



PeopleSoft Enterprise eBenefits

8.9 PeopleBook

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PeopleSoft Enterprise eBenefits 8.9 PeopleBook

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About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, 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.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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 applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed 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, <https://www.peoplesoft.com/corp/en/login.jsp>

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 PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system 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 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 the W key.
Monospace font	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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.

If the note is preceded by *Important!*, the note 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.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Used in 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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise eBenefits Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise eBenefits application fundamentals.
- PeopleBook structure.

PeopleSoft Products

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

PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in eBenefits operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “PeopleSoft Enterprise HRMS 8.9 Application Fundamentals Preface”

PeopleBook Structure

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

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook:

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements that are used in the PeopleBook. For example, if a data field is used on multiple pages, it might be defined only once in this chapter rather than repeatedly throughout the book.
Getting Started with...	This chapter discusses application implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the application and other applications. • General implementation considerations.
Understanding...	(optional) This is an introductory chapter that broadly explains the application and the functionality within it.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the application. For example, if functionality X is part of an application, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of an application, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.

Chapters	Description
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 eBenefits

This chapter discusses:

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

Understanding eBenefits

This section discusses:

- eBenefits components.
- eBenefits roles and security.

eBenefits Components

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.

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

eBenefits Roles and Security

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

- The transactions 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

Enterprise PeopleTools PeopleBook: Security Administration

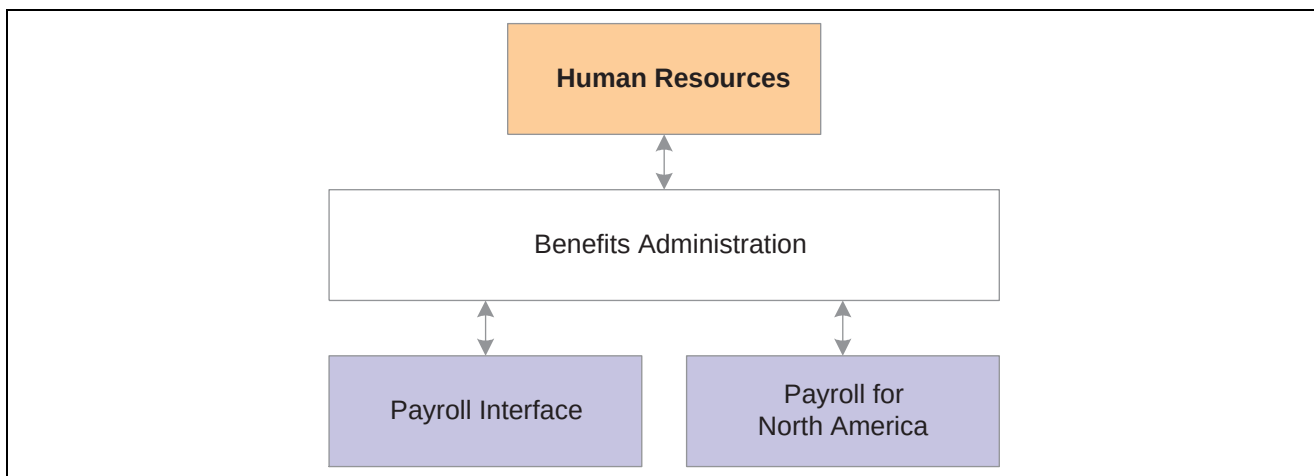
eBenefits Transactions

eBenefits transactions include:

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

eBenefits Integrations

eBenefits integrates with the following PeopleSoft applications:



eBenefits integration flow with other PeopleSoft applications

eBenefits Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise Application Fundamentals for HRMS 8.9 PeopleBook*, with information about where to find the most current version of each.

