

PeopleSoft®

PeopleSoft 8.8
eBenefits PeopleBook

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eBenefits 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>0</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
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)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>
(ISO)	<p>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.</p> <p>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:</p> <p>(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.</p>
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 eBenefits Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.
- Common elements used in this PeopleBook.

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 product line.

PeopleSoft Application Fundamentals

The *PeopleSoft 8.8 eBenefits PeopleBook* provides you with implementation and processing information for your PeopleSoft eBenefits system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft 8.8 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 8.8 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	<p>This is the chapter you're reading now. It explains:</p> <ul style="list-style-type: none"> • 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...	<p>This chapter discusses application implementation guidelines. It explains:</p> <ul style="list-style-type: none"> • The business processes documented within the book. • Integrations between the application and other applications. • 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...	<p>This is an introductory chapter that broadly explains the application and the functionality within it.</p>
Setup and Implementation	<p>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.</p> <p>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.</p>

Chapters	Description
Business Process	<p>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.</p> <p>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.</p>
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 eBenefits

This chapter provides an overview of PeopleSoft eBenefits transactions and discusses PeopleSoft eBenefits implementation tasks.

PeopleSoft eBenefits Transactions

Listed below are the PeopleSoft eBenefits transactions:

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

Implementing PeopleSoft eBenefits

The PeopleSoft eBenefits table-loading implementation includes setting up the following:

- Setting up HRMS fundamental tables.
- Setting up eBenefits core tables.
- Setting up optional supplier 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 eBenefits 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 eBenefits 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 eBenefits 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 eBenefits Tables

The steps discussed in this section suggest an order in which you define the information in your core eBenefits 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:

- Benefits enrollment.
- Review health plan information.
- Review insurance information.
- Review savings plan information.
- Review FSA information.
- Review dependent and beneficiary information.
- Enter life events.

Step	Reference
1. Set up the Human Resources: Base Benefits business process core tables.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits</i> , “Getting Started With PeopleSoft Human Resources Base Benefits”
2. If you are using Benefits Administration, set up the core application tables.	<i>PeopleSoft 8.8 Benefits Administration PeopleBook</i> , “Getting Started With PeopleSoft Benefits Administration”
3. Define the parameters for the eBenefits enrollment form.	Chapter 3, “Setting Up eBenefits,” page 11
4. Define the rules for life events.	Chapter 7, “Managing Life Events,” Defining Life Event Rules, page 57

Setting Up Optional Supplier Tables

These steps define information necessary for integration with third-party suppliers.

Setting up these tables prepares your system to support these features:

- Look up benefit plan information.
- Send benefit enrollment information.

- Find a health care provider.
- Purchase optional benefits or services from third-party suppliers.

Step	Reference
1. (Optional) Set up Authoria HR.	<u>Chapter 4, “Setting Up Suppliers,” page 19</u>
2. (Optional) Set up eBenX.	<u>Chapter 4, “Setting Up Suppliers,” page 19</u>
3. (Optional) Set up GeoAccess ProviderSearch.	<u>Chapter 4, “Setting Up Suppliers,” page 19</u>
4. (Optional) Set up Beyond Works as a discount and perk supplier.	<u>Chapter 4, “Setting Up Suppliers,” page 19</u>

CHAPTER 2

Understanding PeopleSoft eBenefits

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

- PeopleSoft eBenefits integrations.
- Move around eBenefits.
- Understand roles and security.

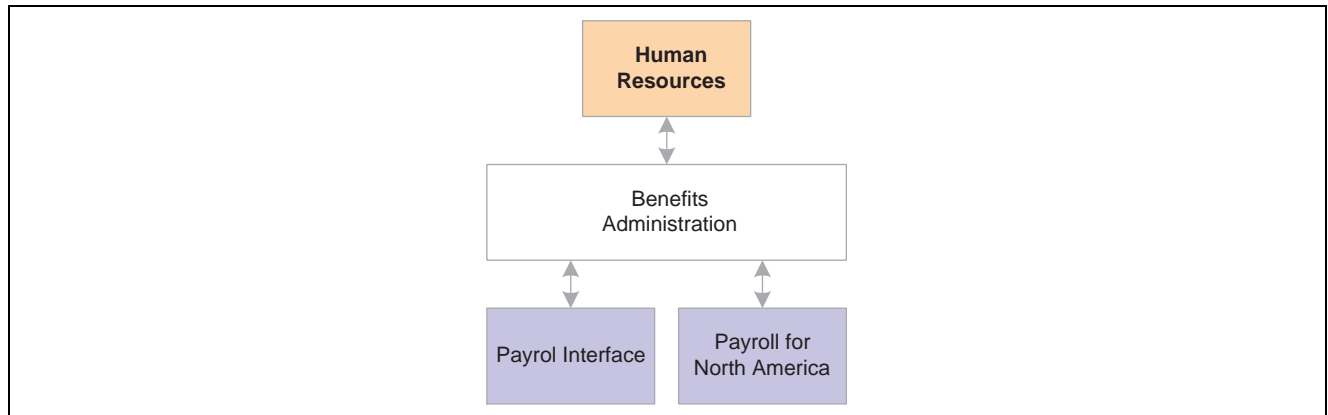
Understanding eBenefits Components

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

- eBenefits Home is the starting place for employees to access their benefit information.
- eBenefits Enrollment pages enable employees to communicate their benefit choices to the organization.
- eBenefits Health pages enable employees to review their health related benefit information by navigating from summary level pages to more detailed information.
- eBenefits Savings pages enable employees to review their savings plan information by navigating from summary level savings plan pages to more detailed information.
- eBenefits Insurances pages enable employees to review the life insurance information by navigating from summary level pages to more detailed information.
- eBenefits Dependents/Beneficiaries pages enable employees to review information about their dependents and beneficiaries by navigating from summary level pages to more detailed information.
- eBenefits Flexible Spending Accounts pages enable employees to review information about their health or medical spending account by navigating from summary level pages to more detailed information.
- eBenefits Life Event pages are designed for employees to use to enter information about a birth or adoption of a child, or recent marriage.

PeopleSoft eBenefits Integrations

PeopleSoft eBenefits integrates with the following PeopleSoft applications:



PeopleSoft eBenefits integration flow with other PeopleSoft applications

Moving Around eBenefits

There are two ways to access self-service transactions:


- Benefits Home page.
- Standard menu navigation path.

Benefits homepages


The homepage presents a simple user interface design for the end user. It is accessed by selecting Employee Self-Service, Benefits, Benefits Home.

