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PeopleSoft

PeopleSoft HCM 9.2 Benefits Administration

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PeopleSoft HCM 9.2 Benefits Administration
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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

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In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
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.
. . . (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.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation

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does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific 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 region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- 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 the PeopleSoft Online Help:

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

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

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Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help
- Managing Hosted online help
- Managing locally installed PeopleSoft Online Help

Related Links for PeopleSoft HCM

Oracle Help Center

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

PeopleSoft Spotlight Series

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Chapter 1

Getting Started with PeopleSoft Benefits Administration

PeopleSoft Benefits Administration Overview

When you build on the Manage Base Benefits business process in PeopleSoft HR by adding PeopleSoft Benefits Administration, you can:

- Automate eligibility checking and respond to Human Resource events that might affect benefits enrollment, based on your eligibility and event rules.
- Administer multiple, simultaneous plan years, according to enrollment rules that you define.
- Calculate benefit costs and coverage amounts independent of PeopleSoft Payroll for North America.
- Define and process a variety of flexible credits, both general and plan-based.
- For federal users, administer multiple, simultaneous open seasons for different benefit plan types.
- Establish the foundation for implementing self-service enrollment using PeopleSoft eBenefits.
- Define flexible spending account (FSA) information for employees.
- Process health-care and dependent-care FSA claims.
- Track and view claim and payment data.
- Disburse monies.

Note: PeopleSoft Benefits Administration is designed to be a supplement to the Manage Base Benefits business process. You cannot run the processes and procedures detailed in this book until you set up the Manage Base Benefits business process.
PeopleSoft Benefits Administration is a US-centric and Canada-centric product, supporting only US and Canadian legislative and regulatory requirements.

See "PeopleSoft Manage Base Benefits Overview" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits).

PeopleSoft Benefits Administration Integrations

PeopleSoft Benefits Administration integrates with the following PeopleSoft applications:

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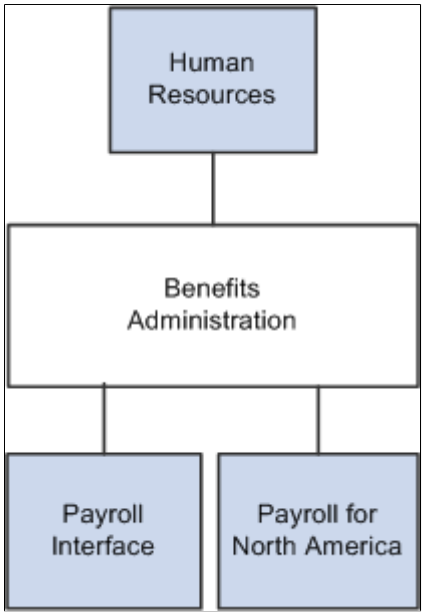
Image: PeopleSoft Benefits Administration integration points

This image describes the PeopleSoft Benefits Administration integration points.



We discuss integration considerations in the implementation sections in this PeopleBook.

PeopleSoft Benefits Administration 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.

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID 2342162.1) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

See product documentation for *PeopleTools: Setup Manager* for more information.

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Chapter 2

Understanding PeopleSoft Benefits Administration

Common Elements Used for Benefits Administration

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

Benefit Information Automation

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

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

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

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

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

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

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

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

Two plan types might use the same set of event rules in one program and different event rules in another. After you define the two sets of event rules, link the appropriate set of event rules with each benefit program and plan type combination.

Multiple Currency Usage

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

For more information, see: "Understanding Currency" (PeopleSoft HCM 9.2: Application Fundamentals)

Benefit Administration Business Processes

This section discusses:

- Open Enrollment and Event Maintenance preparation.
- Flexible Spending Account (FSA) Administration.

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- (CAN) Canadian Flexible Credit allocations.

Open Enrollment and Event Maintenance Preparation

PeopleSoft Benefits Administration automates open enrollment and event maintenance processing. Benefits Administration for U.S. Federal Government automates open season and employee benefit changes with the Open Enrollment and Event Maintenance processes.

Eligibility Rules to Determine Benefit Program and Option Eligibility

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

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

Event Rules Setup to Determine What an Employee Can Choose

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

Automated Benefits Program Design

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

System Preparation for PeopleSoft Benefits Administration

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

Related Links

Understanding Eligibility Rules
Understanding Event Rules
Understanding Benefit Programs
Setting Up Cross-Plan Validation Checks

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FSA Administration

Flexible Spending Account Administration is designed for companies located in the United States and Canada. Use FSA Administration to administer health care and dependent care FSA claims and to:

- Track pledges, process claims, disburse money, print checks, and account for funds according to the amounts employees pledge and the rules for health care and dependent care disbursements.
- Schedule claims processing based on your operational needs, and view the year-to-date status of employee FSAs.
- Use a minimum check option. Selecting this option automatically puts claims below the minimum into a pending file. When the total of pending claims reaches the minimum, the system processes a check for the employee.
- Process pending claims. For example, if an employee submits a claim for more than the amount in his or her FSA, you can pay the claim and hold the excess in a pending account.

Related Links

Setting Up FSA Administration
Understanding FSA Administration

(CAN) Canadian Flexible Credit Allocations

Under Canadian rules, some common benefit plans have a premium cost tax status under which all employer-paid portions are nontaxable and all employee-paid portions are taxable. With PeopleSoft Benefits Administration, you can set up benefit plans that automatically provide the best tax advantage to employees by allocating flexible credits to those benefits that would be taxable unless paid for by credits.

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Chapter 3

Setting Up the Installation Table for Benefits Administration

Defining the Installation Settings for Benefits Administration

To set up implementation defaults for Benefits Administration, use the Benefits Installation (INSTALLATION_BN) component.

This topic describes the Benefits installation component. Other system-wide implementation defaults are set on the installation (INSTALLATION_TBL) component for Human Resources. See "Setting Up Implementation Defaults" (PeopleSoft HCM 9.2: Application Fundamentals) in your PeopleSoft HCM Application Fundamentals product documentation. Also consult your PeopleSoft Human Resources installation product documentation.

Pages Used to Define Benefits Installation Settings

Page Name	*Definition Name*	*Usage*
Benefits Installation Page	INSTALLATION_BN	Defines system-wide Benefits installation settings. **Note:** The settings given here are in addition to the settings on pages in the Installation (INSTALLATION_TBL) component for HR.

Benefits Installation Page

Use the Benefits Installation page (INSTALLATION_BN) to define system-wide Benefits settings.

Note: The settings given here are in addition to the settings on the pages in the Installation (INSTALLATION_TBL) component for HR.

Navigation

Set Up HCM, >Install, >Product Specific, >Benefits Installation

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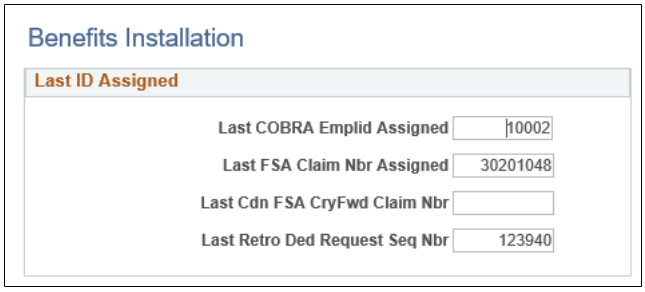
Image: Benefits Installation Page

This example illustrates the fields and controls on the Benefits Installation page.



Related Links

"Setting Up Implementation Defaults" (PeopleSoft HCM 9.2: Application Fundamentals)

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Chapter 4

Setting Up Flexible Credits

Understanding Flexible Credits

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

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

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

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

Defining Flexible Credit Earnings

This section lists prerequisites and discusses how to:

- Set up flexible credits.
- Set up credit amounts.

Prerequisites

This section discusses Benefits Administration activation.

To activate PeopleSoft Benefits Administration:

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

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

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4. Enter the start date for Benefits Administration to set the "look-back" window for your benefits processing.

Start Date for	*Purpose*
Event qualification	The system will flag only changes to job data, birth date, service date, state, postal code, and union code if the job record that is being inserted, corrected, or deleted has an effective date greater than or equal to the Benefits Administration start date. The system will also not trigger event flags for passive events that occur before the start date.
Event maintenance scheduling	When you schedule event maintenance, Benefits Administration will review only event records with an effective date greater than or equal to the Benefits Administration start date. This review includes potentially flagging these event records for your review and determining the proper events to leave open for processing (BAS_PARTIC. EVENT_STATUS = 'O').
Pay calendar access	For event maintenance, when you set coverage and deduction begin dates, Benefits Administration will load pay calendar data starting with pay period end dates greater than or equal to the Benefits Administration start date.

Setting Up Flexible Credits

To set up flexible credits:

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

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

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

Related Links

"Understanding Earnings Tables" (PeopleSoft HCM 9.2: Payroll for North America)

Setting Up Credit Amounts

When you define a general credit using the benefit rate table, the Rate Per Unit field value must be *None.* Only the employee portion is picked up and reflected as the credit amount. Option-based credits may have a rate per unit.

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

Related Links

"Setting Up Calculation Rules" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Setting Up Excess Credit Calculations

To set up excess credit calculations, use the Excess Credit Calculation (EXCESS_CRDT_CALC) component.

This section provides an overview of excess credit calculation setup and discusses how to enter excess credit calculations.

Page Used to Set Up Excess Credit Calculations

Page Name	*Definition Name*	*Usage*
Excess Credit Calculation Page	EXCESS_CRDT_CALC	Enter excess credit calculations.

Understanding Excess Credit Calculation Setup

During the calculation of benefits costs and credits, PeopleSoft Benefits Administration computes a value called *excess credits.* This is an important value, because an organization can choose to treat excess credits in a variety of ways. Excess credits can appear on the paycheck as net additional pay, they can simply be forfeited, or they can be rolled over to automatically increase certain voluntary contributions such as savings plans and flexible spending accounts. Normally, excess credits are calculated by:

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

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

Excess Credit Calculation Page

Use the Excess Credit Calculation page (EXCESS_CRDT_CALC) to enter excess credit calculations.

Navigation

Set Up HCM > Product Related > Automated Benefits > Flex Credit Management > Excess Credit Calculation > Excess Credit Calculation

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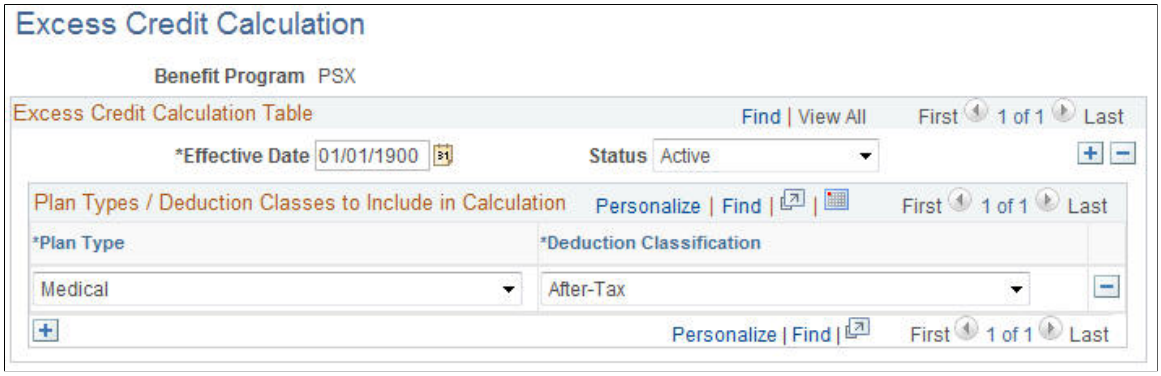
Image: Excess Credit Calculation

This image shows the Excess Credit Calculation page.



Enter the plan types and deduction classifications that you want the system to include when calculating the excess credit amount.

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Chapter 5

Defining Eligibility Rules

Understanding Eligibility Rules

You use eligibility rules to:

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

After you define the eligibility rule, attach it to your benefit program at the program or plan option level using the Benefit Program table.

Note: For federal users: For Thrift Savings Plans (TSPs), if you want to link an eligibility rule to a TSP option, create a separate eligibility rule to be used exclusively for TSPs.

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

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

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

The PeopleSoft Benefits Administration software provides 28 different criteria fields (plus two federal-specific fields) that you can use to determine employee benefit eligibility. Nine of these criteria fields can be user-defined to meet the organization's needs. In addition to the Location field, these other criteria fields are available:

- ACA Eligibility Status
- Age
- Benefit Status
- Eligibility Config 1− 9

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- EmplID Override
- Employee Class
- Employee Type
- FEHB Indicator (federal employee health benefits)
- FLSA Status (Fair Labor Standards Act)
- FTE (full-time equivalency)
- Full/Part Time
- Medicare
- Officer Code
- Pay Group
- Regular and Temporary
- Regulatory Region
- Retirement Plan (Federal)
- Salary Grade
- Service Months
- Standard Hours
- State
- Union Code

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

Related Links

Understanding the Benefits Administration Process

Understanding How Changes in Job Data Affect Eligibility

Actions occur that change an employee's job status and can affect his or her benefits eligibility, such as taking Family Medical Leave Act (FMLA) leave, being terminated, or changing from full-time to part-time employment.

When employee actions occur, two employee status values can be affected: Employee Status and Benefits Status. PeopleSoft HR and PeopleSoft Payroll use Employee Status for a variety of functions. Benefits Status, on the other hand, is used only by Benefits Administration and does not conflict with HR and

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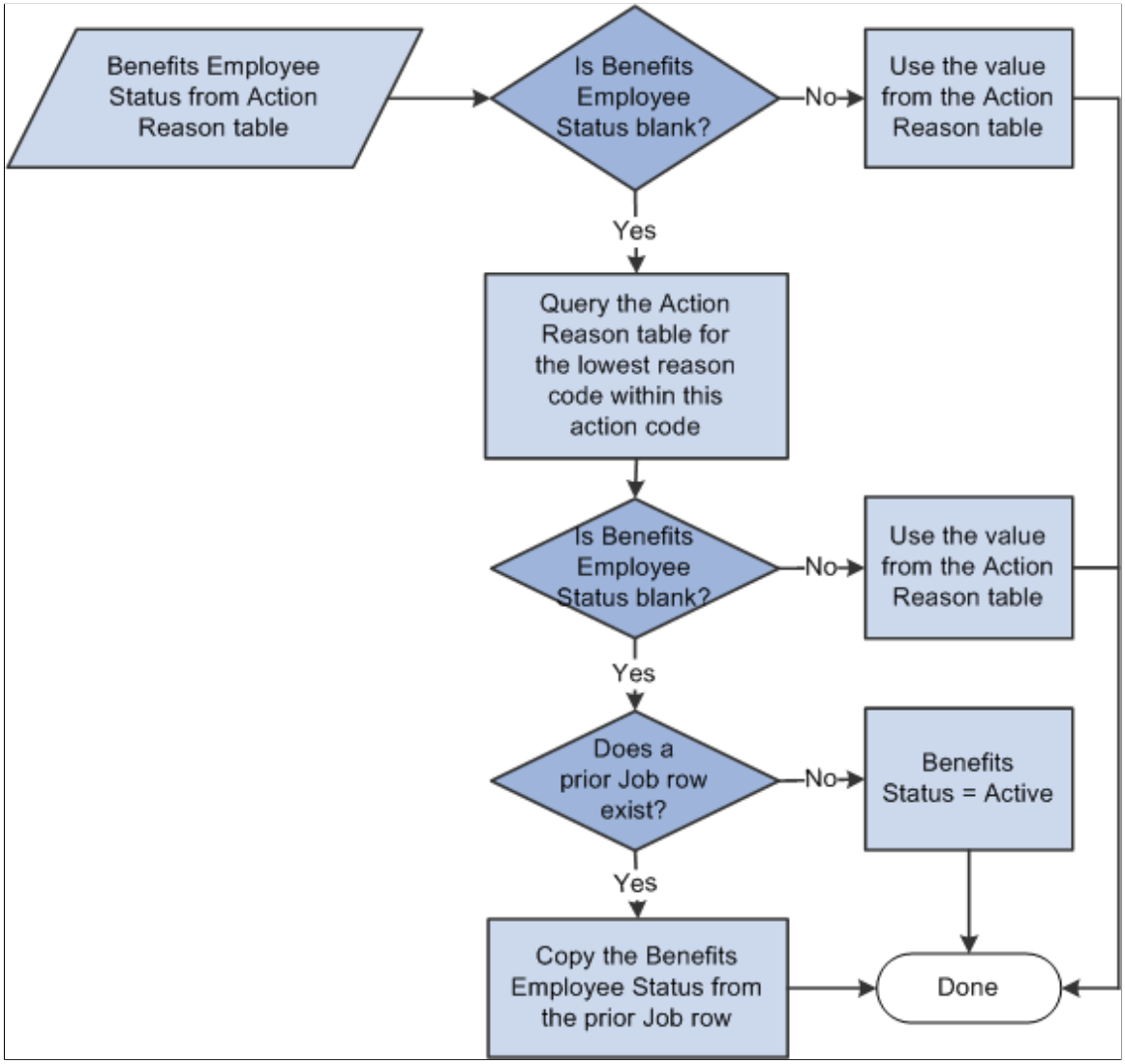
Payroll (North American) operations. This enables you to define employee status in benefits terms without being constrained by HR or Payroll (North American) requirements.

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

The following diagram illustrates how the system sets Benefits Employee Status by matching the action and action reason on the Job row to the action and action reason in the Action Reason table. If the Job row does not have an action reason, the system matches the reason to the entry in the Action Reason table that has a matching action and the lowest action reason value within that action.

Image: Process flow for how the system sets Benefits Employee Status by matching the entry in the Action Reason table

This image illustrates the process flow for how the system sets Benefits Employee Status by matching the entry in the Action Reason table.



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

Related Links

"Defining Personnel Actions and Reasons" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

Setting Up Eligibility Rules

To set up eligibility rules, use the Base Eligibility Rules (BAS_ELIG_RULES_GBL) component.

This section discusses how to:

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

Pages Used to Set Up Eligibility Rules

Page Name	*Definition Name*	*Usage*
Eligibility Rules Table Page	BAS_ELIG_RULES1	Define Benefits Administration eligibility parameters.
Eligibility Rules	RUNCTL_BAS703A	Use modified eligibility parameters. For each eligibility rule definition, print the minimum and maximum criteria (standard hours, service months, and age) and the membership criteria (such as employee class, full or part time, company and pay group, union code, state, and so on), along with the applicable grouping methods and evaluation rules.

Eligibility Rules Table Page

Use the Eligibility Rules Table page (BAS_ELIG_RULES1) to define Benefits Administration eligibility parameters.

Navigation

Set Up HCM > Product Related > Automated Benefits > Eligibility and Event Rules > Eligibility Rules Table > Eligibility Rules Table

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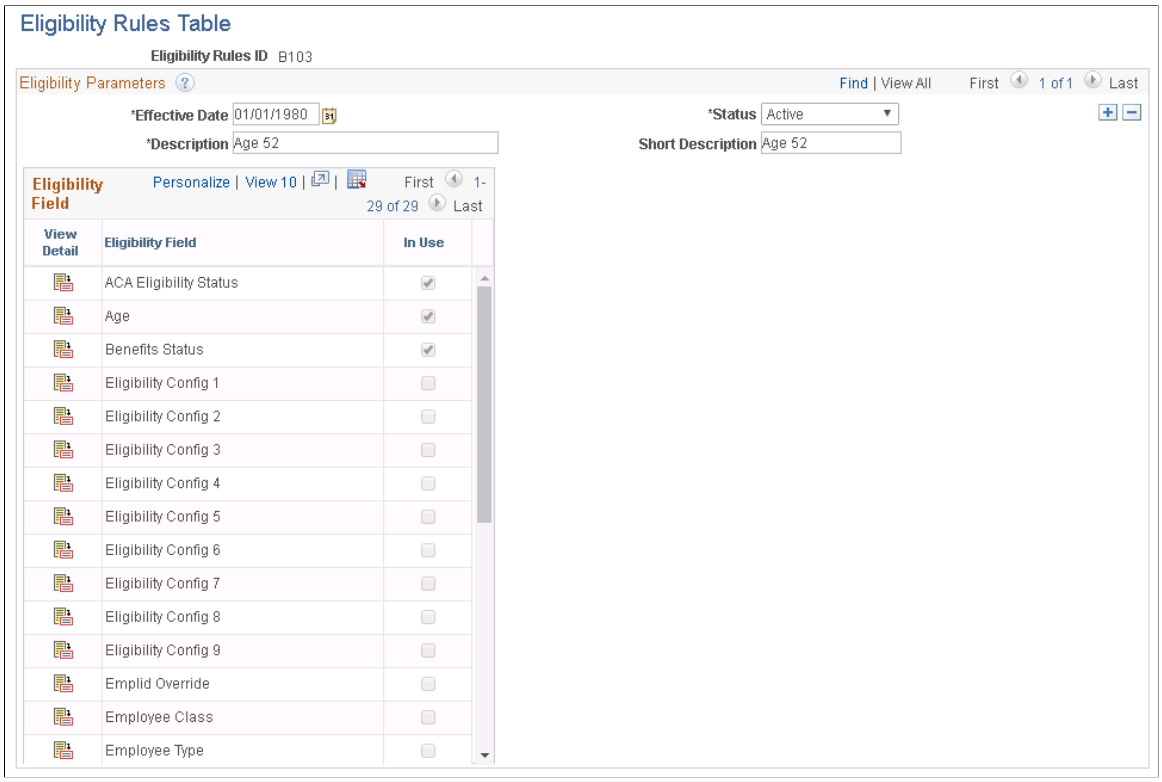
Image: Eligibility Rules Table page

This example illustrates the fields and controls on the Eligibility Rules Table page. You can find definitions for the fields and controls later on this page.



This page contains an Eligibility Field group box from which you can select specific eligibility fields to maintain. When you select the View icon from the Eligibility Field group box for a field, another group box appears with a list of all eligibility fields available that can make up this eligibility rule.

If the check box to the right of a field in the Eligibility Field group box is selected, it indicates that the field is currently being used by the eligibility rule.

The fields in the following list are common to many of the group boxes that appear.

Group Method

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

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

Flagged Jobs in Benefit Record: Group all jobs within the current benefit record number.

Primary Job in Benefit Record: Look only at the primary job within the current benefit record number.

Consider Active Jobs Only

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

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If the value is *Primary Job in Benefit Record* in the Group Method field, this check box is unavailable.

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

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

All in Group: All jobs must satisfy the rule.

Eligibility or **Ineligiblity** Tells the system how to interpret a match with the criteria. Values are *Eligible* and *Ineligible.* If the employee's data matches the criteria, the employee will be eligible or ineligible for benefits.

ACA Eligibility Status

Use the ACA Eligibility Status field to set up benefit plans for employees based on different eligibility rules.

Affordable Care Act Common ID Select the ACA Common ID.

ACA Eligibility Status Select one of the following values: *Always Eligible*, *Eligible*, *Excluded Ineligible*, *To be determined*.

Age

Use this group box to how the system is to calculate the employee's age during eligibility processing.

Minimum Age and **Maximum Age** Enter the minimum age requirements for participation.

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

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

Check Date Select to have the system use the date on which the benefits event occurred to determine the employee's age for benefit eligibility

This Year On Select to have the system use a specific day and month from the current year to determine benefit eligibility.

