your benefit programs.
2	Prepare System for PeopleSoft Benefits Administration processing.	Create pay calendars, audit benefit data, create BAS group IDs, and create process schedules. For OE or Snapshot, create OE IDs or Snapshot IDs.	See Preparing for Open Enrollment and Event Maintenance
3	For EM only, review, add, or delete unprocessed events.	Use the BAS Activity table to review the list of unprocessed events. Add and delete events as necessary.	BAS Activity.
4	Set up the PeopleSoft Benefits Administration run control.		PeopleSoft Benefits Administration Run Control.

Scheduling, Assigning Benefit Programs, Preparing Options, and Entering Elections

This table lists the steps for scheduling, assigning benefit programs, preparing options, and entering elections.

Step	Description	Details	Pages or Processes Used	Process Status Result
5	Assign participants to a processing schedule and prepare options.	Run the PeopleSoft Benefits Administration process to assign participants to the processing schedule, determine eligibility, calculate prices and credits, and identify option defaults and terminations. If the process completes without errors, go to Step 7. If the process results in errors, review and correct them. When you run the process again, the system will reevaluate them.	PeopleSoft Benefits Administration Process Run Control component. Use the Participant Lists run control panel to schedule specific participants for processing.	If scheduling is successful: AS (Assigned) or AN (Assigned None). If scheduling is not successful : AE (Assigned Error). If option preparation is successful : PR (Prepared), FA (Finalized Program None), or FP (Finalized Prepared None). [No additional processing will occur for participants with an FA or FP Process Status.] If option preparation is unsuccessful : PE (Prepared Error).

Step	Description	Details	Pages or Processes Used	Process Status Result
6	Review the results and correct errors from first run of the PeopleSoft Benefits Administration process.	Review processing results and correct errors. During the next run of the process the system will reevaluate participants and attempt to move them through the process. Use the Processing Controls Update to review and reprocess event processing results for individual participants. Use the Eligibility Debugging panel to correct eligibility errors.	Processing Messages, Schedule Summary, Employee Event Summary, Processing Controls Update, Eligibility Debugging, Employee Process Status (BAS027), Eligible Participants (BAS001), Ineligible Participants (BAS010).	
7	Create and deliver enrollment forms.		Enrollment Statements (BAS004).	When you create an enrollment form for a participant, their process status is updated to NT (Notified).
8	Enter employee elections.	Use the Data Entry pages or eBenefits.	Use the Data Entry pages or eBenefits.	When you enter elections for a participant, their process status is updated to ET (Elections Entered).

Validating, Loading, and Finalizing Elections

This table lists the steps for validating, loading, and finalizing elections.

Step	Description	Details	Pages or Processes Used	Process Status Result
9	Validate and load employee elections.	Run the PeopleSoft Benefits Administration process again to validate participant elections and load them into the system. If the process completes without errors, go to Step 12. If the process results in errors, review and correct them in Step 10 and reprocess participants until you have eliminated as many errors as possible. If you're running Open Enrollment, go to Step 11 when you're ready to finalize PeopleSoft Benefits Administration processing.	PeopleSoft Benefits Administration Process Run control.	When you successfully load elections for a participant, the participant's process status is updated to FE (Finalized - Enrolled). If there are errors in the validation and load process, the participant's process status will be EE (Election Error).

Step	Description	Details	Pages or Processes Used	Process Status Result
10	Review validation processing results and correct errors.	Print reports that list participants who did not return elections, participant election errors, and dependent election errors. Use summary panels and reports to review processing results and correct errors. The system will reevaluate participant elections and attempt to validate them. Use the Processing Controls Update to review and reprocess event processing results for individual participants.	Employee Process Status (BAS027), Missing Elections (BAS006), Invalid Benefit Elections (BAS003), Dependent /Beneficiary Elections (BAS007), Processing Messages, Schedule Summary, Employee Event Summary, Processing Controls Update.	
11	For Open Enrollment Only: Finalize employee elections.	Complete processing by running PeopleSoft Benefits Administration process to finalize elections for participants whose elections were in error or who failed to turn in election forms. The system will assign these participants the benefits election defaults that were assigned to them during option processing.	On the Open Enrollment panel, turn on Finalize/Apply Defaults to finalize elections for all participants.	When you run the PeopleSoft Benefits Administration process with Finalize/Apply Defaults turned on, the system will update the process status of all the participants scheduled for that process to FE (Finalized - Enrolled).
12	Create and deliver confirmation letters to participants.		(BAS005) Confirmation Statements.	

Understanding PeopleSoft Benefits Administration Process Status

This section defines PeopleSoft Benefits Administration process status values for:

- Schedule assignment.
- Benefit program assignment.
- Option preparation.
- Entering, loading and validating of elections.
- Reprocessing finalized events.

Understanding Process Status and Schedule Assignment

During schedule assignment, PeopleSoft Benefits Administration:

- Locates the employees who can be included in the process.
- Determines if they have any unprocessed events.
- Assigns unprocessed events to the processing schedule.
- Determines which assigned events should be open for processing.

The PeopleSoft Benefits Administration process can only actively process one event per participant at a time, but it can have several events scheduled for later processing. To manage the schedule, PeopleSoft Benefits Administration uses an event status of *Open*, *Closed*, or *Void*. Events must have *Open* status to be processed.

If you are running Open Enrollment or Snapshot, the system opens an OE or SNP event for all employees with the correct company and/or BAS group affiliation. If you run Event Maintenance, the system creates events for changes to employee job, labor code, and address information. It also creates events for employees who have fulfilled the trigger conditions for a passive event, and it takes note of unprocessed events that were manually inserted through the BenAdmin Activity page.

Events are dynamically opened and closed for processing based on event date and event priority (and by manual event status overrides).

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Scheduling Events and Assigning Benefit Programs, page 135

Chapter 8, “Preparing for Open Enrollment and Event Maintenance,” Establishing a Processing Schedule, page 94

Understanding Process Status and Benefit Program Assignment

The system uses event and eligibility rules to assign the participants associated with an open event to a benefit program.

Participant events can be assigned to a single program, multiple programs, or no program at all. The following table details process status designations:

Process Status	Description	Next Processing Steps
AE - Program Eligibility Assigned Error	Participant event is assigned to multiple programs.	The system cannot process the participant event through the next stage (Option Preparation) until you correct the errors. You'll most likely need to make corrections to participant personal/employment/job information or to program eligibility information. Each time you run PeopleSoft Benefits Administration, the system reevaluates AE events.
AN - Program Eligibility Assigned None	Participant event is not assigned to a benefit program.	During the Option Election phase of the process, the system determines if the AN participant associated with the event has current elections that require termination due to loss of program eligibility. If not, the event is assigned to FA (Finalized - Assigned None) status and processing ends. If the participant does have elections, the system updates process status to PR (prepared). Before the system can terminate this event, you have to acknowledge it on the data entry pages. The Find Terminations workflow process locates participant events at PR status that require termination.
AS - Program Eligibility Assigned	Participant event is assigned to a benefit program.	The event continues on to a process status of FP (Finalized - Prepared None), PE (Prepare Error), or PR, depending on the associated participant's eligibility for benefit options.

Note. You should not see the AN process status when the system *completes* the first run of the PeopleSoft Benefits Administration process. The system only uses this status value during the Schedule and Program Assignment stage of the process. In Option Preparation, the next stage of the first run of PeopleSoft Benefits Administration, the system moves events with an AN process status on to subsequent process status values like FA or PR.

In addition, if you see a set of events at the AS process status after Event Maintenance processing, employees are being processed who have more than one event assigned to them. In Event Maintenance, the system can assign and schedule all unprocessed events to a status of AS. However, because PeopleSoft Benefits Administration can only process one event per participant at a time through option preparation and election validation, it must close those events and leave them behind at AS status until the open events are processed.

See Also

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Entering Participant Benefit Elections, page 152](#)

Understanding Process Status and Option Preparation

During option preparation, the system uses eligibility and event rules to determine:

- Plan eligibility.
- Plan pricing.
- Available options.
- Default options.
- Proof of coverage limits for life and AD/D plans.
- Coverage terminations (as appropriate).

Any processing errors during this phase are typically caused by problems with:

- Eligibility rules.
- Event rules.
- The benefit program involved.
- The participant’s HR information.

When an error occurs, you need to:

1. Evaluate the error.
2. Correct it.
3. Reprocess the event.

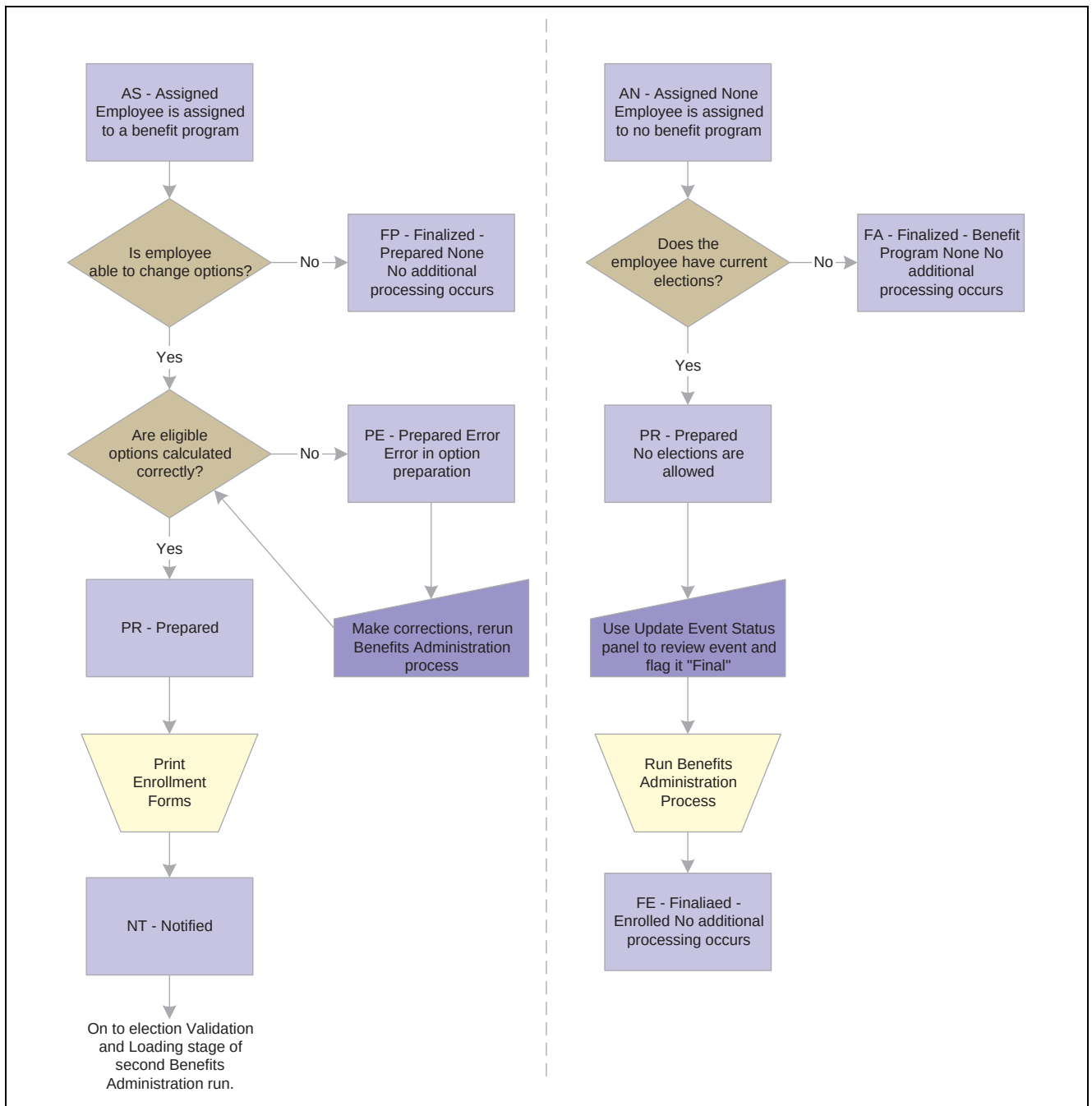
The following table describes Option Preparation status values.

Process Status	Description	Next Processing Steps
FA - Finalized - Benefit Program None	Participant event has no program assignment and no current elections. Used for events assigned an AN process status during the Scheduling and Program Assignment and whose associated participants do not have current benefit elections.	There is no further processing for this event. The online page description for this process status (on the Schedule Summary page, for example) is Program None.
FP - Finalized - Prepared None	System has assigned the participant event to a benefit program, but the associated participant is not allowed to elect any new options.	No further processing occurs for this participant event. The online page description for this process status (on the Schedule Summary page, for example) is Prepare None.

Process Status	Description	Next Processing Steps
PE - Prepare Error	The system has encountered an error. Events are given a PE process status during option eligibility determination or calculation of credits.	To correct, you should make corrections to the personal/employment/job information of the associated participant or to plan and option eligibility information. Each time you run PeopleSoft Benefits Administration, the system reevaluates PE events.
PR - Prepared	The system has calculated eligible options, credits, rates, and proof requirements for the participant associated with the event, and current elections have been identified for proof, eligibility level, and default processing. AN events that have current elections can also be brought to a status of PR.	For PE or AS events, processing stops. Enrollment forms should be created for and delivered to the participant associated with the event to bring the event to a process status of NT (notified). For AN events, processing also stops. Review the event (a pending termination of benefits), confirm it by marking it for finalization, and then run the second phase of PeopleSoft Benefits Administration. The event is brought to a process status of ET (Entered. The system brings the event to a process status of FE (Finalized - Enrolled) and automatically inserts termination rows for each of the associated participant's current elections.
NT - Notified	Election enrollment form has been distributed to the participant associated with the event. The system updates the event's process status to NT when you generate election forms for that participant via report BAS004. Participants can only advance to NT if their previous process status was PR.	Participants need to complete their election forms and return them to the HR/Benefits department. When you enter the elections into the system with the data entry pages, the system will advance the events to an ET (entered) process status.

Note. If you run an Open Enrollment process with Finalize selected, NT and PR events are brought to FE status, and the system follows event rules to determine if current elections or defaults should be loaded into the associated participant's records.

The following two flowcharts illustrate how the system assigns process status values during Option Preparation. The flowchart on the left shows the process status flow for AS events, while the flowchart on the right shows the process status flow for AN events.



Process status flow for option preparation

Understanding Process Status and Entering, Validating, and Loading Elections

In the second phase of PeopleSoft Benefits Administration, you enter participant elections into the system through the data entry pages and then run the PeopleSoft Benefits Administration to validate those elections and load them into the benefits tables and to PeopleSoft Payroll for North America.

The following table describes status values you might encounter.

Process Status	Description	Next Processing Steps
ET - Entered	A benefits administrator (or the employee via PeopleSoft eBenefits) has entered the participant's new elections into the system, and they are ready for validation by the PeopleSoft Benefits Administration process. Participant events with a process status of ET can have a prior process status of PR, NT, or RE (Reentered).	If there are no errors with the elections, the elections are posted to the appropriate benefit and payroll tables, and the system updates the process status to FE. If there are errors, the status becomes EE. If you run the PeopleSoft Benefits Administration process with Finalize selected, EE participant events are brought to FE status, and the system goes through the normal validation and load procedure for all elections. If any of the employee's choices are invalid, event rules are consulted to determine whether current elections or defaults should be loaded.

Process Status	Description	Next Processing Steps
EE - Election Error	The system encountered an error in processing the elections for the participant associated with the event. No elections are posted to the Base Benefits business process tables. Errors are posted to the Message Table and are identified by participant and event. The previous process status was either ET or EE.	No further processing occurs for this participant event. You need to correct the errors by reentering employee elections and run the PeopleSoft Benefits Administration process again. Alternatively, you can "force finalize" this participant event to finalize it with errors. The system loads the default values for the associated participant's erroneous benefit option elections. If a dependent/beneficiary or investment choice is in error, the system loads the employee's option choice but does not load the dependent/beneficiary or investment choice. You can generate confirmation statements for participants whose events have an EE process status; the form indicates the plan information in error along with the valid plan choices.
FE - Finalized - Enrolled	PeopleSoft Benefits Administration processing is complete for the participant event. All elections have been validated and loaded to the appropriate Base Benefits business process and Payroll for North America tables. Events reach this status either from a process status of ET, EE, or PR, or if you "force finalize" a participant. If the participant came from a process status of PR due to a loss of all eligibility, the system inserts a termination row for each of the participant's current elections.	You need to generate and deliver a confirmation form to the participant associated with the event. To change a participant's elections after they've been finalized (for example, if a participant wants to correct information on the confirmation statement), you can reprocess them by giving the associated event a process status of RE (re-entered) in the Event Status Update page and rerunning the PeopleSoft Benefits Administration process.