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


Benefits Home




Benefits Information
Review your current and historical benefits information, including Health, Insurance, and Savings summary information.
[Benefits Summary](#)
[Health Care Summary](#)
[Insurance Summary](#)
[Savings Summary](#)




Flexible Spending Accounts
Review dependent care and health care spending account plan information.
[Flexible Spending Accounts](#)



Dependents and Beneficiaries
Review personal information and benefits coverage for your dependents and beneficiaries.
[Dependents and Beneficiary Summary](#)



Life Events
Add your new dependent or spouse to your benefit plans and update your payroll and personal information.
[Marriage](#)
[Birth/Adoption](#)

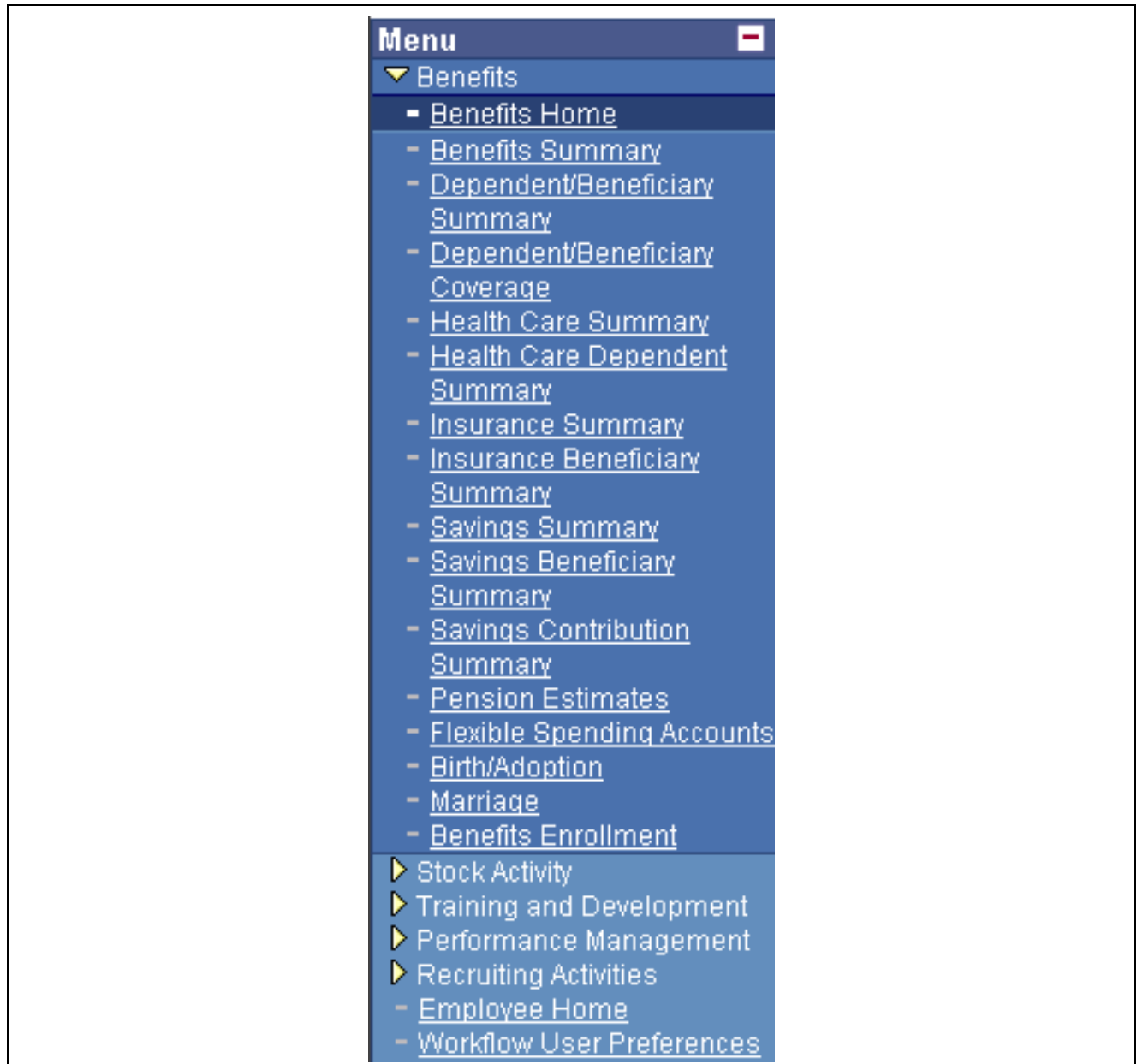


Pension Estimate
Calculate your estimated pension benefits.
[Pension Estimate](#)

Benefits Home page

Standard Menu Navigation

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



Standard navigation path

Understanding Roles and Security

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

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

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

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

User profiles also control the data each employee can access.

See Also

PeopleTools PeopleBook: Security, “Understanding PeopleSoft Security”

CHAPTER 3

Setting Up eBenefits

This chapter explains how to:

- Set up display fields.
- Set up text.

Setting Up Page Display Information

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

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

The fields that control how benefit plan information displays on the eBenefit plan summary and detail pages, and on the enrollment form are located on either the:

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

See Also

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

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

PeopleSoft 8.8 Benefits Administration PeopleBook, “Creating Event Rules”

Displaying Dependent and Beneficiary Information

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

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

Benefit Program - Plan Type and Option

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

Event Rules

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

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

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

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

See Also

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

PeopleSoft 8.8 Benefits Administration PeopleBook, “Creating Event Rules”

Displaying Savings Plan Fund Allocations

The Collect Funds Allocations check box appears on three pages:

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

Benefit Program - Plan Type and Option

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

Event Rules

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

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

Setting Up Domestic Coverage Information

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

The Domestic Coverage For field determines whether plan types can be combined on the enrollment form. This field displays on the Benefit Program - Plan Type and Option page for plan types 15, 16, and 17.

To set up domestic coverage information:

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

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

Suppressing Plan Type Information

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

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

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

Displaying Costs

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

Displaying Credits

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

Setting Up the Self-Service Plan Descriptions Field

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

Setting Up URLs

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

- Employee handbooks.
- Benefit provider Websites.
- Service provider Websites.

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

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

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

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

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

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

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

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

See Also

PeopleTools PeopleBook: Integration Tools, "Merchant Integration," Managing URLs

Setting Up Handbook Links

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

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

There can be one URL for the entire handbook or separate URLs for each plan type.

Setting Up General Policy Links

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

Setting Up Authorized Provider Links

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

Setting Up SPD (Summary Plan Description) Links

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

Setting Up Text Blocks

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

Delivered Text and Effective Dating

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

Page Used to Set Up Text Blocks

Page Name	Object Name	Navigation	Usage
eBenefits Text Entry	W3EB_TEXT	Set Up HRMS, Product Related, eBenefits, Self-Service Text Entry	Enter text and link the text to benefit programs, plan-types, and event classes on eBenefits enrollment pages.

Entering eBenefits Text

Access the eBenefits Text Entry page.

eBenefits Text Entry

Text ID: 1X_PCP_MAIN_HDR

Description: 1x page primary care provider section title

Effective Date: 01/01/1900

Benefit Program:

Plan Type:

Event Classification:

Choose a Primary Care Provider

eBenefits Text Entry page

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

Defining Text for Flexible Keys

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

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

- The system looks for a match on benefit program. It uses only those rows that match the benefit program, or, lacking any rows that match the benefit program, uses the rows that have a blank benefit program.

- Within this set of rows, the system looks for a match on plan type. It uses only those rows that match the plan type, or, lacking any rows that match the plan type, uses the rows that have a blank plan type.
- Within this set of rows, the system looks for a match on event class. It uses only the row that matches the event class, or, lacking a match on event class, uses the row that has a blank event class.

Identifying Field Lists

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

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

Setting Up Delivered Text and Effective Dating

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

Setting Up Enrollment Form Technical Information

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

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

The parameters are as follows:

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

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

&TextArea – Where the function returns the text.

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

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

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

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

CHAPTER 4

Setting Up Suppliers

This chapter discusses how to set up:

- Authoria HR.
- eBenX.
- GeoAccess ProviderSearch.
- Discount and Perk Suppliers.

Setting Up Authoria HR

Use the following procedure and pages to set up Authoria.

To set up Authoria HR:

1. Activate Authoria as a supplier in the Merchant Profile table.
2. Identify Authoria's external IDs.
3. Map the external IDs to PeopleSoft benefit plans.