Last Year On Select to have the system use a specific day and month from the last year to determine benefit eligibility.

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Benefits Status

Benefits Employee Status — Select the benefit status that the employee must have to meet the eligibility rule. Add more than one status by inserting a row.

Eligibility Config 1 − 9

Eligibility Config Field (eligibility configuration field) — Use the Eligibility Config 1 through 9 pages to define an employee's benefit eligibility based on a modified factor. You can create nine separate factors to meet your organization's needs.

If you want to automatically maintain these fields, then you must develop PeopleCode for them using PeopleTools.

EmplID Override

Empl ID (employee identification) — Select an employee who should pass the eligibility process regardless of whether he or she meets the eligibility rules. Enter more than one employee ID by adding a row.

Ben Record (benefit record number) — Enter the benefit record number.

Employee Class

Use this group box to define an employee's benefit eligibility based on the employee's employee class. Add more than one classification by inserting a row.

Employee Type

Use this group box to define an employee's benefit eligibility based on whether the employee is salaried or hourly. You can add more than one by inserting a row.

FLSA (Fair Labor Standards Act) Status

Use this group box to define an employee's benefit eligibility based the employee's FLSA Status. Select the status from the list. You can add more than one by inserting a row.

FTE (Full-Time Equivalency)

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

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

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Full/Part Time

Use this group box to determine an employee's benefit eligibility based on the employee's full-time or part-time status.

Location

Use this group box to define an employee's benefit eligibility based on the location of the employee's home or office. Enter more than one setID and location code by adding a row.

Medicare

Use this group box to define an employee's benefit eligibility based on the employee's medicare status. Enter more than one medicare code by adding a row.

Officer Code

Use this group box to define an employee's benefit eligibility based on the employee's position within the organization. Enter more than one officer code by adding a row.

Pay Group

Company	Select an organization on which to define an employee's benefit eligibility.
Pay Group	Select a pay group associated with the employee and on which to base benefit eligibility. Enter more than one code by adding a row.

Regular and Temporary

Use this group box to define an employee's benefit eligibility based on whether the employee is a regular or temporary employee.

Regulatory Region

Use this group box to define an employee's benefit eligibility based on the regulatory region associated with the employee. Enter more than one region by inserting a row.

Salary Grade

Use this group box to define benefit eligibility based on the employee's salary grade. Enter more than one salary grade by adding a row.

Set ID	Enter a setID.
Sal Plan (salary plan)	Enter a salary plan.
Salary Grade	Enter a salary grade.

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Service Months

Use this group box to define employee benefit eligibility based on the employee's months of service. Select how the system is to calculate years of service during eligibility processing. The starting date is the employee's Service Date, as defined on the Job Data - Employment Information page.

Minimum Service Months and **Maximum Service Months**

Enter the minimum and maximum service months for participation.

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

Check Date

The date of the check.

This Year On

A specific month and day that you enter in the current year.

Last Year On

A specific month and day that you enter in the previous year.

Standard Hours

Minimum Standard Hours and **Maximum Standard Hours**

Use standard hours to determine an employee's benefit eligibility based on the standard hours that the employee works. Enter the minimum and maximum standard hours that the employee must meet to fulfill the requirement.

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

State

Based On

Determine benefit eligibility based on where the employee works or lives. Select from the following locations that you want evaluated:

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

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

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

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

Country and **State**

Select the country and state to associate with an employee and on which to define benefit eligibility. You can enter more than one by inserting a row.

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Union Code

Use this group box to define an employee's benefit eligibility based on the union to which the employee belongs. You can enter more than one code.

Using Modified Eligibility Parameters

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

The following sections provide examples of ways to use the eligibility configuration fields.

Grandfathering In Coverage

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

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

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

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

Handling Mergers

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

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

Configuring Eligibility Based on Values of a Single Field

This example illustrates situations in which the eligibility configuration field emulates data that is not currently part of delivered eligibility.

A manufacturing company wants to use shift assignment in the determination of short-term disability (STD) eligibility. People on the company's third shift do plant maintenance work that is more hazardous

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than the assembly work performed by employees on the first and second shifts. The company wants to offer third-shift workers a plan with higher benefits.

Unfortunately, shift assignment is not part of the delivered eligibility process. You can solve this problem by setting Eligibility Configuration Field 1 equal to the Shift value. Keep the fields synchronized using Field Change PeopleCode. Anytime the Shift field value changes, the PeopleCode moves the new Shift value to Eligibility Configuration Field 1. Now the Shift value can participate in eligibility.

Configuring Eligibility Based on the Values of Multiple Fields

This example illustrates situations in which the eligibility configuration field emulates data that is not currently part of delivered eligibility.

A company determines long-term disability (LTD) eligibility using a combination of salary plan, grade, and shift assignment. The calculation is complex, because the values of salary plan and shift influence what grades qualify for benefits. Even if you could get the fields into the eligibility process, you would then have to change the COBOL programs to evaluate the three fields together.

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

Using Existing Fields to Reduce the Number of Values

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

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

Using Existing Eligibility Fields to Delay Job Data Changes

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

To solve this situation, perform these steps:

1. Add a new field to the Job table called Manual Location Override. Put it on the Job pages near the Location field.

2. Add Save Edit PeopleCode to the Location field. The PeopleCode copies the value of Location to Eligibility Configuration Field 1 when Manual Location Override is *N*. It leaves the value in Eligibility Configuration Field 1 alone when Manual Location Override is *Y*. Then set eligibility to use Eligibility Configuration Field 1 instead of Location.

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3. Change the location code to the new location and select the Manual Location Override option. The PeopleCode leaves Eligibility Configuration Field 1 alone, and the employee can remain in the old coverage.

4. When the employee finally moves the family, the user inserts a new row and deselects the Manual Location Override check box. The PeopleCode copies the location to Eligibility Configuration Field 1. This changes eligibility and the system solicits the employee for the medical plans at the new location.

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

Changing Eligibility Flags

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

The primary table has a hidden internal flag for each of the secondary tables. The flag indicates to the system whether data is in the secondary table. The processing system uses this flag to determine whether to read the secondary table, thereby improving performance.

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

PeopleSoft Benefits Administration supplies a script, BAELIGLD.DMS, that sets all the flags correctly. Run this script in Data Mover anytime that you update the eligibility rules outside of the delivered pages. You can run this script as often as you want.

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

Setting Up Geographic Location Eligibility Rules

To set up geographic location eligibility rules, use the Geographic Location Elig Table (GEOG_LOCN_TABLE) component.

This section provides an overview of geographic location eligibility rules and discusses how to enter geographic location rules.

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Pages Used to Set Up Geographic Location Eligibility Rules

Page Name	*Definition Name*	*Usage*
Geographic Location Elig Table Page	GEOG_LOCN_TABLE	Enter geographic location rules.
Geographic Locations	RUNCTL_BEN_LANG	Print location IDs.

Understanding Geographic Location Eligibility Rules

You can define eligibility for a benefit program or plan according to the postal code of the employee's home and work location. This table describes how the system uses postal ranges to determine employee eligibility:

Employee Location	*Results*
Employee lives within the postal range and works within the postal range.	The employee passes eligibility.
Employee lives within the postal range but works outside the postal range.	The employee passes eligibility.
Employee lives outside the postal range but works within the postal range.	The employee passes eligibility.
Employee lives outside the postal range and works outside the postal range.	The employee fails eligibility.

Note: Users can specify the outcome of the evaluation for each of the preceding scenarios, that is, whether passing the criteria means the employee is eligible or ineligible.

Geographic Location Elig Table Page

Use the Geographic Location Elig Table page (GEOG_LOCN_TABLE) to enter geographic location rules.

Navigation

Set Up HCM > Product Related > Automated Benefits > Eligibility and Event Rules > Geographic Location Elig Table > Geographic Location Elig Table

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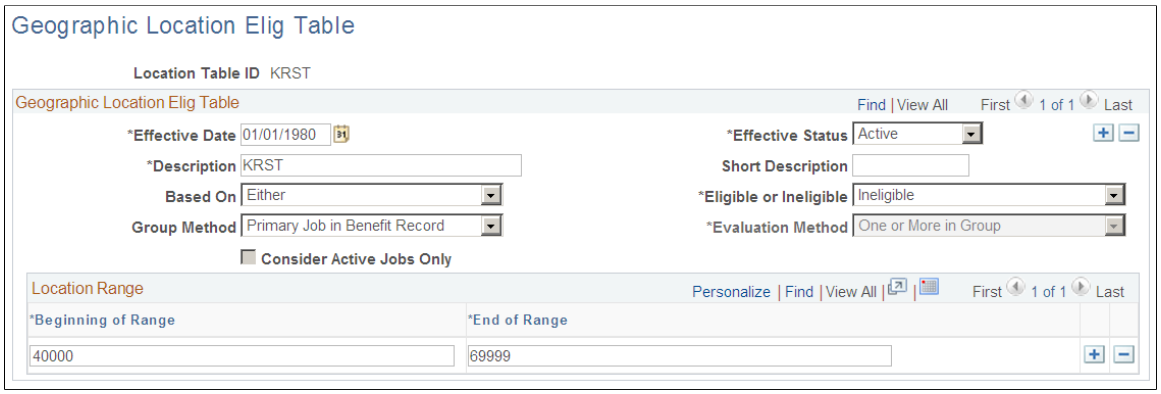
Image: Geographic Location Elig Table page

This example illustrates the fields and controls on the Geographic Location Elig Table page. You can find definitions for the fields and controls later on this page.



Based On

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

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

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

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

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

Eligible or Ineligible

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

Group Method

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

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

Flagged Jobs in Benefit Record: Group all jobs within the current benefit record number.

Primary Job in Benefit Record: Look at only the primary job within the current benefit record number.

Evaluation Method

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

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

All in Group: All jobs must satisfy the rule.

Consider Active Jobs Only

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

If the group method is *Primary Job in Benefit Record,* this check box is automatically selected and cannot be changed.

Beginning of Range and **End of Range**

Use the Location Range group box to define specific postal codes to be evaluated. Enter the beginning and end of the range.

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

In the United States, you can mix 5-digit codes with 9-digit codes.

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Chapter 6

Creating Event Rules

Understanding Event Rules

You use event rules to:

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

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

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

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

To set up event rules:

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

Understanding the Evaluation of Event Rules

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

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

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1. Benefits Administration uses the eligibility rules that you have defined to determine the participant's eligibility as of the effective date of the event.

   For example, if a participant has moved from full-time to part-time status, he might be ineligible for current elections and would need to select from part-time plan options.

2. If the event causes the participant to lose eligibility for current elections, the event is prepared for further processing, regardless of how you defined your event rule.

   At a minimum, the system terminates the participant's newly ineligible elections. If the participant selects a new election within the plan type, the prior election is replaced as of the new election coverage and deduction begin dates.

3. If the event rule has the Use History check box selected, the eligible options as of the event date are compared to the prior eligible options.

   If the participant has gained eligibility to new options, Benefits Administration prepares the event for further processing and enables new enrollment elections.

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

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

Recommended Event Rule Definitions for FSC and HIR Events

This table lists the recommended event rule definitions for family status change (FSC) and new hire (HIR) events:

Fields	***FSC Event Class (commonly used for plan types 1x–3x, 6x)***	***HIR Event Class***
Pre-enter	Yes.	No.
Use History	No. Typically, the event should be controlled by the Select Allowed setting.	No. If your organization uses multiple-jobs processing, you would typically select the Use History check box for the HIR event, and set the default method to one of the Current/Else settings.
Elect Required	Depends on company policy.	Depends on company policy.
Provide FlexCR Upon Default (provide flex credits upon default)	Depends on company policy.	Depends on company policy.

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Fields	***FSC Event Class (commonly used for plan types 1x–3x, 6x)***	***HIR Event Class***
Default Method	*Assign Cur Covrg Else Option* (assign current coverage else option) and *Assign Cur Covrg Else Low Opt* (assign current coverage else low option) are typical selections.	*Default to Lowest Elig Option* (default to lowest eligible option) and *Default to Option and Coverage* are typical selections. If your organization processes employees with multiple jobs, use *Assign Cur Covrg Else Low Opt* or *Assign Cur Covrg Else Option.*
Select Allowed	*Current Plan + Waive* is the typical selection for plan type 1x. For plan types 2x and 3x, use *All Plans.* For plan type 6x, use *Current Plan.*	All Plans.
If currently Enrolled, or not participating Max Number of Change Levels (maximum number of change levels)	Use the same setting that you use for the Open Enrollment (OE) event class. This maximum number varies by plan type; *99* appears by default.	Not applicable for new hires with no current elections. The value *99* appears by default. You can set levels for hire; the system restricts what employees can choose.
Levels of Change w/o Proof (levels of change without proof)	Use the same setting that you use for the OE event class. This value varies by plan type; *99* appears by default.	Not applicable for new hires with no current elections.
Proof Required at Plan Level	Use the same setting that you use for the OE event class. This value varies by plan type; *99* appears by default. Proof required at plan level is typically used for life and accidental death and dismemberment (AD/D) plans.	Use the same setting that you use for the OE event class.
Amt. Proof Required (amount proof required)	Used for life and AD/D plans. The limit is linked to coverage amounts. The same limit by plan type is used across all event classes.	Use the same setting that you use for the OE event class.
If currently Waived Max Number of Change Levels	Use the same setting that you use for the OE event class.	Not applicable for new hires with no current elections (including waive).
Proof Required at Plan Level	Use the same setting that you use for the OE event class.	Use the same setting that you use for the OE event class.
Amt. Proof Required	Use the same setting that you use for the OE event class.	Use the same setting that you use for the OE event class.

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Fields	***FSC Event Class (commonly used for plan types 1x–3x, 6x)***	***HIR Event Class***
Coverage Begins *On the Event Date* *Month-Begin After Event Dt* (month-begin after event date) *On Pay Pd Begin after Event Date* (on pay period begin after event date)	Depends on company policy. For FSC events, *On the Event Date* is a common selection.	Depends on company policy.
Waiting Period... Days Waiting Period... Months	*On the Event Date* is a common selection.	Depends on company policy.
Coverage Ends *On the Event Date* *On Month-End after Event Date* (on month end after event date) *On Pay Pd Begin after Event Date*	Depends on company policy.	Not applicable for new hires. *On Event Date* appears by default.
Grace Period Days *Grace Period Months*	Depends on company policy.	Not applicable for new hires. The value *0* (zero) appears by default.
Deduction + Flex Credits Begin *1st Full PayPd After Covg BgDt* (first full pay period after coverage begin date) *On CovgBegin Date* (on coverage begin date) *Pay Pd Containing Covg BegDt* (pay period containing coverage begin date) *Pay Pd Preceding Covg BegDt* (pay period preceding coverage begin date)	Depends on company policy.	Do not use *Pay Pd Containing Covg BegDt* for HIR events. This can result in enrollments for which the benefits coverage begin date precedes the hire date. Use *On CovgBegin Date* instead.
Deduction + Flex Credits End *On Covg End Date* *1st Full PayPd after Event Dt* *Pay Pd Containing Event Date* *Pay Pd Preceding Covg EndDt*	Depends on company policy.	Depends on company policy.

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

This table lists the recommended event rule definitions for miscellaneous (MSC), OE, and snapshot (SNP) events:

Fields	***MSC Event Class***	***OE Event Class***	***SNP Event Class***
Pre-enter	Yes. Common for MSC events. Saves data entry effort.	Yes. Common for OE events. Saves data entry effort.	No.
Use History	Yes. Common for MSC events.	No.	No.
Elect Required	Depends on company policy.	Depends on company policy.	No.
Provide FlexCR Upon Default (provide flex credits upon default)	Depends on company policy.	Depends on company policy.	Yes.
Default Method	*Assign Cur Covrg Else Option* and *Assign Cur Covrg Else Low Option* are common selections.	*Assign Cur Covrg Else Option* and *Assign Cur Covrg Else Low Option* are common selections, except for plan types 6x and 9x, which use *Terminate Coverage.*	*Assign Cur Covrg Else Low Option.*
Select Allowed	None. Use History controls whether the enrollment is allowed for an event.	*All Plans.*	*All Plans.*
If currently Enrolled, or not participating Max Number of Change Levels	Use the same setting that you use for OE events. This maximum number varies by plan type; *99* appears by default.	This maximum varies by plan type; *99* appears by default.	This maximum number varies by plan type; *99* appears by default.
Levels of Change w/o Proof	Use the same setting that you use for OE events. This value varies by plan type; 99 appears by default.	This value varies by plan type; *99* appears by default.	This value varies by plan type; *99* appears by default.
Proof Required at Plan Level	Use the same setting that you use for OE events. This value varies by plan type; *99* appears by default. Proof required at plan level is commonly used for life and AD/D plans.	This value varies by plan type; *99* appears by default. Proof required at plan level is commonly used for life and AD/D plans.	This value varies by plan type; *99* appears by default.

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Fields	*MSC Event Class*	*OE Event Class*	*SNP Event Class*
Amt. Proof Required	Used for life and AD/D plans. Limit is linked to coverage amounts. The same limit by plan type is commonly used across all event classes.	Used for life and AD/D plans. Limit is linked to coverage amounts. The same limit by plan type is commonly used across all event classes.	Used for life and AD/D plans. Limit is linked to coverage amounts. The same limit by plan type is commonly used across all event classes.
If currently Waived Max Number of Change Levels	Use the same setting that you use for OE events.	This maximum varies by plan type; *99* appears by default.	This maximum varies by plan type; *99* appears by default.
Proof Required at Plan Level	Use the same setting that you use for OE events.	This value varies by plan type; *99* appears by default. Proof required at plan level is typically used for life and AD/D plans.	This value varies by plan type; *99* appears by default. Proof required at plan level is typically used for life and AD/D plans.
Amt. Proof Required	Use the same setting that you use for OE events.	Used for life and AD/D plans. Limit is linked to coverage amounts. The same limit by plan type is typically used across all event classes.	Used for life and AD/D plans. Limit is linked to coverage amounts. The same limit by plan type is typically used across all event classes.
Coverage Begins *On the Event Date* *Month-Begin On/Aft Event Dt* *On Pay Pd Begin after Event Dt*	Depends on company policy. For MSC events, *On the Event Date* is the common selection.	*On the Event Date* is the common selection for OE events. The event date for OE events is equal to the period begin date for the Open Enrollment definition.	*On the Event Date* is the common selection for SNP events. The event date for SNP events is equal to the period begin date for the Snapshot definition.
Waiting Period... Days Waiting Period... Months	*On the Event Date* is a common selection for FSC events.	*On the Event Date* is a common selection for OE events.	Zero days and months.
Coverage Ends *On the Event Date* *On Month-End after Event Dt* *On Pay Pd End After Event Dt*	Depends on company policy.	Depends on company policy.	Depends on company policy.
Grace Period Days *Grace Period Months*	*On the Event Date* is a common selection for FSC events.	*On the Event Date* is a common selection for OE events.	*On the Event Date* is a common selection for SNP events.

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Fields	*MSC Event Class*	*OE Event Class*	*SNP Event Class*
Deduction + Flex Credits Begin *1st Full PayPd After Covg BgDt* *On CovgBegin Date* *Pay Pd Containing Covg BegDt* *Pay Pd ePreceding Covg BgDt*	Depends on company policy.	Depends on company policy.	*1st Full Pay Pd After Covg BgDt.*
Deduction + Flex Credits End *On Covg End Date* *1st Full PayPd after Event Dt* *Pay Pd Containing Event Date* *Pay Pd Preceding Covg EndDt*	Depends on company policy.	Depends on company policy.	*1st Full Pay Pd After Covg BgDt.*

Recommended Event Rule Definitions for TER Events

The Termination (TER) Event class assumes that the participant is not eligible for any benefit programs and that Consolidated Omnibus Budget Reconciliation Act (COBRA) enrollment is managed outside of Benefits Administration.

This table lists the recommended event rule definitions for TER events:

Fields	*TER Event Class*
Pre-enter	No.
Use History	No.
Elect Required	No.
Provide FlexCR Upon Default (provide flex credits upon default)	No.
Default Method	*Terminate Coverage.*
Select Allowed	None.

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Fields	***TER Event Class***
If currently Enrolled, or not participating Max Number of Change Levels	Not applicable; *99* appears by default.
Levels of Change w/o Proof	Not applicable; *99* appears by default.
Proof Required at Plan Level	Not applicable; *99* appears by default.
Amt. Proof Required	Not applicable; *99,999,999* appears by default.
If currently Waived Max Number of Change Levels	Not applicable; *99* appears by default.
Proof Required at Plan Level	Not applicable; *99* appears by default.
Amt. Proof Required	Not applicable; *99,999,999* appears by default.
Coverage Begins *On the Event Date* *Month-Begin After Event Dt* *Month-Begin On/Aft Event Dt* *On Pay Pd Begin after Event Dt*	Not applicable; *On the Event Date* appears by default.
Waiting Period... Days Waiting Period... Months	Not applicable; *0* (zero) appears by default.
Coverage Ends *On the Event Date* *On Month-End After Event Dt* *On Pay Pd End after Event Dt*	Depends on company policy. Selection is typically based on benefit claims processing agreements with carriers and participants.
Grace Period Days *Grace Period Months*	Depends on company policy.

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Fields	TER Event Class
Deduction + Flex Credits Begin *1st Full PayPd After Covg BgDt* *On CovgBegin Date* *Pay Pd Containing Covg BegDt* *Pay Pd Preceding Covg BegDt*	Not applicable; *1st Full Pay Pd After Covg BegDt* appears by default.
Deduction + Flex Credits End *On Covg End Date* *1st Full PayPd after Event Dt* *Pay Pd Containing Event Date* *Pay Pd Preceding Covg EndDt*	Depends on company policy.

Defining Benefits Administration Actions for Event Rules

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

Related Links

"Defining Personnel Actions and Reasons" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

Setting Up Event Classes

To set up the types or classes of events for the Benefits Administration system to recognize, and to control the handling of event classes, use the Event Class table (BAS_EVENT_CLASS_GBL) component.

This section discusses how to define event classes.

Page Used to Set Up Event Classes

Page Name	Definition Name	Usage
Event Class Table Page	BAS_EVENT_CLASS	Define the classes of events that the Benefits Administration system recognizes, and control how event classes are handled.