See Also

Chapter 9, "Running the PeopleSoft Benefits Administration Process," Understanding Process Status and Reprocessing Finalized Events, page 114

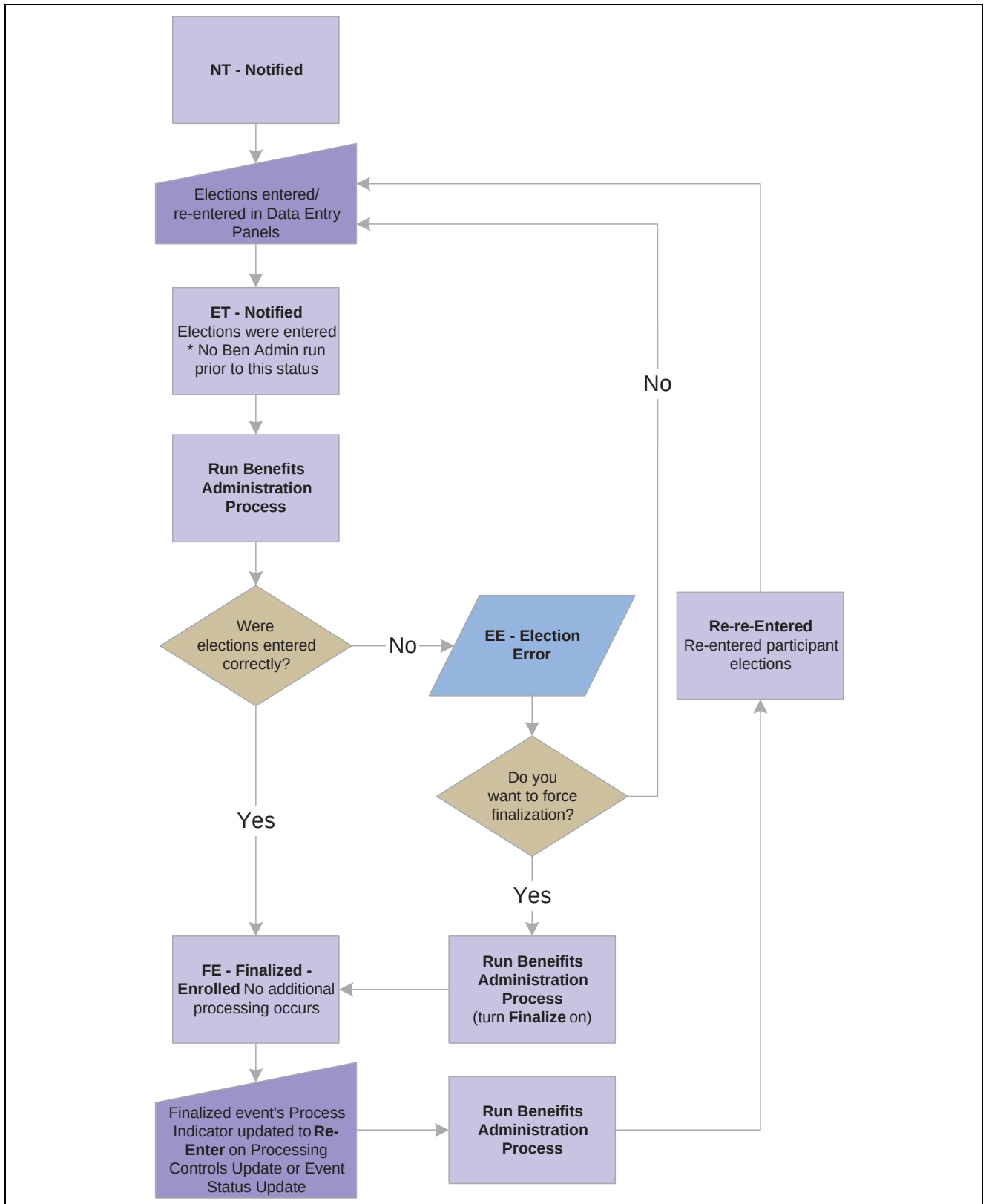
Understanding Process Status and Reprocessing Finalized Events

You can reprocess events at almost every stage of the PeopleSoft Benefits Administration process, from scheduling to election entry. In many cases, event reprocessing does not involve process status values other than those described previously, but when you're planning to reenter participant benefit option elections, the system uses the special RE (re-entered) process status as an interim status before rolling the event back to the ET value.

The following table describes the RE process status value.

Process Status	Description	Next Processing Steps
RE - Re-Entered	Enables elections associated with processing for the participant event to be reentered after the participant event has been brought to a process status of FE. Events are updated to RE status through the Event Status Update page.	After you update the elections in the data entry pages, the system updates the process status from RE to ET.

The following flowchart illustrates the process status flow for ET events and follows it through to the final process status of FE. It also shows how the system uses the RE process status.



Process Status Flow for Election Entry, Validation, Loading, and Re-Entry

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Understanding Process Status and Reprocessing Finalized Events, page 114

Managing Multiple Event Scheduling

PeopleSoft Benefits Administration can only process one event at a time for an individual participant. The system always tries to process events in a logical sequence; usually this means that the system tries to process events in the order that they occur. The management of multiple events for a participant is referred to as event coordination. Typical scenarios include:

- Open Enrollment participant event is in process and a family status change occurs for the associated participant.
- A new hire event is in process and the new hire moves to a new address (change in postal code).
- An event is retroactively entered into the system, affecting eligibility for current or future dated closed events.

If multiple events occur on the same date, the system uses the event priority for that event class to determine processing order. The event with the lowest priority number is processed first.

Multiple events on the same date in the same event class are merged into one event. For example, an employee transfers to a new job and a new union on the same day. Both events are assigned to the MSC event class. The system creates one row for these two activities in the BAS_PARTIC Table (which holds participant event records that are in process) and thereafter processes them as one event. The system indicates the merge by setting the Multi Activity Indicator field on that row to *Yes*. The action source for the activity is set to the first event read from the BAS Activity Table. The order that the system reads events from BAS Activity Table differs depending upon the database engine you’re using.

Understanding Event Status and Retroactive Events

While a participant event is in process, the system continues to recognize new events as they are triggered. If a new event has an earlier date than the event being processed, the system temporarily closes the event in process and opens the new event for processing. The first participant event’s Event Status value changes from *Open* to *Closed*. When the new event finalizes and changes to a closed status, the system reopens the interrupted event and continues its processing.

The following table describes event status values.

Current Event Status	Description
Open	Processed by the system on the next run of the PeopleSoft Benefits Administration process. Only one event can be open for an employee ID/benefit record number combination. Event Status can be updated to Closed naturally by the system or manually on the Event Status Update page.

Current Event Status	Description
Closed	Not currently processed by the system Closed events can be updated to Open, either by the system or manually, if no other events for the employee ID/benefit record number combination are Open.
Void	Has been backed out of the system and all eligibility processing related to it has been reversed. In effect, it is as if the event never occurred. To change event status to Void, use the Controls page or Event Status Update page. Events with an event status of Void can be updated to Open or Closed through event reprocessing.

When a participant event is processed ahead of other events with earlier event dates or lower Event Priority values, the system marks that event with an Out of Sequence flag. This flag appears on the Schedule Summary, Control, and Participant pages. The Out of Sequence flag indicates that the eligibility information for this event may have changed (may be impacted by these earlier, pending events), and therefore the event might need to be reprocessed.

An exception to the event coordination flow occurs when a new event interrupts (precedes) an in-process event, potentially impacting that event's assignment, eligibility, or rate recalculations. Rather than allow the system to reopen the stopped event and continue processing, you may need to use the Event Status page to queue the event for reprocessing such that its assignment, eligibility determinations or rate calculations are refreshed with the most current data.

See Also

[Chapter 5, “Creating Event Rules,” page 29](#)

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Reprocessing Events, page 165](#)

Setting Up the PeopleSoft Benefits Administration Run Control Process

This section describes how to:

- Specify a process to run.
- Add participants to a schedule.
- Set up Open Enrollment and Snapshot routines.
- Process passive events.

Note. To access the run control pages, you need to create a run control code or use an existing one. The COBOL program that runs the PeopleSoft Benefits Administration process, PSPBARUN, will delete this run control only after the process is successfully completed.

Pages Used to Set Up the PeopleSoft Benefits Administration Run Control

Page Name	Object Name	Navigation	Usage
Schedule and Chkpt Restart (schedule and checkpoint restart)	BAS_RUNCTL1	Benefits, Manage Automated Enrollment, Events, Run Automated Events Processing	Identify the Open Enrollment, Event Maintenance, or Snapshot schedule for which you're planning to run the PeopleSoft Benefits Administration process.
Participant Lists	BAS_RUNCTL2	Click the Participants List tab.	Add a specific set of employees to the schedule you're processing, or process a specific set of employees.
OE/Snapshot	BAS_RUNCTL3	Click the OE/Snapshot tab.	Enter reprocessing information for Open Enrollment or Snapshot schedules. Capture new participants for a specific Open Enrollment or Snapshot schedule already in progress. Finalize and apply defaults for participants in the schedule who have been processed with errors.
Passive Event Processing	BAS_RUNCTL4	Click the Passive Events Processing tab.	For Event Maintenance schedules, identify the passive events that have occurred in a defined period of time and create an entry of the events in the BAS_ACTIVITY table.

Specifying a Process to Run

Access the Schedule and Chkpt Restart page.

Schedule and Chkpt Restart		Participant Lists	QE/Snapshot	Passive Event Processing
Run Control ID: 1		Report Manager Process Monitor		Run
Process Date:	11/15/2002			
*Schedule ID:	BEM101	Canadian Employees EM		
*EM Process Mode:	Schedule and Process Events			
BAS Type:	E	Event Maintenance		
Company:				
BAS Group ID:	B02	Canadian Employees		
Restart/Debug Information		Restart Position		
Chk Point Interval in Minutes:	0	Benefit Program:	Passive Event ID:	
BAS Processing Phase:	R Ready	Event Date:		
☐ Record Eligibility Results		EmplID:	Ben Rcd#:	0
		Event ID:	Clear	

Schedule and Chkpt Restart page

Schedule ID

Select the schedule to run. When selected, the page displays the BAS Type (Open Enrollment, Event Maintenance, or Snapshot). The BAS Type of the schedule determines which features you can access on other run control pages.

Also displays the company and BAS group ID defined on the Schedule Table.

EM Process Mode

If you selected an Event Maintenance schedule, pick the EM Process Mode:

- *Schedule and Process Events* : All BAS Activity entries are retrieved and events are created and assigned to all appropriate schedules. Then, any events belonging to the current schedule are processed further during this run.
- *Schedule New Events Only* : All BAS Activity entries are retrieved and events are created and assigned to all appropriate schedules, but they are not processed further during this run.
- *Process Existing Events Only* : Only existing events belonging to the current schedule are processed.

Chk Point Interval in Minutes (check point interval in minutes)

Indicate a number of minutes between commits; 60 is a reasonable number.

If a job terminates abnormally, values for the last record processed appear in Restart Position.

Record Eligibility Results

Use to troubleshoot benefits processing errors related to eligibility.

When selected, the system checks eligibility for all benefit programs and for all options within the benefit programs for which the participant is eligible. It records the results of these checks on the Eligibility Debugging page. In normal processing, the system stops checking eligibility the first time a participant fails an eligibility check.

Note. You should only run processes with Record Eligibility Results selected for small processing populations, because the act of checking and recording all types of eligibility can result in long process run times.

Clear

If a job terminates abnormally, values for the last record processed appear in Restart Position and the run control is “locked” (all fields are disabled, since the parameters should not be changed when the process is restarted). During implementation, you may encounter many instances of aborted runs as you test your table setup. You may decide not to complete an interrupted schedule – the Clear button will “unlock” the schedule and its run control. This feature would not normally be used in a production environment.

The EM Process Mode allows for more efficient processing of very large participant populations. The Scheduling process is very fast, but it does not allow for multiple concurrent batch runs because of its updating of the BAS Activity Table. The Assignment, Option Preparation, Validation, and Finalization activities are slower and more intensive, but do allow for concurrent processing. Thus maximum throughput can be achieved by performing an initial “Schedule Only” run followed by several simultaneous “Process Existing” runs using multiple Schedule IDs.

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Reprocessing Events, page 165

Adding Participants to a Schedule

Access the Participant Lists page.

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

☒ **Process From Participant List** **EM Process Mode:** Schedule and Process Events

Schedule Only Employee(s)			
*EmpID	Name		
B-BARET100	Default,Tocurrent1	+	-

Process Only Participant(s)			
*EmpID	Name	Ben Rcd#	Event ID
		0	0

Participants List page

Process From Participant List

Select to use the remaining features on this page.

Schedule Only Employee(s)

Indicate which specific employees should have new events added to an Open Enrollment or Event Maintenance schedule.

Process Only Participant(s)

Use to process a list of specific participants with existing events (rather than processing all participants within the schedule), sorted by benefit record number (for employees with multiple jobs) and event ID.

You may need to go to the Event Status Update page and indicate the phase to process for this employee (update the Process Indicator field).

Setting Up Open Enrollment or Snapshot Routines

Access the OE/Snapshot page.

OE/Snapshot page

Reprocess

Resets the entire population in your Open Enrollment or Snapshot schedule to the selected action:

- *None*: This is the default action.
- *Schedule*: Use if you've made changes to scheduling criteria or mass changes to Job data which could affect schedule assignment, and need to run through the Open Enrollment process again, beginning with that step. All existing participant records for the schedule will be deleted.
- *Assign Benefit Pgm* (program): Use if you've made changes to eligibility rules for benefit program assignment and need to run through the Open Enrollment process again, beginning with that step.
- *Prepare Options*: Use if you've made changes to eligibility rules, event rules, or rate schedules that affect how the system determines eligible options, defaults, and the costs associated with each option. Any elections posted are deleted. All data entry for affected participants is also deleted. Closed and voided participant events are excluded.

- *Elect Options:* Use if you've made changes to the validation rules stored on the Event Rules Table. All participants are set back to a process status of PR, but any completed data entry on them is preserved. Any elections posted are deleted.

Schedule New Participants

Select if you missed a large group of participants in your initial run of Open Enrollment—participants who did not get scheduled and therefore do not have records on the participant file for this schedule. Rather than use the Participant Lists page to add the employee IDs one at a time, this check box forces the system to reevaluate all employees against the schedule parameters. If the participant fits that selection, and if the participant does not have a record on the participant file for this schedule, the system creates the record.

Note. Schedule New Participants should not be used for the initial Open Enrollment run.

Finalize/Apply Defaults

Select when you are ready to complete Open Enrollment processing. The system performs the same validations against participant election information but also assigns defaults for participants who still have errors or who have not returned their election forms. This closes Open Enrollment for data entry. To reopen it, you will need to reprocess selected participants.

Note. Finalize/Apply Defaults is not typically used for the initial Open Enrollment run.

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Pages Used to Reprocess Events, page 166

Processing Passive Events

Access the Passive Event Processing page.

Schedule and Chkpt Restart Participant Lists QE/Snapshot **Passive Event Processing**

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

Passive Events Processing

☐ Do Not Process ☐ Trigger Passive Events Only ☒ Process

Passive Events To Process [Customize](#) [Find](#) [View All](#) [First](#) [1 of 1](#) [Last](#)

*Event ID	Description	From Date	To Date
A65	Age 65		

Navigation: [+](#) [-](#)

Passive Event Processing

Passive events are not initiated by data entry, but are the result of the passing of a predefined period of time. For example, you might have an eligibility rule set up that enables employees to enroll in a benefit after ten years of service.

Once you set up the parameters here, the system looks at every employee's job data (regardless of schedule) to determine if a passive event has occurred. If a passive event is found, an entry is made to the BAS Activity Table. If the employee has multiple jobs, an entry is made into the BAS Activity Table for each job that meets the eligibility criteria.

To control mistakes with scheduling passive events multiple times and creating redundant data, history records are created that record passive event processing. When scheduling passive events on the run control, the history is referenced and warning messages are displayed if there is overlap with a prior passive event process. You can ignore the warning and schedule the repeat passive event request; however, the PeopleSoft Benefits Administration process only triggers passive events for those employees who were not picked up previously.

Trigger Passive Events Only

Select to trigger the passive event types indicated in the Passive Events To Process group box for the specified date range. The system triggers all passive events currently in your database for that period, but does not process any events. You can then review the triggered events in the BenAdmin Activity page and delete any erroneously triggered events.

Process

Select after you have run passive event processing using Trigger Passive Events Only and have reviewed the triggered passive events in the BenAdmin Activity page. The system triggers and processes the passive events that belong to the schedule you selected on the Schedule and Checkpoint Restart page.

From Date/To Date

Indicate the timeframe during which you want to have the system look for passive events.

The system warns you if you create a timeframe for a particular passive event ID that overlaps a previously recorded timeframe for the same event ID.

See Also

Chapter 9, "Running the PeopleSoft Benefits Administration Process," Reviewing Passive Event Processing History, page 134

Reviewing PeopleSoft Benefits Administration Process Results

This chapter describes how to:

- Review error messages.
- Review process results for schedules.
- Enter search criteria to review process results for participant events.
- Review process results for participant events.
- Review event information for participants.

- Review plan type details for participant events.
- Review cost and credit information for plan types.
- Review passive event processing history.
- View a participant's benefits summary.

Pages Used to Review PeopleSoft Benefits Administration Process Results

Page Name	Object Name	Navigation	Usage
Ben Admin Process Messages (benefits administration process messages)	BAS_MESSAGES	Benefits, Manage Automated Enrollment, Review Processing Results, Processing Messages	Review errors that occurred during the last batch of BenAdmin processing.
BenAdmin Schedule Summary (benefits administration schedule summary)	BAS_PARTIC_SUM	Benefits, Manage Automated Enrollment, Review Processing Results, Schedule Summary	Review employee counts for all available status values.
BenAdmin Processing Controls (benefits administration processing controls)	BAS_PARTIC_PRC1	Benefits, Manage Automated Enrollment, Events, Update Processing Controls	Review processing status of specific participant event records.
Participant	BAS_PARTIC_INQ1	Benefits, Manage Automated Enrollment, Review Processing Results, Employee Event Detail	Review status, processing, and eligibility information for a selected participant and event.
Participant - Plan Type	BAS_PARTIC_INQ2	Benefits, Manage Automated Enrollment, Review Processing Results, Employee Event Detail Click the Plan Type tab.	Review plan type details for a selected participant and event, including dependent and investments information when applicable (via page links).
Participant - Option and Cost	BAS_PARTIC_INQ4	Benefits, Manage Automated Enrollment, Review Processing Results, Employee Event Detail Click the Option and Cost tab.	Review costs and credits for a participant and plan type.
BenAdmin Passive Event History (benefits administration passive event history)	PASSIVE_EVENT_HIST	Benefits, Manage Automated Enrollment, Review Processing Results, Passive Event History	Review passive event history for a specified process date.