See Also

[“PeopleSoft Enterprise eBenefits Preface,” page xvii](#)

PeopleSoft Setup Manager for PeopleSoft Enterprise HRMS and Campus Solutions 8.9 PeopleBook

CHAPTER 2

Setting Up eBenefits

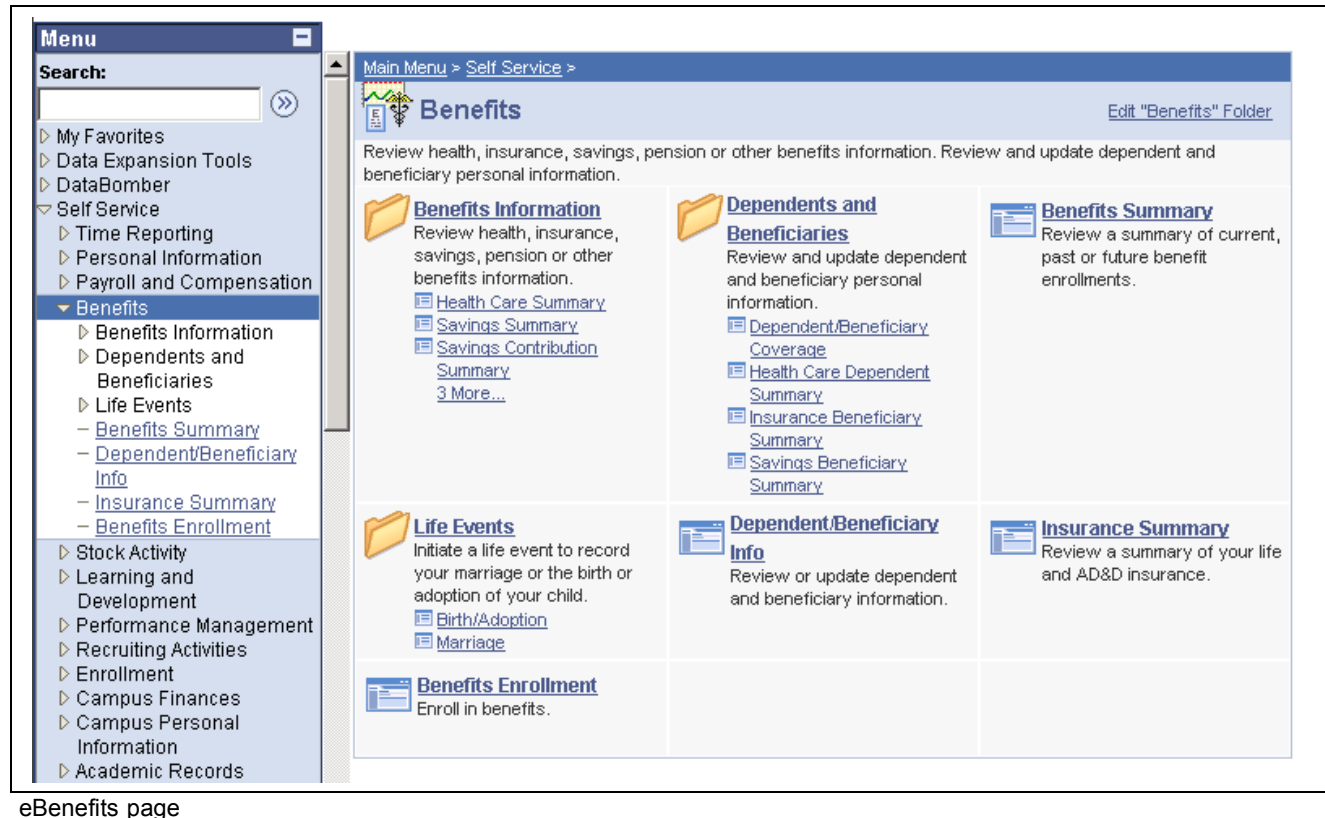
This chapter discusses how to:

- Use eBenefits pages.
- Set up page display information.
- Set up uniform resource locators (URLs).
- Set up text blocks.