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Event Class Table Page

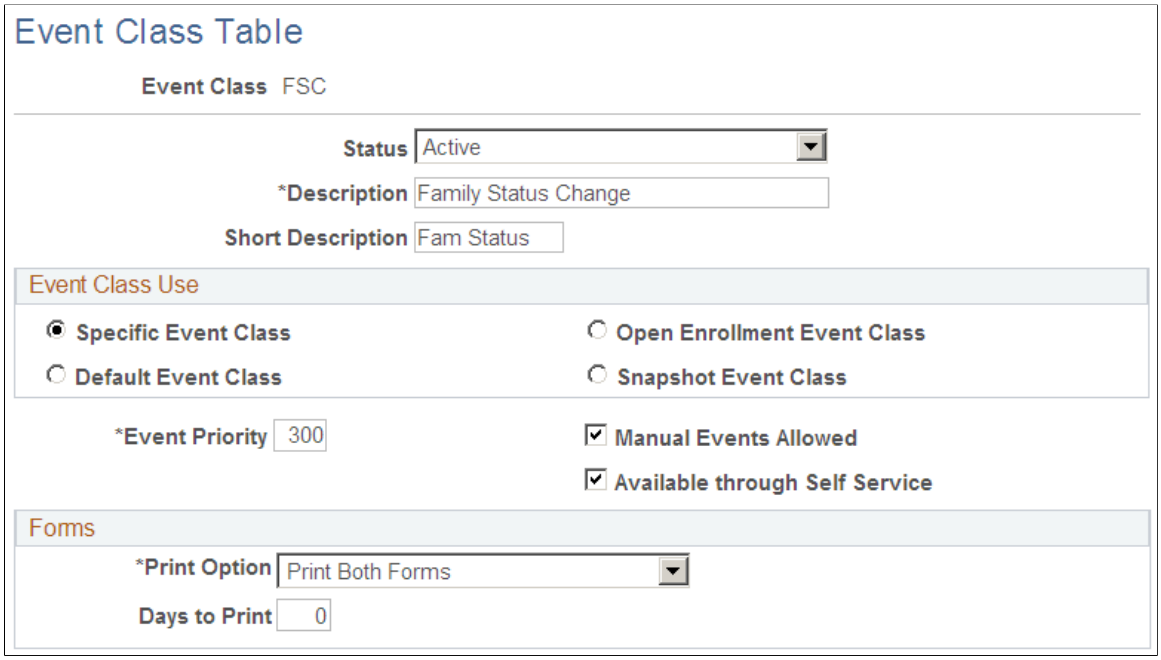
Use the Event Class Table page (BAS_EVENT_CLASS) to define the classes of events that the Benefits Administration system recognizes, and control how event classes are handled.

Navigation

Set Up HCM > Product Related > Automated Benefits > Eligibility and Event Rules > Event Class Table > Event Class Table

Image: Event Class Table page

This example illustrates the fields and controls on the Event Class Table page. You can find definitions for the fields and controls later on this page.



This table shows default values for the event classes delivered by PeopleSoft Benefits Administration:

Event Class	*Description*	*Event Class Use*	*Event Priority*	*Manual Events Allowed?*
BIR	*Birth*	Specific Event Class	*401*	Selected
DIV	*Divorce*	Specific Event Class	*403*	Selected
FSC	*Family status change*	Specific Event Class	*300*	Selected
HIR	*New hire*	Specific Event Class	*100*	Deselected
MAR	*Marriage*	Specific Event Class	*402*	Selected
MSC	*Miscellaneous*	Default Event Class	*400*	Selected
OE	*Open Enrollment*	Open Enrollment Event Class	*900*	Deselected

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Event Class	*Description*	*Event Class Use*	*Event Priority*	*Manual Events Allowed?*
SNP	*Snapshot*	Snapshot Event Class	*50*	Deselected
TER	*Termination*	Specific Event Class	*200*	Deselected

Specific Event Class Select to designate an event class that is designed to match the Benefits Administration action entered on the Action/Reason page to call specific processing rules.

Open Enrollment Event Class Select to indicate that open enrollment events are triggered for all employees associated with a particular open enrollment process.

Default Event Class Select to indicate that the Benefits Administration action does not match any specific event class.

For example, an employee undergoes a Leave of Action/ Military Leave (LOA/MIL) action and action reason, and the Benefit Administration action value for that combination is MIL. If you have not defined any additional event classifications beyond those delivered by PeopleSoft Benefits Administration, the system processes the employee according to the event rules for the MSC class. It does not recognize MIL as a specific event class unless you define it that way.

Snapshot Event Class Select to indicate that snapshot events are triggered for all employees associated with a particular snapshot process.

Event Priority Enter the priority in which the system processes the event in situations in which multiple events take place on the same date.

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

Manual Events Allowed Select if events associated with the event class can be inserted manually for an employee using the Review BAS Activity page.

Available through Self Service Select to enable employees to elect or change benefit information based on the eligibility determinations that result from event processing in the selected class. This is linked to the Enroll In Benefits feature for the PeopleSoft eBenefits application.

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

Print Option Specify the printing of enrollment forms or confirmation statements. You may, at times, create event classifications, which are meant for administrative use only. Event classifications should never be viewed by employees.

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Days to Print Enter the number of days prior to an event that an enrollment form prints. This accommodates future-dated events by holding the form for a reasonable time period just before the event is processed.

Defining Trigger Events

To set up passive events, use the Passive Event Definition (BAS_PASSIVE_EVENT) component.

This section provides an overview of event triggers.

Pages Used to Define Trigger Events

Page Name	*Definition Name*	*Usage*
Review BAS Activity Page	BAS_ACTIVITY	Add events into the BAS Activity table. You manually insert events to be processed according to event rules that map to the BAS action that you enter when you run the Benefits Administration process. You can also delete unwanted, but automatically triggered, events.
Passive Event Definition Page	BAS_PASSIVE_EVENT	Define passive events that are not initiated by data entry.

Understanding Event Triggers

The system triggers events through employee data changes when:

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

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

This table describes the delivered non-job event triggers:

Non-Job Event	*Cause*	*Processing Result*
Date of birth change	Update to the non-effective-dated Date of Birth field on the Personal Data pages.	Generates a workflow notice to the benefits administrator.

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Non-Job Event	*Cause*	*Processing Result*
Postal code change	Update to the effective-dated Postal Code field of the home address on the Personal Data pages. Also triggered if the effective date of the current home address is changed.	Generates a BAS_ACTIVITY trigger.
Service date change	Update to the non-effective-dated Service Date field on the Job Data - Employment Information page.	Generates a workflow notice to the benefits administrator.
State code change	Update to the effective-dated State field of the home address on the Personal Data pages. Also triggered if the effective date of the current home address is changed.	Generates a BAS_ACTIVITY trigger.

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

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

- Action/Action Reason
- Benefits Status
- Benefits System Flag
- Benefit Record Number
- Business Unit/SetID
- Company
- Employee Class
- Employee Type
- Eligibility Config Field 1 - 9
- Employee Status
- FLSA Status
- FTE
- Full/Part-time Status
- Grade
- Location
- Medicare
- Officer Code

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- Paygroup
- Regular/Temporary
- Regulatory Region
- Salary Administration Plan
- Standard Hours
- Union Code

Review BAS Activity Page

Use the Review BAS Activity (review benefits administration system activity) page (BAS_ACTIVITY) to add events into the BAS Activity table.

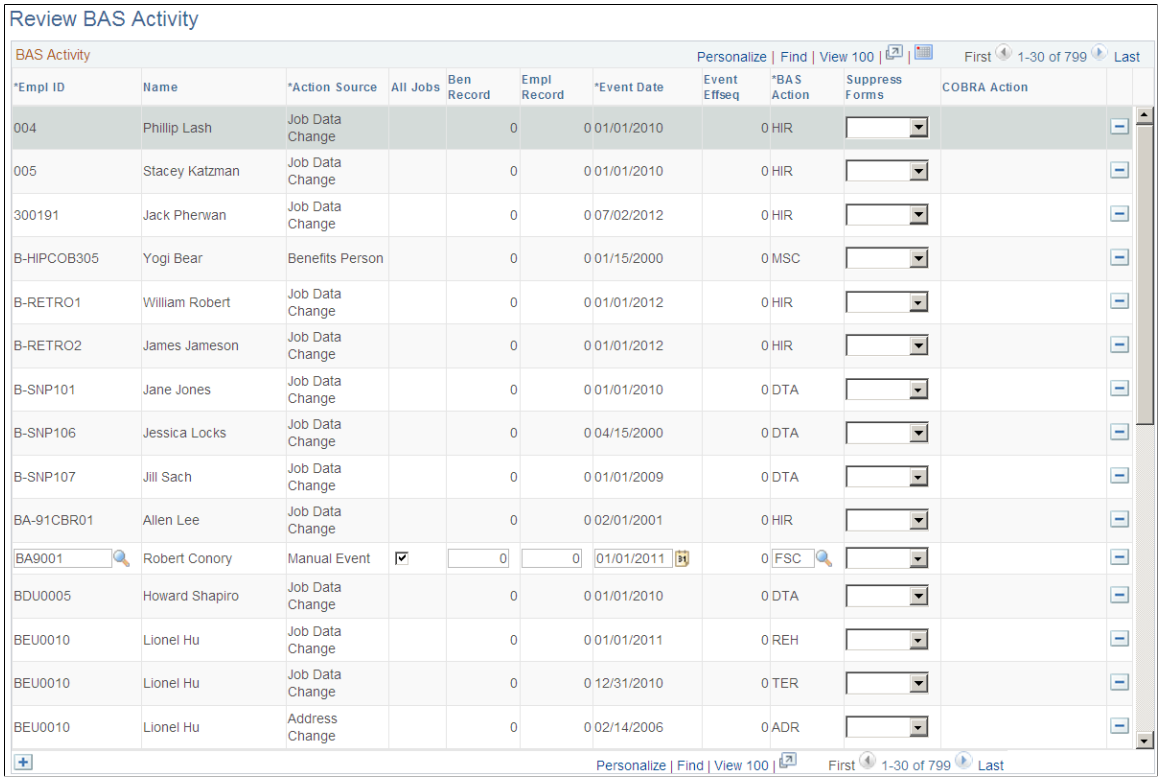
You manually insert events to be processed according to event rules that map to the BAS action that you enter when you run the Benefits Administration process. You can also delete unwanted, but automatically triggered, events.

Navigation

Benefits > Manage Automated Enrollment > Events > Review BAS Activity > Review BAS Activity

Image: Review BAS Activity page

This example illustrates the fields and controls on the Review BAS Activity page. You can find definitions for the fields and controls later on this page.



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

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

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

Action Source

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

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

All Jobs

Select to have the manual event trigger benefits processing for all possible jobs and not just the specific job (employment record number) entered for the event. For example, a manually entered FSC could impact benefits for all jobs.

Note: This option is available if the Multiple Jobs feature is enabled.

Event Date

Displays the event date.

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

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

The date for a manually entered event appears by default when the activity record for the event was inserted into the table through the Review Bas Activity page. You can change the event data if required.

Event Effseq (event effective sequence)

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

BAS Action

Identifies the Benefits Administration action associated with this event as defined in the Action Reason table.

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	Events triggered by job, address, multiple job indicators, and passive events are assigned codes from the Action Reason table. Manual events are given a code that is selected by the user entering the manual event record.
COBRA Action (Consolidated Omnibus Budget Reconciliation Act)	Identifies the COBRA action code associated with this event as defined in the Action Reason table (not entered for a manual event).

Passive Event Definition Page

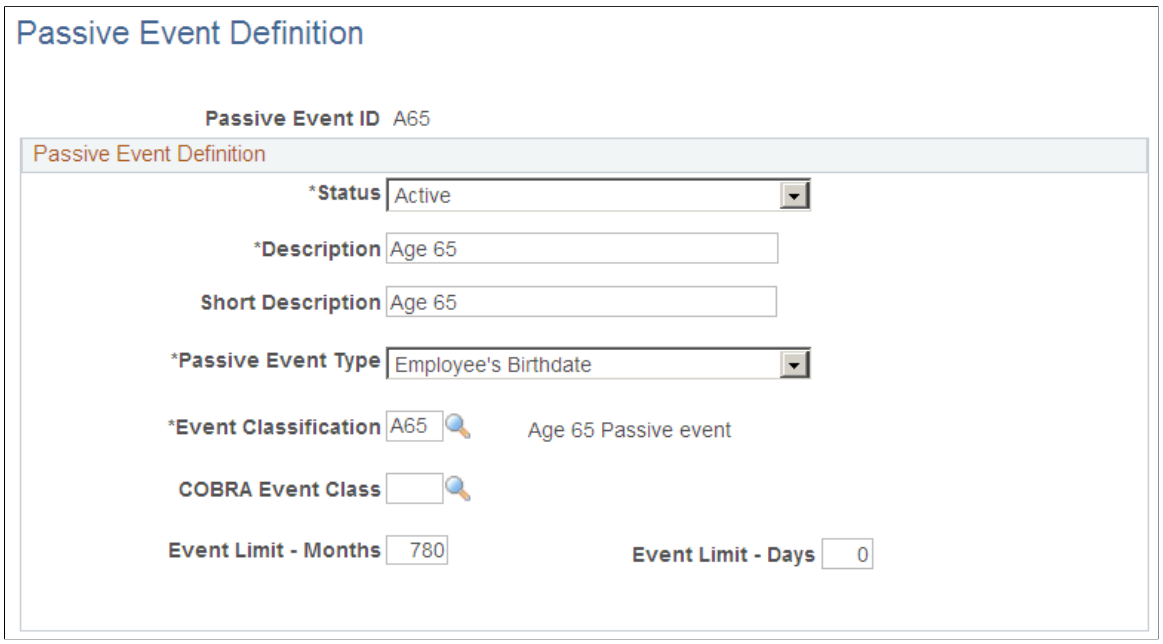
Use the Passive Event Definition page (BAS_PASSIVE_EVENT) to define passive events that are not initiated by data entry.

Navigation

Set Up HCM > Product Related > Automated Benefits > Eligibility and Event Rules > Passive Event Definition > Passive Event Definition

Image: Passive Event Definition page

This example illustrates the fields and controls on the Passive Event Definition page. You can find definitions for the fields and controls later on this page.



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

Passive Event Type	Select a passive event type. Delivered event types include employee birthdate and events based on an employee's service date.

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Event Classification	Select an event classification. Of the delivered event classes, *OE* and *Snapshot* are not available.
Event Limit - Months and **Event Limit - Days**	Indicate how long after the birthday or service date the event will take place.

Example of Passive Event Definition

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

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

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

Defining Event Rules

To define event rules, use the Event Rules Table (BAS_EVENT_RULES) component.

This section provides an overview of event-rule definition.

Pages Used to Define Event Rules

Page Name	*Definition Name*	*Usage*
Event Rules Table- Event Rules Page	BAS_EVENT_RULES1	Define basic event rules for event classes.
EOI and Level Rules Page	BAS_EVENT_RULES1A	Set EOI and level rules for event classes.
Event Rules Table - Date Rules Page	BAS_EVENT_RULES2	Define date rules.
Event Rules	RUNCTL_BAS703B	Print event rule definitions.

Understanding Event-Rule Definition

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

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

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

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

Event Rules Table- Event Rules Page

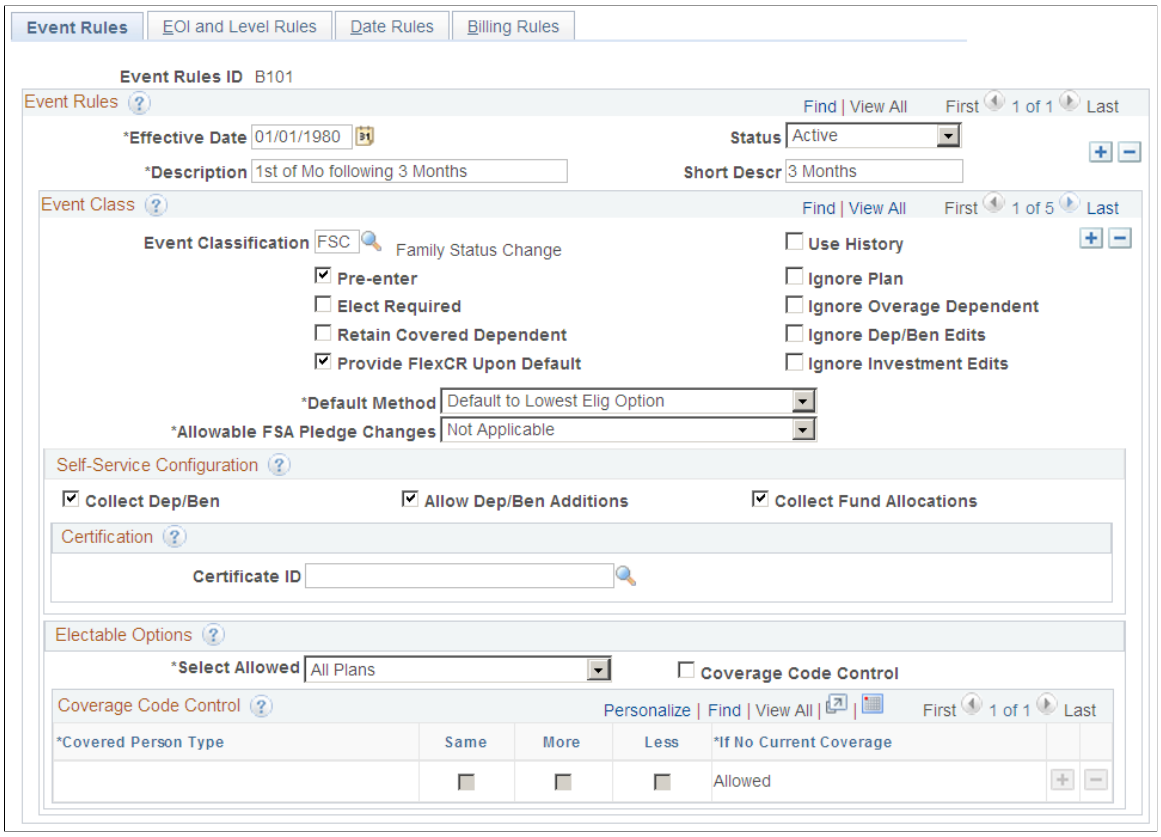
Use the Event Rules Table - Event Rules page (BAS_EVENT_RULES1) to define basic event rules for event classes.

Navigation

Set Up HCM > Product Related > Automated Benefits > Eligibility and Event Rules > Event Rules Table > Event Rules

Image: Event Rules Table- Event Rules page

This example illustrates the fields and controls on the Event Rules Table- Event Rules page. You can find definitions for the fields and controls later on this page.



Event Class

Use this group box to define rule information for an event class.

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Event Classification

Select an event classification.

You can have more than one event classification for an event rule to cover all expected contingencies and usages.

Note: If the Event Classification field is left blank, that row becomes a wildcard and is used to manage any event processed by this rule for which no specific event classification behavior has been defined. This wildcard is difficult to troubleshoot because the system provides no indication as to when it was invoked, and thus can lead to unanticipated results. Use the wildcard feature cautiously.

Use History

Reviews the eligibility history of the participant's benefit plan option and the eligibility of the participant's current benefit plan option to determine whether the employee can change an election. If the lists of eligible options are the same, the participant is not allowed to make plan option changes. This setting is used to filter out events that do not result in an opportunity for an employee to change elections.

If, after processing, the participant is eligible for new options, Benefits Administration prepares the event for further processing and enables new enrollment elections. If the participant has lost eligibility for one or more current elections, he or she can make a new election.

Pre-enter

Select to populate the Benefits Administration data entry pages with the participant's current elections for the plan type associated with the event rule. Doing so enables you to view current elections during data entry and change them as necessary.

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

Note: You should avoid selecting Pre-enter for plan types 4x (Savings), 6x (FSA), and 9x (Vacation Buy/Sell) during open enrollment, because these plans types may legally require positive annual reenrollment.

Ignore Plan

Select to make changes to plan information without restrictions as to how often or when the changes are made. When this option is selected, the plan types linked to this event rules ID and event classification combination are unaffected by Benefits Administration processing. You can use this option to arrange for specific plan types to have automatic event processing only for major event classifications such as hires, terminations, and open enrollment, while leaving them unaffected by lesser event classifications.

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When you select Ignore Plan, the system selects and locks Ignore Dep/Ben Edits and Ignore Investment Edits. The system also sets Select Allowed to *None,* and all participate and waive level values to *99.*

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

If participant plan eligibility does not change, the system gives employees their current coverage. But if participant plan eligibility does change—that is, if employees lose eligibility for their current plan—you need to set a default method of *Assign Cur Covg Else Option, Assign Cur Covg Else Low Opt,* or *Assign Cur Covg Else None.*

With Ignore Plan selected, the system ignores:

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

The system continues to:

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

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

Elect Required (election required) Select to note the absence of elections for this plan type as an error in the Benefits Administration Messages table.

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Ignore Overage Dependent

Select to control when and how dependents are actually dropped from coverage. You can create a midyear event that allows overage dependents to remain covered until the open enrollment event, when they are dropped from the coverage.

Retain Covered Dependent

Select to enable employers to move employees from one plan to another, while maintaining the current coverage code and dependent elections (default plan). In case of no matching coverage, the system assigns the default coverage and the existing dependent is not retained.

If the employee has lost eligibility for a current election and the default election is supplied, the system determines the plan for the default option and attempts to move that employee into an option with the default plan and the employee's current coverage code.

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

Select to skip all checks for the presence of dependents or beneficiaries and bypass all edits on dependents or beneficiaries already present or entered with elections.

Provide FlexCR Upon Default (provide flex credit upon default)

Select if you want participants that appear by default in a plan type to continue to receive credits that are tied to the default plan type.

When this check box is deselected for plan types 1x through 3x (plan types 1x through 2x for federal users), participants who accept election defaults do not receive any credits (general plan type credits or option-based credits) for those plan types.

For employees who elect to have excess credits applied to an FSA plan type and who are not enrolled in an FSA plan type, and for whom the Default Method field is set to *Default Option for Excess Credit,* the system creates an enrollment for the employee with a contribution amount equal to the excess credits.

Ignore Investment Edits

Select to skip all checks for the presence of investments on savings plans and bypass all edits on investment elections already present or entered with elections.

Default Method

Indicates what happens when an employee does not select an election for a particular plan type. Values are:

- *Assign Cur Covrg Else Option* (assign current coverage else option): Select to assign and continue the participant's current coverage.

  If participants do not have current coverage, or have lost eligibility to current coverage, they are assigned to the default for the specific plan type, as defined in the Benefit/Deduction Program table. The participant must be eligible for the current election for it to be used as the default.

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- *Assign Cur Covrg Else None* (assign current coverage else none): If the employee loses eligibility for the current plan, another plan is not set up to replace the old one.
- *Assign Cur Covrg Else Low Opt* (assign current coverage else low option): Select to assign and continue the participant's current coverage.

  If the participant has no current coverage, or if the participant has lost eligibility to current coverage, the system assigns the lowest-level option available, as defined in the Benefit/Deduction Program table. This option is not recommended for Savings, FSA, and Vacation Buy/Sell plan types.
- *Default to Lowest Elig Option* (default to lowest eligible option): Select to assign the lowest-level option for which the employee is eligible.

  This option is not recommended for Savings, FSA, and Vacation Buy/Sell plan types.
- *Default to Option and Coverage:* Select to assign the option marked for default on the Benefit Program Definition page.

  The participant must be eligible for the option for it to be used as the default. This option is not recommended for Savings, FSA, and Vacation Buy/Sell plan types.
- *Default Option for Exc Credit:* (default option for excess credit) Applicable only to FSA plan types.

  If the employee has indicated that excess credits should be directed to an FSA enrollment, this rule assigns the option marked for default on the Benefit Program Definition page and sets the annual pledge to the amount of the excess credits. The participant must be eligible for the option for it to be used as the default, and excess credits must exist.

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

- *Terminate Coverage:* Inserts a termination entry for the plan type covered by this event rule.

  This option is commonly used for FSA and Vacation Buy/Sell plan types, because employees are usually required to reenroll in them each year or lose coverage.