Pages Used to Set Up Authoria HR

Page Name	Object Name	Navigation	Usage
Merchant Profile	MERCHANTID	Set Up HRMS, Common Definitions, Supplier Administration, Merchant Profile	Activate supplier.
Merchant Authentication	MERCHANTAUTH	Set Up HRMS, Common Definitions, Supplier Administration, Merchant Profile	Enter supplier information.
Merchant BI Overrides	MERCHANTBIPARMS	Set Up HRMS, Common Definitions, Supplier Administration, Merchant Profile	Enter supplier information.
Merchant Category	MERCHANTCAT	Set Up HRMS, Common Definitions, Supplier Administration, Merchant Profile	Enter supplier information.
Authoria External Page IDs	AUTH_KEYWORDS1	Set Up HRMS, Common Definitions, Supplier Administration, Authoria, Authoria External Page IDs	Identify the identification codes that will be used to link information between PeopleSoft and Authoria HR.
PeopleSoft/Authoria Mapping	AUTH_KEYWORDS	Set Up HRMS, Common Definitions, Supplier Administration, Authoria, Authoria Mapping	Link external page IDs to specific benefit plan information within Authoria HR.
Default Return Location	CO_DFLTRTN_PG	Set Up HRMS, Common Definitions, Supplier Administration, Default Return Location	Defines the default return location link on the supplier site. This is system provided data.

Activating Authoria HR as a Supplier

Follow the procedure below to activate Authoria.

To activate Authoria HR:

1. Access the Merchant Profile page.

Make sure the Merchant Enabled check box is selected. If this check box is not selected, links to the plan provider, flexible benefit overview, and Search Authoria will not be available within eBenefits.
2. Select the Merchant Authentication tab.
 - a. In the Merchant User ID Type field, select *Company Identifier* from the list of available options.
 - b. In the Company ID Type field, enter the identification number provided by your Authoria representative.
 - c. In the Company Authentication Tokenfield, enter the “Shared Secret” password provided by your Authoria representative. You will have to enter the password again as a confirmation.
 - d. In the Merchant Website URL field, enter Authoria’s full-path URL address. Obtain this information from your Authoria representative.
3. Select the Merchant BI Overrides tab.

- a. In the Business Interlink field, select *PSAUTHORIA_1* from the list of available options.
- b. Select the Sign-On Business Interlink check box.
- c. Enter the following overrides:

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
































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

See Also

PeopleTools PeopleBook: Integration Tools, "Merchant Integration"

Mapping Benefit Plans to Authoria HR

Access the Authoria External Page IDs page.

Authoria External Page IDs				
Customize Find View All  First 1-10 of 36 Last				
*External Page ID	*Type			
#01K	P		Benefit Plan	 
ADD	P		Benefit Plan	 
BIRTH	O		Other	 
CHILDDDEATH	O		Other	 
CHILDOVERAGE	O		Other	 
DENTAL	P		Benefit Plan	 
DEPCAREFSA	P		Benefit Plan	 
DEPLIFE	P		Benefit Plan	 
DIVORCE	O		Other	 
EEDEATH	O		Other	 




Authoria External Page IDs page

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

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

Linking Page IDs to Benefit Plan Information

Access the PeopleSoft/Authoria Mapping page.

PeopleSoft/Authoria Mapping	
Authoria External Page ID:	BIRTH
Mapping Find View All First 1 of 1 Last	
*Active Flag:	Active   
Plan ID:	BI

PeopleSoft/Authoria Mapping page

External Page ID The system displays the ID that you selected on the search page.

Active Flag This check box is selected by default. Selecting this check box activates the link for this plan type throughout the eBenefits. To inactivate the plan type link, clear the check box.

Plan Type	This field appears only if the External Page ID Type field on the Authoria External Page IDs page is set to <i>P</i> . Select the plan type that you want linked to this external page ID.
Plan ID	This field appears only if the External Page ID Type field on the Authoria External Page IDs page is set to <i>O</i> . If this field is already populated, do not change the entry. <i>BI</i> is assigned if this is a birth life event. <i>MA</i> is assigned if this is a marriage life event.
Include All Benefit Plans	This field appears only if the External Page ID Type field on the Authoria External Page IDs page is set to <i>P</i> . Select this check box if you want all benefit plans within this plan type to be linked to this external page ID. If all benefit plans are not to be linked to this external page ID, do not select this check box; you can specify which benefit plans you want linked or not linked to the ID.
Specific Benefit Plans	This field appears only if the External Page ID Type field on the Authoria External Page IDs page is set to <i>P</i> and if you have not selected the <i>Include All Benefit Plans</i> check box. You have the choice of selecting one of the following values: <i>Include Plans:</i> The list of benefit plans in the <i>Included Benefit Plans</i> group box will be linked to the external page ID. Anything not listed is excluded. <i>Exclude Plans:</i> The list of benefit plans in the <i>Excluded Benefit Plans</i> group box will not be linked to the external page ID. Anything not listed is included.
Included/Excluded Benefit Plans	This group box appears only if the External Page ID Type field on the Authoria External Page IDs page is set to <i>P</i> and if the <i>Include All Benefit Plans</i> check box is not selected. The title of the group box depends on what you selected in the <i>Specific Benefit Plans</i> field. This group box enables you to specify which plan types you want linked or not linked to the external page ID.

Setting Up eBenX

Use the following procedure to set up eBenX.

To set up a supplier:

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

See Also

[Chapter 4, "Setting Up Suppliers," Activating eBenX as a Supplier, page 24](#)

[Chapter 4, "Setting Up Suppliers," Defining the Supplier FTP Parameters, page 24](#)

[Chapter 4, "Setting Up Suppliers," Defining Carrier Reporting Schedules, page 25](#)

Pages Used to Set Up eBenX

Page Name	Object Name	Navigation	Usage
Merchant Profile	MERCHANTID	Set Up HRMS, Common Definitions, Supplier Administration, Merchant Profile	Use this page to activate the supplier.
Define FTP Parameters	BN_M_SUPPLIER_FTP	Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Define FTP Parameters	This page defines the information the system needs to communicate with the supplier.
Define Carrier Reporting Schedule	BN_M_SCHEDULE	Set Up HRMS, Common Definitions, Supplier Administration, CarrierRpt, Define Carrier Rpt Schedule	This page provides the information the system needs to send the correct information to the supplier.

Activating eBenX as a Supplier

After setting up eBenX, follow these steps to activate.

To activate eBenX:

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

See Also

PeopleTools PeopleBook: Integration Tools, "Merchant Integration"

Defining the Supplier FTP Parameters

Access the Define FTP Parameters page.

Define FTP Parameters

Supplier ID: EBENX eBenX **Supplier Is Not Enabled**

FTP Parameters

*FTP Address:

*FTP User Name:

*FTP Password:

Confirm Password:

Define FTP Parameters page

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

Defining Carrier Reporting Schedules

Access the Define Carrier Reporting Schedule page.

Define Carrier Reporting Schedule

Schedule ID: KUEBX1

***Description:**

File Parameters

***Company Descr:**

***Supplier ID:** eBenX

File Name: **Auto Generate File Name** [Resend a file created from this schedule](#)

***File Directory:**

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

Define Carrier Reporting Schedule page

- Schedule ID** This is a unique identification code assigned to this schedule. It can be up to six characters long.