Using eBenefits Pages

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

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



eBenefits page

Setting Up Page Display Information

With the exception of text tables used by Benefits enrollment, all controls for how and what the eBenefits pages display have been added to existing setup tables within the Base Benefits business process in 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 eBenefits 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 Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, "Building Base Benefit Programs"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, "Setting Up Benefit Plans"

PeopleSoft Enterprise Benefits Administration 8.9 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 Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, “Building Base Benefit Programs”

PeopleSoft Enterprise Benefits Administration 8.9 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 to the Benefit Program - Plan Type and Option page.
2. Display the plan type level information for the nonqualified health plan.
3. In the Self-Service 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 is displays on the enrollment when the employee has no option to choose and cannot waive out of the option. A good example is paid vacation. Employees receive the benefit, but you don't display it on the enrollment form.

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

Displaying Costs

The Cost 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 indicate for 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 Uniform Resource Locators

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

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

The specific uniform resource locator (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 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.

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

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

Enterprise PeopleTools PeopleBook: System and Server Administration, “Using PeopleTools Utilities”

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 modified 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 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 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.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Understanding HRMS,” Effective Dates

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 five 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 3

Setting Up Suppliers

This chapter discusses how to set up eBenX.

Setting Up eBenX

This section provides an overview of setting up eBenX as a supplier and discusses how to:

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

See Also

[Chapter 3, “Setting Up Suppliers,” Activating the Supplier, page 16](#)

[Chapter 3, “Setting Up Suppliers,” Defining Supplier FTP Parameters, page 16](#)

[Chapter 3, “Setting Up Suppliers,” Defining Carrier Reporting Schedules, page 17](#)

Understanding Setting up eBenX as a Supplier

To set up eBenX as 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.

Pages Used to Set Up eBenX

Page Name	Object Name	Navigation	Usage
Merchant Profile	MERCHANTID	Set Up HRMS, Common Definitions, Supplier Administration, Merchant Profile	Activate the supplier.
Define FTP Parameters	BN_M_SUPPLIER_FTP	Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Define FTP Parameters	Define file transfer protocol (FTP) information, such as FTP address and password, that 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	Define carrier reporting schedule information that the system needs to send the correct information to the supplier.

Activating the Supplier

Access the Merchant Profile page.

Select the Merchant Enabled check box.

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

See Also

Enterprise PeopleTools PeopleBook: System and Server Administration

Defining Supplier FTP Parameters

Access the Define FTP Parameters page.

Define FTP Parameters

Supplier ID: EBENX eBenX ☐ Supplier Is Not Enabled

FTP Parameters

*FTP Addresss:

*FTP User Name:

*FTP Password:

Confirm Password:

Define FTP Parameters page

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

Defining Carrier Reporting Schedules

Access the Define Carrier Reporting Schedule page.

Define Carrier Reporting Schedule

Schedule ID: KUEBX1

***Description:** Weekly Health Plans extract

File Parameters

***Company Descr:** YourCompanyName

***Supplier ID:** EBENX eBenX

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

***File Directory:** c:/temp/

Extract Parameters			View All	First	1-4 of 6	Last
*SetID	Vendor ID	Plan Type				
SHARE		10				
SHARE		11				
SHARE		14				
SHARE		15				

Define Carrier Reporting Schedule page

Schedule ID	Displays a unique identification code assigned to this schedule. It can be up to six 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	The name of the file sent to the supplier. You can create your own name or have the system generate a name for you.

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

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

Auto Generate File Name	Select 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	Enter the name of the directory located on the application server where the extract file is to be stored.
Extract Parameters	This group box enables you to select only the information that you want to extract from the BN_SNAP files for this supplier. You can enter more than one row of parameters.
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.

CHAPTER 4

Enrolling in eBenefits

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

Understanding Enrollment Pages

You use eBenefits enrollment pages to:

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

The enrollment process begins when the system creates an enrollment event and notifies you of the event. You can link to the Benefits Enrollment page from the Benefits page. From the Benefits Enrollment page, you can then access the Enrollment Summary page, where 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, 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 2, “Setting Up eBenefits,” Suppressing Plan Type Information, page 8

Pages Used to Enroll in Benefits

Page Name	Object Name	Navigation	Usage
Benefits Enrollment	W3EB_ENR_SELECT	Self Service, Benefits Click the Benefits Enrollment link on the Benefits page.	This page provides enrollment information to the employee and 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.
Benefits 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.
Benefits Enrollment - Medical	W3EB_ENR_1X_SELECT	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.