Allowable FSA Pledge Changes (allowable flexible spending account pledge changes)

Select either *Increase* or *decrease* to indicate whether employees can increase or decrease their FSA pledges based upon the event classification that is being processed. For example, if the event

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classification is Birth, employees can increase, but not decrease their FSA pledge. This field applies only to 6x plan types and should be set to *N/A* for all other plan types.

See Option Election Page.

Self-Service Configuration

Use this group box to define rules for the information that appears on the eBenefits application pages. Values are:

Collect Dep/Ben (collect dependent or beneficiary coverage)

Select this check box when you want the system to collect information pertaining to dependents and benefits and display that information on the eBenefit Summary and eBenefit Detail Information pages.

For 1x Health plans on the enrollment form, the system collects elections at the plan level. The system then derives the coverage code based on the dependents covered. When this check box is deselected, the system collects elections at the coverage code level for 1x plans on the enrollment form.

This works in conjunction with the Ignore Dep/Ben Edits check box on the Event Rules page.

Allow Dep/Ben Additions (allow dependent or beneficiary additions)

Select to indicate that an employee can add new dependents through the eBenefits enrollment process.

Collect Fund Allocations

When this check box is selected, the system collects the information pertaining to savings plans and displays that information on the eBenefit savings pages.

Certification

Certificate ID

Select from available certificates that will appear during self-service enrollment for this event class

Electable Options

Use this group box to define benefit plans to which employees can make changes, and to set up coverage codes.

Select Allowed

Provides a means for you to indicate which plan or plans an employee can select from among all eligible types of plans. Values are:

- *All Plans:* Select to enable employees to select from any option within the list of eligible options for the event.
- *Current Plan:* Select to indicate that employees can make changes only to the current plan.

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- *Current Plan + Waive:* Select to enable employees to change only coverage levels (eligible options), including electing *Waive,* within their currently enrolled benefit plan. However, if the employee's current election is a waive of the plan type, she can elect any eligible option within any benefit plan.

  For example, an employee has single coverage and gets married and the new spouse has health coverage through her employer. They decide that covering both individuals under the spouse's benefit plan is a better choice. In this case, the employee is allowed to waive his current coverage because the spouse is adding the employee to the spouse's coverage.

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

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

Coverage Code Control

Select to enable employees to change only coverage levels (eligible options) within their currently enrolled benefit plan (applies only to the 1x series of plans). Coverage code control rules specify the criteria you use to select a valid coverage code for presentation to the employee for election. The rule specifies one set of criteria that is used when current coverage is in effect, and another set of criteria to be used when no current coverage is in effect.

If an employee loses eligibility for his current benefit plan, the system automatically overrides this setting and allows all options.

When you select the Coverage Code Control check box, the Coverage Code Control group box appears, where you can define coverage types and indicators.

See "Setting Up Coverage Codes" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits).

Coverage Code Control

Use this group box to define parameters for coverage codes that help control the gain and loss of eligibility and who can be added to or dropped from coverage. The codes you define are for the event class.

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To increase the number of covered person types, the event must be an increase in the number of eligible dependents such as marriage, birth, adoption, or placement for adoption. Coverage decrease is allowed only if a divorce, annulment, legal separation, death of spouse or dependent, or loss of dependent eligibility occurs.

Note: For the system to enforce ERISA (Employee Retirement Income Security Act) rules, you must define coverage codes at the Covered Person Type level, rather than by Total Persons Covered. The system ignores ERISA rules if the coverage codes are defined by Total Person Covered.

Covered Person Type

Select a person category that determines how the person is to be processed by the system. In using covered person types, each relationship type that is eligible to enroll in benefits must be mapped to a covered person type. A given relationship code can map to zero or one covered person type code, while a particular covered person type code can map to one or more relationship codes.

You specify the rate separately for each type of person. You can use the same rate table ID for both employees who have adult children and those who do not. The system accumulates the rates for each dependent who is enrolled on the employee's health election. If an employee has an adult child, the system adds the rate to the deduction. If an employee only has children who are not adult children, it will accumulate only at the regular child rate.

The following values are defined in the Dependent Relationship table. This table makes consistency across all types of covered persons possible, while allowing for new types of covered persons to be added in the future. The table is used as a child table of the Coverage Codes table.

- *Child*
- *Adult Child*
- *Dom Partner* (domestic partner)
- *Employee*
- *NQ Dependent* (nonqualified dependent)
- *Oth Q Dependent* (other qualified dependent)
- *Spouse*

Same, More, and **Less**

The Same, More, and Less check boxes apply if the employee is already enrolled in a plan.

Select Same to keep the same number of covered persons in the plan. You can enroll more, less, or the same number of a particular covered person type. An example of using the Same, More, and Less check boxes to define covered person type might be in the case of a divorce event class. In a divorce, you might have more, the same, or fewer children enrolled

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depending on the situation. So you would select all three check boxes for the *Child* person type option.

Continuing with the divorce event class example, you would add a row, select the *Spouse* person type in the Covered Person Type field, and select the Less check box because the spouse will no longer be covered. Finally, you would select the *Employee* person type and select the Same check box. The coverage code control rule allows for all variations of a particular event class, so you could allow more and less in the same event classification. In addition the same, more, or less applies if the employee is already enrolled in a plan. The Coverage indicator on the right applies if the employee is newly enrolled in the plan.

Select Same to keep the same number of covered persons in the plan.

Select More to allow more covered persons to be added to the plan.

Select Less to allow fewer covered persons to be enrolled in the plan.

If No Current Coverage

Indicate the status of the covered person type enrollment if the employee is enrolling in the plan for the first time.

- *Allowed:* Select to indicate that enrollment for the covered person type is allowed.
- *Not Allowed:* Select to indicate that enrollment for the covered person type is not allowed.
- *Required:* Select to indicate that enrollment for the covered person type is required.

Applying Defaults

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

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

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

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Making a Certificate Available for Enrollment

Two pages are available to which you can attach a certificate: Event Rules and Dependent Relationship.

- Use the Event Rules component (BAS_EVENT_RULES1) to apply rules for the plan type selected in the Benefit program table. Enter a certificate ID that will be associated with the plan type selected and event rule defined.

  The participant enrolls himself or herself into a benefit plan and if an administrator has decided that the plan requires a certificate, the participant is presented initially with a certificate to answer. If the participant passes the certification, he or she is allowed to enroll in the benefit plan. If the participant fails the certification, he or she is not be allowed to enroll in that particular plan type.

- Use the Dependent Relationships Table component (DEPBEN_TYPE_TBL) to map a certification ID to a relationship.

  The participant enrolls himself or herself into a benefit plan and if an administrator has decided that the plan requires a certificate, the participant is presented initially with a certificate to answer. If the participant passes the certification, his or her dependent is accepted. If the participant fails the certification, his or her dependent is defined as a beneficiary.

See "Setting Up Benefits Certifications" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits).

See "Setting Up Dependent Relationships" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits).

See "Setting Up eBenefits" (PeopleSoft HCM 9.2: eBenefits)

See "Reviewing Dependent and Beneficiary Information" (PeopleSoft HCM 9.2: eBenefits).

EOI and Level Rules Page

Use the EOI and Level Rules (Evidence of Insurability and Level Rules) page (BAS_EVENT_RULES1A) to set EOI and level rules for event classes.

Navigation

Set Up HCM > Product Related > Automated Benefits > Eligibility and Event Rules > Event Rules Table > EOI and Level Rules

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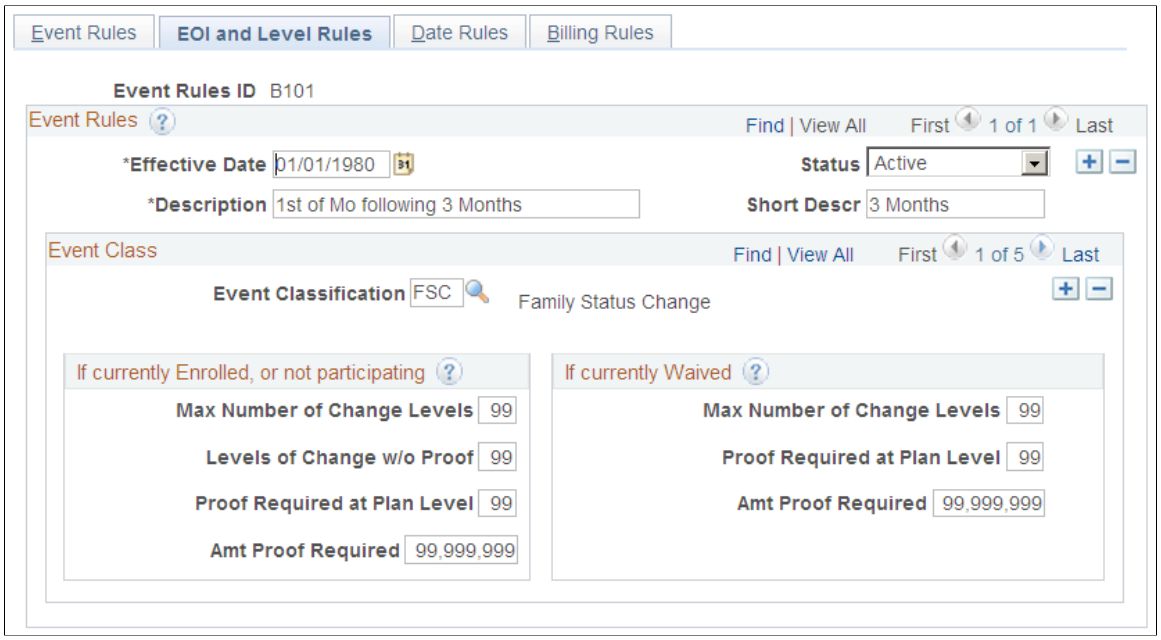
Image: EOI and Level Rules page

This example illustrates the fields and controls on the EOI and Level Rules page. You can find definitions for the fields and controls later on this page.



Use the Event Classification field to select the event class for which you want to define rules.

If currently Enrolled, or not participating

Use this group box to define rules that apply to an employee's participation in a benefit option following an event when the employee is currently participating in a plan or is new to a plan. These rules commonly apply to life, accidental death and dismemberment, and disability plan types, and are used to indicate the types of changes that employees can make.

Max Number of Change Levels (maximum number of change levels) — Indicates how many levels a participant can change or jump.

Levels of Change w/o Proof (levels of change without proof) — Indicates how many levels a participant can change without proof of good health or insurability.

Proof Required at Plan Level — Indicates the initial level at which proof of good health or insurability is required.

Amt. Proof Required (amount at which proof is required) — Enter the amount of coverage above which proof of good health or insurability is required.

If currently Waived

Use this group box to define rules that apply to an employee's participation in a benefit option following an event if the employee is currently opted out of the program.

Max Number of Change Levels (maximum number of change levels) — Indicates how many levels a participant can change.

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Proof Required at Plan Level	Indicates the initial level at which proof of good health or insurability is required.
Amt. Proof Required (amount at which proof is required)	Enter the amount of coverage above which proof of good health or insurability is required.

Event Rules Table - Date Rules Page

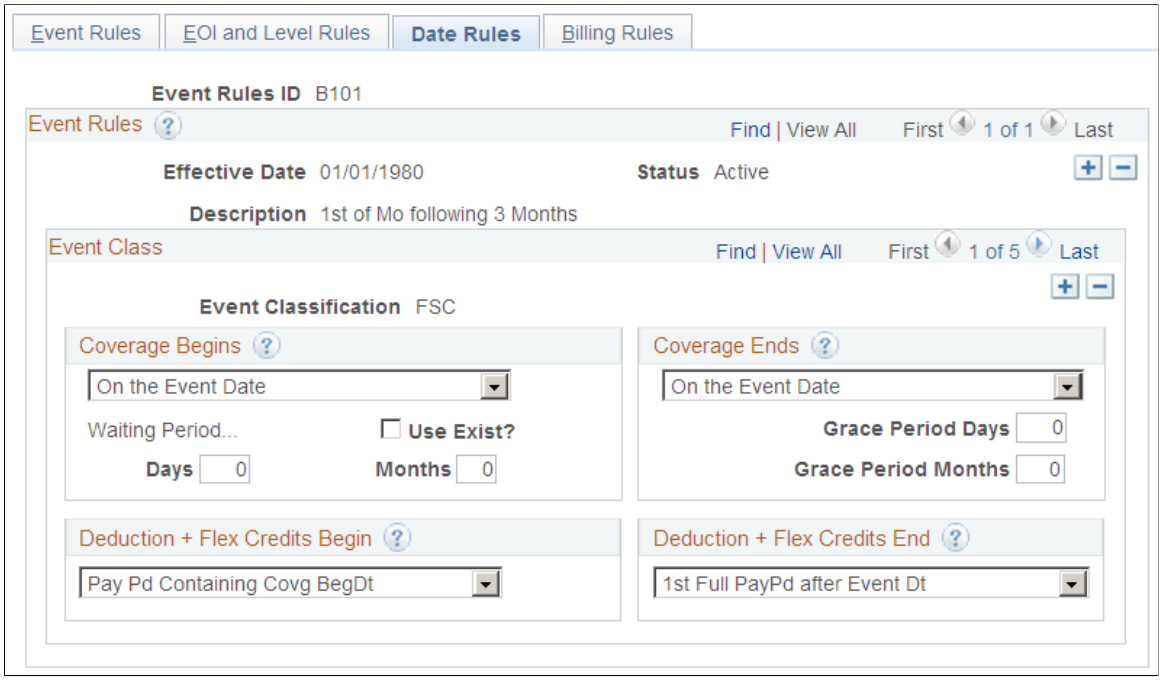
Use the Event Rules Table - Date Rules page (BAS_EVENT_RULES2) to define date rules.

Navigation

Set Up HCM > Product Related > Automated Benefits > Eligibility and Event Rules > Event Rules Table > Date Rules

Image: Event Rules Table - Date Rules page

This example illustrates the fields and controls on the Event Rules Table - Date Rules page. You can find definitions for the fields and controls later on this page.



Use this page to set up date information for benefits.

Coverage Begins

Indicate when coverage begins following an event.

Values are:

- *Month-Begin After Event Dt* (month begin after event date): Coverage begins on the first day of the following month.

  If the event date is equal to the first of the month, coverage still begins on the first day of the following month.

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

  If the event date equals the first day of the pay period, coverage begins on the event date.
- *On the Event Date:* Coverage begins on the day of the event.

Waiting Period...

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

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

Use Exist?

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

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

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

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

Days and **Months**

Enter the number of days and months for the system to use as a waiting period to begin coverage.

Coverage Ends

Select when coverage ends. The coverage end date is used only when an existing election within a plan type is truly terminating and not simply being superseded by another election (benefit option). In this case, the system inserts a new election row with Coverage Election set to *Terminated.*

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If you select either *On Month - End after Event Date* or *On Pay Pd End after Event Dt,* the coverage begin date of this new row is one day after the calculated coverage end date for the current election. This occurs because this is the first date for which coverage no longer exists.

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

Deduction + Flex Credits Begin

Use this group box to indicate when deductions and flexible benefit credits should be taken. Values are:

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

Deduction + Flex Credits End

Use this group box to indicate when deductions and flexible benefit credits should end. Values are:

- *1st Full PayPd after Event Dt* (first full pay period after event date): Credits and deductions end on the first day of the pay period following the coverage end date, regardless of when the coverage begin day occurs within the pay period.
- *On CovgEnd Date* (on coverage end date): Credits and deductions end on the date that benefit coverage for the plan type ends.
- *Pay Pd Containing Event Date* (pay period containing event date): Credits and deductions end on the first day of the pay period containing the event date, regardless of when the coverage begin date occurs within the pay period.
- *Pay Pd Preceding Covg EndDt* (pay period preceding coverage end date): Credits and deductions end on the first day of the full pay period that precedes the coverage end date.

Processing Events for COBRA Administration

Consolidated Omnibus Budget Reconciliation Act (COBRA) administration uses Benefits Administration processes to identify and process:

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

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- Secondary COBRA events, which *extend coverage* for COBRA participants and their dependents.

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

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

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

This table describes qualified COBRA events delivered by PeopleSoft, actions that trigger Benefits Administration to recognize these events as qualified COBRA events, and potential COBRA beneficiaries of the events:

Qualifying COBRA Event	***User Action Trigger***	***Potential COBRA Beneficiaries***
Loss of eligibility due to termination.	Employee status changes to terminated or suspended.	Employee and dependents.
Loss of eligibility due to reduction in hours.	Employee status remains active; standard hours decrease.	Employee and dependents.
Loss of eligibility due to retirement.	Employee status changes to retired.	Employee and dependents.
Loss of eligibility due to military leave.	Leave of Absence/Military Leave action/ action reason entered for employee.	Employee and dependents.
Death of employee.	Employee status changes to deceased or FSC/DEA entered as action/reason code in the Job table.	All dependents.
Divorce.	Change in marital status of employee to divorced; change in status of spouse to ex-spouse. Family Status Change/Divorce action/ action reason entered for employee.	Spouse.
Marriage of dependent.	Marital status of dependent changes to married. Family Status Change/Married Dependents action/action reason entered for employee.	Individual dependent.
Dependent reaches coverage age limit (overage dependent).	Not identified by Benefits Administration. (Benefits Administration does not automate passage of time events for dependents.) You must run the COBRA process to identify overage dependents.	Individual dependent.

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Qualifying COBRA Event	*User Action Trigger*	*Potential COBRA Beneficiaries*
Employee becomes entitled to receive Medicare.	Medicare entitlement date is reached. Family Status Change/Medicare Entitlement action/action reason is entered.	All dependents.

Related Links

Understanding the Benefits Administration Process

Defining Rules for Benefits Billing

To define benefit billing parameters, use the Billing Parameters (BILLING_PARAMETERS) component.

This section provides an overview of event processing for Benefits Billing and removing participants from Benefits Billing and discusses how to set up Benefits Billing enrollments.

Pages Used to Define Rules for Benefits Billing

Page Name	*Definition Name*	*Usage*
Event Rules Table - Billing Rules Page	BAS_EVENT_RULES3	Define rules for Benefits Billing enrollments.
Event Rules-Billing	RUNCTL_BAS703B	List the parameters in which billing enrollments are created or updated during the Benefits Administration process.

Understanding Event Processing for Benefits Billing

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

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

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

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

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- Billing Status field to *Active.*
- Billing Reason field to *Ben Admin.*

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

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

The system inserts flat amount billing rows for savings, FSA, retirement, and pension plans (plan types 4x, 6x, 7x, and 8x). The way in which the system calculates deductions for these plans is not compatible with billing when no gross wages exist and no updating of payroll deduction balances occurs. The system issues a message to update the billing enrollments.

Removing Participants from Benefits Billing

The system deactivates Billing Enrollment records if:

- The value in the Effect on Billing field on the Billing Rules page is *End Billing.*
- The employee loses eligibility for the plan type.
- The employee waives or terminates coverage.

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

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

Related Links

"Setting Up Benefits Billing" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Event Rules Table - Billing Rules Page

Use the Billing Rules page (BAS_EVENT_RULES3) to define rules for Benefits Billing enrollments.

Navigation

Set Up HCM > Product Related > Automated Benefits > Eligibility and Event Rules > Event Rules Table > Billing Rules

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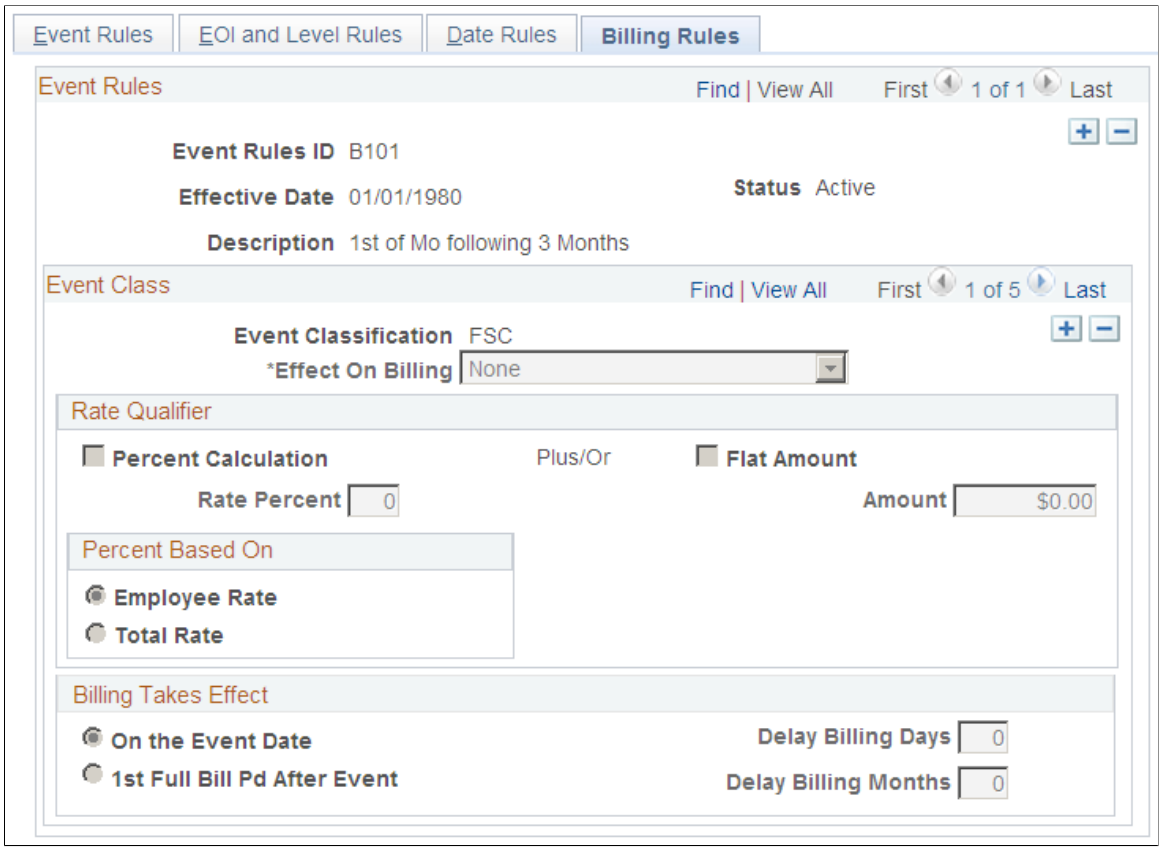
Image: Event Rules Table - Billing Rules page

This example illustrates the fields and controls on the Event Rules Table - Billing Rules page. You can find definitions for the fields and controls later on this page.



You can define a different set of Benefits Billing enrollment event rules for each event classification.

Rate Qualifier

Determines how to modify the deduction calculation for billing purposes.

Percent Based On Select if the system should use the employee rate or the total rate to determine total charges if you select both Percent Calculation and Flat Amount.

Billing Takes Effect

Select an option to indicate when the billing action takes effect.

Related Links

"Enrolling Participants in Benefit Programs and Plans" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

"Understanding Benefits Billing" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

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(USF) Setting Up Multiple, Concurrent Open Seasons

In the federal government, open seasons for various plan types are usually scheduled independently of each other, and their solicitation periods often overlap. In other words, a FEGLI (federal employees group life insurance code) open season may begin after a FEHB (federal employee health benefits) open season solicitation period has started.