Description	This is a detailed description for this schedule. It can be up to 30 characters long.
Company Descr (company description)	Enter the name of your company. This information is included in the header section of the files sent to the supplier.
Supplier ID	Select the supplier ID from the list of valid options.
File Name	<p>This is the name of the file sent to the supplier. You can create your own name or have the system generate a name for you.</p> <p>When creating your own name, make sure it is a name that helps you easily identify the contents. If you run the Carrier Interface Schedule more than once using the same name and directory, a sequence number will be placed in front of the file name. For example, if you send a file with the name eBenX twice, the first file name will be eBenX.txt and 2eBenX.txt.</p> <p>To have the system generate a name, leave <i>File Name</i> blank and select <i>Auto Generate File Name</i>.</p>
Auto Generate File Name	Select this check box to create a file name for you. When selected, the <i>File Name</i> field becomes unavailable for entry. The system creates the name using the following format: <Schedule ID name>_YYYY-MM-DD-HH.MM.SS.txt.
Resend a file created from this schedule	This link appears only if this schedule before. Click this link to display the Resend File page.
File Directory	This is the name of the directory located on the application server where the extract file is to be stored.
Extract Parameters	This group box enables you to select only the information that you want to extract from the BN_SNAP files for this supplier. You can have more than one row of parameters.
SetID	If you want enrollment information for a specific setID, select a setID from the list of available options. You must enter at least one setID.
Vendor ID	If you want enrollment information for a specific benefit provider, select a vendor ID from the list of available options. If you want information for all benefit providers, leave this field blank.
Plan Type	If you want enrollment information for a specific benefit plan type, select a plan type from the list of available options. If you want information for all plan types, leave this field blank.

Setting Up GeoAccess ProviderSearch

Use this procedure to set up integration.

To integrate with GeoAccess ProviderSearch:

1. Set up GeoAccess ProviderSearch.
2. Load GeoAccess ProviderSearch codes.

3. Map plan types to GeoAccess ProviderSearch.

Understanding GeoAccess ProviderSearch Integration

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

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

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

Understanding Enterprise Integration Points

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

- GA_PRV_SRCH
- GA_PRV_CODE

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

Pages Used to Set Up GeoAccess ProviderSearch

Page Name	Object Name	Navigation	Usage
Provider Search Enable/Disable	GA_PRV_CMPID_INST	Set Up HRMS, Supplier Administration, GeoAccess, Activate GeoAccess	Activate supplier.
GeoAccess Code Load	GA_PRCO_CODES	Set Up HRMS, Supplier Administration, GeoAccess, GeoAccess Code Load	Load GeoAccess ProviderSearch codes and provider names used by the system when mapping benefit plans and searching for providers.
PeopleSoft/GeoAccess Plan Matching	GA_PRV_PS_GA_SYNC	Set Up HRMS, Supplier Administration, GeoAccess, Plan Mapping	Link GeoAccess ProviderSearch product codes to your plan type and benefit plans combinations. You might need assistance from GeoAccess ProviderSearch for the mapping process.

Activating GeoAccess ProviderSearch

Access the Provider Search Enable/Disable page.

Provider Search Enable/Disable page

Merchant ID The system displays the ID associated with the supplier.

Company ID Enter the identification number provided by your GeoAccess ProviderSearch representative.

Merchant Enabled This check box must be selected. If this check box is not selected, you won't be able to transmit data to the supplier.

Loading GeoAccess ProviderSearch Codes

Access the GeoAccess Code Load page.

GeoAccess Code Load page

Mapping Plan Types to GeoAccess ProviderSearch

Access the PeopleSoft/GeoAccess Plan Matching page.

PeopleSoft / GeoAccess Plan Matching Powered by
GeoAccess

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

Map your plan types and benefit plan to a GeoAccess product code. Customize | Find First 1-9 of 9 Last

*Plan Type		*Benefit Plan		*Effective Date	*Product Code				
10	<input type="text" value="Medical"/>	KUHMO3	Medical HMO Plan 3	01/01/1999	39	Blue Shield of California - HMO	+	-	
10	<input type="text" value="Medical"/>	KUMED	Enhanced Medical Plan	01/01/1999	202	Blue Cross of California - PPO	+	-	
10	<input type="text" value="Medical"/>	KUMED1	Basic In-Network Medical	01/01/1999	230	Aetna U.S. Healthcare - PPO	+	-	
10	<input type="text" value="Medical"/>	KUMED2	Basic Out-of-Network Medical	01/01/1999	231	Aetna U.S. Healthcare - POS	+	-	
10	<input type="text" value="Medical"/>	ZBLUE	Blue Cross Indemnity	01/05/2000	6		+	-	
10	<input type="text" value="Medical"/>	ZKSRHM	Kaiser Permanente HMO	01/05/2000	1		+	-	
10	<input type="text" value="Medical"/>	ZKSRPP	Kaiser Permanente PPO	01/05/2000	2		+	-	
10	<input type="text" value="Medical"/>	ZTCPOS	Take Care POS	01/05/2000	8		+	-	
10	<input type="text" value="Medical"/>	ZTCPPO	Take Care PPO	01/05/2000	4		+	-	

PeopleSoft/GeoAccess Plan Matching page

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

Setting Up Discounts and Perks Suppliers

This sections discusses the steps involved for setting up suppliers and describes how to:

- Activate a discounts and perks supplier.
- Create a message node.
- Set up eligibility information.
- Set up eligibility fields.
- Set up supplier links.

Understanding Supplier Setup

Setting up suppliers can be broken down to three areas:

- Setting up basic information about the supplier so your PeopleSoft application can recognize the supplier.
- Defining eligibility information.
- Creating links on self-service pages.

Understanding Eligibility Data

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

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

Understanding Supplier Links

Supplier links are the mechanism employees used to access the supplier. Links can be placed on:

- Self-service transaction pages.
- Category pages.

Links can take you to:


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

Category pages are pages that you create to group or organize related supplier information. These pages may also contain links that go to other category pages or directly to the supplier's Website.


Categories are major areas located on the supplier's Website. Examples are tickets, health, travel, or finance. Technically, categories are nothing more than a URL address to the supplier's Website.


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

Discounts and Perks Home





[Tickets](#)
Purchase discounted tickets for movie theaters, concerts, theme parks, performing arts and many more programs.







[Gifts](#)
Make someone's day with a perfect present for any occasion. Choose from books, DVD's, music, jewelry, sporting goods and much more.







[Travel](#)
Enjoy the benefits of travel previously reserved for top-performing executives at Fortune 1000 companies! Warm, relaxing beaches, thrilling vistas and fascinating cultures are all just a click away.







[Services](#)
Your time is precious ... so let BeyondWork help you make the most of it. Review different rates and offerings for loans, legal advice, home cleaning services, and much more.






[Wellness and Nutrition Program](#)
Get all the tools you need to eat nutritiously, exercise and live a healthy life. Build a customized meal plan exclusively for you!





[BeyondWork - My Account](#)
Review your order history, update your password or email address, or change your shipping address.



Example of a Discounts and Perks category page

Linking to Suppliers

Here's how you set up links to a supplier.

1. Discuss with the supplier the categories or locations available on the supplier's Website.

2. Define which categories you want to use and create them using the Define Categories page.
3. If you want a page that contains nothing but links to discounts and perks suppliers, create a category page.
4. Add links to existing self-service transaction pages or category pages using the Discounts and Perks Links page.

Using Group Build With Discounts and Perks Suppliers

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

See *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Setting Up Groups,” Setting Up Group Definitions.

Understanding Enterprise Integration Points

When connecting to discounts and perks suppliers, the system uses an Enterprise Integration Point (EIP) called DISCOUNT_AND_PERKS.

To research the technical details of any EIP used by PeopleSoft applications, refer to the online EIP Catalog database under Open Integration Framework in the Documentation section of the Customer Connection Website.

Common Elements Used in This Section

Sequence Number	Enter the order in which you want this link to appear on the page.
Page ID	If this link is to a self-service transaction, home page, or category page, select the ID.
Supplier ID	If this link is to a category on the supplier’s Website, select a supplier ID.
Category Code	If this link is to a category on the supplier’s Website, select a category code.