Reviewing Error Messages

Access the BenAdmin Process Messages page.

Note. You can also run the following reports to review PeopleSoft Benefits Administration processing errors: Invalid Benefit Elections, Missing Elections, and Ineligible Participant (for Open Enrollment schedules only).

The event ID for Open Enrollment processes is always 0, because the system opens one Open Enrollment event for all participants in the Open Enrollment schedule during the initial run of the OE process.

A message often requires additional information or help in identifying the specific plan type or benefit option involved. Additional data is displayed in the generic Message Data area and is described in the message text.

Categories of Errors

When you run the PeopleSoft Benefits Administration process, you might expect the following categories of errors:

Error Category	Description	To Correct
Program Assignment	Participant events are assigned to multiple benefit programs. Occurs during the first phase of PeopleSoft Benefits Administration processing.	Review eligibility rules and benefit program setups for errors. The system reviews the participant's program assignment during the next PeopleSoft Benefits Administration run.
Option Preparation (occurs during first phase)	A participant is eligible for a benefit program, but there is an error in the determination of option eligibility, credit, or deduction calculations. Typical errors result from deduction calculations—for example, omitting the age from an age-graded rate table. Occurs during the first phase of PeopleSoft Benefits Administration processing.	Adjust the participant's personal/employment/job information or program eligibility/deduction information.
Election Validation	The system cannot validate participant benefit option elections, dependent/beneficiary assignments, or investment allocations. Occurs during the second phase of PeopleSoft Benefits Administration processing.	Return to the data entry pages and ensure that correct election information has been entered into the system.

Reviewing Process Results for Schedules

Access the BenAdmin Schedule Summary page.

BenAdmin Schedule Summary									
Schedule ID:		KUEM		US Event Maintenance		Participant Count:		13	
Process Status Totals			Event Status Totals			Finalize Totals			
Assn Error:	0	0.00%	Open:	8	61.54%	Finalize:	0	0.00%	
Assn None:	0	0.00%	Closed:	5	38.46%				
Assigned:	1	7.69%	Voided:	0	0.00%	Elig Changed Totals			
Prep Error:	0	0.00%				Address:	0	0.00%	
Prepared:	8	61.54%				Job:	0	0.00%	
Notified:	0	0.00%	Process Indicator Totals			MultiJob:	0	0.00%	
Re-Enter:	0	0.00%	Normal:	13	100.00%	Out of Sequence Totals			
Entered:	0	0.00%	Assign:	0	0.00%	Seq:	0	0.00%	
Elect Err:	0	0.00%	Prepare:	0	0.00%	Disconnected Event Totals			
Enrolled:	2	15.38%	Re-Enter:	0	0.00%	Disc:	0	0.00%	
Pgm None:	1	7.69%	Elect:	0	0.00%				
Prep None:	1	7.69%	Void:	0	0.00%				

BenAdmin Schedule Summary page

Note. The Schedule Table shows the state of the schedule population at the current moment, so if you have participant events marked for finalization but have not run the process, they will show up in Finalize Totals. Once you run the process for that schedule, all events marked for finalization will be finalized and will not appear in Finalize Totals.

Note. This page shows a cumulative total over the entire history of the Schedule. You may occasionally "retire" an Event Maintenance schedule (mark it to allow *No New Events*), and create a new schedule for new statistics.

Process Status Totals	Only one event can be open for any one participant/benefit record number combination at a time. However, these totals represent the sum of all events, open or closed.
Event Status Totals	Voided events are not considered for any further processing.
Process Indicator Totals	View the participant event totals that currently have been requested to go through reprocessing. When the system actually reprocesses events, the system removes them from these lists of totals as appropriate.
Finalize Totals	Displays the number of participant events that are currently marked to be finalized or to have defaults applied to them, but which have not yet been run through the PeopleSoft Benefits Administration process. You can flag individual events to be finalized and to have option defaults applied to them by selecting the <i>Final</i> check box for those events in the Controls page of the Processing Controls Update component.

Elig Changed Totals
(eligibility changed totals)

View the number of participant events that may need to be reprocessed.

The system flags these events when the HR data used for processing event eligibility is changed, a new row affecting eligibility is inserted, or the row used for eligibility is deleted.

There are three categories of eligibility changes: address (state or postal code), job information, or multiple jobs (changes to primary job flags).

Out of Sequence Event Totals

View the number of events that have been processed out of sequence by the system for the selected schedule.

An Out of Sequence event might need to be reprocessed because an earlier, opened event might have changed the defaults, eligibility, or event rule processing results for the later, closed event.

Disconnect Event Totals

View the number of disconnected events detected by the system during processing for the selected schedule.

Events can become disconnected when one or more of the HR records (PERSON, PERS_DATA_EFFDT, EMPLOYMENT, JOB) needed for eligibility processing for the event have been deleted.

See Also

[Chapter 8, “Preparing for Open Enrollment and Event Maintenance,” Defining Open Enrollment and Snapshot IDs, page 89](#)

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Reprocessing Events, page 165](#)

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Entering Search Criteria to Review Process Results for Participant Events, page 127](#)

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Validating and Loading Elections, page 161](#)

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Understanding PeopleSoft Benefits Administration Process Status, page 107](#)

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Manually Updating Event Status, page 140](#)

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Analyzing Disconnected Events, page 141](#)

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Multiple Jobs,” Activating Multiple Jobs

Entering Search Criteria to Review Process Results for Participant Events

Access the BenAdmin Processing Controls page.

BenAdmin Processing Controls			
Required Search Fields			
Schedule ID:	KUEM	Q	US Event Maintenance
EmplID:	B-BARET100	Q	Default,Tocurrent1
Optional Search Fields			
Benefit Program:	B03	Q	BAS Eligibility 3
Event Classification:	A52	Q	Age 52 Passive event
Event Status:	O	Q	Open for Processing
Process Status:	AE	Q	Program Elig Assign Error
Process Indicator:	A	Q	Assign Benefit Program
☐ Finalize/Apply Defaults ☒ Event Out of Sequence ☐ Event Disconnected			

BenAdmin Processing Controls page

You'll enter your search criteria for the set of participant event records that you want to review or update. You'll initiate a search, and the system displays the results page to review the process status information of the participant event records that match your search criteria.

Note. You might use the Schedule Summary page to get an idea of the overall processing status of your schedule before using the Processing Controls Update pages.

Schedule ID and EmplID

You must use one or the other as selection criteria, to focus your search on either a participant or a schedule.

Note. Selecting a particular employee ID locates all event records for that employee with a process status value assigned to them: only one event will be open, but there might be multiple closed or void events.

Finalize/Apply Defaults

Locates events that have been flagged to be finalized or have option defaults applied.

You flag events this way with the Final check box on the Processing Controls Update - Controls page.

Reviewing Processing Results for Participant Events

Access the BenAdmin Processing Controls page.

BenAdmin Processing Controls										
Search Results										
Sched ID	EmplID	Ben Rcd#	Event Date	Event Class	Event ID	Pgm	Event Status			
KU00	KU0007	0	Locherty,Betty	01/01/2000	Opn Enroll	0	KU1	Closed		
Process Status:	Enrolled	*Process Indicator:	Normal Prc	☐ Addr Elig Chg	☐ Event Out of Sequence	☐ Final/Dflt				
				☐ Mult.JobChg	☒ Disconnected	Suppress Forms:				
				☐ Job Elig Chg						
KU99	KU0007	0	Locherty,Betty	01/01/1999	Opn Enroll	0	KU1	Closed		
Process Status:	Enrolled	*Process Indicator:	Normal Prc	☐ Addr Elig Chg	☐ Event Out of Sequence	☐ Final/Dflt				
				☐ Mult.JobChg	☒ Disconnected	Suppress Forms:				
				☐ Job Elig Chg						
KUEM	KU0007	0	Locherty,Betty	08/01/2000	Fam Status	1	KU1	Open		
Process Status:	Prepared	*Process Indicator:	Normal Prc	☐ Addr Elig Chg	☐ Event Out of Sequence	☐ Final/Dflt				
				☐ Mult.JobChg	☒ Disconnected	Suppress Forms:				
				☐ Job Elig Chg						

BenAdmin Processing Controls page

This page displays the results from the criteria in the search fields.

Process Indicator

Tells the system the event status to which you want to reprocess the specific participant event on the next PeopleSoft Benefits Administration run.

Addr Elig Chg (address eligibility change), **Mult Job Chg** (multiple job change), **Job Elig Chg** (job eligibility change)

Indicates that event eligibility changes, insertions, or deletions, have occurred and the participant event may need to be reprocessed. If you determine that the event does not need reprocessing, you can clear these check boxes to indicate this fact, although these flags are only informational.

Disconnected

Indicates an event has been disconnected and can no longer be processed. Disconnected events are events that have lost rows in one of the core HR tables: PERSON, PERS_DATA_EFFDT, EMPLOYMENT, or JOB.

Final/Dflt (final/default)

Indicates that you want to finalize and/or apply default benefit option elections to a specific participant event on the next run of the PeopleSoft Benefits Administration process for the schedule to which that the participant event is assigned.

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Entering Search Criteria to Review Process Results for Participant Events, page 127

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Analyzing Disconnected Events, page 141

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Manually Updating Event Status, page 140

Chapter 8, “Preparing for Open Enrollment and Event Maintenance,” Defining Open Enrollment and Snapshot IDs, page 89

Chapter 10, “Processing Event Maintenance On Demand,” Reviewing and Updating Event Status, page 184

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Analyzing Disconnected Events, page 141

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Managing Multiple Jobs”

Reviewing Event Information for Participants

Access the Participant page.

Participant		Plan Type		Option and Cost		
Sched ID:	KU00	US Open Enrollment 2000				
EmplID:	KU0003	Parsons, Jean				
Benefit Rcd#: 0						
Event Information						
ID:	0	Empl Rcd#:	0	Date:	01/01/2000	
Status:	Closed to Processing		Effseq:	0		
Class:	OE	Open Enrollment		Priority:	900	
Source:	Open Enrollment		☐ Multi-Activity Indicator			
Eligibility Information						
Empl Rcd#:	0	COBRA Action:				
Addr Effdt:	03/12/1988					
Job Effdt:	03/12/1988	Effseq:	0			
Processing Information						
Benefit Program:	KU1 GBI US Fulltime Benefit Pgm			☐ Address Eligibility Changed		
Process Status:	Finalized - Enrolled			☐ Multi-Job Indicator Changed		
Status Date:	06/23/2000			☐ Job Eligibility Changed		
Process Indicator:	Normal Processing			☐ Event Out of Sequence		
Election Source:	None Entered			☐ Event Disconnected		
Excess Credit:	Cash			☒ Available through Self Service		
Option Notify:	11/01/1999	Election Rcvd:	11/22/1999			
Confirm Notify:	12/15/1999	Confirm Rcvd:				
Finalize/Apply Defaults	☐		Suppress Forms:	Enrl/Print Days: 0		
Eligibility Source						
Empl Rcd#	Effdt	Effseq	Pri Job	Incl Elig	Incl Ded	Eligibility Source
	03/12/1988					ADDRESSES
0	03/12/1988	0	☒	☒	☒	JOB

Participant page

Source	Displays the event trigger: a changed employee address, or job information; a passive event; or the insertion of a manual event.
Event Priority	Indicates the order of processing for events with different classes that occur for the same benefit record number on the same event date.
Multi-Activity Indicator	Multiple activity records from the BAS Activity Table had the same benefit record number, event date, and event class, and were merged into a single participant event.
COBRA Action	If the event is associated with an action that may make the employee eligible for COBRA coverage, the system will display that action code.
Empl Rcd# (employment record number), Job Effdt (job effective date), Effseq (effective sequence)	The keys of the Primary job at the time of the event. See the Eligibility Source grid.
Addr Effdt (address effective date)	The effective date of the address (state or postal code) used for eligibility. See Eligibility Source grid.

Election Source	How the system received the employee's elections.
Option Notify, Confirmation Notify, Election Rcvd, and Confirm Rcvd	The dates that you sent the employee his or her notification and confirmation letters, and the dates those letters were received.
Available through Self Service	If selected, the participant can enter elections for the option processing results of this event through PeopleSoft eBenefits application.
Eligibility Source	Shows the source of eligibility data that was used when the event was last processed. The first line is always the effective date of the ADDRESSES Table that contributed address data to the eligibility processing. The remaining rows show each job that may have contributed eligibility information and the <i>Pri Job</i> (primary job), <i>Incl Elig</i> (include for eligibility), <i>Incl Ded</i> (include for deductions) flags, used primarily in multiple job processing.

See Also

[Chapter 9, "Running the PeopleSoft Benefits Administration Process," Manually Updating Event Status, page 140](#)

[Chapter 9, "Running the PeopleSoft Benefits Administration Process," Analyzing Disconnected Events, page 141](#)

[Chapter 5, "Creating Event Rules," page 29](#)

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, "Managing Multiple Jobs"

Reviewing Plan Type Details for Participant Events

Access the Plan Type page.

Participant	Plan Type	Option and Cost
Sched ID: KU00	EmplID: KU0003	Ben Rcd#: 0 Event ID: 0
Plan Types Find View All First 4 of 26 Last		
Plan Seq: 11	Plan Type: 11 Dental	
Option Code: W	Benefit Plan:	Coverage Code:
Curr Election: Yes	☒ Elections Allowed	Coverage Begin: 01/01/2000
Enroll Action: None	☐ BAS Error	Deduction Begin: 01/01/2000
Ignore Plan: No	☐ Proof Received	Coverage Elect:
Coverage Elect: Elect		Addl Pay Eff: 01/01/2000
Billing		
Billing Action: N None		

Plan Type page

Curr Election

You have the following options:

- *Yes*: The employee had coverage in this plan type as of the event date.
- *No*: The employee did not have coverage in this plan type as of the event date.
- *Only*: The employee had coverage in this plan type as of the event date, but is no longer eligible as a result of the event. Coverage is displayed here *only* because it will be terminated.
- *Future*: The employee has a future-dated election in this plan type that the system will terminate.

Enroll Action and Coverage Elect

Until the event is finalized, these fields have default values of None and Elect. After finalization, *Enroll Action* can be either:

- None: No action occurred for this plan.
- Enroll: *Coverage Elect* is set to Waive or Elect.
- Term: *Coverage Elect* is set to Terminate.

A participant receives an enroll action of None if the election for the given plan type matches the participant's current election. This way, if the participant stays in the same benefit plan for twenty years, there will be only one enrollment record rather than twenty. Participants also receive an enroll action of None if there is an error with the election, or no current election, when the participant is finalized.

The date the election was processed.

Ignore Plan

Reflects the setting on the Event Rules Table 1 page.

BAS Error

The system has encountered an error during eligibility, event rule, or election processing for this plan type.

Deduction Begin

The effective date of the coverage.

Billing

If the Enroll Action has triggered Benefits Billing, then billing parameters will display in this group box.

Note. Certain plan types (Life, Savings, FSA, Pension, and Vacation Buy/Sell) have additional plan-specific election information that appear above the Billing group box. This includes life coverage amount, savings contribution amount and rollover options, pension contribution amount, and vacation hours. A page link may also appear for displaying Dependent, Beneficiary, or Investment information.

See Also

[Chapter 5, "Creating Event Rules," page 29](#)

Reviewing Cost and Credit Information for Plan Types

Access the Participant - Option and Cost page.

Participant **Plan Type** **Option and Cost**

Sched ID: KU00 EmpID: KU0003 Ben Rcd#: 0 Event ID: 0

Plan Types Find | View All First 10 of 26 Last

Plan Seq: 21 Plan Type: 21 Supplemental Life

Options Find | View All First 1 of 8 Last

Option Seq: 1 ID: 1 Type: Waive Option

Benefit Plan: Coverage Code:

Option Code: W Option Level:

☒ Default Election ☐ Proof Required ☐ History Only

Coverage Base: Premium Base:

Ded Class:

Pay Periods: ☐ First ☐ Second ☐ Third ☐ Fourth ☐ Fifth

Option Cost					
Cost ID	Cost Type	Earn Code		Annual Amt	Deduct Amt

Participant - Option and Cost page

Default Election

When selected, indicates the option will be assigned as a default to participants who fail to make their elections. It does *not* mean that this option has already been assigned to this participant as a default option.

Proof Required

When selected, means the participant must pass proof rules to legitimately enroll in the plan. These proof rules are stored in the event rules you have defined for your PeopleSoft Benefits Administration system.

History Only

Identifies options that the employee is eligible for but are not the result of the current event, and so cannot be chosen.

For example, when a participant undergoes an FSC (family status change) event, such as a marriage, the event rules only allow the participant to choose between options that are available as a direct result of the change in coverage status.

See Also

[Chapter 5, "Creating Event Rules," page 29](#)

Reviewing Passive Event Processing History

Access the BenAdmin Passive Event History page.

BenAdmin Passive Event History page

Search Enter any combination of search criteria and then click this button to retrieve results that display in a grid below.