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

To set up multiple, concurrent open seasons:

1. Define open enrollment event classes for each open season scheduled for your employees on the Event Class Table page.
2. Define open enrollment processes for each scheduled open season, and link to them the appropriate open season event classes.

   Use the Open Enrollment Definitions page.
3. Define individual event rule IDs for each plan type available to your employees.

   Use the Event Rules page.
4. With each event rule ID, associate the *entire set* of open enrollment event classes that you defined in step 1, by using the Date Rules page.
5. For each event rule ID, use Ignore Plan and Default Method functionality to disable Benefits Administration processing for all event classes linked to open seasons for plan types other than the one linked to the event rule ID.

   For example, if an event rule ID is associated with the FEHB plan type, select Ignore Plan for all event classes *not* associated with FEHB open season events.

   Use the proper default method to ensure that your employees are not automatically moved in and out of plans that are not part of the open season. The suggested default method is *Assign Current Coverage Else None.*
6. Once you've finished defining your event rule IDs, link them to their corresponding plan types by using the Benefit Program page.

   Place FEHB event rule IDs with FEHB plan types, TSP (Thrift Savings Plans) event rule IDs with TSP plan types, and so on.
7. Run open enrollment processes as planned for your various open season events.

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

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Chapter 7

Setting Up FSA Administration

Understanding the Setup Procedure

You use the FSA Administration components to define a unique flexible spending benefit structure that integrates with the overall benefit program. After you set up the component, you can use it to administer health-care and dependent-care claims for the U.S. and Canada.

To set up the FSA Administration system, you must:

1. Use the Form Table page to define the forms for printing FSA checks.

   If you use the same form for all FSA checks, then set up that check stock. It is then available to you each time you print checks. If you print FSA checks using more than one kind of check stock, define each one. If you add a new check stock later, make another entry in the Form table.

   If your organization uses PeopleSoft Payroll for North America, some forms may already be set up. Your payroll department uses this table to define the stock for paychecks.

2. Define business rules for each benefit program.

   Process claims as necessary for each benefit program. For example, you might select two benefit programs for one claims processing cycle, and for another, you might select one program.

For additional information, see: "Setting Up Implementation Defaults" (PeopleSoft HCM 9.2: Application Fundamentals)

Setting Up FSA Administration

To set up form IDs and business rules for benefit programs, use the Check Form Table (PAY_FORM_TABLE), FSA Run Table (FSA_RUN_TABLE_GBL), and Benefit Program Definition (BEN_PROG_DEFN) components.

This section lists prerequisites and discusses how to set up form IDs and add business rules for benefit programs.

Pages Used to Set Up FSA

Page Name	*Definition Name*	*Usage*
Form Table Page	PAY_FORM_TABLE	Set up form IDs for each type of FSA check stock that your organization uses.

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Page Name	*Definition Name*	*Usage*
FSA Run Table (flexible spending account run table)	FSA_RUN_TABLE	Define an FSA Run ID for each benefit program for which you administer FSA claims.
Benefit Program Page	BEN_PROG_DEFN1	Add business rules for benefit programs.
Benefit Program - Plan Type and Option	BEN_PROG_DEFN2	Link plan types to the benefit program.
Benefit Program - Cost	BEN_PROG_DEFN3	Link a benefit program and plan type to rate and calculation rules.

Prerequisites

Before you can set up form IDs and business rules for FSA Administration, activate FSA Administration on the Installation table.

See: "Setting Up Implementation Defaults" (PeopleSoft HCM 9.2: Application Fundamentals)

Form Table Page

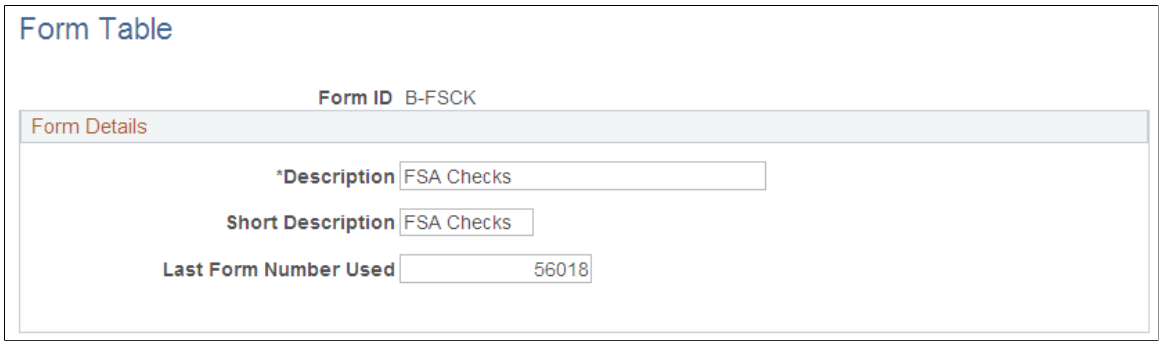
Use the Form Table page (PAY_FORM_TABLE) to set up form IDs for each type of FSA check stock that your organization uses.

Navigation

Set Up HCM > Product Related > Base Benefits > FSA > Check Form Table > Form Table

Image: Form Table page

This example illustrates the fields and controls on the Form Table page. You can find definitions for the fields and controls later on this page.



Form ID If you use several check stocks for FSA Administration, set up a form ID for each one.

Last Form Number Used The first time you print FSA checks using a form ID, enter the last form number that you used. After that, the system updates this field each time you print checks using the form. You can update this field if the form numbers are out of sequence. This can happen, for example, if you delete a check.

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Benefit Program Page

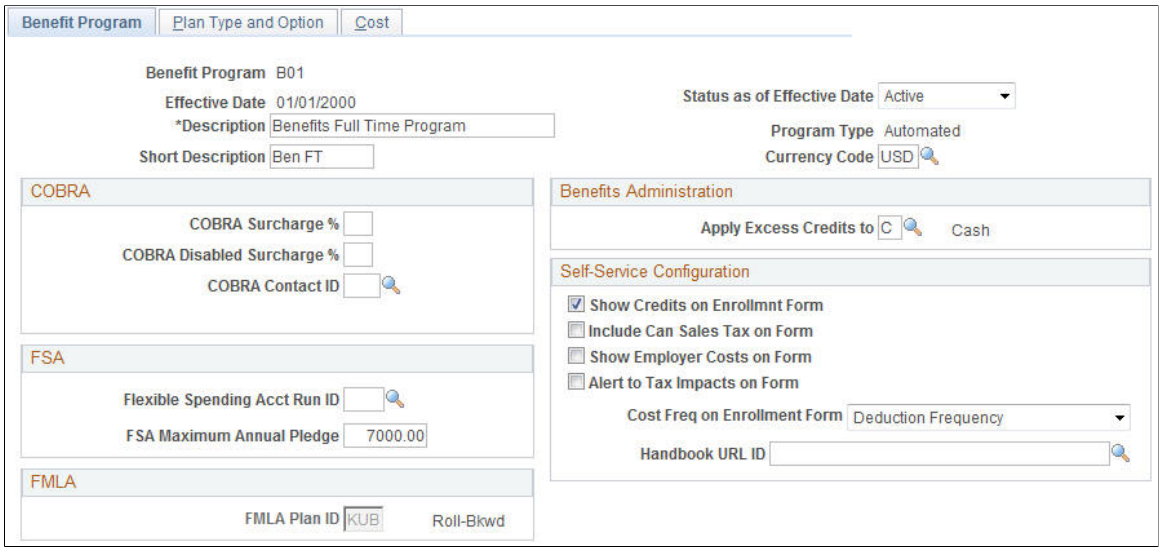
Use the Benefit Program page (BEN_PROG_DEFN1) to add business rules for benefit programs.

Navigation

Set Up HCM > Product Related > Base Benefits > Program Structure > Benefit Program Table > Benefit Program

Image: Benefit Program page

This example illustrates the fields and controls on the Benefit Program page. You can find definitions for the fields and controls later on this page.



Flexible Spending Acct Run ID (flexible spending account run ID)

Each time you initiate claim payment processing, identify the run ID for that cycle. The system processes claim data for employees in the benefit programs with those run IDs.

FSA Maximum Annual Pledge (flexible spending account minimum annual pledge)

Enter the maximum amount that an employee in the benefit program is allowed to pledge. For a plan year, this is the total maximum that an employee can pledge for both health-care and dependent-care FSAs.

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Chapter 8

Building Automated Benefit Programs

Understanding Benefit Programs

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

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

1. Define benefit deductions using the Deduction Table - Setup page.
2. Identify benefit plans using the Benefit Plan Table page.
3. Identify benefit providers using the Provider and Vendor Table - Vendor Information page.
4. Define benefit coverage using the Coverage Codes - Health Coverage Codes page.
5. Establish rate tables using the benefit rates tables.
6. Establish calculation rules using the Calculation Rules Table - Calculation Rules page.

Next, build your Automated Benefits program:

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

Related Links

"Setting Up Deduction Codes" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)
"Defining Benefit Plans" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)
"Setting Up Benefit Rates" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)
"Setting Up Calculation Rules" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)
"Setting Up Benefit Providers" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Building Benefit Programs with the Benefit Program Table

To set up benefit programs for automation, use the Benefit Program Table (BEN_PROG_DEFN) component.

This section provides an overview of building benefit programs.

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Pages Used to Build the Benefit Program Table

Page Name	*Definition Name*	*Usage*
Benefit Program Table - Benefit Program Page	BEN_PROG_DEFN1	Define benefit program information.
Benefit Program Table - Plan Type and Option Page	BEN_PROG_DEFN2	Set up plan types and options for the benefit program and add important information about plan types, including event and eligibility rules.
Benefit Program Table - Cost Page	BEN_PROG_DEFN3	Calculate costs and credits by linking rate and calculation rules to a benefit program and plan type.
Benefit Program/Plan/Options	RUNCTL_BAS_PGM	For a specified benefit program, print program-level information (effective date and status, program type, age criteria, COBRA, FMLA, and FSA parameters, and self-service configuration) along with the plan-level and option-level structure (event rules, eligibility rules, coverage levels, and deduction codes).
Benefit Program Costs	RUNCTL_BAS_PGM	For a specified benefit program, print the program description along with the cost and credit structure for all of the offered options (deduction and earnings codes, rate information, and calculation rules).

Understanding Building Benefit Programs with the Benefit Program Table

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

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

Related Links

"Building Benefit Programs" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Benefit Program Table - Benefit Program Page

Use the Benefit Program Table - Benefit Program page (BEN_PROG_DEFN1) to define benefit program information.

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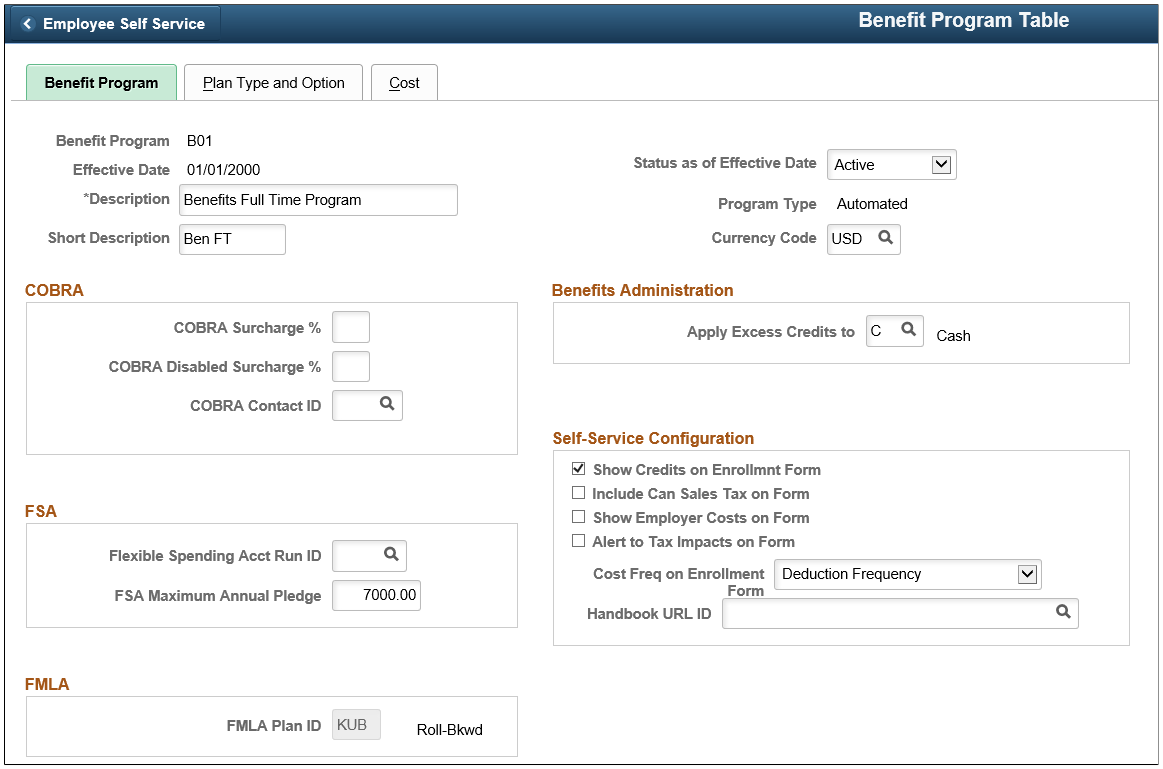
Navigation

Set Up HCM > Product Related > Base Benefits > Program Structure > Benefit Program Table > Benefit Program

Image: Benefit Program Table - Benefit Program page

This example illustrates the fields and controls on the Benefit Program Table - Benefit Program page. You can find definitions for the fields and controls later on this page.



Effective Date — The date the row in the table becomes effective. This date determines when you can view and change information.

Status as of Effective Date — Indicates whether a row in the table is *Active* or *Inactive.* Processes ignore benefit programs designated as *Inactive,* even if the effective date defines the program as current.

Program Type — The type of program can be *Manual* or *Automated.* If you are using only the Manage Base Benefits business process, this option is automatically set to *Manual.* If you activate Benefits Administration on the Installation Table, it is automatically set to *Automated.*

Currency Code — The type of currency that is used for this program's benefit and deduction calculations.

COBRA

This group box defines the rules regarding the surcharge amounts that your organization imposes on COBRA (Consolidate Omnibus Budget Reconciliation Act) plans.

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COBRA Surcharge % (COBRA surcharge percentage)

Enter the percentage amount of the benefit cost that you want added to the benefit cost. For example, if the cost of medical coverage is 100 USD and the COBRA surcharge % is 30%, the cost for medical coverage for someone on COBRA would be 130 USD.

COBRA Disabled Surcharge % (COBRA disabled surcharge percentage)

If you want a different percentage amount for a disabled person, enter that percentage amount. If you leave the field blank, the surcharge amount entered in the COBRA Surcharge % field will be applied to a disabled person with COBRA coverage.

FSA

For FSA (flexible spending account) Administration users. Use this group box to set up your organization's business rules for flexible spending accounts.

Flexible Spending Acct Run ID (flexible spending account run ID)

For FSA Administration users. Enter the FSA run ID that you created on the FSA Run Table.

FSA Maximum Annual Pledge

Enter the maximum amount that an employee can contribute across all flexible spending accounts within the Benefit Program for a plan year.

FMLA

Use this group box to define the rules for processing under FMLA (Family Medical Leave Act).

FMLA Plan ID (FMLA plan identification)

Enter the FMLA plan ID that you created on the FMLA Plan Table.

Benefits Administration

This group box is available if Benefits Administration is activated on the Installation Table. If you are using flexible credits, it is used to define how the system will process excess flexible credit amounts when an employee does not designate a rollover election during benefit enrollment.

Apply Excess Credits to

The system can convert excess flexible credit amounts to:

C (Cash)

D (FSA-Dependent Care)

F (Forfeit Excess Credit)

H (FSA-Health Care)

R (FSA Retirement Counseling)

S (Savings-401(k))

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Self-Service Configuration

Use this group box to define the rules for displaying and processing the PeopleSoft Benefits Self Service application pages.

Show Credits on Enrollmnt Form (show credits on enrollment form) — Select if you want credit amounts to appear on the enrollment form. If you do not offer flexible credits, you may not want this heading to appear on the form.

Include Can Sales Tax on Form (include Canadian sales tax on form) — Select if you want Canadian sales tax information to appear on the Benefits Self Service Enrollment Summary page.

Show Employer Costs on Form — Select to display the employer's contributions (costs) on the enrollment form

Alert to Tax Impacts on Form — Select to alert the employee to any potential tax impacts (due to the employer's contributions) on the enrollment form. Most typically, this would be if a T-Tax (imputed income) component existed.

Cost Freq on Enrollment Form (cost frequency on enrollment form) — This defines how the cost of the benefits appears on the enrollment form. Values are

Annual: Displays the costs as annual amounts.

Deduction: Displays the costs as per-pay-period amounts.

Handbook URL ID (handbook uniform resource locator identification) — Enter the URL ID that connects to your benefit handbook. URL IDs are set up in the URL Table.

Note: The URL entered in this field displays as a link in the Resources group box in the fluid Benefits Enrollment page. Only one handbook can be assigned per benefit program.

Related Links

"Building Benefit Programs" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Benefit Program Table - Plan Type and Option Page

Use the Benefit Program Table - Plan Type and Option page (BEN_PROG_DEFN2) to set up plan types and options for the benefit program and add important information about plan types, including event and eligibility rules.

Navigation

Set Up HCM > Product Related > Base Benefits > Program Structure > Benefit Program Table > Plan Type and Option

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Image: Benefit Program Table - Plan Type and Option page

This example illustrates the fields and controls on the Benefit Program Table - Plan Type and Option page. You can find definitions for the fields and controls later on this page.

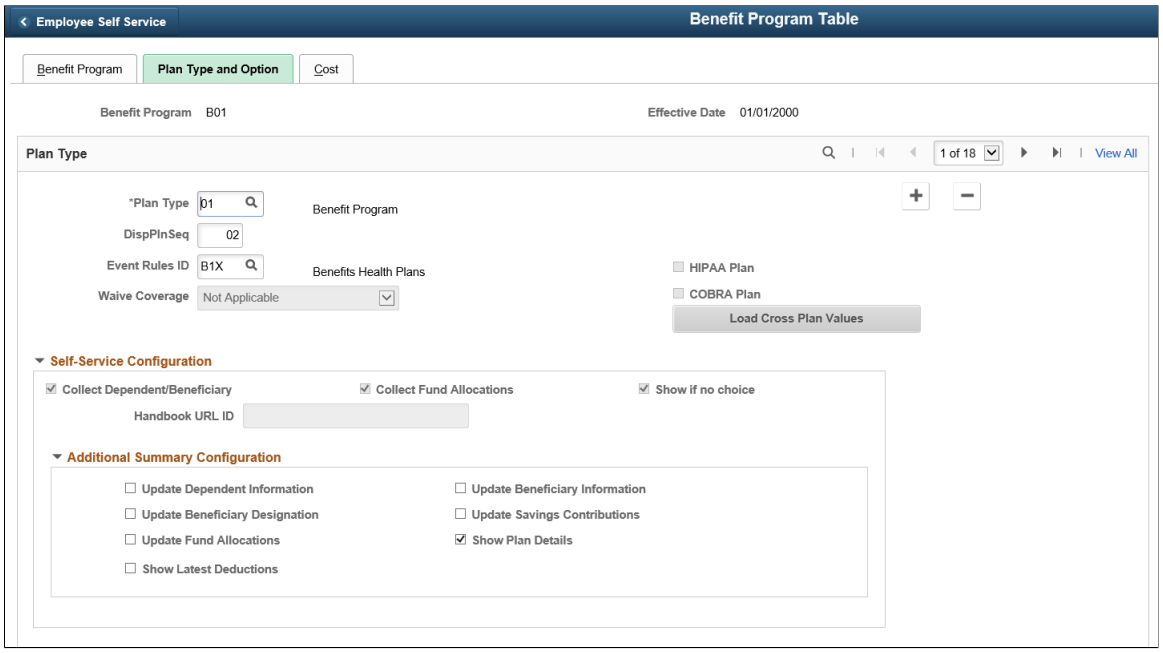
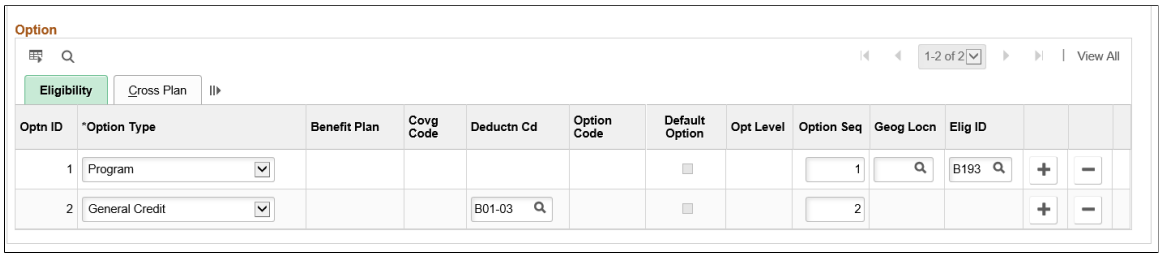


Image: Benefit Program Table - Plan Type and Option page

This example illustrates the fields and controls on the Benefit Program Table - Plan Type and Option page.



Use this page to set up the basic plan types for your benefit program.

Use the Self-Service Configuration group box to define the rules for displaying enrollment and plan information on the fluid Benefits plan type pages.

Collect Dependent/Beneficiary

Select this check box when you want the system to collect information pertaining to dependents and benefits and display that information on the fluid Benefit Summary and the plan enrollment pages.

This works in conjunction with the Ignore Dep/Ben Edits check box on the Event Rules page.

Collect Fund Allocations

When this check box is selected, the system collects the information pertaining to savings plans and displays that

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	information on the fluid Benefit Summary and the plan enrollment pages.
Show if no choice	This check box controls whether a plan type appears on the enrollment when the employee has no option to choose and cannot waive out of the option. A good example is paid vacation. Employees receive the benefit, but you don't display it on the enrollment form. If the check box is selected, the system displays the plan type in the enrollment form summary. When the check box is deselected, the system will not display the plan type. This setting is not relevant to 6x plans (flexible spending accounts) and 9x plans (vacation buy/sell), which are always shown in self-service.
Handbook URL	If you have a special handbook for this plan type, you can enter the URL ID. URL IDs are set up in the URL Table.

This table displays the field requirements for the Plan Type level of the Plan Type and Option page for the Benefit Program row (Plan Type *01*) and the Benefit Plan rows (Plan Types *1x-9x*):

Field	***Values***	***Values***	***Values***
Plan Type	*01*	*1-5x, 7-9x*	*6x*
Display Sequence	Required; default is Plan Type. Must be unique within the benefit program.	Required; default is Plan Type. Must be unique within the benefit program.	Required; default is Plan Type. Must be unique within the benefit program.
Event Rules ID	Required	Required	Required
Waive Coverage	Not available for selection	Allowed, but default is *N* (not allowed).	Allowed, but default is *N* (not allowed).

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

Additional Summary Configuration

Use this group box to define the rules for displaying information on the fluid Benefit plan pages within Benefits Summary.

Update Dependent Information check box	This check box controls if updating dependent information is allowed or not.
Update Beneficiary Designation check box	This check box controls if changing the beneficiary allocations is allowed or not.
Update Fund Allocations check box	This check box controls if changing the fund allocations on 4X plans are allowed or not.