Pages Used to Set Up Discounts and Perks Suppliers

Page Name	Object Name	Navigation	Usage
Merchant Profile	MERCHANTID	Set Up HRMS, Common Definitions, Supplier Administration, Merchant Profile	Activate supplier.
Merchant Authentication	MERCHANTAUTH	Set Up HRMS, Common Definitions, Supplier Administration, Merchant Profile	Enter supplier information.
Merchant BI Override	MERCHANTBIPARM	Set Up HRMS, Common Definitions, Supplier Administration, Merchant Profile, Merchant BI Override	Enter supplier information.
Node Definitions	NODE	PeopleTools, Integration Broker, Node Definitions	Create a node for the supplier and attach it to the channel.
Discounts and Perks Supplier Setup - Eligibility File	CO_DPK_SUPP_TBL	Set Up HRMS, Common Definitions, Supplier Administration, Discounts and Perks, Supplier Setup	Enter additional supplier parameters and eligibility data.
Discounts and Perks Supplier Setup - Eligibility Fields	CO_DPK_SUPP_TBL2	Set Up HRMS, Common Definitions, Supplier Administration, Disc/Perks, Supplier Setup	Enter eligibility data.
Discounts and Perks Category Setup	CO_DPK_CAT_TABLE	Set Up HRMS, Common Definitions, Supplier Administration, Discounts and Perks, Supplier Categories	Define the areas you want employees to access on the supplier's Website.
Discounts and Perks Category Page Definition	CO_DPK_PAGE_TABLE	Set Up HRMS, Common Definitions, Supplier Administration, Discounts and Perks, Category Pages	Create a category page.
Discounts and Perks Links	CO_DISPRK_LINKS	Set Up HRMS, Common Definitions, Supplier Administration, Discounts and Perks, Links	Add links to self-service transaction pages.

Activating Discounts and Perks Suppliers

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

To activate a supplier:

1. Access the Merchant Profile page.
 - a. Select the supplier's name from the list of available suppliers.
 - b. Select the Merchant Enabled check box.
2. Select the Merchant Authentication tab.

- a. In the Company ID field enter the identification number provided by the supplier's representative.
 - b. In the Company Authentication Token field, enter the *Shared Secret* password provided by the supplier's representative.
3. Select the Merchant BI Overrides tab.
 - a. In the Metatag parameter field enter the domain name to the address provided by the supplier's representative.
 - b. In the MerchantURL parameter field enter the domain name to the address provided by the supplier's representative.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Tools and Utilities

Creating the Merchant Node

To send eligibility information, you must create a node for the supplier. You only need to do this if you are sending eligibility information as an XML message.

To create a node:

1. Access the Node Definitions page.
 - a. Click Add.
 - b. Enter the supplier's name, for example BEYONDWORK, in the Node Name field.
The Node Info page appears.
 - c. In the Description field, enter any descriptive text you want.
This information does not display anywhere else.
 - d. In the Company ID field, enter the identification code given to you by the supplier's representative.
 - e. In the Node Type field, select *External*.
 - f. In the Routing Type field, select *Explicit*.
 - g. In the Authentication Operation field, select *Password*.
 - h. Select the Active Node check box.
2. (Optional) Select the Contacts/Notes tab.
Information about the supplier is entered on this page.
3. The Properties page is not used.
4. Select the Connectors tab.
 - a. In the Gateway ID field, select *Local*.
 - b. In the Connector ID field, select *PSFT81TARGET*.
 - c. In the Properties group box, select the Properties tab.
 - d. Click the Add button.
 - e. In the Property ID field, select *PSFT81TARGET*.

- f. In the Property Name field, select *URL*.
 - g. In the Value field, enter the URL address for the message servlet given to you by the supplier's representative.
 5. Select the Transactions tab.
 - a. Click the Add Transaction button.
 - b. In the Message Node Name field, select the supplier's name.
 - c. In the Effective Date field, enter today's date.
 - d. In the Transaction Type field, select *Outbound Asynchronous*.
 - e. In the Request Message field, select *CO_DPK_ELIG*.
 - f. In the Request Message Version field, select *VERSION_1*.
 - g. Click Add.

The Transaction Detail page appears.
 - h. Click Save.

Setting Up Eligibility Information

Access the Discounts and Perks Supplier Setup page.

Supplier Setup
Eligibility Flds

BeyondWork

Find | View All
First ◀ 1 of 1 ▶ Last

*Effective Date:

Supplier Logo:

Eligibility File

Send: Changes Only All Employees

File Format: XML Message Flat File

Msg Node:

File Name: Auto Generate File Name

File Directory:

Eligibility Criteria

Group ID:

Eligible Employee Statures

Customize | Find | View All |
First ◀ 1-3 of 3 ▶ Last

1	<input type="text" value="Active"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
2	<input type="text" value="Leave of Absence"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
3	<input type="text" value="Leave With Pay"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Discounts and Perks Supplier Setup page

Supplier Logo

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

Send

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

File Format

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

Msg Node

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

File Name

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

When creating your own name, make sure it is a name that helps you easily identify the contents. If you run the extract process more than once using the same name and directory, a sequence number will be placed in front of the file name.

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

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

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

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

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

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

Setting Up Eligibility Fields

Access the Discounts and Perks Supplier Setup - Eligibility Flds page.

Supplier Setup
Eligibility Flds

BeyondWork

Find | View All
First ◀ 1 of 1 ▶ Last

*Effective Date:

Eligibility Fields

Personal Information

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

Address

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

Job Information

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

Dates

<input type="checkbox"/> Hire Date	<input type="checkbox"/> Leave Date	<input type="checkbox"/> Termination Date	<input type="checkbox"/> Job Change Date
<input type="checkbox"/> Rehire Date	<input type="checkbox"/> Leave Reason	<input type="checkbox"/> Term Reason	<input type="checkbox"/> Retirement Date

Phone Numbers

<input type="checkbox"/> Phone 1	Type: <input type="text"/>	<input type="checkbox"/> Phone 2	Type: <input type="text"/>
----------------------------------	----------------------------	----------------------------------	----------------------------

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

E-Mail Address			
<input checked="" type="checkbox"/> Email	Type:	Business	
National ID			
<input type="checkbox"/> National ID	Source:	<input type="radio"/> Country	Country: <input type="text"/>
		<input checked="" type="radio"/> Primary	NID Type: <input type="text"/>
Compensation			
<input type="checkbox"/> Comp Rate 1	Source:	<input checked="" type="radio"/> Regular Salary	Frequency: <input type="text"/>
		<input type="radio"/> Annual Benefits Base Rate	
<input type="checkbox"/> Comp Rate 2	Source:	<input checked="" type="radio"/> Regular Salary	Frequency: <input type="text"/>
		<input type="radio"/> Annual Benefits Base Rate	

Discounts and Perks Supplier Setup page (2 of 2)

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

Defining Category Codes

Access the Discounts and Perks Category Setup page.

Discounts and Perks Category Setup

BeyondWork

Find View All		First	1 of 8	Last
*Category Code:	<input type="text" value="CAT001"/>	+ -		
Find View All		First	1 of 1	Last
*Effective Date:	<input type="text" value="01/01/1900"/>	*Status:	<input type="text" value="Active"/>	
Group ID:	<input type="text"/>			
*Description:	<input type="text" value="BeyondWork EDS Home Page"/>			
*Link Text:	<input type="text" value="BeyondWork Home"/>			
Image Name:	<input type="text" value="PS_DISCOUNTS_MY_BENEFITS_ICN"/>			
Link Descr:	<input type="text" value="Save 10 to 40 % off tickets to amusement parks and theaters across the country. You'll also find great deals on gifts, travel and other services."/>			

Discounts and Perks Category Setup page

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

Creating Category Pages

Access the Discounts and Perks Category Page Definition page.