From Date and To Date The system searched this period for passive events during the run of the PeopleSoft Benefits Administration process. Set on the Passive Event Processing page of the PeopleSoft Benefits Administration run control component.

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Processing Passive Events, page 122

Viewing a Participant’s Benefits Summary

Access the Benefits Summary page.

See *PeopleSoft HR Base Benefits PeopleBook* “Viewing Benefits Summary Data”

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Reviewing Enrollments and Benefit Calculations”

Scheduling Events and Assigning Benefit Programs

Open Enrollment and Event Maintenance differ most in scheduling events and assigning benefits programs.

This section describes how to:

- Schedule events and assign programs for Open Enrollment.
- Schedule events and assign programs for Event Maintenance.
- Manage unprocessed activities for Event Maintenance.
- Manually update event status.

Page Used to Schedule Events and Assign Benefit Programs

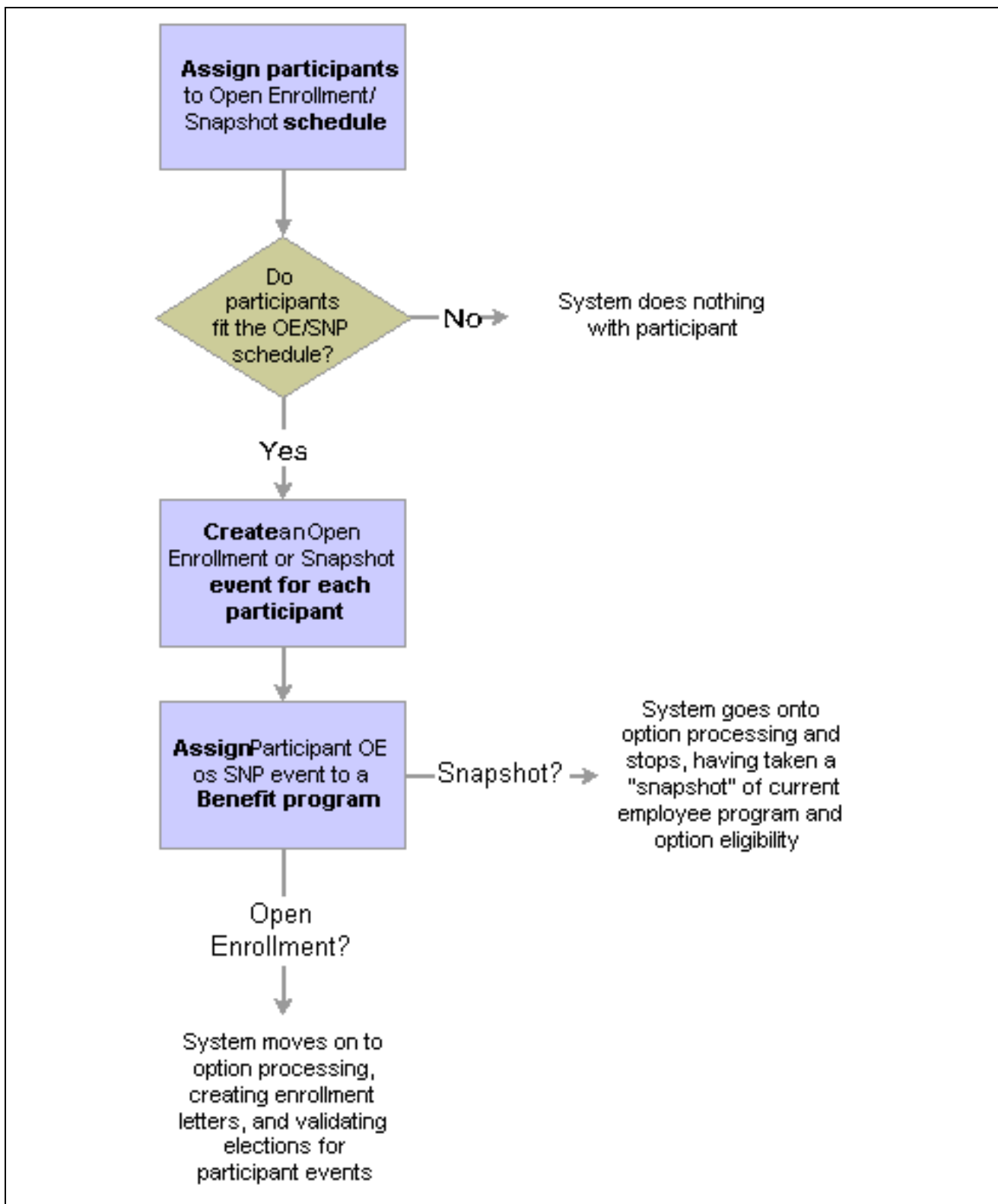
Page Name	Object Name	Navigation	Usage
BenAdmin Event Status Update (benefits administration event status update)	BAS_PARTIC_STS	Benefits, Manage Automated Enrollments, Events, Update Event Status	Identify event status information for events that are updated or reprocessed.

Scheduling Events and Assigning Programs for Open Enrollment

For each participant, the Open Enrollment event:

- Assigns the participant to the Open Enrollment schedule and creates an event (BAS_PARTIC).
- Reevaluates current benefit program eligibility and assigns participant to an appropriate program.

The following flowchart illustrates the process steps for this phase of Open Enrollment.



Open Enrollment scheduling and program assignment flowchart

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Managing Unprocessed Activities for Event Maintenance, page 140

Scheduling Events and Assigning Programs for Event Maintenance

Event Maintenance begins by selecting event triggers, including:

- Changes to employee address, employment, and job information.
- Passive events.

The system creates rows for each event trigger in the BAS Activity Table. Each event trigger in the table represents an *unprocessed activity* that has the potential to be processed into a participant event row on BAS_PARTIC.

Note. When you use the BenAdmin Activity page to enter a manual event, you are really entering a row into the BAS Activity Table.

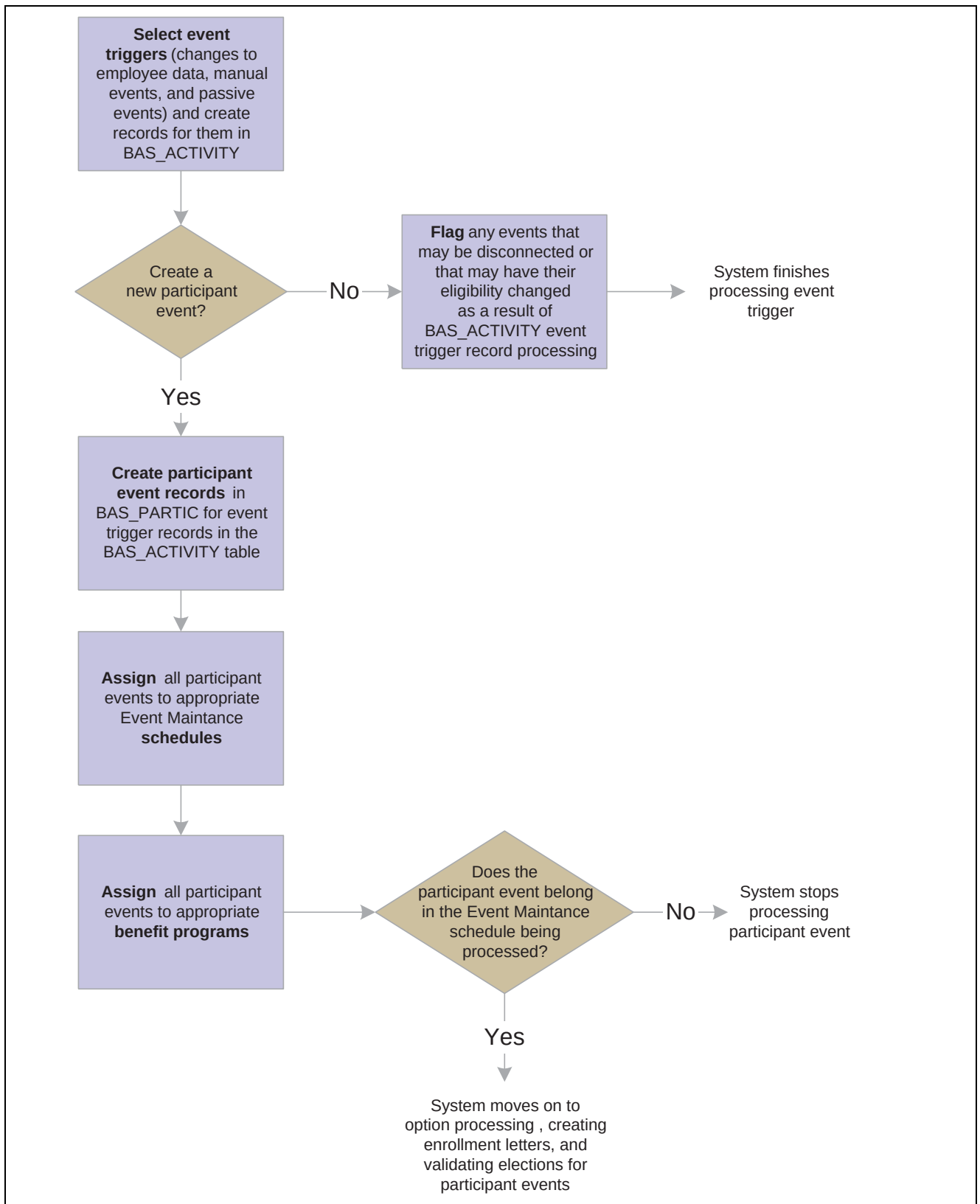
The system evaluates each unprocessed activity and determines possible courses of action:

- Create a new participant event for the activity in BAS_PARTIC.
- If the creation of the new participant event affects the eligibility processing for an existing event, flag that event to indicate that it may need reprocessing.
- If the trigger information for the event has been deleted or changed, create a new participant event and flag it as being disconnected.

The event is assigned to the processing schedule that is most appropriate for the participant associated with the event. The system then determines the event’s benefit program eligibility, whether or not it’s been assigned to the specific schedule for which you’re processing Event Maintenance.

Note. At this stage of Event Maintenance, the system might assign participant events to schedules other than the one you’re processing. This way, when you run Event Maintenance for another schedule, you’ll already have a set of participant events that have been assigned to benefit programs and are ready to go on to option processing.

The following flowchart illustrates the scheduling and assignment process for Event Maintenance.



Event Maintenance scheduling and program assignment flowchart

See Also

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Managing Unprocessed Activities for Event Maintenance, page 140](#)

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Analyzing Disconnected Events, page 141](#)

Managing Unprocessed Activities for Event Maintenance

Before you run PeopleSoft Benefits Administration for an Event Maintenance process, use the BenAdmin Activity page to:

- Review the unprocessed activities that are currently triggered for your employees.
- Insert manual events for Event Maintenance processing.
- Delete unprocessed activities.

After you’ve begun processing your participants, you can continue to use the BenAdmin Activity page to insert manual events.

You can delete any activity trigger record on the BenAdmin Activity page, but only after careful consideration. Events are often triggered that have no effect on benefits; the system is designed to handle these sorts of events, so it’s better to leave them in the system. One example is an annual raise that has no effect on benefits but that affects a great number of employees.

Note. When an activity is processed without error during the PeopleSoft Benefits Administration processing cycle, the system deletes it from the BAS Activity Table, which means it no longer shows up on the BenAdmin Activity page.

See Also

[Chapter 5, “Creating Event Rules,” Manually Inserting Events into the BAS Activity Table, page 34](#)

Manually Updating Event Status

Access the BenAdmin Event Status Update page.

The Event Status Update page displays all of the participant event records currently associated with a specific participant and benefit record number combination.

To open another event for processing, change the event status of the currently open event to *Closed*. Then change the event status of the event you would like to process to *Open*.

Note. The system flags the event that was in process as out of sequence, which means that the event may require reprocessing later.

You cannot manually change an event status to *Void*. You can only change an event’s event status to *Void* when you reprocess the event.

See Also

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Reprocessing Events, page 165](#)

Analyzing Disconnected Events

This section provides an overview of event disconnection and describes how to:

- Investigate and void disconnected events.
- Reconnect Open Enrollment or Snapshot events.

Understanding Event Disconnection

When the system flags a participant event as being disconnected, it means that information that the system uses to track and/or process the event was deleted at some point after the event was triggered. Once an event is disconnected, it can no longer be processed by the system, except to be voided. There are two ways a participant event can become disconnected:

- The changed HR record that previously triggered the event is deleted.
- One or more HR records needed for eligibility processing no longer exist.

The disconnection needs to be analyzed to determine any impact on benefit processing of the participant associated with the event. If an event is disconnected after it is finalized, you may want to void the event through reprocessing.

Disconnection Due to Loss of Event Trigger

When the system processes event triggers on the BAS Activity Table, it looks at the source of the triggered activity. If the triggered activity results from the change of address, employment, or job information, the system needs to determine what type of change occurred: an information *insert*, a data *change*, or a *deletion* of information.

- When you *update* employee state, postal code, or job information by inserting new records for that information into the system, the system creates a new participant event in BAS_PARTIC.
- If the trigger was a *correction* of those same types of information, the system sets an eligibility change flag for any existing participant event that was dependent upon that information, indicating that reprocessing for the flagged event may be necessary.
- If the trigger was a *deletion* of participant state, postal code, or job information, the system disconnects the participant events associated with that information.

Note. When you correct the effective date of a particular address or job information record, the system simultaneously creates a new participant event and disconnects any participant events that were initially triggered by that address or job record.

Disconnection Due to Loss of Eligibility Information

When the system prepares options or validates elections for participant events, it must access the current HR records that provide the event's eligibility parameters. If eligibility data has been deleted or no longer exists as of the event date (because the effective date of the eligibility data was changed), the system can no longer process the event. It must assume that the event was originally triggered in error or has been superseded. PeopleSoft Benefits Administration disconnects these events, preventing them from being processed further by the system.

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Managing Unprocessed Activities for Event Maintenance, page 140

Investigating and Voiding Disconnected Events

Under most circumstances, you should verify that a disconnected event did not occur due to a data entry error in the HR data associated with the event.

You also want to review the impact of the event’s disconnection as well as the impact of the *correction* of the event disconnection. For example, if the disconnection takes place because HR data was inadvertently deleted, the correction of that mistake will most likely cause the system to create new BAS_ACTIVITY records and possibly a new participant event.

If a participant event is disconnected after it has been finalized (also because eligibility information related to the event was lost), you may have to void the disconnected event to back out any election information it entered.

To void a disconnected event:

1. Access the finalized, disconnected event on the Controls page of the Processing Controls Update component or the Event Status Update page.
2. Select a Process Indicator value of *Void*.
3. Reprocess the event.

When you do this, the system backs out elections associated with the event, sets the event status to *Void*, and sets the event’s process status to RE.

See Also

Chapter 10, “Processing Event Maintenance On Demand,” Reprocessing Participant Events, page 180

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Understanding Process Status and Reprocessing Finalized Events, page 114

Reconnecting Open Enrollment or Snapshot Events

Disconnected Open Enrollment or Snapshot events can be reconnected with the Schedule New Participants feature, which enables the automatic scheduling of participants who were added to the system after Open Enrollment or Snapshot processing for a selected schedule has begun.

The following example sequence illustrates how a disconnected Open Enrollment participant event can be reconnected:

1. During scheduling and assignment for an Open Enrollment schedule, the system processes Open Enrollment events for three participants with the following employee IDs: 8001, 8002, and 8003.
2. The system disconnects the Open Enrollment event for employee 8003 because job eligibility information associated with the event has been lost. Employees 8001 and 8002 are scheduled, assigned, and have their options prepared.
3. While employees 8001 and 8002 are reviewing their enrollment forms and making their new elections, you fix the event trigger information for participant 8003, resulting in a reinsertion of a record for 8003 in the job row. At the same time, a new employee, with an employee ID of 8012, is hired.

4. When you next run the PeopleSoft Benefits Administration process for this Open Enrollment schedule with Schedule New Participants selected, the system picks up the new employee, 8012, and assigns an Open Enrollment event. The system also picks up the reinserted record for participant 8003, resulting in a reconnection of the disconnected Open Enrollment event for that employee.

See Also

Chapter 8, “Preparing for Open Enrollment and Event Maintenance,” Defining Open Enrollment and Snapshot IDs, page 89

Performing Options Processing

During the option processing phase of the PeopleSoft Benefits Administration process, the system evaluates participant events for eligibility and applies event rules to determine the appropriate benefit plan options that are available to the participant as of the event’s Event Date. The system determines the following things for the participant:

- Plan eligibility and available options.
- Option pricing and credits.
- Coverage and deduction dates (or terminations, if appropriate).
- Default options.
- Evidence-of-Insurability requirements, and coverage limits for Life and AD/D plans.

The results of the participant event evaluation are entirely dependent upon the event and eligibility rules you set up for the event classifications, benefit plan types, and benefit plan options involved.

If there are processing errors, it generally means that there is a problem with the design of the eligibility rules or event rules involved. It could also mean that there is a problem with the HR information of the participant associated with the event. You will need to evaluate the error in order to determine what (if anything) needs to be fixed. After you correct errors that result from program, rate, or rule design issues, you will need to reprocess the events.

One of the most common classes of errors is an unexpected eligibility status. This is discussed in the following section.

When an event reaches a process status of *PR* (prepared), you may want to create enrollment statements for the participant.

Note. Option Processing is the same regardless of whether the event is linked to an Event Maintenance or an Open Enrollment schedule.