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Show Latest Deductions check box	This check box controls if the latest deductions section (displaying deduction data from North America Payroll) should be shown or not.
Update Beneficiary Information check box	This check box controls if updating and adding beneficiary information is allowed or not.
Update Savings Contributions check box	This check box controls if changing the savings allocations on 4X plans are allowed or not.
Show Plan Details check box	This check box controls if drill down is available to show more details of a plan type or not.

Associating Plan Options with Plan Types

Use the Benefit Program Table - Plan Type and Option page and the Eligibility tab in the Option group box to set up the options within a plan type.

When you create a new option row by clicking the Insert Row button, the system automatically assigns the option a unique option ID value. You cannot update this value.

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

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

Note: The manner in which you complete the rest of a given option row depends on the plan type to which the row belongs and the option type of that row.

Field Requirements for the Option Grid by Plan and Option Type

This table describes field requirements for the Option Grid by Plan and Option type:

Field	***Values***	***Values***	***Values***	***Values***
Plan Type	01	01−3x	1x−9x	1x−9x

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Field	*Values*	*Values*	*Values*	*Values*
Option Type	*P* - Program	*G* - General Credit	*W* - Waive Controlled by waive coverage.	*O* - Option
Benefit Plan	Not allowed	Required for plan types 2x−3x.	Required for plan types 2x−3x, when you want a credit for the waive election. Not allowed for other plan types.	Required
Covg Code (coverage code)	Not allowed	Not allowed	Not allowed	Required for plan type 1x. Not allowed for other plan types.
Deductn Code (deduction code)	Not allowed	Required	Required for plan types 1x−3x if you want a credit for the waive election. Not allowed for other plan types.	Required
Option Code	Not allowed	Not allowed	Required	Required
Default Option	Not allowed	Not allowed	Allowed	Allowed for plan types 1x−3x, 5x, 7x, and 8x. For 2x, you cannot define options that require coverage to be specified at the employee level as default options. Only the Waive option is allowed as the default for plan types 4x, 6x, and 9x. Options requiring proof are not allowed as defaults.
Opt Level (option level)	Not allowed	Not allowed	Not allowed	Required

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Field	*Values*	*Values*	*Values*	*Values*
Option Seq (option sequence)	Required	Required	Required	Required
Geog Locn (geographic location)	Allowed	Not allowed	Not allowed	Allowed
Elig ID (eligibility rules ID)	Required	Not allowed	Not allowed	Required

Option Type Designations Allowed Per Plan Type

This table describes option type designations allowed per plan type:

Plan Type	*Option Type Allowed*
01 (Benefit Program)	*G, P*
1x–3x	*G, W, O*
4x–9x	*W, O*

Setting Up the Benefit Program Row (Plan Type 01)

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

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

Benefit Program Table - Cost Page

Use the Benefit Program Table - Cost page (BEN_PROG_DEFN3) to calculate costs and credits by linking rate and calculation rules to a benefit program and plan type.

Navigation

Set Up HCM > Product Related > Base Benefits > Program Structure > Benefit Program Table > Cost

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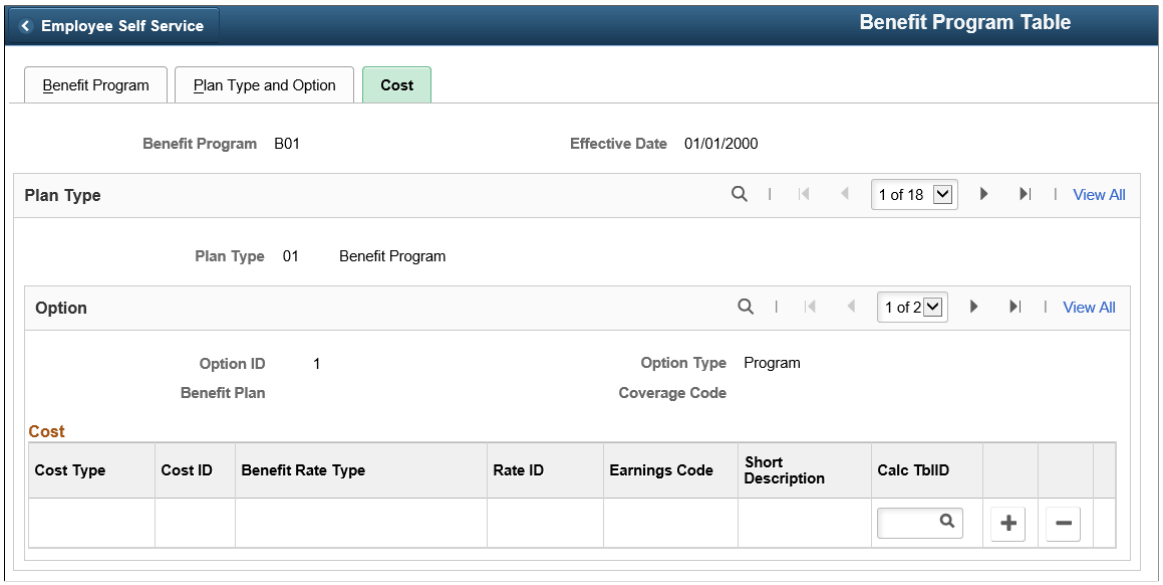
Image: Benefit Program Table - Cost page

This example illustrates the fields and controls on the Benefit Program Table - Cost page. You can find definitions for the fields and controls later on this page.



Cost Type Each option can have one price element defined, while options and general credits can have multiple credit elements defined. Select from the following values:

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

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

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

Benefit Rate Type Enter which table to use to determine rates for the cost or credit entry.

Rate IID Indicate the appropriate rate table because multiple tables may exist. In the case of credits, only the *Employee Portion* is picked up and reflected as the credit amount.

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

Calc TblID (calculation rules table ID) Indicates an applicable calculation rule, which references what dates and rules to apply to determine age, service, and compensation amounts for the purpose of rate calculation.

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Calculation rules are also used to determine what point in time to use to determine the calculation of service for service step calculations.

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

Rate and Calculation Rules Requirements

This table describes rate and calculation rules requirements:

Plan Type Series	*Rate Table Required?*	*Calculation Rules Required?*	*Comments*
01	Yes	Yes	Earnings codes are also required for credits.
Ax	Yes	Yes	
1x	Yes		
2x	Yes	Yes	
3x	Yes	Yes	
4x	Not Allowed	Yes	The calculation rules support the service step calculation and provide a placeholder for possible future functionality.
5x–9x	Not Allowed	Not Allowed	Not Used

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

Related Links

"Building Benefit Programs" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)
Defining Event Rules

Working with Flexible Credits

This section provides an overview of flexible credits and discusses how to use flexible credits to achieve your Benefits Administration goals.

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Pages Used to Work with Flexible Credits

Page Name	*Definition Name*	*Usage*
Benefit Program Table - Plan Type and Option	BEN_PROG_DEFN2	Link plan types to the benefit program and to add important information about plan types.
Benefit Program Table - Cost	BEN_PROG_DEFN3	Link a benefit program and plan type to rate and calculation rules.

Understanding Flexible Credits

You can define three kinds of credits for your employees:

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

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

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

Related Links

"Establishing Earnings Programs" (PeopleSoft HCM 9.2: Payroll for North America)
"Setting Up FEGLI Codes" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Using Flexible Credits to Achieve Your Benefits Administration Goals

This section provides examples of how to:

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

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

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

1. Access the Benefit Rate Table page.

   Add a new rate schedule for the credit amount.

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

   Enter a *G* row for the plan type credit.

3. Access the Benefit Program - Cost page and enter *Credit* as your cost type and reference the new rate schedule created for plan type general option.

Example 2: Encouraging Employees to Elect Employee-Only Coverage

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

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

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

Example 3: Defining Credits for Participants Who Waive Coverage

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

1. Access the Benefit Rates table.

   Define the amount of the credit for waived coverage.

2. Access the Benefit Program Table - Cost page.

   Insert a row for the waived coverage credit.

3. Enter *Credit* as the cost type value on the Benefit Program - Cost page. This is the flexible credit that employees will receive when taking the waive option.

Example 4: Defining Credit Amounts Based on Employee Health Coverage

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

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

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

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

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

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

   Set up an option type row with a *General* value. Give it the same deduction code as the other life plans.

2. Access the Benefit Program Table - Cost page.

   Enter a *Credit* cost row for the general credit. Give it the same rate type and rate table ID as the one times salary life plan option.

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

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

1. Access the Benefit Plan table.

   Define a special 50,000 USD Basic Life Benefit Plan.

2. Access the Life and AD/D Plan Table page.

   Complete the life plan definition of the 50,000 USD Life Benefit Plan.

3. Access the Benefit Program Table - Plans and Options page.

   Create a General row for the 50,000 USD Life Benefit plan. Give it the same deduction code as the other benefit plan options.

4. Access the Benefit Program Table - Cost page.

   Enter *Credit* as the cost type for the General credit. The *Credit* cost row should reference the appropriate rate schedule, earnings code, and set of calculation rules.

Example 7: Adding the Benefit Plan and Coverage Code Rates for an Adult Child

Suppose that you want to add an adult child to the employee's benefit plan.

1. Access the Benefit Rates table page.

   Insert a row for the new coverage code that includes the adult children.

2. Enter the appropriate Employer and Employee rates on either the Composite Rates or the Detail Rates tab.

   On the Tax Adjustment tab, enter the amount on Tax Adjustment column for the adult child's portion of the premium.

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Note: The amount on the Tax Adjustment column is only a memo rate because it is already included in the total rate. Accordingly, the Total Rate column formula does not include the new column

When no incremental cost exists for adding coverage for adult children, leave the Tax Adjustment column blank. If the state requires the application of an imputed rate though there is no incremental cost to the employee, you must calculate the amount and enter it in the Tax Adjustment column.

Separate rate rows are required on the rate table for coverage codes that include adult children and those that do not. You must add a row for Adult Child and enter the rate in the Tax Adjustment column on Benefit Rate Table page.

Setting Up Cross-Plan Validation Checks

This section discusses how to use the Benefit Program Table to set up cross-plan validation.

Note: You cannot enter cross-plan validation rules for the Benefit Program (plan type 01). Cross-plan validation must be on a one-to-one basis as an enrollment verification for disability and life insurance plans.

Pages Used to Set Up Cross-Plan Validation Checks

Page Name	*Definition Name*	*Usage*
Benefit Program Table - Plan Type and Option Page	BEN_PROG_DEFN2	Link plan types to the benefit program and add important information about plan types.
Load Cross Plan Values Page	BEN_PROG_XLOAD	Create codes that will automatically populate the Cross-Plan Type, Coverage Limit (Pct), and Check Dependents fields on the Benefit Program Table - Plan Type and Option page.

Benefit Program Table - Plan Type and Option Page

Use the Benefit Program Table - Plan Type and Option page: Cross Plan tab page (BEN_PROG_DEFN2) to link plan types to the benefit program and add important information about plan types.

Navigation

Set Up HCM > Product Related > Base Benefits > Program Structure > Benefit Program Table > Plan Type and Option

Select the Cross Plan tab in the Option group box.

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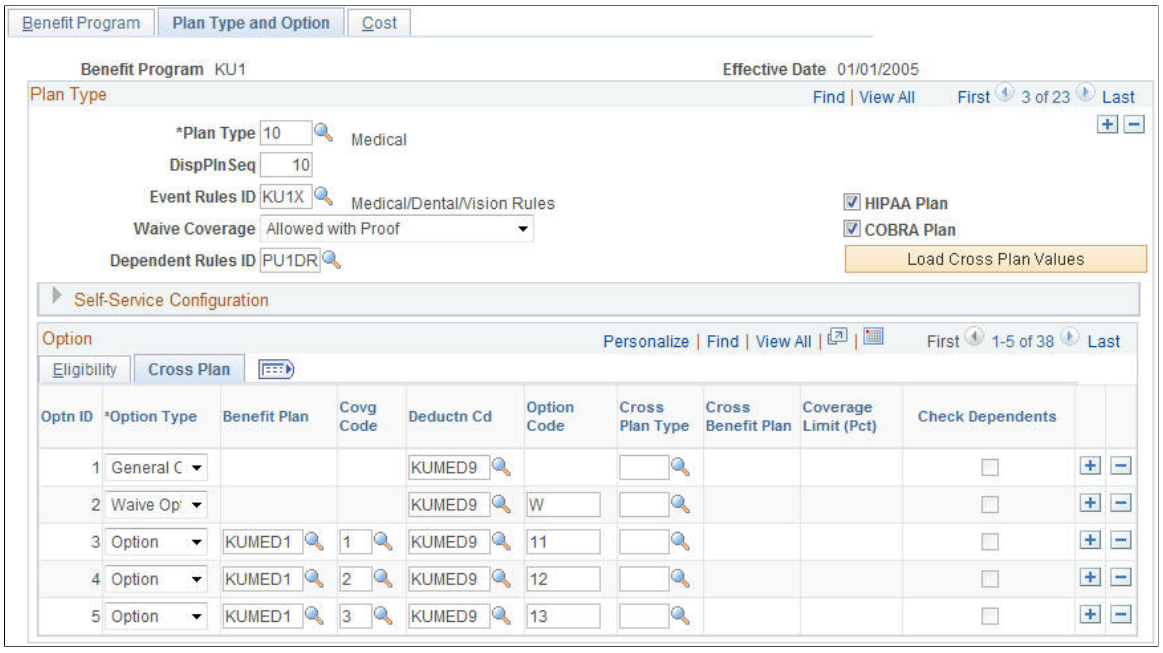
Image: Benefit Program Table - Plan Type and Option page: Cross Plan tab

This example illustrates the fields and controls on the Benefit Program Table - Plan Type and Option page: Cross Plan tab. You can find definitions for the fields and controls later on this page.



Option: Cross Plan Tab

Cross Plan Type

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

Cross Benefit Plan

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

Coverage Limit (Pct) (coverage limit percentage)

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

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

Check Dependents

When selected, this option informs the system to check that potential dependents (for the specified benefit plan or option) are also enrolled as dependents for the specified Cross Benefit plan. This is available only to 1x plan types and becomes

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available after you associate a cross-plan type with a benefit plan.

Load Cross Plan Values Page

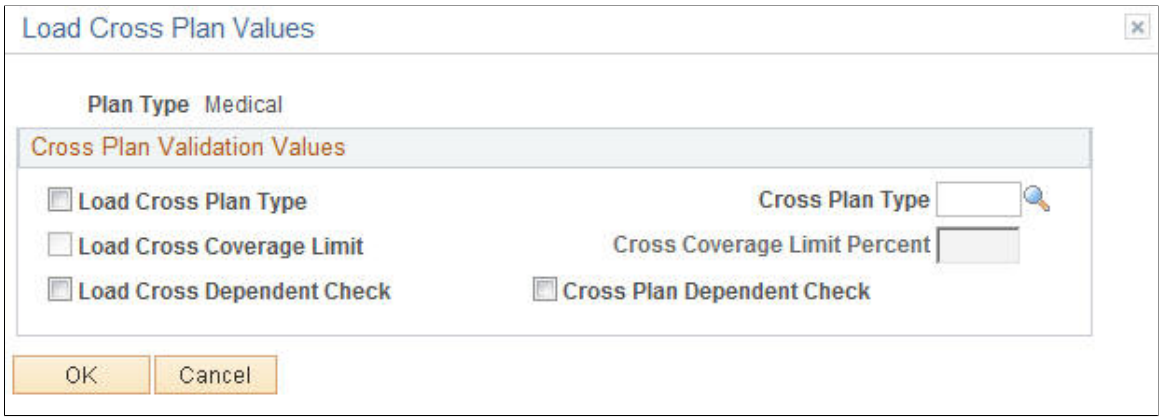
Use the Load Cross Plan Values page (BEN_PROG_XLOAD) to create codes that will automatically populate the Cross-Plan Type, Coverage Limit (Pct), and Check Dependents fields on the Benefit Program Table - Plan Type and Option page.

Navigation

Click the Load Cross Plan Values link on the Plan Type and Option page.

Image: Load Cross Plan Values page

This example illustrates the fields and controls on the Load Cross Plan Values page. You can find definitions for the fields and controls later on this page.



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

Cross Plan Type Identifies the benefit plan that employees or dependents must be enrolled in before they are eligible for enrollment in the specified benefit plan or option. This field is available to all plan types.

Cross Coverage Limit Percent Places a limit on the amount of the coverage the dependent can receive. This is available only to 2x plan types.

Cross Plan Dependent Check When selected, this option tells the system to check whether potential dependents for the specified benefit plan or option are also enrolled as dependents for the specified Cross Benefit plan. This is available only to 1x plan types.

OK Click to save the information and close the page. This option copies the criteria to each underlying option row.

Cancel Click to close the page and not save any information.

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Note: You can also use the Load Cross Plan Values page to clear the cross-plan validation values for a plan type. Access the Load Cross Plan Values page, select the Load check box and deselect the values for the fields that you want to clear from the cross plan type, coverage limit percent, and dependent check fields, and click OK. The system clears the fields that you selected.

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Chapter 9

Administering Flexible Spending Accounts

Understanding FSA Administration

This section discusses:

- Payment processing.
- FSA Administration processes.

Payment Processing

Payment processing is based on the one or more benefit programs that you group together and the plan year that you identify. You can run payment cycles simultaneously. Scheduling frequent payment processing is to your advantage because employee year-to-date information remains current.

FSA Administration Processes

This table lists the FSA Administration processes:

Process	*Usage*	*What the System Does*
FSA Claims Processing (FSA001)	Process claim payments for the employees in the plan years and the benefit programs that you include.	Processes claims and updates claim and payment detail and year-to-date activity. After you enter claim data, claim status is Submitted.
Account Closure (FSA002)	Close out previous year accounts, after you have processed all claims for the year—probably at the second quarter of the current year.	Updates all prior year accounts to Closed status and produces a report that accounts for prior-year funds.
Check Print (FSA003)	Select a type of check to print.	Prints checks.
Check Register (FSA004)	Define check register information for printing.	Prints check register.
Quarterly Account Register (FSA005)	Define quarterly balance statement information for printing.	Prints quarterly balance statements.

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Process	*Usage*	*What the System Does*
FSA Check Reversal (FSA006)	Reverse paid checks to claims.	If a claim is processed and the check is not printed, the process sets: • Check status to Void. • Claim status to Pended. If a claim is processed and the check is printed, the process: • Sets check status to Reversed. • Sets claim status to Pended. • Reduces the claim's Paid-to-Date field by the appropriate amount, and marks it so it will be picked up during the next Claims Processing run.
FSA Claim Reversal (FSA007)	Reverse an FSA claim and all checks that reimburse that claim.	If a claim is not processed, the process sets the claim to Void. If a claim is processed, but the check is not printed, the process: • Sets claim status to Reversed. • Sets check status to Void. If a claim is processed and the check is printed, the process: • Sets claim status to Reversed. • Sets check status to Reversed. • Clears the claim's Paid-To-Date field. • Subtracts the claim's submitted and approved amounts from the committed FSA balances. • Lists other claims that are affected by the reversal.

Common Elements Used for FSA Administration

Calendar Year

Enter the year for which you want to process claims. You can process more than one run ID for different years in the same payment processing cycle. However, each combination of calendar year and run ID must be unique.

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Form ID	Select the stock that you want to use for check printing in this payment cycle.
Participant	An individual employee who participates in an employer benefits plan. For example, if an employee contributes to an employer's tax deferred savings plan, he is considered a participant of that plan. All participants are considered employees, but from plan to plan all employees might not be participants.

(USA) Entering Health Care Claims

This section provides an overview of claims processing and discusses how to enter health care claim data.

Pages Used to Enter Health Care Claims

Page Name	*Definition Name*	*Usage*
Create FSA Claims Page	FSA_CLAIM_ENTRY	Enter health care claim data for both active and terminated employees.
Modify FSA Claims (Modify Flexible Spending Accounts Claims)	FSA_CLAIM_PARTIC	Make changes to claim data before you process a payment for a health care claim.

Understanding Claims Processing

FSA Administration starts with your receipt of employee claims. As employees submit claims, you use specific health care and dependent care pages to enter data. Continue entering data and making changes until you're ready to process payments.

When you submit a claim, the system can allow a 2 1/2 month grace period. This allows employees to submit claims for services that occurred 2 1/2 months after the end of the plan year. Whether this grace period is allowed is determined by the dates entered in the FSA Service From Date and Through fields on the FSA Admin Config page.

Employees can be enrolled in two FSA plans that have overlapping service dates. So if a claim is submitted that falls within the service dates of two plans, the system selects the older plan and checks whether an amount is available for reimbursement.

- If no money is available for reimbursement in the older plan, the claim is paid using the later plan.
- If money is available for reimbursement in the older plan and the amount available can cover the entire claim, the claim is paid using the older plan.
- If money is available for reimbursement and the amount available cannot cover the entire claim, the claim is paid using both plans.

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- If the money available in both plans is less than the submitted claim, the claim is paid using the amount available in both plans and the remaining submitted amount is denied.

Before you process a payment, make changes to claim data on participant pages. You use the participant pages to locate claim and payment data, using a variety of search criteria.

Create FSA Claims Page

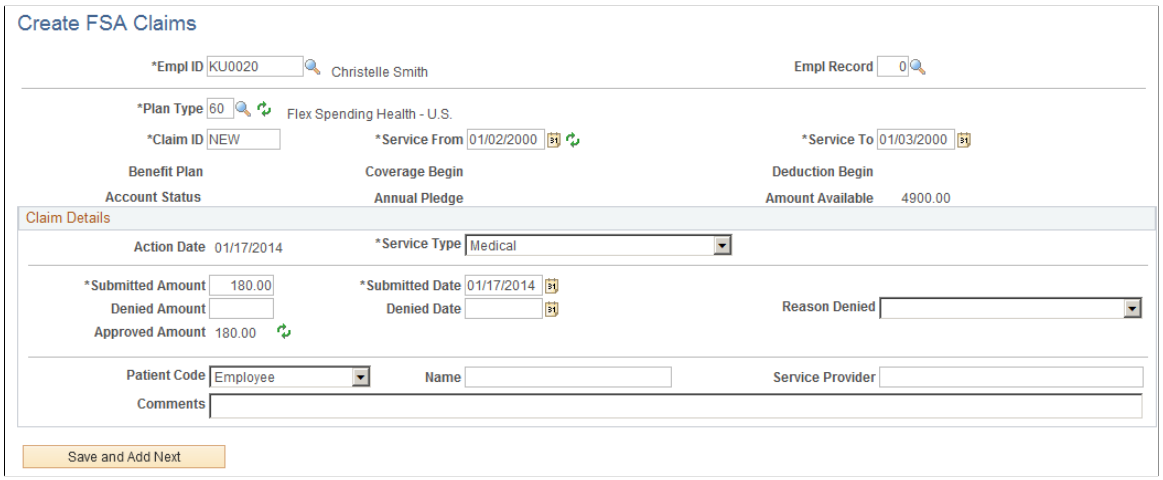
Use the Create FSA Claims (Create Flexible Spending Accounts Claims) page (FSA_CLAIM_ENTRY) to enter health care claim data for both active and terminated employees.