Discounts and Perks Category Page Definition

Page ID: HOME

Page Definition Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Status: Active

*Page Title: Discounts and Perks Home

Image Name: PS_DISCOUNTS_MY_BENEFITS_ICN 

Link Descr: This is one page that lists all the links to the BeyondWork site.

Page Links Find | View All First 1-2 of 6 Last

*SeqNum: 1

Page ID:

Merchant ID: BEYONDWORK BeyondWork

Category Code: CAT002 EDS Tickets

*SeqNum: 2

Page ID:

Merchant ID: BEYONDWORK BeyondWork

Category Code: CAT003 EDS Gifts

Discounts and Perks Category Page Definition page

- Page Title** Enter the name of the page exactly as you want it to appear on the page.
- Image Name** Select the logo you want to appear on the page.
- Link Descr** (link description) Enter a description of the page exactly as you want it to appear on the page.
- Page Links** Add as many links as you want. Links are placed on the page in the following ordering scheme:
 - 1__2
 - 3__4
 - 5__6

CHAPTER 5

Enrolling in eBenefits

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

Overview of Enrollment Pages

PeopleSoft eBenefits enrollment pages are used to:

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

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

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

Understanding Benefit Enrollments

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

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

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

For all plan-types, the system always shows the plans available and if there is the option of waiving coverage. However, the setup tables can be modified so that the system suppresses the plan types if the employees have no choice available.

Note. Calculation amounts that display on the benefit enrollment pages are only estimated amounts.

See Also

Chapter 3, “Setting Up eBenefits,” Suppressing Plan Type Information, page 13

Pages Used to Enroll in Benefits

Page Name	Object Name	Navigation	Usage
Benefits Home page	W3EB_INTRO	Employee Self Service, Benefits, Benefits Home	Use this page to access the Benefits Enrollment page which displays information about an enrollment event. The enrollment process is initiated when eligibility and event rules have been processed to produce a list of valid benefit choices.
Benefits Enrollment	W3EB_ENR_SELECT	Employee Self Service, Benefits, Benefits Enrollment. Click the Benefits Enrollment link on the Benefits Home page.	This page provides enrollment information to the employee. This page displays information about an enrollment event. The enrollment process is initiated when eligibility and event rules have been processed to produce a list of valid benefit choices.
Open Benefits Event	W3EB_ENR_INFO	Click the Information button on the Benefits Enrollment page.	This page provides enrollment information to the employee. After your initial enrollment, the only time you may change your benefit choices is during open enrollment or a qualified family status change. This page provides you with additional information about your enrollment.
Benefit Enrollment Summary	W3EB_ENR_SUMMARY	Click the Select button on the Benefits Enrollment page.	Use the Benefits Event Summary page to review benefit plan elections. The Enrollment Summary displays which benefit options are open for edits. All of your benefit changes are effective as of the date of the benefit change event. Your enrollment is not complete until you submit your choices to the Benefits Department.

Page Name	Object Name	Navigation	Usage
Benefits Enrollment - Medical	W3EB_ENR_1X_ELECT	Click the (Medical) Edit button on the Benefit Enrollment Summary page.	Employees use this page to review or elect health (medical) plan-type benefits.
Benefits Enrollment - Medical (summary)	W3EB_ENR_1X_SMRY	Click the Overview of All Plans button on the Benefits Enrollment - Medical page.	Use the condensed Summary page to view all plans, coverage levels, and costs condensed into a single grid.
Benefits Enrollment - Life , Benefits Enrollment - Supplemental Life , Benefits Enrollment - Dependent Life	W3EB_ENR_2X_ELECT	<ul style="list-style-type: none"> Click the (Life) Edit button on the Benefit Enrollment Summary page. Click the (Supplemental Life) Edit button on the Benefit Enrollment Summary page. Click the (Dependent Life) Edit button on the Benefit Enrollment Summary page. 	Employees use the Life Insurance Enrollment page to enroll in life insurance benefits. Employees use the Supplemental Life Insurance Plan Enrollment page to enroll in supplemental life insurance benefits. The Benefits Enrollment - Dependent Life page is used to enroll dependents in life insurance plans.
Benefits Enrollment - Long Term Disability Life , Benefits Enrollment - Retirement Plan	W3EB_ENR_357X_ELCT	<ul style="list-style-type: none"> Click the Long-Term Disability (Edit) button on the Benefit Enrollment Summary page. Click the Edit button on any retirement line of the Benefit Enrollment Summary page. 	Employees use the Long Term Disability Plan Enrollment page to enroll in disability benefits. Employees use the Retirement Plan Enrollment page to enroll in retirement plan benefits.
Benefits Enrollment - Savings Plans	W3EB_ENR_4X	Click the (401(k)) Edit button on the Benefit Enrollment Summary page.	Employees use the Savings Plan Enrollment page to enroll in savings plan benefits.
Benefits Enrollment - Leave Plans	W3EB_ENR_357X_ELECT	Click the (Sick) Edit button on the Benefit Enrollment Summary page.	Employees use the Leave Plan Enrollment page to enroll in leave plan benefits.
Flex Spending Accounts	W3EB_ENR_6X_ELECT	Click the Edit button on any FSA line of the Benefit Enrollment Summary page.	Employees use the FSA Enrollment page to enroll in FSA plan benefits.
Flex Spending Health – U.S. Worksheet	W3EB_ENR_6X_WKSHT	Click the Worksheet link on the Flex Spending Accounts page.	Employees use the Worksheet page to estimate per-pay-period contributions.
Benefits Enrollment - Pension Plan	W3EB_ENR_8X_ELECT	Click the Edit button on any Pension line of the Benefit Enrollment Summary page.	Employees use the Pension Plan Enrollment page to enroll in pension plan benefits.
Benefits Enrollment - Vacation Buy/Sell	W3EB_ENR_9X_ELECT	Click the Edit button on any Vacation line of the Benefit Enrollment Summary page.	Employees use Vacation Enrollment pages to enroll in vacation plan benefits.
Submit Benefit Choices	W3EB_ENR_SUBMIT	Click the Submit button on of the Benefit Enrollment Summary page.	Employees use the Submit Benefit Choices page to submit their benefit choices to the system.

Page Name	Object Name	Navigation	Usage
Submit Confirmation	W3EB_ENR_CONFIRM	Click the Submit button on Submit Benefit Choices page.	Employees use the Submit Confirmation page to confirm that their benefit choices have been submitted to the system.

CHAPTER 6

Reviewing Benefit Information

This chapter discusses how to:

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

Reviewing Health Plan Information

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

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

See Also

[Chapter 5, “Enrolling in eBenefits,” page 43](#)

Pages Used to Review and Edit Health Plan Information Page

Page Name	Object Name	Navigation	Usage
Health Care Summary	W3EB_GRID	Employee Self Service, Benefits, Health Care Summary	Use the Health Care Summary page to review health plan coverage.
Medical , Dental , Vision , Domestic Partner Medical	W3EB_HEALTH_PLANS	<ul style="list-style-type: none"> • Select Medical from the Health Care Summary page. • Select Dental from the Health Care Summary page. • Select Vision from the Health Care Summary page. • Select Domestic Partner Medical from the Health Plan Summary page. 	Use the Medical page to review medical plan coverage. Use the Dental page to review dental plan coverage. Use the Vision page to review vision plan coverage. Use the Domestic Partner Medical page to review domestic partner medical plan coverage.
Health Care Dependent Summary	W3EB_DEPSMRYBYNM	Employee Self Service, Benefits, Health Care Dependent Summary	Used to review dependents covered under health plans.
Health Plan Dependents Coverage	W3EB_DEPENDENTS	Click Review Covered Dependents on the following pages to access the Dependents Summary pages: Medical Plan Summary page Dental Plan Summary page Vision Plan Summary page Domestic Partner Medical Plan Summary page	Used to review dependents covered under health plans.