Event Maintenance Only: Prepared Participant Events that Qualify for Termination

During Event Maintenance processing, participant events that qualify for termination of all coverages will receive a process status of *PR* rather than being terminated automatically by the system. Full termination is a rather drastic event, and since it can occur inadvertently through a data change that causes an unexpected loss of eligibility to a benefit program, the system takes the conservative approach of stopping in *PR* status to give the administrator a chance to review the event. You must complete these termination events manually by flagging them to be force-finalized.

PeopleSoft provides a workflow process called Find Terminations that searches for and delivers a list of participant events with a *PR* process status that qualify their associated participants for termination.

See Also

[Chapter 4, “Defining Eligibility Rules,” page 13](#)

[Chapter 5, “Creating Event Rules,” page 29](#)

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Validating and Loading Elections, page 161](#)

Investigating Participant Eligibility

This section provides an overview of eligibility processing and discusses how to:

- Review eligibility checks.
- Review job eligibility evaluations.
- Process flagged participants.

Understanding Participant Eligibility Processing

When you run the PeopleSoft Benefits Administration process with the Record Eligibility Results check box selected on the Schedule and Checkpoint Restart page of the PeopleSoft Benefits Administration Run Control component, the system performs an eligibility check for all employees who have not yet had their options prepared. The results of that eligibility check are displayed on the Eligibility Debugging page. You can use this information to correct errors in your eligibility rule or benefit program setup.

The system only records benefits eligibility appropriate to the process status of the event. For example, if the event is at a status of *AS* or later, the system does not record program eligibility checks, because program eligibility is determined before events are assigned. And if the event is at a process status of *PR* or later, the system does not record option eligibility for that event because its options have already been prepared.

The system follows these procedures when it makes eligibility checks and records their results:

- The system starts by checking eligibility for eligibility rules associated with benefit programs. If a benefit program *fails* the eligibility check, the system records that eligibility check but then moves on to the next benefit program in the sequence.
- After all benefit program eligibility has been processed, and if eligibility for only one program has been met, the system begins testing all the option-level eligibility rules associated with that benefit program.

See Also

[Chapter 4, “Defining Eligibility Rules,” page 13](#)

[Chapter 6, “Building Automated Benefit Programs,” page 59](#)

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Setting Up the PeopleSoft Benefits Administration Run Control Process, page 117](#)

Pages Used to Investigate Participant Eligibility Processing Issues

Page Name	Object Name	Navigation	Usage
BenAdmin Eligibility Debugging (benefits administration eligibility debugging)	BAS_ELIG_DEBUG	Benefits, Manage Automated Enrollment, Investigate Exceptions, Review Eligibility Results	Review the results of program eligibility processing for specific employees.
Job Eligibility Evaluation	BAS_ELIG_JOB_VAL	Benefits, Manage Automated Enrollment, Investigate Exceptions, Review Eligibility Results Click a link in the Eligibility Fields group box to access the Job Eligibility Evaluation page.	Review details for a specific field on an eligibility check.
BAS Employee Processing Status	RUNCTL_BAS027	Benefits, Manage Automated Enrollment, Investigate Exceptions, Employee Process Status Rpt	Lists all participants in a particular process status or set of status levels.
BenAdmin Flagged Participants (benefits administration flagged participants)	RUNCTL_BAS008	Benefits, Manage Automated Enrollment, Investigate Exceptions, Report on Flagged Items	Lists events that have had job, address, or union eligibility information changed, events that have been processed out of sequence, and events that have been disconnected during processing.
BenAdmin Eligible Participants (benefits administration eligible participants)	RUNCTL_BAS001	Benefits, Manage Automated Enrollment, Investigate Exceptions, Eligible Participants Rpt	Lists, by schedule and benefit program, employees that are eligible to participate in company benefit programs with details on plan and option eligibility.
BAS Ineligible Participants	RUNCTL_BAS_SCHED	Benefits, Manage Automated Enrollment, Investigate Exceptions, Ineligible Participants Rpt	Lists all participants ineligible for any benefit program (events processed to AN status) and their eligibility parameters, such as birthdate and status.

Page Name	Object Name	Navigation	Usage
Preparation/Election Errors	RUNCTL_BAS_SCHED	Benefits, Manage Automated Enrollment, Investigate Exceptions, Invalid Elections Report	Lists, by schedule and event, participants and their dependents, showing any errors such as coverage over the maximum or under the minimum, invalid choices, failure to meet eligibility requirements, and so on.
BenAdmin Missing Elections (benefits administration missing elections)	RUNCTL_BAS_SCHED	Benefits, Manage Automated Enrollment, Investigate Exceptions, Missing Elections Report	Lists and provides location information for participants who did not return enrollment statements.

See Also

[Appendix A, “PeopleSoft Benefits Administration Reports,” page 187](#)

Reviewing Eligibility Checks

Access the BenAdmin Eligibility Debugging page.

BenAdmin Eligibility Debugging

EmplID: KU0010 Santos,Antonio **Ben Rcd#:** 0

Eligibility Rule Find | View All First 1 of 12 Last

Rule ID: K01C Program-Level Eligibility (CN) **Option Type:** Program **Benefit Program:** KC1
Type: Eligibility Rule **Rule Effective Date:** 01/01/2000
Sched ID: KUEM **Event ID:** 1 **Process Date:** 07/27/2000 **Rule Result:** Ineligible

Eligibility Fields

Field Compared	Field Result	Active Only	Group Method	Evaluation Method		
Age	Eligible				+	-
Service Months	Eligible	☐	Primary	1 or More	+	-
Standard Hours	Eligible	☐	Primary	1 or More	+	-
FTE	Eligible	☒	AllFlagged	Sum	+	-
Pay Group	Ineligible	☐	Primary	1 or More	+	-
Benefits Status	Eligible	☐	AllFlagged	1 or More	+	-

BenAdmin Eligibility Debugging page

Type Indicates a standard eligibility rule or a geographic rule.

Rule Result This tells you the participant’s overall eligibility for the benefit program or option according to the eligibility rule being reported. It is the logical result of all of the individual field tests.

Eligibility Fields

This section displays each eligibility field tied to the eligibility rule and whether the participant failed or passed the eligibility check for that particular field.

Field Compared

Click a field name to display the corresponding Job Eligibility Evaluation page. This page presents the evaluation results for each job that contributes to eligibility, along with details of the eligibility rule being applied.

Field Result

This tells you whether the employee passed or failed the criteria set for this eligibility field.

You may notice *Location Postal Code* displayed next to the result, if the eligibility field is State, Postal, or Geographic Location. This means the criteria for the eligibility field was set up to match either the employee's home or work address.

Active Only

Indicates that the eligibility check was made on only the employee's active jobs.

Group Method

If multiple jobs are active, displays the grouping method set up for the eligibility field.

Evaluation Method

If multiple jobs are active, displays the evaluation method set up for the eligibility rule.

Reviewing Job Eligibility Evaluations

Access the Job Eligibility Evaluation page.

Job Eligibility Evaluation

Santos, Antonio
ID: KU0010
Ben Rcd#: 0

Rule ID: K01C Program-Level Eligibility (CN)

Field Compared: Age

Field Result: Eligible

If Criteria Met: Eligible

Employee Values						
Ben Rcd#	Empl Rcd#	Empl Status	Pri Job	Incl Elig	Field Value	Job Result
0	0				27	Eligible

Eligibility Rule				
Age As Of	Month	Day	Min Age	Max Age
Check Dt			0	99

Job Eligibility Evaluation page

Pri Job (primary job)

If multiple jobs are active, this indicates whether this employee job record for the listed benefit record is the primary job.

Incl Elig (include eligibility)

If multiple jobs are active, this indicates whether the Include for Eligibility flag is on or off for the listed employee job record.

Field Value

The system displays the value that the participant possesses in that field that is being compared against the eligibility rule.

Job Result

Possible values include:

- *Eligible:* The job passed the eligibility check.
- *Ineligible:* The job did not pass the eligibility check.
- *Not evaluated:* The job did not contribute any data to the eligibility check. This could be because the group method was set to Primary and this was not the primary job for the benefit record, or the Include for Eligibility flag was not set for this job, or job status was set to Active Jobs Only and the job status was inactive.

Eligibility Rule

This group box displays the parameters set up for the eligibility field on the Eligibility Rules Table.

Processing Flagged Participants

Access the BenAdmin Flagged Participants page.

BenAdmin Flagged Participants

Run Control ID: GN4 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Schedule ID: (Leave blank for all schedules)

From Date: 10/01/2002 Thru Date: 10/25/2002

Include Summary ☐

Report Participants Flagged for

☐ Address Eligibility Changed
 ☐ Event Disconnected
☐ MultiJob Indicator Changed
 ☐ Event Out of Sequence
☒ Job Eligibility Changed

BenAdmin Flagged Participants page

Schedule ID

To print flagged events from all schedules, leave this field blank.

Include Summary

Select to include summary information on all flagged participant events.

Reports Participants Flagged for

Select all of the criteria in this group box to use when reporting on selecting participants.

Printing Enrollment Statements

This section provides an overview of enrollment statements and describes how to:

- Run enrollment statements.

- Create print IDs for enrollment statement reprinting.

Understanding Enrollment Statements

Enrollment statements are an optional communication to the employee regarding their election options in response to Open Enrollment or other personal or employment-related events. If your company has gone completely “paperless” via self-service enrollment you may choose not generate paper forms. Enrollment forms can be created for each open event that has had options processed to at least a *PR* status.

Enrollment statements provide participants with a report of their:

- Current elections.
- Eligible options.
- Prices and credits associated with eligible options.
- Current dependent, beneficiary, and savings investment information.

You can modify the forms as necessary to meet the unique requirements of your company.

Note. To retain ease of data entry when you get your enrollment statement forms back from participants, order the options displayed on the statements the same way you’ll enter them into the data entry pages. That is, make use of the Display Sequence entered for each plan and option when building your benefit programs.

The system prints new enrollment statements for participant events that have:

- A process indicator value of Normal.
- An event status of Open.
- A process status of PR, ET, or EE.
- A blank Option Notification Date field.

After the system prints an enrollment statement for a participant/participant event combination, the system updates the participant event’s process status to NT (notified) and the option notification date to the date the statement was printed.

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Entering Participant Benefit Elections, page 152

Pages Used to Print Enrollment Statements

Page Name	Object Name	Navigation	Usage
BenAdmin Enrollment Form (benefits administration enrollment form)	RUNCTL_BAS004	Benefits, Manage Automated Enrollment, Participant Enrollment, Print Enrollment Statements	Enter the parameters for printing enrollment statements.
BenAdmin Statement Reprinting (benefits administration statement reprinting)	BAS_PRINT	Benefits, Manage Automated Enrollment, Participant Enrollment, Reprint Selected Statements	Set up print IDs for reprinting statements.
Benefit Mailing Labels (4-up)	RUNCTL_BAS002	Benefits, Manage Automated Enrollment, Participant Enrollment, Print Mailing Labels	Print a set of 4-across mailing labels for employees participating in benefit programs. Benefit mailing labels compile lists from the BAS Participant tables created during Open Enrollment or Event Maintenance processing.

See Also

[Appendix A, “PeopleSoft Benefits Administration Reports,” page 187](#)

[Appendix A, “PeopleSoft Benefits Administration Reports,” PeopleSoft Benefits Administration Selected Reports, page 190](#)

Running Enrollment Statements

Access the Ben Admin Enrollment Form page.

BenAdmin Enrollment Form

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

Run

Language: English
☒ Specified
☐ Recipient's

Schedule ID: BEM104
(Leave blank for all schedules)

EmplID:
(Leave blank for all employees)

Name:

Cost Frequency

☒ Deduction Frequency
☐ Annual Frequency

Reprint Options

Reprint Report ☒
Print ID:

BenAdmin Enrollment Form page

The PeopleSoft Benefits Administration Enrollment Form prints a generic enrollment statement for each eligible benefit program participant in the BAS Participation table. This enrollment statement includes the name and address of each participant, which options the participant is eligible for, and the associated price tags and credits (if applicable) for the options.

Schedule ID and EmplID
(employee ID)

To print statements for *all* eligible participants in your system, leave both fields blank.

To print out statements for eligible participants that belong to a specific schedule, enter a schedule ID.

To print enrollment statements for an individual (and eligible) participant, enter the participant's employee ID. Keep in mind that some participants may have events in more than one schedule. An employee can only be in one schedule at a time, but may have been in different schedules in the past.

Cost Frequency

You have the following options:

Select *Deduction Frequency* to print, for each available option, the cost of the benefit per pay period.

Select *Annual Frequency* to print the annual cost of the benefit option.

The system calculates the annual frequency by multiplying the option's deduction frequency by the number of pay periods the employee experiences in a year.

Reprint Options

To reprint reports, select *Reprint Report* and enter the *Print ID*. You create print IDs on the BenAdmin Statement Reprinting page.

When the system finishes reprinting a set of enrollment or confirmation statements, it deletes the associated print ID.

Note. When enrollment statements are reprinted, the participants' option notification date is updated to the reprint date.

Creating Print IDs for Enrollment Statement Reprinting

Access the BenAdmin Statement Reprinting page.

BenAdmin Statement Reprinting

Print ID: PRINT

***Schedule ID:** BEM101 Canadian Employees EM
Event Maintenance

Participant(s) to Print				Customize	Find	View All	First	1 of 1	Last
*EmpID	Name	Ben Rcd#	Event ID						
16546		0	0						

BenAdmin Statement Reprinting page

The system only reprints enrollment and confirmation statements for participant events with a Process Indicator value of Normal and a process status value of *PR*, *NT*, *RE*, *ET*, *EE*, or *FE*.

Schedule ID Required. The system uses the schedule ID to narrow down the set of eligible participant/participant event combinations for which statements can be reprinted.

Event ID Each employee ID must be associated with an event ID of 1 or higher for an Event Maintenance schedule.

An event ID of 0 is only acceptable for an Open Enrollment schedule I.

If the participant is associated with multiple event IDs, you can enter records for each.

Ben Rcd # (benefit record number) If the participant has multiple jobs with different sets of benefit elections, you can enter the benefit record number.

It is acceptable to have a benefit record number of 0.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Managing Multiple Jobs”

Entering Participant Benefit Elections

This section provides an overview of elections data entry and describes how to:

- Select schedule or participant mode.
- Enter benefit elections.
- Enroll dependents and assign beneficiaries.
- Enter dependent or beneficiary data.

Understanding Participant Benefit Elections Data Entry

You use the data entry pages to enter benefit elections that your participants make after reviewing their available options. Once you enter this election information into the system, you can have the system validate the elections without leaving the data entry component.

Note. The data entry validation process only checks to ensure that data has been entered into correctly. It does not validate employee elections for participant events using eligibility and event rules. You have to run the PeopleSoft Benefits Administration process to validate benefit information updates and finalize participant events.

Data entry needs can differ depending upon the type of PeopleSoft Benefits Administration schedule that you're processing and the volume of participants for whom you're entering benefits election data. To provide for these different needs, we have designed two different data entry modes. You can enter election data by schedule or by participant.

Entering data by schedule is designed for Open Enrollment. This mode has been designed so that benefits clerks with a minimal amount of training in the PeopleSoft Benefits Administration process can use it to quickly enter batches of employee elections in the order that they receive them. Validation is performed only on demand, with the rationale that the entry clerk would not be authorized (or trained) to correct employee errors.

Entering data by participant is typical for Event Maintenance. This mode might best be used by experienced benefits administrators who are processing events on an employee-by-employee basis. Each employee's data is validated before opening a new page for the next participant, with the rationale that a trained administrator would immediately correct errors.

Note. In both components, there are no functional edits applied during data entry, in order to maximize the ability to perform rapid entry. Functional edits are made only when validation is performed — during Save, or on-demand. All data entry errors are presented as warnings so the pages can always be saved without loss of data.

Pages Used to Enter Participant Benefit Elections

Page Name	Object Name	Navigation	Usage
Event/Participant Selection	BAS_ELECT_EVENT	Benefits, Manage Automated Enrollment, Participant Enrollment, Perform Election Entry	Select schedule or participant mode. If a participant has multiple jobs, select the events in order to enter a participant's benefit elections.
Option Election	BAS_ELECT_ENROLL2	Benefits, Manage Automated Enrollment, Participant Enrollment, Perform Election Entry Click the Option Elections tab.	Enter benefit elections.
Dependents/Beneficiaries	BAS_ELECT_DEPBENEF	Benefits, Manage Automated Enrollment, Participant Enrollment, Perform Election Entry Click the Dependents/Beneficiaries tab.	Enroll dependents and assign beneficiaries.
Supplemental Enrollment	BAS_ELECT_DEPBENWK	Click Enroll Dependents or Assign Beneficiaries on the Dependents/Beneficiaries page.	Enter dependent or beneficiary data.
Dependent/Beneficiary Election	RUNCTL_BAS_SCHED	Benefits, Manage Automated Enrollment, Participant Enrollment, Dep/Beneficiary Election Rpt	Lists all dependents with current or new elections.

Selecting Schedule or Participant Mode

Access the Event/Participant Selection page.

Select By Participant

Schedule ID: US Event Maintenance

EmpID: Santos, Antonio

Ben Rcd#:

Event ID:

*Excess Credit Rollover To:

Available Events 1 of 1

	Ben Rcd#	Event ID	Event Date	Event Classification	Benefit Program	Process Status	Process Indicator
Selected	0	1	05/01/2000	FSC Fam Status	KU1 GBI US FT	PR Prepared	N Normal Prc

Event/Participation Selection page

Select by Schedule

Click this link to switch between “Select By Participant” mode and “Select by Schedule” mode.