Page Name	Object Name	Navigation	Usage
Benefits Enrollment - Life, Benefits Enrollment - Supplemental Life, Benefits Enrollment - Dependent Life	W3EB_ENR_2X_ELECT	- Click the (Life) Edit button on the Benefit Enrollment Summary page. - Click the (Supplemental Life) Edit button on the Benefit Enrollment Summary page. - Click (Dependent Life) Editbutton 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	- 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 5

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 4, “Enrolling in eBenefits,” page 19](#)

Pages Used to Review and Edit Health Plan Information Page

Page Name	Object Name	Navigation	Usage
Health Care Summary	W3EB_GRID	Self Service, Benefits, Benefits Information, Health Care Summary	Use the Health Care Summary page to review health plan coverage.
Medical, Dental, Vision, Domestic Partner Medical	W3EB_HEALTH_PLANS	• 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	Self Service, Benefits, Dependents and Beneficiaries, 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	Self Service, Benefits, Insurance Summary	Displays 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	- 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	Self Service, Benefits, Dependents and Beneficiaries, 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	Self Service, Benefits, Benefits Information, 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	Self Service, Benefits, Benefits Information, 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	Self Service, Benefits, Benefits Information, 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:	
Web Results Retention Months:	14
Maximum BCD Age/YY.MM:	
Wage Base Escalation Rate:	
Salary Increase	%
CPI Percent Increase:	

Assumptions	
☒ Calculate All Plans	☒ Detailed Worksheet
☐ Grant Full Service Credit	☐ Load External Employee Data
☒ Allow User Salary Increase	Maximum Salary Increase: 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:	
Optional Forms Description:	

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
	☐ 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 *Calculate All Plans* 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 enable the user to choose their own projected salary increase for use in the Estimate Pension calculation.
Maximum Salary Increase	If you have selected the <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 (FSAs) are plans that enable employees to save money on out-of-pocket health or dependent care expenses by enabling them to pay with pretax dollars. 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	Self Service, Benefits, Benefits Information, 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	Self Service, Benefits, Dependents and Beneficiaries, Dependent/Beneficiary Coverage	Display summary dependent/beneficiary benefit information.
Dependent and Beneficiary Personal Information	W3EB_PERS_DTA_SMRY	Self Service, Benefits, Dependent/Beneficiary Info	Display a summary of dependent and beneficiary personal information.
Dependent/Beneficiary Personal Information	W3EB_DEPBEN_DETAIL	Click any name in the information section of the Dependent and Beneficiary Summary page.	Review and update detailed dependent and beneficiary personal information.

CHAPTER 6

Managing Life Events

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

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

Understanding Life Events

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

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

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

Defining Life Event Rules

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

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

Understanding Life Event Rules

eBenefits supports two Life Event transactions:

- Marital Status Change.
- Birth/Adoption.

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

You use these rules 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	• 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	If an employee is managed by Base Benefits, a COBRA activity is triggered when: • COBRA Administration is selected on Installation page. • Benefits Administration is not selected on Installation page. • Proof Required is not selected on the Life Events Rules page. If the employee is managed by Benefits Administration, a COBRA Activity is triggered when: • Benefits Administration is selected on Installation page. • The employee has at least one job managed by Benefits Administration as of the Life Event date. • Proof Required is not selected on the Life Event Rules page. • Create Event is selected on the Life Event Rules page. • A COBRA Action code is entered on the Life Event Rules page. • Benefits Administration event finalizes.
Employee’s marital status is updated in PERS_DATA_EFFDT table	• 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	• 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.

Page 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.

Setting Up Life Event Rules

Access the Life Event Rules page.