Navigation

Benefits > Admin Flex Spending Acct US > Submit Claims > Create FSA Claims > Create FSA Claims

Image: Create FSA Claims page

This example illustrates the fields and controls on the Create FSA Claims page. You can find definitions for the fields and controls later on this page.



For terminated employees that still have an active FSA enrollment status, you can enter claims through the end of the FSA plan year and process claims up to the full annual pledge elected.

Claim ID

Displays the claim ID. The system can automatically assign the claim ID. When you enter a new claim, the Claim ID field is automatically set to *NEW*. If you do not change it, the system replaces it with the next available eight-digit claim ID when you save the data. After the system assigns the claim ID to the data entry record, it displays a message with the ID that it assigned. This enables you to record the ID on the employee's paperwork, if required.

Service From and **Service To**

Select the dates on which the eligible expenses occurred. If you enter service dates that are not within the same calendar year, a warning appears. A warning also appears if the service dates are not within the coverage begin and end dates. After you enter the service from date, the system displays the FSA benefit plan data

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for the employee, including the annual pledge. The data is based on the plan year.

Claim Details

Action Date Displays the date on which the claim was entered.

Service Type Select a service type for this claim from the list of available options.

Submitted Amount Enter the amount submitted on this claim. The system verifies that this amount does not exceed the annual pledge amount. An employee can submit a health care claim amount that is more than the year-to-date contribution. If the submitted amount is more than the annual pledge amount, the system pays up to the annual pledge amount that is available and rejects the rest of the claim. If the submitted amount is more than the year-to-date contribution but less than the annual pledge amount, the system pays the claim. For example, if an employee pledges 1200 USD for the year and submits a claim for 600 USD after contributing only 100 USD, the system pays 600 USD.

Denied Amount Enter the values to deny part of a claim or an entire claim. Use these values to indicate expenses that are not eligible for payment under the flexible spending account.

Denied Date Enter the values to deny part of a claim or an entire claim. Use these values to indicate expenses that are not eligible for flexible spending accounts, based on the Section 125 rules.

Reason Denied Enter the values to deny part of a claim or an entire claim. Use these values to indicate expenses that are not eligible for flexible spending accounts, based on the Section 125 rules.

Select from the following values:

- *Already Paid*
- *Claim Pended-Exceeds Avail Bal* (claim pended-exceeds available balance)
- *Not a Covered Expense*
- *Submitted Amt Exceeds Balance* (submitted amount exceeds balance)

Approved Amount Displays a calculated value, based on the data that you enter.

Patient Code For health care claims only, the Patient Code, Name, and Service Provider fields are optional informational fields and are for your use only.

If the claim is for an employee, enter the patient code *Employee.* Other values are *Dependent, Spouse,* and *[None]*.

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If the patient code value is *Dependent* or *Spouse,* enter the name of the related person in the Name field.

(CAN) Entering Claims

This section provides an overview of claims processing and discusses how to enter claim data.

Pages Used to Enter Claims

Page Name	*Definition Name*	*Usage*
Create Health Care Claim Page	HC_CANAD_DATA_ENTY	Enter a new health care claim and provide details for each claim line item.
Modify Health Care Claim - Heath Care Participant	HC_CANAD_PARTIC	Make changes to claim data before you process a payment for a health care claim.
Modify Health Care Claim - Claim Details	HC_CANAD_PARTIC2	Change detailed information about a particular participant health care claim.
Create Retirement Counsel Claim	RC_CANAD_DATA_ENTY	Enter new retirement claims with a detailed level of information.
Modify Retirement Counsel Claim - Claim/Comments	RC_CANAD_PARTIC	Review basic claim and comment information for a specific claim.
Modify Retirement Counsel Claim - Claim Details	RC_CANAD_PARTIC2	Change detailed information about a particular participant retirement counseling claim.

Understanding Claims Processing

Canadian employers use the Canadian Health Care and Canadian Retirement Counseling Data Entry pages. Canadian pages operate much like the U.S. pages described in the preceding sections. Additional Canadian data entry pages allow for multiple line items per claim.

Create Health Care Claim Page

Use the Create Health Care Claim page (HC_CANAD_DATA_ENTY) to enter a new health care claim and provide details for each claim line item.

Navigation

Benefits > Admin Flex Spending Acct CAN > Submit Claims > Create Health Care Claim > Create Health Care Claim

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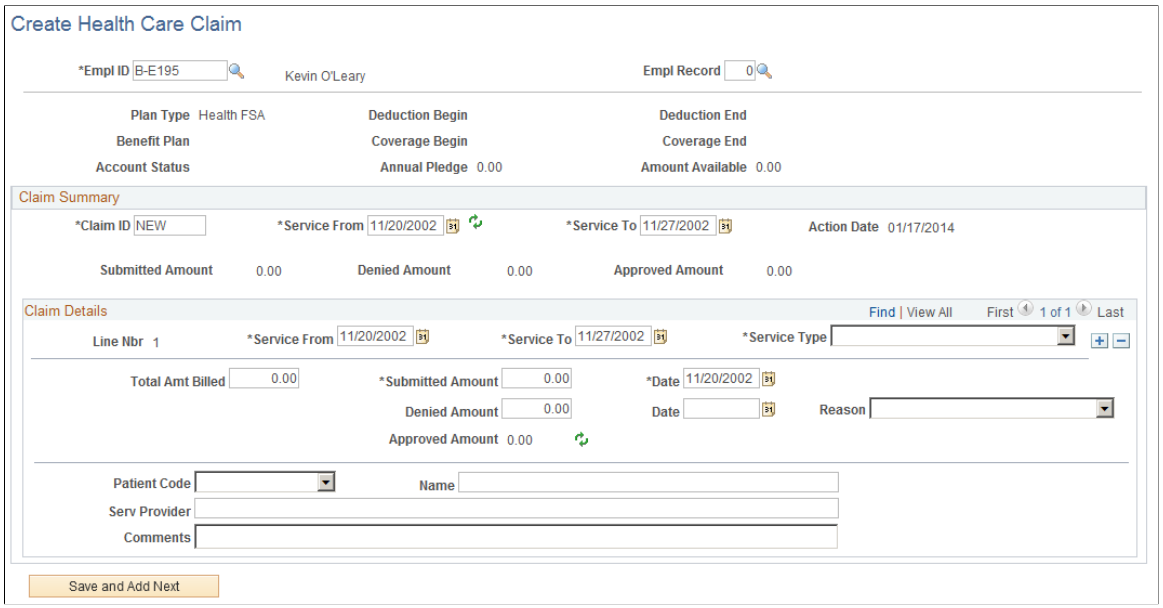
Image: (CAN) Create Health Care Claim page

This example illustrates the fields and controls on the (CAN) Create Health Care Claim page. You can find definitions for the fields and controls later on this page.



Service From and **Service To**	These dates represent the earliest and latest entries of the detail line items. When you finish entering these dates, access the Health Care Claims Entry page.
Total Amt Billed (total amount billed)	Enter an amount for each claim line item.
Patient Code	If the claim is for an employee, enter *Employee.* Other values are *Dependent, Spouse,* and *[None]*. If the relationship is *Dependent* or *Spouse,* enter the name of the related person.

Revenue Canada requires that Canadian Retirement Counseling claims be paid directly to the service provider, not the claimant. For this reason, the Canadian Retirement Counseling page requires the entry of a provider ID. This provider information appears on the check stubs for the claimant, along with employee claim information. Special care is required in situations that involve partial payments.

Processing FSA Claim Payments

This section provides an overview of payment cycle activities.

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Pages Used to Process FSA Claim Payments

Page Name	*Definition Name*	*Usage*
Specify Processing Parameters	RUNCTL_FSA_CLAIMS	Set up the information that controls a payment processing cycle. Claims for all employees in the benefit program who are associated with the run ID and a service from date in the calendar year must have a claim status of *Submitted* or *Pending.*
FSA Claim Payment Process	PRCSRUNCNTL	Process all claim data with statuses of *Submitted, Pending,* or *Ready To Pay.*
Print Cheques Print Checks	RUNCTL_FSA003CN RUNCTL_FORM_ID	Print FSA claim checks for records flagged in FSA001.
Print Cheque Register Print Check Register	RUNCTL_FSA004CN RUNCTL_FSA004	Print a list of the checks printed on the FSA Check Print Report.

Understanding Payment Cycle Activities

For each payment cycle, perform these activities:

1. Set up a run control ID for the payment processing cycle.
2. Initiate the FSA Claims Processing process.
3. To process claims payments, initiate FSA Claims Processing from the Process menu.

The system then performs the following steps:

1. Based on the run control ID that you set up, processes all claim data with statuses of *Submitted, Pending,* or *Ready To Pay.*
2. During payment processing, verifies that claims approved year-to-date do not exceed the annual pledge amount for the health care account or the year-to-date contribution for the dependent care account.
3. Based on the minimum check amount that you define for employees in a benefit program, holds claims that are less than the minimum, changing the claim status to *Pending.*

   The system processes the claim but does not print a check until the total of the pending minimum reaches the minimum check amount. You define the minimum check amount for participants in a benefit program on the Benefit/Deduction Program page.
4. When the total for pending claims reaches the minimum, during the next processing cycle the system processes a payment for the employee.
5. Holds dependent care claims that are more than the year-to-date contribution amount.

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For example, if an employee submits a dependent care claim for more than the amount contributed to the dependent care FSA as of that date, the system pays the claim up to the amount in the FSA and holds the excess in a pending status.

6. After processing a claim, changes the claim status from *Submitted* to *Pending, Ready to Pay,* or *Fully Processed.*

Printing Checks

Access the Print Check Register page.

To print checks, set up and run the Check Print process using the Reports menu. This process prints checks for all of the claims with statuses of *Pay this Run* and form IDs that are equal to the form ID defined on the Print Checks or Print Cheques page.

The Check Print process also updates the claim payment status from *Pay this Run* to *Paid.*

Printing the Check Register

Access the Print Check Register page.

To print the Print Check Register, initiate the Check Register process. One check register exists for each benefit plan year, sorted by the health care and dependent care claims.

Related Links

Benefits Administration Reports: A to Z

Viewing Claim and Payment Details

This section provides an overview of claim and payment details.

Pages Used to View Claim and Payment Details

Page Name	*Definition Name*	*Usage*
FSA Claim Details Page	FSA_CLAIM_DETAILS FSA_CLAIM_DET_CAN	View FSA claim entry information for Canada and the U.S. (on separate pages).
FSA Payment Details Page	FSA_PAYMENT_DETAIL	View payment detail for Canada and the U.S. for any claim payment.
Year-to-Date Activity Page	FSA_YTD_ACTIVITY	View all year-to-date data for Canada and the U.S. for an employee.

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Understanding Claim and Payment Details

Claim detail refers to specific claims. Payment detail refers to specific payments that an employee receives during a plan year. *Year-to-date activity* refers to total pledge, contribution, claim, and payment amounts.

Use the FSA Claim Details page to view claim detail for any claim. You locate a claim by entering one or more search criteria.

To request a search based on FSA claim status, enter one of these codes: *F* (fully processed), *J* (rejected), *P* (pending), *R* (ready to pay), *S* (submitted), or *X* (reversed).

Note: (CAN) Canadian users can review two levels of claim details. Both U.S. and Canadian users review claims at the first level of claim details, the FSA Claim Details page. Canadian users use the Health Care Participant - Claim Details page to review further details about health care and retirement counseling claims.

FSA Claim Details (CAN) Page

Use the FSA Claim Details page (FSA_CLAIM_DETAILS) to view FSA claim entry information for Canada.

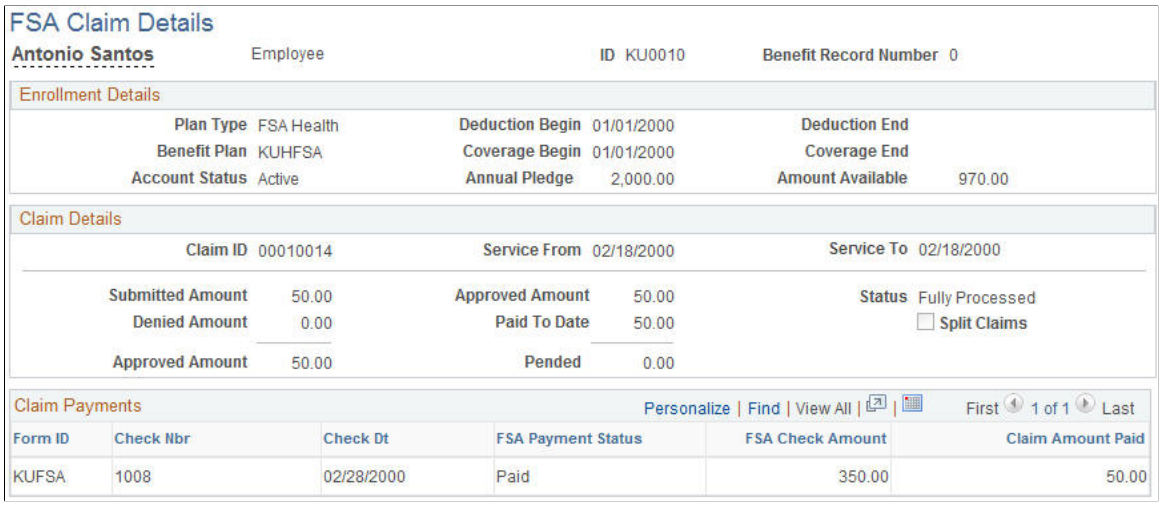
Navigation

Benefits > Admin Flex Spending Acct CAN > Review Claim/Payment Info > FSA Claim Details > FSA Claim Details

Select the FSA Claim Details tab.

Image: FSA Claim Details (CAN) page

This example illustrates the fields and controls on the FSA Claim Details (CAN) page. You can find definitions for the fields and controls later on this page.



Claim Details This group box contains various claim amounts, such as amounts approved and denied.

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Status When you enter claim data, the system sets the claim status to *Submitted.* When the system approves payment for a claim, it sets the status to *Ready to Pay, Pending,* or *Fully Processed.*

Claim Payments This group box provides payment information for this claim. Note that you might see more than one check for the same claim. This can happen in a situation in which the system held part of a claim and then paid it after funds became available.

FSA Payment Details Page

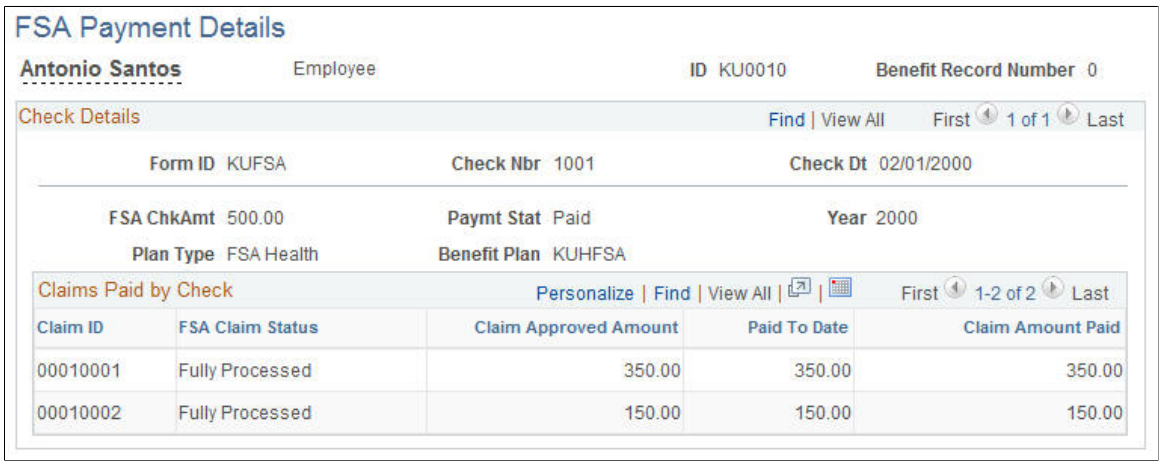
Use the FSA Payment Details page (FSA_PAYMENT_DETAIL) to view payment detail for Canada and the US.

Navigation

- Benefits > Admin Flex Spending Acct CAN > Review Claim/Payment Info > FSA Payment Details
- Benefits > Admin Flex Spending Acct US > Review Claim/Payment Info > FSA Payment Details

Image: FSA Payment Details page

This example illustrates the fields and controls on the FSA Payment Details page. You can find definitions for the fields and controls later on this page.



Paymt Stat (payment status) The system displays one of these values:

- *Pay This Run:* Payment has been calculated and authorized, but a check has not yet been printed.
- *Reversed:* Payment was canceled before a check was printed (although a check number was still allotted).
- *Paid:* A check has been printed.
- *Void:* A check was printed and subsequently voided.

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FSA Claim Details Page

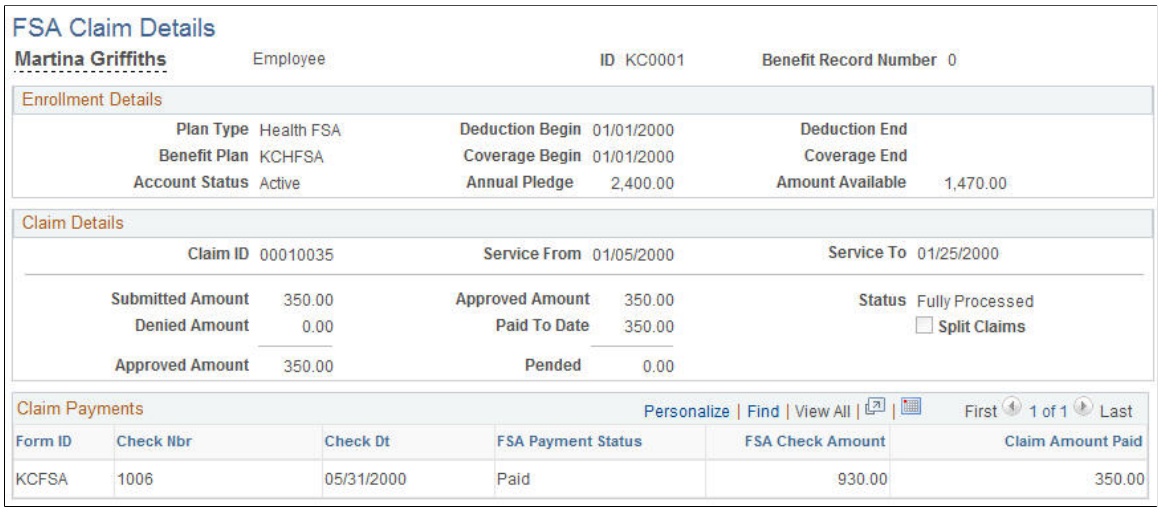
Use the FSA Claim Details page (FSA_CLAIM_DETAILS) to review FSA claim entry information.

Navigation

Benefits > Admin Flex Spending Acct CAN > Review Claim/Payment Info > FSA Claim Details > FSA Claim Details

Image: FSA Claim Details page

This example illustrates the fields and controls on the FSA Claim Details page. You can find definitions for the fields and controls later on this page.



Deduction Begin and **Deduction End**	Displays the dates on which the first and last deductions can be taken from a participant's paycheck.
Coverage Begin and **Coverage End**	Displays the dates on which FSA coverage begins and ends.
Account Status	Displays the current status of the FSA account.
Amount Available	Displays the annual pledge amount minus claims amounts that have been submitted or paid. This can be more than the contributions that the employee has made to date.
Split Claims	Select to *split* or divide a claim into two with payments paid out of both plans during Claims Processing. **Note:** A claim can be split if it is eligible to be paid under two different plan years due to overlapping service dates and the submitted amount exceeds the amount available from the first plan year.

Year-to-Date Activity Page

Use the Year-to-Date Activity page (FSA_YTD_ACTIVITY) to view all year-to-date data for Canada and the U.S. for an employee.

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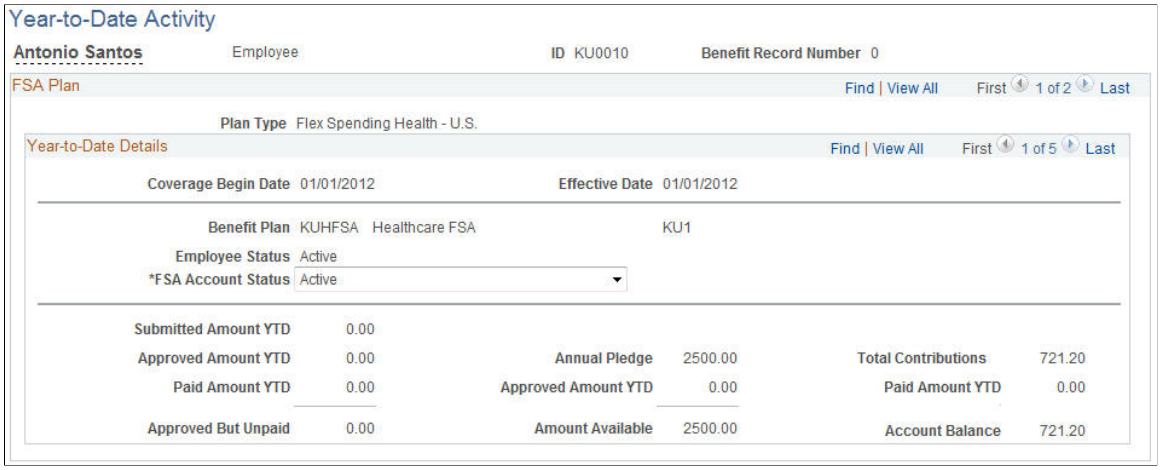
Navigation

- Benefits > Admin Flex Spending Acct CAN > Review Claim/Payment Info > Year-to-Date Activity > Year-to-Date Activity
- Benefits > Admin Flex Spending Acct US > Review Claim/Payment Info > Year-to-Date Activity > Year-to-Date Activity

Image: Year-to-Date Activity page

This example illustrates the fields and controls on the Year-to-Date Activity page. You can find definitions for the fields and controls later on this page.



FSA Account Status Update the status of this account. The system maintains this status, but you can update it. You might do this, for example, if you decide to close an account before the end of the year (however, you would typically use the Manage Base Benefits business process to terminate an employee's FSA election).

Reversing Checks and Claims

This section provides an overview of reversals.

Pages Used to Reverse Checks and Claims

Page Name	*Definition Name*	*Usage*
Reverse Cheques in Error Page	RUNCTL_FSA006	Reverse FSA payment checks that were created in error.
Cancel Claim/Reverse Cheque Page	RUNCTL_FSA007	Enter the parameters for canceling a claim.

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Understanding Reversals

You may have FSA payment checks or claims that were entered erroneously. You handle these situations with processes that reverse offending checks and back out incorrectly entered claims, returning the associated FSA accounts to the state they were in before the checks, claims, or both were entered into the system.