Ben Rcd# (benefit record number)

Used by the participant mode only.

Event ID

Used by the participant mode only.

Search

Click to locate event information for this participant.

Defer Dep/Benef Enrollment (defer dependent/beneficiary enrollment)

Select to defer dependent and beneficiary enrollment until after the entry of employee elections is complete. This hides the Dependent/Beneficiary grid for each plan on the Option Election page to streamline data entry. Dependent and beneficiary enrollment would be performed from the Dependents/Beneficiaries page instead.

Defer Savings Investments

Select to defer savings investment enrollment until after the entry of employee elections is complete. This hides the Investment Allocation grid for each savings plan on the Option Election page to streamline data entry. Investment allocation would be performed from the Dependents/Beneficiaries page instead.

Hide Unused Items/Links

Select to streamline data entry by not displaying certain fields and navigation links if they are not applicable to a plan or option. This reduces the need to tab over unused fields, but it may break the data entry “rhythm” by varying the number of fields per plan.

Validate When Saved

When selected, data entry is validated automatically when you save the record. When cleared, data entry is only validated on demand, when you click the Validate Elections button.

Excess Credit Rollover To

Overrides the default destination of excess benefit credits for the participant.

Validate Elections

Validates all plans and options for correct and sufficient entry. These are the same validations automatically performed when the page is saved, if that feature is selected. All discrepancies are presented as warnings only, so the employee's elections can always be successfully saved for later correction.

Available Events

Once the system has found the event associated with the selected schedule ID and employee ID, the event is displayed in this group box. For multiple jobs, more than one event might be found. Select the event you want to perform data entry for.

Entering Benefit Elections

Access the Option Election page.

Option Election page

Option Code

Select or update the benefit plan option currently assigned to the participant.

Special Requirements

Click to view the option's special requirements:

- *Elect Required* (election required): When selected, this indicates that an election is required for this plan type, based on the results of event rule processing.
- *Proof Received*: If this check box is available for selection, you can select it to indicate to the system that any required proof of insurability has been received from the employee. Until proof is received the system will not grant the employee's selected option.

- *Cross-Plan Required:* If the program rules for this option have cross-plan requirements the system will summarize them here:
 - XType (“Cross Plan Type”: employee must also make an election in this controlling plan type).
 - XPlan (“Cross Benefit Plan”: employee must also make an election of this controlling benefit plan).
 - Limit (coverage may not exceed the indicated percentage of the employee’s coverage under the XType plan).
 - DpndChk “Dependent Check”: (indicates whether dependents must also be covered under the XType plan).

Enroll All

Click to enroll all available dependents or beneficiaries in a particular plan type. The system looks at the list of dependents and beneficiaries currently associated with the participant and insert rows for them, overwriting all dependent/beneficiary records currently assigned to the benefit plan type in question. Individuals are enrolled only if they meet all of the eligibility criteria for the option and coverage elected by the employee (for example, age, relationship to employee, marital status, student status, etc.).

Plan-Specific Election Fields

In addition to the standard data entry fields described above, each plan type may have its own special fields required to complete the election of an option. Plan-specific detail information displays for *Health* (1x), *Life* (2x), *Savings* (4x), *FSA* (6x), *Pension* (8x), and *Vacation* (9x) plan types. These detail fields may display for all plans within a category for consistency – your benefit plan definitions will control whether entry is allowed or required, and these rules will be enforced during final validation.

Health Plans

When entering information for health plans (plan type 1x), you may need to enter the Health Provider ID associated with the participant’s medical plan and indicate whether the participant has previously seen the identified provider.

Life and ADD Plans

Life and Accidental Death plans that are defined as having their coverage amount specified by the employee as part of their election may require additional entry. You specify the coverage amount as either a multiple of salary or a flat amount (or both), depending on the benefit plan definition. You also indicate what Benefit Base (salary source) to use in the coverage calculation.

Savings Plans

When entering benefits election information for savings plans (plan type 4x), you may be able to determine before and after tax matching information and specify savings rollover information for the savings plan, if the plan was set up to allow for the adjustment of these values at the employee level.

Each Flat Amount and % of Earnings combination of fields is available if there is an applicable limit entered on the corresponding fields in the Savings Plan Table for before-tax and after-tax contribution percentages.

You can also allocate investments as long as the participant has not selected a waive option for this plan type. The Allocate Savings Investments grid will be displayed if applicable.

You can also specify how employee contributions should rollover when plan or regulatory limits are reached. The link to this Specify Rollover page will only be available if the plan has been defined as one that enables rollover options to be specified at the employee level in the Savings Plan Table.

FSA Plans

FSA plan (plan type 6x) require enrollment entry of an Annual Pledge amount. An additional Employee Contribution field may or may not be required. This Employee Contribution field appears and behaves differently depending upon whether or not you implement PeopleSoft Payroll for North America.

The field is labeled Employee Contribution Override if you utilize PeopleSoft Payroll for North America or Employee Contribution, if you do not.

When you optionally enter a value in Employee Contribution Override, the system uses that to calculate the employee's FSA contribution, rather than dynamically calculating the paycheck deduction from the Annual Pledge value. When PeopleSoft Payroll for North America is not being used then the Employee Contribution field is required, since the system will not have sufficient information to dynamically calculate the paycheck deduction from the Annual Pledge.

Use the FSA Contribution Worksheet to determine the exact amount of money the participant will need to contribute per month and pay period in order to reach a desired annual pledge goal.

The available fields differ depending upon whether or not your organization currently implements PeopleSoft Payroll for North America or if the event in process is an OE (open enrollment) or HIR (hire) event.

- If you do implement PeopleSoft Payroll for North America or you are processing an OE or HIR event, the Annual Pledge, Pay Period Amount, and Employee Contribution Amount fields are open for entry. (The Contributions Year-to-Date are known to be either zero or can be derived from the employee's paycheck balances.)
- If you do not use PeopleSoft Payroll for North America, and you are not processing an OE or HIR event, the Contributions Year-To-Date field is also open for entry. (In this situation the system cannot reliably know the Contributions Year-To-Date so that value must be supplied to complete the equation).

In either situation, you can open all fields for change by selecting the *Open Protected Fields for Change* check box. Since the system normally calculates the values in the protected fields dynamically, you should use this option carefully.

Note. The Employee Contribution Amount field represents the amount the employee is contributing in terms of the FSA plan's frequency as set up on the FSA Benefit Table, not in terms of the employee's own paycheck deduction frequency.

Pension Plans

You can only enter values for the Voluntary Percent (voluntary contribution percentage) and Voluntary Amount (voluntary contribution amount) fields if the plan option has been defined on the Pension Plan Table as one that enables voluntary contributions.

The Pension Base (base salary for pension calculations) field is always available. Use this field to calculate the pension using a salary other than the employee pay rate.

Vacation Plans

When you're entering benefits election information for participant Vacation Buy or Sell plans (Plan Type 9x), you must enter the Vacation Buy/Sell Hours. The value you enter in the Vacation Hours field represents the number of hours an employee buys or sells for the plan year.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Enrolling Participants”

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Setting Up Benefit Plans”

Enrolling Dependents and Assigning Beneficiaries

Access the Dependents/Beneficiaries page.

Event / Participant Selection
Option Election
Dependents / Beneficiaries

Sched ID: KUEM **EmplID:** KU0010 Santos, Antonio **Ben Rcd#:** 0 **Event ID:** 1

Event Data: 05/01/2000 Family Status Change **Excess Credit Rollover To:** Cash

Dependent/Beneficiaries Currently on Record			
Name	Relationship to Employee	Dependent Beneficiary Type	Birthdate
Santos, Megan	Spouse	Both	10/12/1965
Santos, Marguerite	Daughter	Both	03/18/1992
Santos, Sean	Son	Both	09/17/1998
Santos, Carissa	Mother	Beneficiary	02/23/1924
Santos, Samuel	Son	Both	05/01/2000

[Change/Add Dependent Data](#)

Elections Requiring Supplemental Information	
11 Dental	Enroll Dependents
14 Vision	Enroll Dependents
20 Life	Assign Beneficiaries
21 Supplemental Life	Assign Beneficiaries
22 AD/D	Assign Beneficiaries
24 Dependent AD/D	Enroll Dependents
25 Dependent Life	Enroll Dependents
27 Supplemental AD/D	Assign Beneficiaries

Dependents / Beneficiaries page

Dependent/Beneficiaries Currently on Record

This grid summarizes, for review only, all of the dependents and beneficiaries currently associated with the participant.

Change/Add Dependent Data

Click to open up a version of the Base Benefits Dependent/Beneficiary information component. The participant's current dependents can be edited, or new individuals added.

Elections Requiring Supplemental Information

Displays links to all plan types requiring additional dependent, beneficiary, or savings investment information to complete the employee's election choices. This information can also be entered from the Option Election page, but is repeated here to provide an alternate method of data entry.

Enroll Dependents

Click to open the Supplemental Enrollment page. Appears for:

- Health plan types (plan type 1x).
- Dependent AD/D plans (plan type 24).
- Dependent life plans (plan type 25).

Assign Beneficiaries

Click to open the Supplemental Assignment page. Appears for:

- All other life and AD/D plan types (plan type 2x).
- Savings and pension plan types (plan types 4x and 8x).

Allocate Investments

Click to open the Supplemental Allocation page. Appears for Savings plans (plan types 4x).

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Entering Dependent and Beneficiary Information”

Entering Dependent or Beneficiary Data

Access the Supplemental Enrollment page.

Supplemental Enrollment for Plan: 11

Enroll All 

Dependents/Beneficiaries					
ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	
01	 Santos, Megan	Spouse		☐	
02	 Santos, Marguerite	Daughter		☐	
03	 Santos, Sean	Son		☐	
 ...					

Supplemental Enrollment page

The information displayed on this page depends on the plan type being accessed. This page presents essentially the same field layout as found on the Option Election page for enrolling dependents, assigning beneficiaries, and allocating savings investments.

Validating and Loading Elections

This section provides an overview of the validation and loading and describes how to:

- Force-finalize events.
- Find prepared participants who qualify for termination.
- Find employees with late enrollment forms.
- Post elections to Base Benefit tables.

Understanding Validation and Loading

When the PeopleSoft Benefits Administration process validates and loads elections associated with participant events, it reevaluates the events in much the same way it did during the option preparation phase. The difference is that the participants have had a chance to update their benefit election information and their choices have been entered into the system.

The system evaluates the updated benefits information using the same set of eligibility rules and event rules that it used to determine options. It also recalculates benefit election *defaults* where appropriate. This is important because it is possible that these defaults may have changed if events are processed out of sequence, or if changes are made to Base Benefit tables in the interim between runs of the PeopleSoft Benefits Administration process. In this case, the recalculated defaults may not match the defaults shown on enrollment forms or inquiry pages.

During finalization, the system also assigns excess credits to plans in which the participant is enrolled. If the participant event processes correctly, it loads the new option elections and related information to the Base Benefits tables that store benefits information for the associated participant. It creates rows for new, changed or terminated benefit option enrollments, but only if the new enrollment is different from the existing enrollment. (That is, simply re-electing an existing coverage will not generally cause a new row to be inserted into Base Benefit tables if all election-related data is the same).

Processing errors during validation and loading might be caused by:

- Problems with the new election information that was entered into the system during data entry.
- HR information linked to the participant event.
- The design of the related eligibility rules, the event rules, or benefit program associated with the event.

You need to evaluate the error to determine if anything needs to be fixed. If only the employee's election data needs to be corrected, then an event in *EE* status will be picked up for further processing during the next run of the schedule. However, if you need to correct the employee's HR data (which could affect his benefits eligibility), or if you need to correct the underlying benefits rules or setup, then the event must be specifically reprocessed back to the first phase of benefits processing (scheduling, event assignment, or option preparation).

Note. Event Maintenance and Open Enrollment schedules are processed the same way during validation and loading.

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Reviewing PeopleSoft Benefits Administration Process Results, page 123

Chapter 5, “Creating Event Rules,” page 29

Chapter 6, “Building Automated Benefit Programs,” page 59

Force-Finalizing Participant Events

When you tell the system to finalize a participant event, it brings that event to an FE process status, even if it has been processed with errors. If the event is at a process status of ET or EE (election error), the system loads the participant’s valid elections to the Base Benefits business process tables. If the event is at any other process status, the system applies the appropriate default elections and loads them into the Base Benefit tables. The system also applies and loads default elections to replace elections that have been made in error.

You can force-finalize individual participants with the Final check box on either the Event Status Update page or the Controls page of the Processing Controls Update component. On the next run of the PeopleSoft Benefits Administration process, the system automatically force-finalizes all participants with Final selected.

If you’re processing an Open Enrollment schedule, you can force-finalize all of the participants within that schedule. You’ll arrange this when you set up the run control for the PeopleSoft Benefits Administration process.

Open Enrollment schedules can be force-finalized because this method fits in with the nature of the Open Enrollment process, which has a finite set of start and end points. At the end of the enrollment period, you would force-finalize any employees who hadn’t yet made their elections. Presumably, the Open Enrollment event rules you create would enforce your business policies regarding failures to make positive elections (or re-elections) in certain critical or regulated plan types.

Event Maintenance schedules, on the other hand, are processed on an ongoing basis. Each employee in a typical Event Maintenance schedule can be associated with a variety of different events and triggered actions at a given point in time. As you process certain events for the participant, more events are triggered for later Event Maintenance processing. There is no *end* to the Event Maintenance procedure, so it doesn’t make sense to enable the forced finalization of an entire Event Maintenance schedule.

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Entering Search Criteria to Review Process Results for Participant Events, page 127

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Reprocessing for Individual Participants, page 166

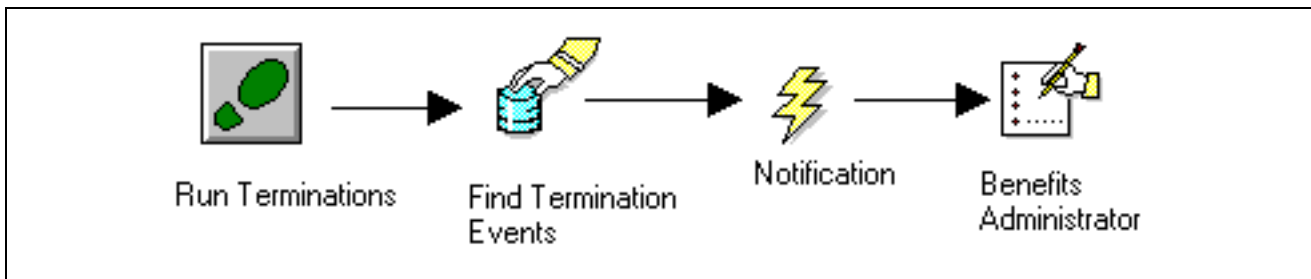
Chapter 8, “Preparing for Open Enrollment and Event Maintenance,” Defining Open Enrollment and Snapshot IDs, page 89

Finding Prepared Participants Who Qualify for Termination

When the Event Maintenance process is run, participants can be identified as qualifying for termination when their participant events reach a process status of PR. The benefits administrator must terminate these employees manually by force-finalizing them.

The Find Terminations Workflow process locates participant events at a process status of PR that qualify for termination after Event Maintenance processing but who have not yet been manually terminated. It then makes a list of these participant events and sends it to the benefits administrator.

Set this workflow in action through the Process Scheduler by selecting Benefits, Manage Automated Enrollments, Events, Find Terminations to Finalize.



Find Terminations

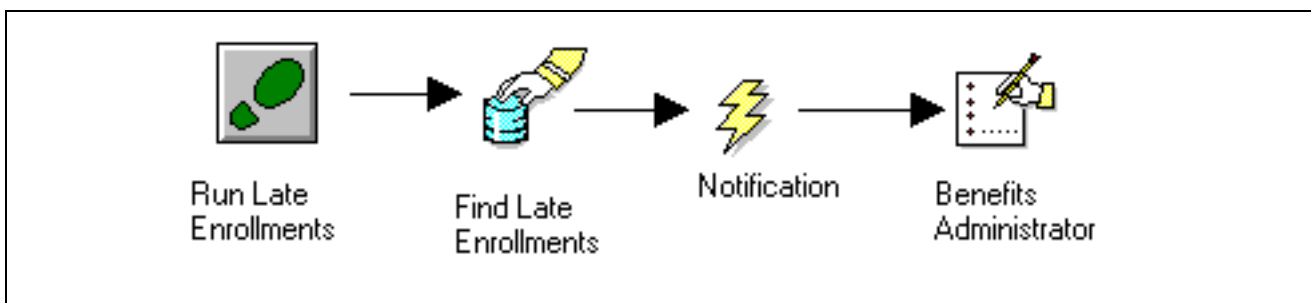
See Also

PeopleTools PeopleBook: Workflow, "Using Workflow"

Finding Employees with Late Enrollment Forms

When Event Maintenance is run, a set of notification letters and election forms are sent out to new employees and to employees whose coverage has changed due to a specific event. The Find Late Enrollments workflow retrieves a list of the employees who have not returned their benefits enrollment forms. Find Late Enrollments will bring you to the Event Status Update page where you can select the Final check box to assign default coverage for these employees.

Set this workflow in action through the Process Scheduler by selecting Benefits, Manage Automated Enrollments, Events, Find Late Enrollments.



Find Late Enrollments

See Also

PeopleTools PeopleBook: Workflow, "Using Workflow"

Posting Elections to Base Benefit Tables

As elections are prepared for posting to the Base Benefit tables, PeopleSoft Benefits Administration determines the proper coverage begin dates and deduction begin dates based on event rules defined by plan type. Future-dated elections are inserted into Base Benefit tables as the participant elections are validated or finalized.