Life Event Rules

Customize Find  First  1-4 of 4  Last							
Life Event Type	Maximum Days To Notify	Notify Administrator	Proof Required	Allow Event Creation	Source of Action	BAS Action	
Adoption	31	☒	☐	☒	Manual	FSC	
Birth	31	☒	☐	☒	Manual	FSC	
Divorce	31	☒	☒	☐			
Marriage	31	☒	☐	☒	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 using 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 <i>Manual</i> in the field.
BAS Action	This field is available and required if Benefits Administration is selected on the Installation table and Allow Event Creation is selected. Enter a BAS Action code that is appropriate for this life event. Typically, this will be FSC - Family Status Change.
COBRA Action	This field is available if both COBRA Administration and Benefits Administration are selected on the Installation table. This field is only used when the life event is for an employee managed by Benefits Administration, Create Event is selected, and when the resulting Benefits Administration event should create a COBRA Activity trigger when it finalizes.

Changing Marital Status

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

After accessing the transaction, the system presents you with a series of pages that direct you through the life event process. Rules set on the Life Event page and the Activity List for the Change Marital Status transaction determine which pages the system displays.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Pages Used to Change Your Marital Status

Page Name	Object Name	Navigation	Usage
Marital Status Change Life Event	W3EB_MARR_START	Self Service, Benefits, Life Events, Marriage	Initiate a change in your marital status.
Request Marital Status Change	HR_EE_MAR_STATUS	Click Start on 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 New Dependents

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.

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

Pages Used to Add a Dependent

Page Name	Object Name	Navigation	Usage
Birth and Adoption	W3EB_BRTH_START	Self Service, Benefits, Life Events, Birth/Adoption	Initiate the birth or adoption of a dependent life event process.
Birth/Adoption Event Form	W3EB_BRTH_ADPT_EVT	Click Start 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 Datepage.	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 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 7

Working with Suppliers

This chapter describes how to integrate with eBenX.

Integrating with eBenX

This section provides an overview of integrating with eBenX and discusses 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 Human Resources, Base Benefits application.

This process writes your most current enrollment data to four records: BN_SNAP_PER, BN_SNAP_JOB, BN_SNAP_PLAN, BN_SNAP_HIST.

3. Run the Carrier Interface Report process within eBenefits.

See Also

Chapter 3, "Setting Up Suppliers," page 15

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. The system then uses the FTP parameters entered on the Define Supplier FTP Parameters page to send the data to the supplier.

Resending Data to Suppliers

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

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

- The file was deleted.
- The name of the directory was changed on the Define Carrier 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 Integration Points

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

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

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

Enrollment Reporting Snapshot

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

Carrier Interface Schedule

*Schedule ID:

Run Carrier Reporting Schedule page

Enrollment Reporting Snapshot

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

Carrier Interface Schedule

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

Resending Extract Files

Access the Resend File page.

Resend File

Schedule ID: KUEBX1

Description: Weekly Health Plans extract

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

Resend File page

File Name

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

Run Date

Displays the date and time that the file was transmitted to the supplier.

Pub/Sub Timestamp

Displays the date and time on which the report ran.

Select

Select if you want to send this file again.

Resend File

Click this link to send the file.

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.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
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 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.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
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.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

	courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
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.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
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 activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. 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).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i> .
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
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. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
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.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
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> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
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.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .
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.
collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
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.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
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.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
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 PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions. 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.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
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.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also <i>class</i>.
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
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 cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
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.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollout structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i>.

document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are 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 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.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Human Resources, also refers to an incident that affects 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.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
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.

financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
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.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
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.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.
joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.
keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
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.
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.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
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.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
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.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (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	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package

	is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page 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.
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>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (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.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
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 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.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
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.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
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 a Structured Query Report (SQR), a COBOL or Application Engine 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	A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.
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.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.
product line	The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
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>.
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
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.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

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.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
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.
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.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
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.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
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.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
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.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry. It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements. 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.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
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 key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
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.
speed key	See <i>communication key</i> .
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.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
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.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
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 time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
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.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
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.
third party	A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
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.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
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 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.
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.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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.
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.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
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.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
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.
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.

XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . 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. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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