Reviewing Insurance Plan Information

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

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

Pages Used to Review Insurance Information

Page Name	Object Name	Navigation	Usage
Insurance Summary	W3EB_GRID	Employee Self Service, Benefits, Insurances Summary	Used to display summary information about all insurance plan types for which you are enrolled. Includes links to plan-type detail pages, and a link to the enrollment page.
Life , Dependent Life , Vision , Dependent AD/D	W3EB_LIFEADD_MAIN	<ul style="list-style-type: none"> • Click Life on the Insurance Summary page. • Click Dependent Life on the Insurance Summary page. • Click Dependent AD/D on the Insurance Summary page. 	Use the Life page to display information about your life insurance plan, and a link to associated plan beneficiaries. Use the Dependent Life page to review dependent life insurance information. Use the Dependent Life AD/D page to review dependent AD/D insurance information.
Insurance Beneficiary Summary	W3EB_LIFINSALLBYNM	Employee Self Service, Benefits, Insurance Beneficiary Summary	Used to review beneficiary insurance information.
Covered Beneficiaries – Life	W3EB_PRIM_SEC_BEN	Click Review Covered Beneficiaries on the Insurance page.	Used to review beneficiary allocations.
Change Current Beneficiaries and Allocations	W3EB_LFE_CHG_ALLOC	Click Change Current Beneficiaries and Allocations on the Insurance Review Covered Beneficiaries page.	Used to change beneficiary allocations.

Reviewing Savings Plans Information

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

Pages Used to Review Savings Plan Information

Page Name	Object Name	Navigation	Usage
Savings Summary	W3EB_GRID	Employee Self Service, Benefits, Savings Summary	Review summary information about savings plans.
Savings Plan	W3EB_VIEWSAVINGS	Click a Type of Benefit savings plan link on the Savings Summary page.	Review information about your savings plan, review covered beneficiaries, and change fund allocations.
Change Current Savings Plan Contributions	W3EB_SAVPLAN1	Click the Edit button in the Current Contributions section of the Savings Plan page.	Change current and savings plans contributions.
Fund Allocations	W3EB_SAVEVWFUND	Click Fund Allocations on the Savings Plan page.	Review savings plans fund allocations, and to link to pages enabling changes to fund allocations.
Change Current Fund Allocations	W3EB_SAVPLAN3_WRK	Click the Change Current Fund Allocations link on the Fund Allocations page.	Change fund allocations.
Savings Contributions for All Plans	W3EB_VWALLSAVCONTR	Employee Self Service, Benefits, Savings Contribution Summary	View savings contributions for all plans.
View Beneficiary Allocations	W3EB_SAVEVWBENEF	Click the Review Covered Beneficiaries link on the Savings Plan page.	View savings plan beneficiary allocations.
Change Current Beneficiary Allocations	W3EB_SAVPLAN4_WRK	Click Change Current Beneficiaries and Allocations on the View Beneficiary Allocations page.	Change savings plan beneficiary allocations.

Calculating Pension Estimates

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

This section explains how to:

- Enter the parameters for the pension estimate.
- Calculate pension estimates.


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

Pages Used to Set Up and Calculate Pension Estimates

Page Name	Object Name	Navigation	Usage
Self Service Calculation Default Values	PA_SSV_DEFAULTS2	Set Up HRMS, Product Related, Pension, Self Service Calc Defaults	Define parameters for the Estimate Pension self-service transaction.
Estimate Pension	PA_I_ESTIMATE	Employee Self Service, Benefits, Pension Estimates	Enter information to run the Estimate Pension calculation.
Pension Plan Estimates – Payment Options Summary	PA_I_RESULTS	Click Accept on the Disclaimer page.	Displays a summary of the plans for which the user qualifies. This page is only displayed if the user is eligible for more than one plan.
Pension Plan Estimates – Payment Options Details	PA_I_RESULTS_PLAN	Click the link on the Payment Options Summary page.	Displays a list of all the estimated benefit payment options for a specified plan. If the user is only eligible for one plan, the system will bypass the Pension Plan Estimates – Payment Options Summary page and direct the user to the Pension Plan Estimates – Payment Options Details page.
Optional Forms Description	PA_I_OPFORM_DISP	Click the Descriptions of Options for Forms of Payment link on the Pension Plan Estimates – Payment Options Details page.	Displays a description of the payment options the company has defined for the available Pension plans.

Entering Pension Estimate Parameters

Access the Self Service Calculation Default Values page.

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

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

Self-Service Calculation Default page (1 of 3)

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

Self-Service Calculation Default page (2 of 3)

Plan Information Find First 1 of 1 Last

Plan:

Pension Type:

Assumed Contributions Pct: Use Process Selection

Processes Find | View All First 1 of 1 Last

Process Name	Process Type
	<input type="checkbox"/> Execute

Self-Service Calculation Default page (3 of 3)

Default Values

As Of Date

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

Web Results Retention Months

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

Maximum BCD Age/YY.MM (maximum benefit commencement date age)

Enter the *Maximum BCD Age* in YY.MM format.

Wage Base Escalation Rate

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

Salary Increase

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

CPI Percent Increase (consumer price index percent increase)

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

Assumptions

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

Instructions for Users

Instructions to User	Use the <i>Instructions to User</i> text box to enter any instructions that you would like the user to read. These instructions appear at the top of the Estimate Pension page.
Disclaimer	Use the <i>Disclaimer</i> text box to enter information that appears to the user at the top of the Disclaimer page.
Optional Forms Description	Use the <i>Optional Forms Description</i> text box to enter payment descriptions that users access by clicking the Descriptions of Options for Forms of Payment button on the Pension Plan Estimate – Eligible Plans page.

Plan Information

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

Plan Information – Processes

Process Name	The <i>Process Name</i> is the name your organization has assigned to the specific process; the description follows.
Process Type	The <i>Process Type</i> tells you how your organization defined the processing rules; you can disregard this field.
Execute	Select the <i>Execute</i> check box for every process you want to execute.

Reviewing Flexible Spending Account Information

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

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

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

Pages Used to Review FSA Accounts

Page Name	Object Name	Navigation	Usage
Flexible Spending Accounts	W3EB_FSA_ACCT_LIST	Employee Self Service, Benefits, Flexible Spending Accounts	Review flexible spending accounts activity.
Flexible Spending Account Review	W3EB_FSA_ACCT_DTLS	Click any Spending Account link on the Flexible Spending Accounts page.	Review details of flexible spending account.
Flexible Spending Account Claim Details	W3EB_FSA_CLAIM_DTL	Select any Service Start Date link under Claim History on the Flexible Spending Accounts page.	Review details of flexible spending account.
Flexible Spending Account Payment Details	W3EB_FSA_CLAIMPYMT	Click the Payment History link on the Flexible Spending Account Claim Details page.	Review details about FSA claim payments.
Flexible Spending Account Payment Details	W3EB_FSA_PYMTCLAIM	Select any Check Date link under Payment History on the Flexible Spending Accounts page.	Review details about FSA payments.

Reviewing Dependent and Beneficiary Information

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

Pages Used to Review Dependent and Beneficiary Information

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

CHAPTER 7

Managing Life Events

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

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

Understanding Life Events

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

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

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

Defining Life Event Rules

PeopleSoft eBenefits supports two Life Event transactions:

- Marital Status Change
- Birth/Adoption

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

These rules are used to:

1. Determine whether an employee can automatically update the HR database.
2. Identify the pages the employee will see when using the Marital Status Change and Birth/Adoption self-service transactions.