Payroll processes such as PeopleSoft Payroll for North America's Pay Calculation select elections based on effective date, using future-dated elections only as they become effective for the current pay period. If the election for a given plan type is equal to the current election, no entry is posted. If a participant is no longer eligible for a given plan type, that participant's current elections are terminated by inserting a row into the Base Benefit table for the plan type.

Inserting termination rows into the Base Benefit tables (rather than making a current row inactive) facilitates rolling back or reprocessing elections that have been posted to the Base Benefit tables. Individual elections—or groups of participant elections—can be reversed out of the Base Benefit tables by identifying those participants for reprocessing.

Note. If you were to look at the physical record structures underlying the Base Benefits election tables, you might notice that it still contains the fields Coverage End Date and Deduction End Date. This is for historical reasons only, and their use is discontinued, having been replaced by the approach of inserting superceding Termination, Waive, or Election rows. You should not create any processes which update these End Date fields or any fields that rely on them.

Printing Confirmation Statements

You typically create a confirmation statement when an event reaches FE status. Confirmation statements provide participants with a report of their current elections, dependent and beneficiary information, and investment information after Event Maintenance or Open Enrollment processing has completed.

You can modify the forms as necessary to meet the unique requirements of your company. The confirmation statement printing process is similar to the enrollment form printing process.

Note. You can also print confirmation statements for events with EE status. Confirmation statements are only printed for events with a Process Indicator value of Normal. Unless you are reprinting forms, statements are only printed for participant events where the Confirmation Notify Date is either blank (no form has been previously printed) or is less than the last processing date (the event has been reprocessed since the form was printed).

Page Used to Print Confirmation Statements

Page Name	Object Name	Navigation	Usage
Benefit Confirmation Statement	RUNCTL_BAS005	Benefits, Manage Automated Enrollment, Participant Enrollment, Print Confirmation Statement	Enter parameters for confirmation statement printing process.

Running Confirmation Statements

Access the Benefit Confirmation Statement page.

Benefit Confirmation Statement	
Run Control ID: GN2	Report Manager Process Monitor Run
Language: English	☒ Specified ☐ Recipient's
Schedule ID: KUEM Search (Leave blank for all schedules)	
Print Single Event EmpID: Search (Leave blank for all employees) Ben Rcd#: 0 Search Event ID: 0 Search	
Process Status to Include ☐ Election Error ☐ Finalized - Enrolled	Reprint Options Reprint Report ☐ Print ID: Search

Benefits Confirmation Statement page

The options on this page are almost identical to those on the BenAdmin Enrollment Form page.

To create print IDs, you use the BenAdmin Statement Reprinting page, exactly as you do for enrollment forms.

Reprocessing Events

This section provides an overview of reprocessing events and discusses how to:

- Reprocess for individual participants.
- Reprocess events for selected groups.
- Reprocess Open Enrollment schedules.

Understanding Event Reprocessing

Reprocessing can be necessary in a number of instances. For example, you may want to reprocess an event when it is processed out of order or when eligibility information related to the event has been changed. You might also need to reprocess finalized events in cases where employees find errors in their confirmation statements.

You can reprocess events to any previous stage of the PeopleSoft Benefits Administration cycle. You can reprocess entire Open Enrollment schedules as well as individual events.

Analyze the situation carefully before you reprocess: in some cases, reprocessing can have an adverse effect on employee data, especially when you reprocess large numbers of employees without analyzing the situation beforehand.

Reprocessing Flow

When you reprocess a participant event, the system backs the event out to the stage you indicate on the Controls page of the Process Status Update component, the Event Status Update page, or the Open Enrollment/Snapshot run control page. So if you have an ET event (and you reprocess it to an AS status, the system backs out all of the election information you entered for the event and disregards all of the prepared options.

Then the system moves the event through the process again. If an event is reprocessed back to AS process status, the system then attempts to process the event all the way to the PR process status, where it will await the printing of enrollment forms and data entry of employee elections. Option eligibility, costs, credits, defaults, and pre-entry values are rechecked.

RE Status

Events that have already been finalized and loaded can be reprocessed to RE status, which acts as a stand-in for the NT process status. After you reenter data for the participant event, and the system will attempt to validate and load the elections to get the event back to the FE status.

See Also

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Understanding Process Status and Reprocessing Finalized Events, page 114](#)

Pages Used to Reprocess Events

Page Name	Object Name	Navigation	Usage
BenAdmin Event Status Update (benefits administration event status update)	BAS_PARTIC_STS	Benefits, Manage Automated Enrollments, Events, Update Event Status	Reprocess individual participant events.
BenAdmin Processing Controls (benefits administration processing controls)	BAS_PARTIC_PRC2	Benefits, Manage Automated Enrollment, Events, Update Processing Controls Enter criteria and then click the search button.	Update event status, queue reprocessing, and finalize events.

Reprocessing for Individual Participants

Access the BenAdmin Event Status Update page.

BenAdmin Event Status Update										
EmplID: KC0002		Dunbar,Kirby		Ben Rcd#: 0						
Event Status Update										
Sched ID	Event ID	Pgm	Process Status	Eligibility Change	Disc	Out of Seq	*Process Indicator			
Event Date	Event Class	Priority	Action Source	Addr / MultiJob / Job	Suppress	Forms	*Event Status	Final		
Indicator										
KC00	0	KC1	Enrolled	☐ ☐ ☐	☐	☐	Normal Prc	☐		
01/01/2000	Opn Enroll	900	Open Enrollment				Closed	☐		
KC99	0	KC1	Enrolled	☐ ☐ ☐	☐	☐	Normal Prc	☐		
01/01/1999	Opn Enroll	900	Open Enrollment				Closed	☐		

BenAdmin Event Status Update page

You see all events currently in BAS_PARTIC for the participant and benefit record number combination you select in descending date order, so the “current” events are at the top. The event currently in process has an event status of *Open*.

Note. Only one event can have an event status of *Open*. You cannot change another event to *Open* status until the current event is closed.

Eligibility Change, Addr/MultiJob/Job, Out of Sequence

Indicates that changes have occurred since the event was scheduled; the event may have been impacted and may need to be reprocessed.

If you determine that the event does not need reprocessing, clear these check boxes.

Note. These check boxes remain selected until you clear them. After you reprocess the event or otherwise correct the problem that caused the system to select the flag, you should return to this page to clear the check boxes.

Disc (disconnected event)

If selected, indicates the event is disconnected and can no longer be processed, with the exception of finalized and disconnected events, which can be reprocessed to a Void status.

Final

When selected, the system attempts to finalize/apply defaults for the participant event on the next run of the PeopleSoft Benefits Administration process.

Process Indicator

You use the Process Indicator options to indicate how you want the event to be reprocessed on the next run of the PeopleSoft Benefits Administration process. The following table describes Process Indicator values.

Process Indicator	Processing
Assign Pgm (assign benefit program)	Event status must be Open. Elections for participant events are rolled back (deleted) from the Base Benefit enrollment tables. Election choices are not retained in BAS_PARTIC Tables for the participant events. Schedule assignment is not reviewed. Program eligibility is checked and option eligibility, cost credits, defaults and pre-entry are recalculated. The system attempts to reprocess participants to a PR status.
Elect Optn (elect options)	Event status must be Open. The system does roll back elections from Base Benefit enrollment tables. Schedule assignment, program assignment and option eligibility are not reviewed. The system revalidates elections for this event and loads them, if there are no errors, back into the Base Benefit enrollment tables, resetting the final process status to FE. If errors occur the process status will be EE.
Normal Prc (normal processing)	Standard processing for PeopleSoft Benefits Administration. Nothing is reprocessed.
Prep Optn (prepare options)	Event status must be Open. Elections for participant events are rolled back (deleted) from the Base Benefit enrollment tables. Election choices are not retained in BAS_PARTIC Table for the participant events. Schedule assignment and program assignment are not reviewed. The system recalculates option eligibility, cost credits, defaults, and pre-entry information. The system attempts to reprocess participants to a PR status.

Process Indicator	Processing
Re-Enter	Use to correct election errors for finalized events with enrollment information that has been loaded to benefit tables. Event status must be Open. The system rolls back elections back from Base Benefit enrollment tables. It retains elections in the BAS_PARTIC Table. The system leaves the event at a process status of RE. Schedule assignment, program assignment and option are not reviewed. When you post election changes to the data entry pages, the system updates the process status to ET.
Void	If the event is in a process status of Enrolled, elections are rolled back from Base Benefit enrollment tables. The system retains prior election choices for this event in the BAS_PARTIC Table. The system leaves the event at a process status of RE. The system does not review schedule assignment, program assignment, and option eligibility. The system updates the event status to Void and removes the event from further processing.

See Also

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Scheduling Events and Assigning Benefit Programs, page 135](#)

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Analyzing Disconnected Events, page 141](#)

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Manually Updating Event Status, page 140](#)

[Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Investigating and Voiding Disconnected Events, page 142](#)

Reprocessing Events for Selected Groups

Access the BenAdmin Processing Controls (results) page.

The fields on this page are similar to the BenAdmin Event Status page, described in the previous section, except you can set reprocessing indicators for multiple participants.

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Scheduling Events and Assigning Benefit Programs, page 135

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Analyzing Disconnected Events, page 141

Chapter 8, “Preparing for Open Enrollment and Event Maintenance,” Defining Open Enrollment and Snapshot IDs, page 89

Chapter 10, “Processing Event Maintenance On Demand,” Reprocessing Participant Events, page 180

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Validating and Loading Elections, page 161

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Managing Multiple Jobs”

Reprocessing Open Enrollment Schedules

You can use the Open Enrollment/Snapshot page of the Run Control component to reprocess every participant in an Open Enrollment schedule. Select a reprocessing value in the Reprocess group box and run the PeopleSoft Benefits Administration process again.

The following table summarizes the processing performed by the system in response to your reprocess request. Only participant events on this schedule will be included. In general, the system excludes participant events with an event status of *Closed* or *Void* from Open Enrollment run control reprocessing.

Reprocess Indicator Value	Processing
None	Standard processing for PeopleSoft Benefits Administration.

Reprocess Indicator Value	Processing
Schedule (reassign schedules)	This restarts PeopleSoft Benefits Administration processing. You might do this when you work through test runs during implementation, for example. No participant events on the selected PeopleSoft Benefits Administration schedule can be in a process status of NT, EE, ET, RE, or FE. The system checks this at the start of the run and terminates processing if this condition is not met. The system ignores the participant events' process indicator status and event status—all events, open and closed, are included. The system deletes all participant event data for this schedule and then recalculates it through option preparation. This includes reevaluating the employee population for inclusion in the schedule, and subsequent program assignment, and the determination of eligible options/defaults. The system attempts to process participant events to a PR process status.
Assign Benefit Program	The system rolls back (deletes) elections for participant events from the Base Benefit enrollment tables. The system does not retain participant event election information in the BAS_PARTIC Table. The system does not review schedule assignment. The system rechecks program eligibility and recalculates option eligibility, cost credits, defaults, and pre-entry information. The system attempts to process participant events to a PR process status.

Reprocess Indicator Value	Processing
Prepare Options	The system rolls back (deletes) elections for participant events from the Base Benefit enrollment tables. The system does not retain participant event election information in the BAS_PARTIC Table. Schedule assignment and program eligibility and assignment are not reviewed. Option eligibility, cost credits, defaults, and pre-entry are recalculated. The system attempts to process participant events to a PR (prepared) process status.
Elect Options	The system rolls back elections from Base Benefit enrollment tables. The system retains participant event election information in the BAS_PARTIC Table. The system does not review or reprocess schedule assignment, program assignment, or option eligibility. It revalidates elections for this event and loads them, if there are no errors, back into the Base Benefit enrollment tables, resetting the final process status to FE.

See Also

Chapter 8, “Preparing for Open Enrollment and Event Maintenance,” Defining Open Enrollment and Snapshot IDs, page 89

Understanding Event Maintenance and COBRA Administration

This section describes how the Event Maintenance process initiates COBRA qualifying events.

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Understanding Event Maintenance and COBRA Administration, page 172

Chapter 5, “Creating Event Rules,” page 29

Initiating COBRA Qualifying Events

PeopleSoft Benefits Administration initiates qualifying COBRA events during the Event Maintenance process when a recognized COBRA event is finalized. The only exception to this rule is the Overage Dependent event, which is initiated by the COBRA process for both the Base Benefits business process and PeopleSoft Benefits Administration clients.

When PeopleSoft Benefits Administration initiates the COBRA event, it populates the COBRA Activity table with the employee ID, employment record number, COBRA event date, COBRA action code (as defined on the Action Reason table) and event ID related to the initiated event. From that point, the activity (event trigger) is further processed only by the COBRA Administration system, not by PeopleSoft Benefits Administration.

CHAPTER 10

Processing Event Maintenance On Demand

This chapter provides an overview of on-demand event maintenance processing and discusses how to:

- Begin the On-Demand Maintenance process.
- Move events through the process.
- Reprocess participant events.
- Set up and manage on-demand event maintenance.

Understanding On-Demand Event Maintenance Processing

The administration of an Event Maintenance or Open Enrollment schedule can extend from several days to several weeks, depending upon the number of employees involved. This can involve time correcting processing errors, delivering enrollment forms, entering employee elections as the forms are returned, validating elections, and sending out confirmation notices.

With On-Demand Event Maintenance, you can run an individual participant through the entire PeopleSoft Benefits Administration process—from participant event scheduling to enrollment confirmation—with a single page. You can:

- Process participant events quickly, without setting up run controls.
- Correct processing errors as they occur.
- Link to PeopleSoft Benefits Administration pages to review processing information and enter option elections.

On Demand Event Scenarios

You might use On-Demand Event Maintenance for an employee who has been promoted and is transferring offices in a few days. In one day, you could:

- Produce a benefits package.
- Enter elections.
- Produce a confirmation statement.

You can also integrate the On-Demand Event Maintenance page into the standard PeopleSoft Benefits Administration processing cycle. For example, a new hire is typically scheduled as a participant event during a regularly scheduled Event Maintenance batch process. However, what if the new employee needs to submit an enrollment form right away to make a doctor's appointment and show proof of medical insurance? You can use the On-Demand Event Maintenance page to produce the enrollment statement on demand. The employee makes elections that same day via the company's interactive voice response system or self-service Website via eBenefits, and the system finalizes the elections and prints a confirmation statement during the next run of the PeopleSoft Benefits Administration process for the normal Event Maintenance schedule.

See Also

[Chapter 9, "Running the PeopleSoft Benefits Administration Process," page 97](#)

Beginning the On-Demand Event Maintenance Process

This section describes how to:

- Start the On-Demand Event Maintenance process.
- Select an activity to process.

Pages Used to Begin the On-Demand Maintenance Process

Page Name	Object Name	Navigation	Usage
On-Demand Event Maintenance	BAS_ON_DEM_EM	Benefits, Manage Automated Enrollment, Events, On-Demand-Event Maintenance	Process a single participant through all stages of the PeopleSoft Benefits Administration process.
BAS Activities	BAS_ACTY_EMPL	Click the Show Activities button on the On-Demand Event Maintenance page.	Review the list of activities waiting to be processed for a particular employee ID/benefit record number combination and select one to be processed.

Starting the On-Demand Event Maintenance Process

Access the On-Demand Event Maintenance page.

On-Demand Event Maintenance			
Hoinck,Susan		Employee	EmplID: KU0119 Ben Rcd#: 0
Activity Date: 05/01/2000	Source: Job Data Change		Empl Rcd#: 0
Schedule/Prepare Activity	Pending Activities: 1	Show Activities	Action: HIR
Event ID: 0	Event Date:	Status:	Class: Event Status Update
Prepare Options		Event Status:	
Enrollment Statement		Frequency ☒ Deduction ☐ Annual	
Run Date:			
Election Entry	Entered 0 of 0	Show Plans	
Validate/Finalize	Errors 0	Show Errors ☐ Finalize/Apply Defaults	
Confirmation Statement	Run Date:		
Reprocess	Process Indicator: N	Normal Processing	

On-Demand Event Maintenance page

Empl Rcd# (employee record number)

Used for employees with multiple jobs.

Employees with multiple jobs can have different sets of benefits elections. The system keeps track of the different sets of elections by assigning benefit record numbers for each benefits package.

Activity Date and Show Activities

This is the date on which the trigger activity for the PeopleSoft Benefits Administration event occurred.

If the system finds only one activity for the employee, the system automatically displays the date. If there is more than one activity, click Show Activities to select an activity to process.

Source

The type of action that triggered the activity record: a change to the employee address, multiple job flags, or job data; manually adding an event through the BenAdmin Activity page; or a passive event.

Schedule/Prepare Activity

Click to run the Schedule/Prepare Activity process.

Pending Activities

Displays the number of activities waiting to be processed into participant events for this employee ID/benefit record number combination.

As activity triggers are processed into participant events, they are deleted from the BenAdmin Activity page. If there are no activities waiting to be processed, Pending Activity is blank and the Show Activities button is not available.

Action

The type of job action associated with the action trigger.

For example, if the triggering action is a hire of an employee, the action is HIR. When the system processes the activity into a participant event, it uses the action to determine which event classification governs the event.

The remaining features, discussed below, are unavailable until the activity is scheduled.

Selecting an Activity to Process

Access the BAS Activities page.

Hoinck,Susan		Employee		EmplID: KU0119		
BAS Activity Customize Find First ◀ 1 of 1 ▶ Last						
Sel ACTY	Empl Rcd#	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
☒	0	JobChg	05/01/2000	0	HIR	
						+ -

Bas Activity page

Sel ACTY (select activity) Select to process the activity.

When you select an activity record, information from that record populates the Activity Date, Source, Empl Rcd#, Pending Activity, and Action fields on the On-Demand Event Maintenance page.

Event Effseq (event effective sequence) If there is more than one event for this employee that occurred on the same day, indicates the order in which it occurred.

COBRA Action This indicates whether this is a COBRA qualifying activity.

Moving Events Through the Process

This section describes how to:

- Schedule and assign activities.
- Prepare options.
- Print enrollment statements for on-demand Event Maintenance.
- Enter elections.
- Validate and finalize elections.
- Generate confirmation statements.

Scheduling and Assigning Activities

To schedule the activity record as a participant event and assign the event to a benefit program, click the Schedule/Prepare Activity button on the On-Demand Event Maintenance page.

The Schedule/Prepare Activity button is only active if there is an activity waiting to be processed.

If the activity record is processed successfully, it is:

- Scheduled as a participant event.
- Deleted from the list of activities waiting to be processed.

- Added to the BAS Participant Table.
- Assigned to a specific Benefit Program where Event Classifications are determined.
- Prepared (option eligibility and costs are calculated).

Note. In certain cases, the system will process the event to FP status, in which case the event will be closed and processing will stop. This can happen, for example, when event processing rules have Use History turned on and there is no change in eligible options.

The system always assumes that you intend the selected activity on the On-Demand Event Maintenance page to be the event currently in process. So if you're working with a participant who currently has an event midway through the PeopleSoft Benefits Administration process cycle and a pending activity record selected for On-Demand Maintenance, the system closes the current event by changing its event status to *Closed*, converts the activity trigger into a new participant event, and gives that event an event status of *Open*.

See Also

Chapter 9, "Running the PeopleSoft Benefits Administration Process," Scheduling Events and Assigning Benefit Programs, page 135

Preparing Options

Typically, after the event has been scheduled and assigned, options and costs are automatically prepared (so long as no errors were encountered during scheduling and program assignment). However, if errors are encountered and need further resolution, click the Prepare Options button to continue automated processing and to prepare benefit options and election defaults.

Due to an error during the scheduling and assignment, the Prepare Options button is only available when the event's process status is *AS*, *AE*, or *PE*.

See Also

Chapter 9, "Running the PeopleSoft Benefits Administration Process," Analyzing Disconnected Events, page 141

Printing Enrollment Statements for On Demand Event Maintenance

After options have been prepared, click Enrollment Statements to generate an enrollment statement for the participant. The Enrollment Statements button is only available when the process status is PR or NT.

The Run Date field displays the date that an enrollment statement was last run for the participant event currently in process.

In the Frequency group box, you can indicate how to display benefit option cost information on the enrollment statement. Use Deduction Frequency to print the cost of the benefit per pay period for each available option. Use Annual Frequency to print the annual cost of the benefit option.

Note. If you're using PeopleSoft eBenefits, this step may be optional (since the employee has access to enrollment choices directly from the self-service Website).

Entering Elections

After options have been prepared and you've received the participant's election choices, click the Election Entry button to access the PeopleSoft Benefits Administration data entry pages. The button is only available when the process status is *PR*, *NT*, *EE*, *RE*, or *ET*.

On the On-Demand Event Maintenance page, the Entered ... Of ... field tells you how many plan election choices have been entered for the participant versus the total number of plan election choices the participant can make. When an election has been entered, you can also click Show Plans to review changes.

See Also

Chapter 9, "Running the PeopleSoft Benefits Administration Process," Entering Participant Benefit Elections, page 152

Validating and Finalizing Elections

After entering elections, click the Validate/Finalize button to validate and load the information to benefit tables. The button is available if the process status of the event is *ET*, *EE*, or *RE*.

Note. If a participant's elections have not been updated and event rules dictate the participant cannot keep some or all current elections, the system determines default elections for the participant and enrolls them.

Use the Finalize/Enroll Defaults check box to force-finalize a participant's elections and enroll the participant in default elections, or both, even if the current elections are in error. Events with a process status of *PR* and *NT* can be force-finalized, as well as events at *ET*, *EE*, or *RE*.

See Also

Chapter 9, "Running the PeopleSoft Benefits Administration Process," Validating and Loading Elections, page 161

Generating Confirmation Statements

After validating and finalizing the participant's elections, click the Confirmation Statement button to generate a confirmation statement. The Confirmation Statement button is available when the process status *FE* or *EE*.

The Run Date field displays the date a confirmation statement was last printed for the participant event in process.

See Also

Chapter 10, "Processing Event Maintenance On Demand," Setting Print Options, page 183

Reprocessing Participant Events

If an event requires reprocessing, click the Reprocess button and the Process Indicator on the On-Demand Event Maintenance page to reprocess the event to a previous stage of the PeopleSoft Benefits Administration process. The Reprocess button is not available for events with *AS* status.

As with the normal PeopleSoft Benefits Administration process, use the Event Status Update page to identify events that may need reprocessing. To open the Event Status Update page from the On-Demand Maintenance page, click the Event Status button.

Note. If you need to reprocess an event that has been closed, open Event Status Update, close the currently open event, and open the event that you want to reprocess. When you return to the On-Demand Event Maintenance page, the system displays the event you reopened for processing.

Use the Process Indicator menu to indicate the level to which you want the system to reprocess the event. The following table describes Process Indicator values.

Process Indicator	Processing
A (assign benefit program)	Event status must be Open. Schedule assignment is not reviewed or changed. Elections for participant events are rolled back (deleted) from the Base Benefit enrollment tables. Elections are not retained in the BAS_PARTIC Table. Program eligibility is determined again. Option eligibility, cost credits, defaults, and pre-entry are recalculated. The system attempts to reprocess participants to PR status.
E (elect options)	Event status must be Open. Schedule assignment, program assignment, and option eligibility is not reviewed or changed. The system rolls back elections from Base Benefit enrollment tables. Elections are retained in the BAS_PARTIC Table. It revalidates elections for this event and loads them, if there are no errors, back into the Base Benefit enrollment tables, resetting the final process status to FE.
N (normal processing)	Standard processing for PeopleSoft Benefits Administration.

Process Indicator	Processing
P (prepare options)	Event status must be Open. Schedule assignment and program assignment are not reviewed or changed. Elections for participant events are rolled back (deleted) from the Base Benefit enrollment tables. Elections are not retained in the BAS_PARTIC Table. The system recalculates option eligibility, cost credits, defaults, and pre-entry information. The system attempts to reprocess participants to PR status.
R (reenter)	Use to correct election errors for finalized events, when enrollment information has been loaded to benefit tables. Event status must be Open. Schedule assignment, program assignment, and option eligibility is not reviewed or changed. The system rolls back elections back from Base Benefit enrollment tables. It retains elections for this event in the BAS_PARTIC Table. The system leaves the event at a process status of RE. When you post election changes to the data entry component, the system updates the process status to ET.
V (void)	The system updates the event status to Void and removes the event from processing. The system does not review schedule assignment, program assignment, and option eligibility. If the event is in a process status of FE-Enrolled, elections are rolled back from Base Benefit enrollment tables. The system retains prior elections for this event in the BAS_PARTIC Table. The system leaves the event at a process status of RE.

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Analyzing Disconnected Events, page 141

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Reprocessing Events, page 165

Setting Up and Managing On-Demand Event Maintenance

This section explains how to:

- Set print options.
- Review changed elections.
- Review and update event status.
- Review error messages.

Pages Used to Set Up and Manage On Demand Event Maintenance

Page Name	Object Name	Navigation	Usage
BenAdmin Online Form Printing (benefits administration online form printing)	BAS_ODEM_PRINT	Set Up HRMS, Product Related, Automated Benefits, Processing Controls, Online Printing	Set the print destination for on-demand enrollment and confirmation forms.
Participants Enrolled	BAS_PARTIC_EMPLINQ	Click the Show Plans button on the On-Demand Event Maintenance page.	Review the plan types for which elections were entered or changed and the plan types that the participant is eligible to change but for which no changes have been entered.
BenAdmin Event Status Update (benefits administration event status update)	BAS_PARTIC_STS	Click the Event Status Update button on the On-Demand Event Maintenance page.	Review the plan types for which elections were entered or changed and the plan types that the participant is eligible to change but for which no changes have been entered.
On Demand EM - Error Messages	BAS_MESS_EMPL	Click the Show Errors button on the On-Demand Event Maintenance page.	Review On-Demand Event Maintenance error messages.

Setting Print Options

Access the BenAdmin Online Form Printing page.

BenAdmin Online Form Printing page

You only need to set up print options once per user ID. Use the fields in the Output Destination group box to determine the output destination of the enrollment and confirmation forms you print with the On Demand Event Maintenance facility. If you want to print the report on a printer, select *Printer*. If you want the system to generate the form as a text file, select *File*. In *File/Printer*, either give the path to the directory in which you want the system to save the file (if you've selected *File*), or the printer to which you want the system to send the form (if you've selected *Printer*).

Note. Reports are always run from the client.

Reviewing Changed Elections

Access the Participants Enrolled page.

Election Made	A Y value indicates election has been entered or changed.
Option Cd (option code)	The benefit option code can also indicate the participant has waived a certain option.

Note. The Participants Enrolled page only displays the plan types for which the participant is currently eligible to choose or change benefit option elections. It might not display all of the plan types in which the participant is currently enrolled.

Reviewing and Updating Event Status

Just like in the normal PeopleSoft Benefits Administration process, you can use the Event Status Update page to open and close events and reprocess events. You can also use the Event Status Update page to review the participant events currently associated with the participant/benefit record number combination with which you are working. To open the Event Status Update page from the On-Demand Maintenance page, click the Event Status button.

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Manually Updating Event Status, page 140

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Reprocessing Events, page 165

Reviewing Error Messages

Access the On Demand EM - Error Messages page.

The error messages generated by the last processing action you initiated appear in the Messages area. Each time you run the PeopleSoft Benefits Administration process, the system deletes the error messages generated by the previous run. If errors from a previous run are not corrected, they are generated again with the new run of the process.

See Also

Chapter 10, “Processing Event Maintenance On Demand,” Reviewing Error Messages, page 185

APPENDIX A

PeopleSoft Benefits Administration Reports

This appendix provides an overview of PeopleSoft Benefits Administration reports and enables you to:

- View summary tables of all reports.
- View report details and source records.

Note. For samples of these reports, see the PDF files published on CD-ROM with your documentation.

PeopleSoft Benefits Administration Reports: A to Z

This table lists the PeopleSoft Benefits Administration reports, sorted alphanumerically by report ID. The reports listed are all SQR reports. If you need more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
BAS001 Eligible Participants	Lists, by schedule and benefit program, employees that are eligible to participate in company benefit programs with details on plan and option eligibility.	Benefits, Manage Automated Enrollment, Investigate Exceptions, Eligible Participants Rpt	RUNCTL_BAS001
BAS002 Benefit Program Mailing Labels	Prints a set of 4-across mailing labels for employees participating in benefit programs. Compiles the list from the BAS Participant tables created during Open Enrollment or Event Maintenance processing.	Benefits, Manage Automated Enrollment, Participant Enrollment, Print Mailing Labels	RUNCTL_BAS002
BAS003 Invalid Benefit Elections	Lists, by schedule and event, participants and their dependents, showing any errors such as coverage over the maximum or under the minimum, invalid choices, failure to meet eligibility requirements, and so on.	Benefits, Manage Automated Enrollment, Investigate Exceptions, Invalid Elections Report	RUNCTL_BAS_SCHED

Report ID and Report Name	Description	Navigation	Run Control Page
BAS004 Enrollment Statements	Prints a generic enrollment statement for each eligible benefit program participant in the BAS Participation table. Includes the name and address of each participant, with options the participant is eligible for and the associated price tags and credits (if applicable) for the options.	Benefits, Manage Automated Enrollment, Participant Enrollment, Print Enrollment Statements	RUNCTL_BAS004
BAS005 Confirmation Statements	Prints a generic confirmation statement for each valid benefit program participant. Includes coverage and per pay period costs.	Benefits, Manage Automated Enrollment, Participant Enrollment, Print Confirmation Statement	RUNCTL_BAS005
BAS006 Missing Elections	Lists and provides location information for participants who did not return enrollment statements.	Benefits, Manage Automated Enrollment, Investigate Exceptions, Missing Elections Report	RUNCTL_BAS_SCHED
BAS007 Dependent/Beneficiary Election	Lists all dependents with current or new elections.	Benefits, Manage Automated Enrollment, Participant Enrollment, Dep/Beneficiary Election Rpt	RUNCTL_BAS_SCHED
BAS008 Flagged Participants	Lists events that have had job, address, or union eligibility information changed, events that have been processed out of sequence, and events that have been disconnected during processing.	Benefits, Manage Automated Enrollment, Investigate Exceptions, Report on Flagged Items	RUNCTL_BAS008
BAS010 Ineligible Participants	Lists all participants ineligible for any benefit program (events processed to AN status) and their eligibility parameters, such as birthdate and status.	Benefits, Manage Automated Enrollment, Investigate Exceptions, Ineligible Participants Rpt	RUNCTL_BAS_SCHED
BAS027 Employee Process Status	Lists all participants in a particular process status or set of status levels.	Benefits, Manage Automated Enrollment, Investigate Exceptions, Employee Process Status Rpt	RUNCTL_BAS027
BAS701 Geographic Locations	Prints location IDs, effective dates, and from/to ranges for the U.S. ZIP code ranges and Canadian postal code ranges you've defined to determine benefit eligibility.	Set Up HRMS, Product Related, Automated Benefits, Reports, Geographic Location	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BAS702A Benefit Program /Plan/Options	For a specified benefit program, prints program-level information (effective date and status, program type, age criteria, COBRA, FMLA, and FSA parameters and self-service configuration) along with the plan- and option-level structure (event rules, eligibility rules, coverage levels and deduction codes).	Set Up HRMS, Product Related, Automated Benefits, Reports, Benefit Program/Plan/Options	RUNCTL_BAS_PGM
BAS702B Benefit Program Costs	For a specified benefit program, prints the program description along with the cost and credit structure for all of the offered options (deduction and earnings codes, rate information and calculation rules).	Set Up HRMS, Product Related, Automated Benefits, Reports, Benefit Program Costs	RUNCTL_BAS_PGM
BAS703A Eligibility Rules	For each plan type in a benefit program, prints the rules for minimum standard hours, maximum standard hours, minimum service, maximum service, minimum age, maximum age, service and age as of information, employee class, employee status, employee type, full/part, reg/temp, officer code, union code, company, location, state and eligibility configuration. For each Eligibility Rule definition, prints the minimum/maximum criteria (standard hours, service months and age) and the “membership” criteria (such as employee class, full or part time, company and paygroup, union code, state, etc.) along with the applicable grouping methods and evaluation rules.	Set Up HRMS, Product Related, Automated Benefits, Reports, Eligibility Rules	RUNCTL_BAS703A

Report ID and Report Name	Description	Navigation	Run Control Page
BAS703B Event Rules	Prints event rules for benefit plan types. For an Event Rule definition, prints each Event Class with its basic change restrictions (type of changes allowed and option-level movement), date rules (coverage and deduction dates with waiting periods), and other event controls (defaulting, editing and exceptions).	Set Up HRMS, Product Related, Automated Benefits, Reports, Event Rules	RUNCTL_BAS703B
BAS703C Event Rules-Billing	Lists the parameters in which billing enrollments are created or updated during the PeopleSoft Benefits Administration process. Displays the event rules, event class, billing action, billing action date, and the rate qualifier.	Set Up HRMS, Product Related, Automated Benefits, Reports, Event Rules Billing	RUNCTL_BAS703B
BAS714 Benefits Administration Scheduling	Lists the criteria that make up a schedule. Use to review schedules that have been entered into the system and to ensure that there are no employee overlaps.	Set Up HRMS, Product Related, Automated Benefits, Reports, Schedules	RUNCTL_BAS_SCHED

PeopleSoft Benefits Administration Selected Reports

This section provides detailed information on individual reports, including important fields and source records. The reports are listed alphabetically by report ID.

BAS002 - Benefit Program Mailing Labels (4-Up)

Note. Be sure to load the correct label stock in your printer before initiating this report.

See Also

Chapter 9, "Running the PeopleSoft Benefits Administration Process," page 97

Chapter 9, "Running the PeopleSoft Benefits Administration Process," Investigating Participant Eligibility, page 144

BAS003 - BenAdmin Preparation and Election Errors

Note. You can use this report as an audit trail for fixing errors by having staff check off each error as they make a correction.

See Also

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” page 97

Chapter 9, “Running the PeopleSoft Benefits Administration Process,” Investigating Participant Eligibility, page 144

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
account	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting entry	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery method it may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure

	from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
application agent	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
category	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail values dynamically directly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
key	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See <i>activity</i> .
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	The feature that initiates a process to automatically load information into a PeopleSoft application for example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location indicated by a <i>1</i> is the address you use most often and may be different from the main address.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>participant object</i> .
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
private view	A user-defined view that is available only to the user who created it.
process	See <i>Batch Processes</i> .
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

	automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
results management process	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
routing	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes email message, electronic form, or worklist entry.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
self-service application	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

	Learning Management activity characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
sibling	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See <i>Structured Query Report (SQR)</i> .
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.

table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction loading process	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
transaction type	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
uniform resource locator (URL)	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL

See *uniform resource locator (URL)*.

user interaction object

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist

The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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