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

Update to HR Database	Requirement
Create BAS_ACTIVITY trigger	<ul style="list-style-type: none"> • Benefits Administration selected on Installation page. • Create Event is selected on Life Event Rules page. • Employee has at least one job managed by Benefits Administration as of the Life Event effective date. • The employee enters the transaction within the period described by the “days to Notify” parameter. • Allow Event Creation check box is selected.
Create COBRA_ACTIVITY trigger	<p>If an employee is managed by Base Benefits, a COBRA activity is triggered when:</p> <ul style="list-style-type: none"> • COBRA Administration is selected on the Installation page. • Benefits Administration is not selected on the Installation page. • Proof Required is not selected on the Life Events Rules page. <p>If the employee is managed by Benefits Administration, a COBRA Activity is triggered when:</p> <ul style="list-style-type: none"> • Benefits Administration is selected on the Installation page. • The employee has at least one job managed by Benefits Administration as of the Life Event date. • Proof Required is not selected on the Life Event Rules page. • Create Event is selected on the Life Event Rules page. • A COBRA Action code is entered on the Life Event Rules page. • Benefits Administration event finalizes.
Employee’s marital status is updated in PERS_DATA_EFFDT table	<ul style="list-style-type: none"> • For marital status change only. • Proof Required field in Life Event Rules page is not selected.
Current spouse’s marital status is changed to Divorced and relationship is changed to Ex Spouse in DEPENDENT_BENEF table	<ul style="list-style-type: none"> • Proof Required field in Life Event Rules page is not selected. • Life Event Type is Divorce.

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

Pages Used to Define Life Event Rules

Page Name	Object Name	Navigation	Usage
Life Event Rules	W3EB_LE_RULES	Set Up HRMS, Product Related, eBenefits, Life Event Rules	Create rules that impact how data and information is processed for changes in marital status or birth or adoptions.

Defining Life Event Rules

Access the Life Event Rules page.

Life Event Type	Maximum Days To Notify	Notify Administrator	Proof Required	Allow Event Creation	Source of Action	BAS Action
Adoption	31	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Manual	FSC
Birth	31	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Manual	FSC
Divorce	31	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Marriage	31	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Manual	FSC

Life Event Rules page

Maximum Days To Notify

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

Notify Administrator

If selected, an email is sent to the benefits administrator when this type of life event occurs informing them of the event.

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

Proof Required

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

Allow Event Creation

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

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

Source of Action

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

BAS Action

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

COBRA Action

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

Changing Your Marital Status

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

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

See Also

PeopleTools PeopleBook: Workflow, "Defining Worklist Records"

Pages Used to Change Your Marital Status

Page Name	Object Name	Navigation	Usage
Marital Status Change Life Event	W3EB_MARR_START	Employee Self Service, Benefits, Marriage	Initiate a change in your marital status.
Request Marital Status Change	HR_EE_MAR_STATUS	Click Continue from the Marital Status Change Life Event page.	Enter changes in marital status.
Benefits Summary	W3EB_GRID	Click Next on the Request Marital Status Change page.	Review current benefits.
Personal Information	HR_EE_PERS_INFO	Click Next on the Benefits Summary page.	Review and change personal information.
W-4 Tax Information	PY_IC_W4_DATA	Click Next on the Personal Information page.	Review and change tax information.
Direct Deposit	PY_IC_DD_LIST	Click Next on the W-4 Tax Information page.	Review direct deposit information.
Voluntary Deductions	PY_IC_DED_LIST	Click Next on the Direct Deposit page.	Review and change voluntary deduction information.
Congratulations	W3EB_MARR_FINISH	Click Finish on the Enrollment Information page.	Provide confirmation life events process completed and provide other relevant event information.

Adding a New Dependent

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

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

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

Pages Used to Add a Dependent

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

CHAPTER 8

Working With Suppliers

This chapter describes how to integrate with:

- Authoria HR
- Discount and Perk suppliers
- eBenX

Integrating With Authoria HR

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

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

Understanding Authoria HR Integration

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

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

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

Connecting to Authoria HR

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

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

Benefits Summary Link

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

Specific Benefit Plan Links

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

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

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

Understanding Enterprise Integration Points

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

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

Understanding the Authoria HR Bridge

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

Authoria provides documentation that explains when and how to run this SQR.

Page Used to Run the Authoria Bridge

Page Name	Object Name	Navigation	Usage
Process Bridge Data	AUTH_RUNCNTL	Set Up HRMS, Common Definitions, Supplier Administration, Authoria, Process Bridge Data	Run the Authoria Bridge process.

Integrating With Discount and Perk Suppliers

This section discusses eligibility data and describes how to send eligibility data to discounts and perks suppliers.

Understanding Eligibility Data

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

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

Pages Used to Work With Discount and Perk Suppliers

Page Name	Object Name	Navigation	Usage
Discounts and Perks Eligibility	RUN_CNTL_DPK_ELIG	Set Up HRMS, Common Definitions, Supplier Administration, Discounts and Perks, Eligibility File	Send data to the supplier.

Sending Eligibility Data to Discounts and Perks Suppliers

Access the Discounts and Perks Eligibility page.

Discounts and Perks Eligibility page

Supplier ID

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

Integrating With eBenX

This section provides an overview of integrating with eBenX and how to send enrollment data.

Understanding eBenX Integration

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

To send enrollment data to eBenX, you need to:

1. Set up eBenX.
2. Run the Carrier Interface process located in the PeopleSoft Human Resources, Base Benefits application.
This process takes a snapshot of your enrollment data and writes it to four records: BN_SNAP_PER, BN_SNAP_JOB, BN_SNAP_PLAN, BN_SNAP_HIST.
3. Run the Carrier Interface Report process located within eBenefits.

See Also

[Chapter 4, "Setting Up Suppliers," page 19](#)

Sending Enrollment Data

Use this procedure to send enrollment data.

Sending Data to Suppliers

To send data to a supplier:

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

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

To Resend Data to Suppliers

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

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

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

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

Understanding Enterprise Integration Points

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

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

Pages Used to Send Data

Page Name	Object Name	Navigation	Usage
Run Carrier Reporting Schedule	BN_M_RUN_CNTL	Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Run Carrier Reporting Schedule	Use the Carrier Interface Supplier Extract page to extract and send data to a supplier.
Resend File	BN_M_REFTP_FILE	Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Define Carrier Rpt Schedule	Resend a file created from this schedule. Access this page by clicking the <i>Resend a file created from this schedule</i> link on the Define Carrier Reporting Schedule page.

Running the Extract Process

Access the Run Carrier Reporting Schedule page.

Run Carrier Reporting Schedule page

Enrollment Reporting Snapshot

This group box specifies the date on which the Enrollment Reporting Snapshot process was last run and the as of date entered for that run. These dates are taken from the BN_SNAP_HIST_TBL table. If the BN_SNAP_HIST_TBL or

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

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

Resending Extract Files

Access the Resend File page.

Resend File

Schedule ID: KUEBX1

Description: Weekly Health Plans extract

Currently no files exist in the specified directory that were created by this Schedule ID.

Resend File page

File Name	This is the name of the file created by the extract process.
Run Date	This is the date and time that the file was transmitted to the supplier.
Pub/Sub Timestamp	This is the date and time on which the report ran.
Select	Select if you want to send this file again.
Resend File	Click this link to send the file.

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	Metastings are special expressions included in SQL string literals. The metastings, 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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