Reverse Cheques in Error Page

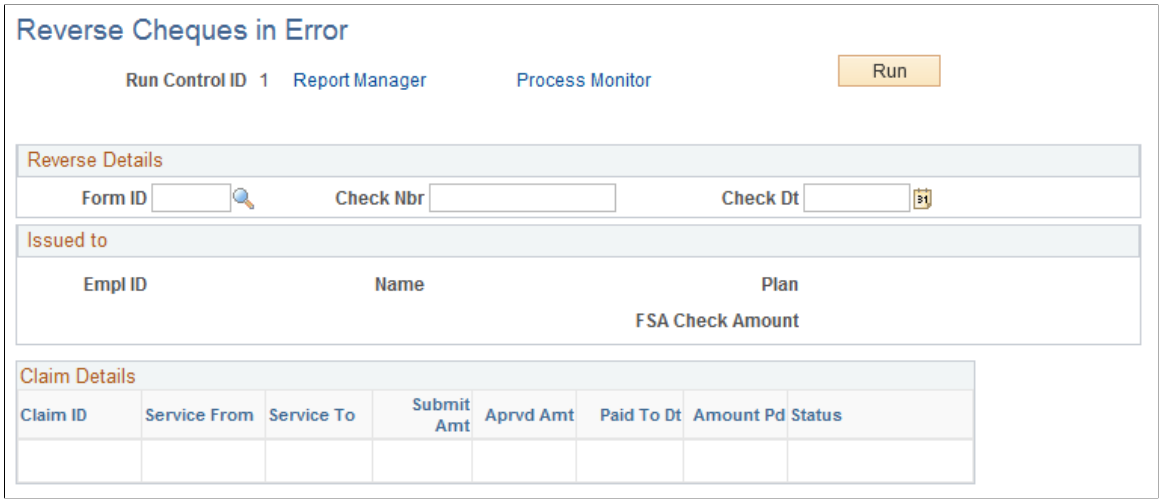
Use the Reverse Cheques in Error page (RUNCTL_FSA006) to reverse FSA payment checks that were created in error for CAN and US on separate pages.

Navigation

- Benefits > Admin Flex Spending Acct CAN > Correct Errors > Reverse Cheques in Error > Reverse Cheques in Error
- Benefits > Admin Flex Spending Acct US > Correct Errors > Reverse Checks in Error > Reverse Checks in Error

Image: Reverse Cheques in Error page

This example illustrates the fields and controls on the Reverse Cheques in Error page. You can find definitions for the fields and controls later on this page.



To set up the FSA Check Reversal process run control ID, enter the form ID, Check number, and check date for the check that you want to reverse.

If claim payment information is related to the check that you identify, the system automatically populates fields in the Issued to group box. You can use this information to verify that you specified the correct check.

Claim ID	Displays the claim paid by the specified check.
Service From and **Service To**	Displays the dates on which the eligible expenses occurred.

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Submitted Amt (submitted amount)	Displays the amount submitted on this claim. The submitted amount can exceed the annual pledge; it just won't pay the whole amount.
Aprvd Amt (approved amount)	Displays the amount of the claim that was approved for payment. The system verified that the approved amount does not exceed the annual pledge amount.
Paid To Dt (paid to date)	Displays the amount paid to date for a claim. The FSA Check Reversal process reverses an FSA check by distributing the reimbursement amount back to each of the claims that were paid by the check. For each claim, the value in this field is reduced by the amount paid in the reversed check.
Amount Pd (amount paid)	Displays the amount paid for the claim.
Status	Displays the claim status. The claim's status is reset to *Pending* so that it will be picked up during the next FSA Processing run. The check's status is set to *Reversed* if it has not yet been printed or to *Void* if it has been printed.

The FSA account balance (as represented by the highest elected FSA Benefit record for the calendar year) is adjusted to reflect a reduced Paid To Dt field.

Cancel Claim/Reverse Cheque Page

Use the Cancel Claim/Reverse Check page (RUNCTL_FSA007) to enter the parameters for canceling a claim for CAN and US on separate pages.

Navigation

- Benefits > Admin Flex Spending Acct CAN > Correct Errors > Cancel Claim/Reverse Cheque > Cancel Claim/Reverse Cheque
- Benefits > Admin Flex Spending Acct US > Correct Errors > Cancel Claim/Reverse Check > Cancel Claim/Reverse Check

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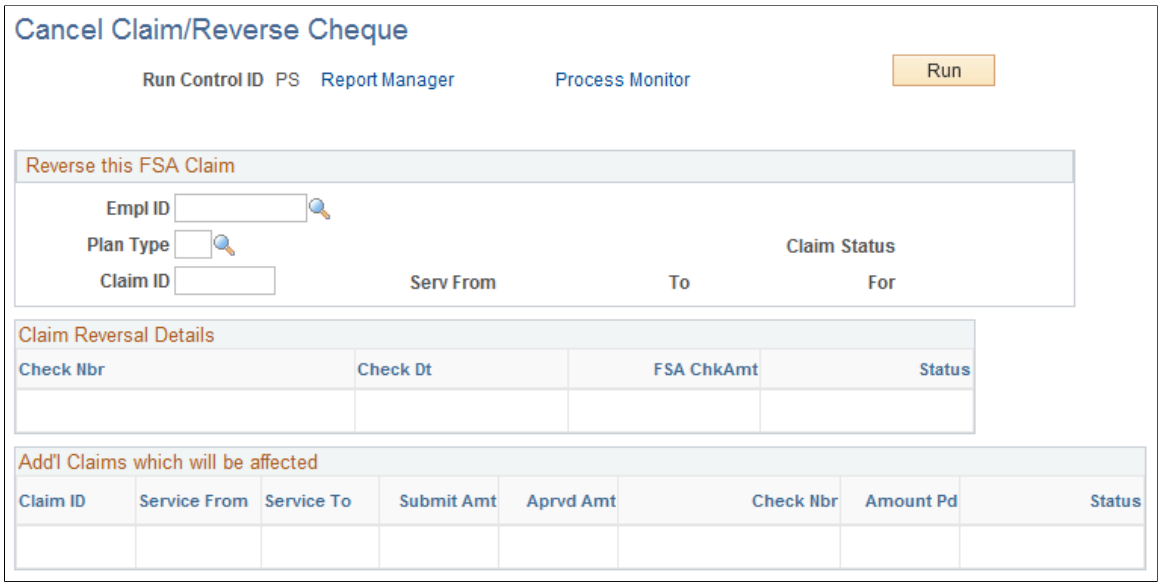
Image: Cancel Claim/Reverse Cheque page

This example illustrates the fields and controls on the Cancel Claim/Reverse Cheque page. You can find definitions for the fields and controls later on this page.



Use this page to identify the FSA claim that you want to reverse by entering the employee ID, plan type, and claim ID associated with the claim. The system populates the Claim Reversal Details group box when an existing claim is identified. It lists all checks that reimbursed portions of the claim specified. Each of those checks must be reversed before the specified claim as a whole is reversed. The Claim Reversal process performs this step.

The system populates the Add'l Claims which will be affected (additional claims which will be affected) group box when an existing claim is identified. It lists all FSA claims that are affected when the checks listed in the Claim Reversal Details group box are reversed. Additional claims are held and any reversed amounts are paid during the next run of the FSA process.

Serv From (service from) and **To**	Display dates that provide information to verify that the correct claim was specified.
Claim Status and **For**	Display additional information to verify that the correct claim was specified.

When you run the Cancel Claim/Reverse Check process, the system reverses the FSA claim, first by reversing every check that reimburses the claim and then by backing out the claim itself. The claim's Paid-To-Date field is deselected, the claim displays a status of *Reversed,* and the claim's submitted and approved amounts are subtracted from the committed FSA account balances.

Note: The committed FSA account balances are taken from the highest elected FSA benefit record for the calendar year.

Reporting and Closing FSAs

This section provides an overview of the reporting process and discusses how to close prior year FSAs.

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Pages Used to Report and Close FSAs

Page Name	*Definition Name*	*Usage*
Close and Summarize Accounts Page	RUNCTL_FSA002	Close the prior year FSA accounts and produce the Account Closure Statement.
Quarterly Account Statements	PRCSRUNCNTL	Process quarterly account statements for employees.

Understanding the Reporting Process

To prepare quarterly employee statements, initiate the Quarterly Account Register process from the Reports menu. These statements provide employees with important information about their FSA accounts: the annual pledge, contributions, and claims paid.

Employees typically have a grace period after the end of the year to submit claims for the prior year. During the grace period, you can process claims for both the prior and current years. After you complete all prior year processing, you can close the prior year and produce a report of prior-year activity. The report serves as an audit trail.

To perform the closing process, select Account Closure from the Reports menu. This process changes the account status to *Closed* for every account with a coverage period in the year prior to the date when you initiate the close process.

Note: (CAN) On the Canadian version of the Quarterly Account Statements page, you can elect to report only high-level claim information or full details (per line item).

Related Links

Benefits Administration Reports: A to Z

Close and Summarize Accounts Page

Use the Close and Summarize Accounts page (RUNCTL_FSA002) to close the prior year FSA accounts and produce the Account Closure Statement for CAN and US on separate pages.

Navigation

- Benefits > Admin Flex Spending Acct CAN > Create Account Reports > Close and Summarize Accounts > Close and Summarize Accounts
- Benefits > Admin Flex Spending Acct US > Create Account Reports > Close and Summarize Accounts > Close and Summarize Accounts

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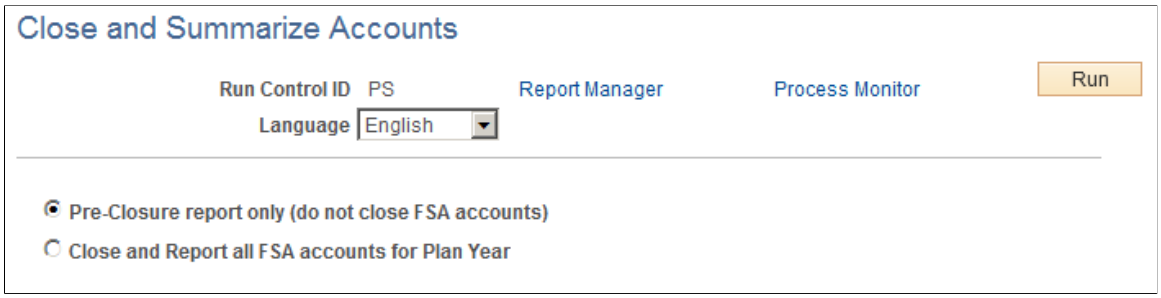
Image: Close and Summarize Accounts

This example illustrates the fields and controls on the Close and Summarize Accounts. You can find definitions for the fields and controls later on this page.



The Close and Summarize Accounts process produces a report of prior-year claim activity, including detailed data such as employee pledge amounts, contributions, claims paid year-to-date, amounts forfeited, and excess payments. This process also closes the prior year's flexible spending accounts.

Pre-Closure report only (do not close FSA accounts)	Select if you do not want to close FSA accounts. If you run the Close and Summarize Accounts process with this option selected, the system generates a pre-closure report and leaves the FSA Account Status unchanged. This enables you to run the report at any time and get a preview of the company's overall FSA program status.
Close and Report all FSA accounts for Plan Year	Select to close all prior-year accounts permanently.

Related Links

"Setting Up FSA Plans" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

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Chapter 10

(CAN) Handling Canadian Credit Allocations

Understanding Credit Allocations

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

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

1. Define your employer-paid flexible credits for each plan type and link them to taxable earnings codes.

   Use the Benefit Program table to define these flexible credits.

2. Define the premium deductions for each of your variable taxation benefit plans as before-tax deductions to use when sufficient flexible credits are available to pay for the benefit premium.

   Use the Deduction table to define these premium deductions.

3. Create a set of taxable benefit deductions (the tax alteration deductions) that complement the variable taxation benefit plan deductions to use only when sufficient credits are not available to pay for the benefit premium.

   Every variable taxation benefit plan deduction (not taxed) should have a corresponding tax alteration general deduction (taxed).

   Use the Deduction table to create a set of taxable benefit deductions.

4. Set up the tax alteration deductions as general deductions.

   Use the General Deductions table to set up the tax alteration deduction codes as general deductions.

5. Add your tax alteration general deductions to the list of valid general deductions for each applicable company.

   Use the Company General Deductions table to add these deductions.

6. Link your variable taxation benefit plan deduction codes to your tax alteration general deduction codes through the Credit Allocation table to prepare them for Benefits Administration and Payroll for North America processing.

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Payroll Calculations for Variable Taxation Benefit Plan Reviews

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

- Pays flexible credit earnings amounts.
- Calculates and applies benefit plan premiums.
- Determines whether sufficient credits are available to cover the entire cost of variable taxation benefit premiums.
- If sufficient credits are not available, calculates taxable benefit deduction amounts to cover the portion of the benefit premium not paid for by credits.

You can view this information on the Paycheque Deduction page. To access the page, select Payroll for North America > Payroll Processing CAN > Produce Payroll > Review Paycheque.

Note: Some benefit deductions are subject to sales tax, such as Goods and Service Tax, Harmonized Sales Tax, and Provincial Sales Tax and can be defined on the Deduction table. If your benefit deduction is paid for by credits and also attracts sales tax, the sales tax amount for that deduction is included when the system is calculating the amount of credits used.

Related Links

"Defining Benefit Deductions" (PeopleSoft HCM 9.2: Payroll for North America)

Understanding the Adult Child Benefit Taxability

The value of health care benefits provided to adult children is not considered taxable income for U.S. federal income tax purposes through the calendar year in which they attain age 26; but it is considered taxable income for some non-conforming states

The health premium amount for adult children reduces the employee’s federal taxable gross. However, the health premiums attributed to these adult children should not reduce the state taxable gross for employees in non-conforming states.

The user designates a value of the benefit attributable to the Adult Child in the Benefit Rate table, Nontaxable Before tax deduction class. This value is used to calculate the appropriate state tax. To add the dollar value attributable to the cost of health care benefits provided to adult children to the employee's state taxable gross wages, Taxable Gross Definition Table entries are available for the states that do not conform to the Internal Revenue Code. Both the GL Interface processes can exclude the taxable benefit of these plan types.

For example, an employee has an adult child and the child qualifies for coverage under the adult child rules. The employee is in a state that is not following these federal rules.

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Item	How Calculated	Amount	Taxable Gross Definition ID
Gross Pay	10 hours @ $20/hr	200	
Medical deduction - Employee's portion	Ded class B (Before tax)	-10	125
Medical deduction - Adult child portion	Ded class B (Before tax)	-5	125
Federal taxable gross		185	
Add back child portion	Non-taxable Btax benefit	5	ACT
State taxable gross		190	

The effect of this example is to give the employee the benefit of deducting the over-age child portion at the federal level, but disallowing it at the state level. It imputes income at the state level.

- The Non-taxable deduction class applied at the federal level must reduce gross pay, whereas the Non-taxable Before-tax Benefit deduction class at the state level will add-back to the Federal Taxable Gross.
- For federal taxable gross, you can use the same deduction class B (Before tax) for both the employee and the adult child deductions. You cannot set the same deduction class up twice on a single deduction, so you would combine the employee and adult child's portions into one amount.
- For state taxable gross, you can use the Non-taxable Before-tax Benefit deduction class because it does not impact federal taxable gross amount, and will impute $5 of income for the state. The ACT Taxable Gross Definition on the Non-taxable Before-tax Benefit deduction class causes it to add the $5 back to the federal taxable gross amount for state taxes. The Taxable Gross Component ID is needed only for states that do not conform to the federal rules. At this time, all states follow the federal rules

Creating Deductions

This section discusses how to set up deduction classifications.

Pages Used to Create Deductions

Page Name	Definition Name	Usage
Deduction Table - Tax Class Page	DEDUCTION_TABLE2	Set up deductions for the variable taxation benefit plans, and create the tax alteration deduction codes.
General Deduction Table Page	GENL_DEDUCTION_TBL	Define general deduction rules for tax alteration deductions.

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Page Name	Definition Name	Usage
Company General Deductions Page	GDED_COM_TBL	Link tax alteration deductions with company general deductions.

Deduction Table - Tax Class Page

Use the Deduction Table - Tax Class page (DEDUCTION_TABLE2) to set up deductions for the variable taxation benefit plans, and create the tax alteration deduction codes.

Navigation

Set Up HCM > Product Related > Payroll for North America > Deductions > Deduction Table > Tax Class

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

You should be able to easily identify tax alteration deductions that you design for use with variable taxation benefit plans. You can create an individual deduction for each benefit plan or create a single deduction to be used for all plans.

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

Typically, the total healthcare premium reduces both federal and state taxable gross. If the adult child portion of the health premium is to be taxable at the state level, then assign the value to the Non-Taxable Before-Tax Benefit deduction class. Accordingly, this deduction class must also be added to all applicable health care deduction codes. The Taxable Gross Component ID is available to add to the federal taxable gross. That means: state taxable gross amount = federal taxable gross amount + the adult child health premium.

The deduction class is ideal because it has no impact on the federal taxable gross amount calculation, and is not deducted from the employee’s pay. Its purpose is to record the amounts for year-end balances. It is currently used mostly for 401k Employer Match.

General Deduction Table Page

Use the General Deduction Table page (GENL_DEDUCTION_TBL) to define general deduction rules for tax alteration deductions.

Navigation

Set Up HCM > Product Related > Payroll for North America > Deductions > General Deduction Table > General Deduction Table

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

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

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

Related Links

"Defining General Deductions" (PeopleSoft HCM 9.2: Payroll for North America)

"Establishing Earnings Codes" (PeopleSoft HCM 9.2: Payroll for North America)

Company General Deductions Page

Use the Company General Deductions page (GDED_COM_TBL) to link tax alteration deductions with company general deductions.

Navigation

Set Up HCM > Product Related > Payroll for North America > Deductions > Company General Deductions > Company General Deductions

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

Setting Up the Credit Allocation Table

To set up credit allocations, use the Credit Allocation Table (CDN_HIERARCHY) component.

This section provides an overview of the Credit Allocation table and discusses how to set up the Credit Allocation table.

Page Used to Set Up the Credit Allocation Table

Page Name	*Definition Name*	*Usage*
Credit Allocation Table Page	CAN_BA_HIER_TBL	Set up Credit Allocation tables.

Understanding the Credit Allocation Table

You use the Credit Allocation table to:

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

Credit Allocation Table Page

Use the Credit Allocation Table page (CAN_BA_HIER_TBL) to set up Credit Allocation tables.

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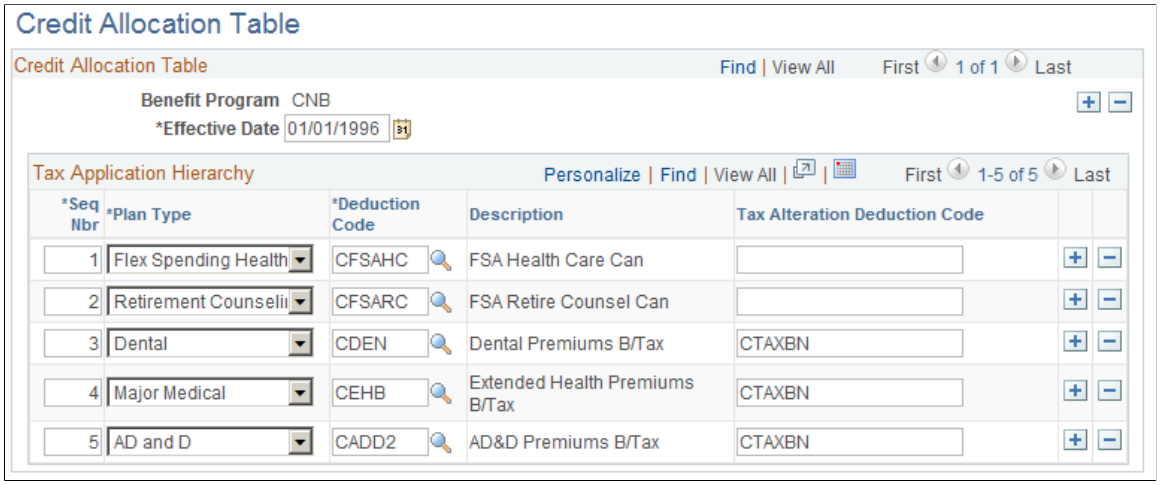
Navigation

Set Up HCM > Product Related > Automated Benefits > Flex Credit Management > Credit Allocation Table > Credit Allocation Table

Image: Credit Allocation Table page

This example illustrates the fields and controls on the Credit Allocation Table page. You can find definitions for the fields and controls later on this page.



Use this page to enter credit allocation hierarchy records and assign the priority sequence order of the allocation of flexible credits to benefit plans; link benefit plan deduction codes with their corresponding tax alteration deduction codes.

Seq Nbr (sequence number)

The system's tax optimization feature assesses the credit usage of the deductions in the order they are listed here.

For example, credits are applied first to sequence number 1 (perhaps the variable taxation plan type Dental), second to sequence number 2 (perhaps the variable taxation plan type Medical/Dental), third to sequence number 3 (perhaps the variable taxation plan type AD/D), and so on. If insufficient credit earnings are available during payroll processing to cover the entire premium costs of the Dental, Medical/Dental, or AD/D plan types, taxable benefit deduction amounts are automatically processed for the amounts of the shortages, using the applicable tax alteration deduction code.

Deduction Code

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

Tax Alteration Deduction Code

Specify a taxable benefit general deduction that you defined on the General Deduction Table page.

Reviewing Taxable Benefits for Tax Alteration Deduction Codes

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This section provides an overview of taxable benefits for tax-alteration deduction codes and lists the pages used to review taxable benefits for tax alteration deduction codes.

Page Used to Review Taxable Benefits for Tax Alteration Deduction Codes

Page Name	*Definition Name*	*Usage*
Create Deduction Data	GENL_DED_DATA	Review the general deductions created by Benefits Administration for tax alteration management.

Understanding Taxable Benefits for Tax-Alteration Deduction Codes

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

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

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Chapter 11

Setting Up Benefits Eligibility for US Same Sex Spouse

Understanding Benefits Eligibility for US Same Sex Spouse

This topic provides an overview of benefits eligibility for U.S. Same Sex Spouse.

PeopleSoft HCM Benefits enables you to account for the new dependent relationship US same-sex spouse, and validate benefits eligibility options based on this new relationship. The following has been accounted for:

- The dependent relationship US same-sex spouse.
- The covered person type US same-sex spouse.
- Health coverage codes for US same-sex spouse.

Additionally, a user can add the same-sex spouse relationship to his/her personal data.

Reviewing Benefits Setup for US Same-Sex Spouse

This topic describes the benefits setup for US same-sex spouse delivered with the system.

The Benefits product provides new coverage codes, for example, for same sex marriage, which can be linked to a separate set of Benefits Tax Adjustment Rates used to calculate the taxation differences between states and locals vs. Federal. These tax adjustment rates required for same-sex spouse are defined in the Tax Adjustment field, in the Tax Adjustment tab of the Benefits Rate Table.

The new coverage codes for same sex marriage allow the Covered Person Type of US Same Sex Spouse. The new Covered Person Type is associated to a new Relationship with the same name US Same Sex Spouse. A dependent or beneficiary is defined in HR personal data by means of a Relationship. Hence all the same-sex spouse setup eventually gets associated with the set of adjustment rates used to calculate necessary state and local tax adjustments.

Depending on the benefits plan type, the following new setup is recommended to implement the US same-sex spouse enhancement:

- For health plans, new coverage codes are set up for the US same-sex spouse relationship, distinguished by the covered person type US same-sex spouse. Coverage codes 22 and 24 are delivered with the system.
- For life plans, customers are required to set up new benefit plans for same-sex spouse and associate different sets of benefit rate IDs.

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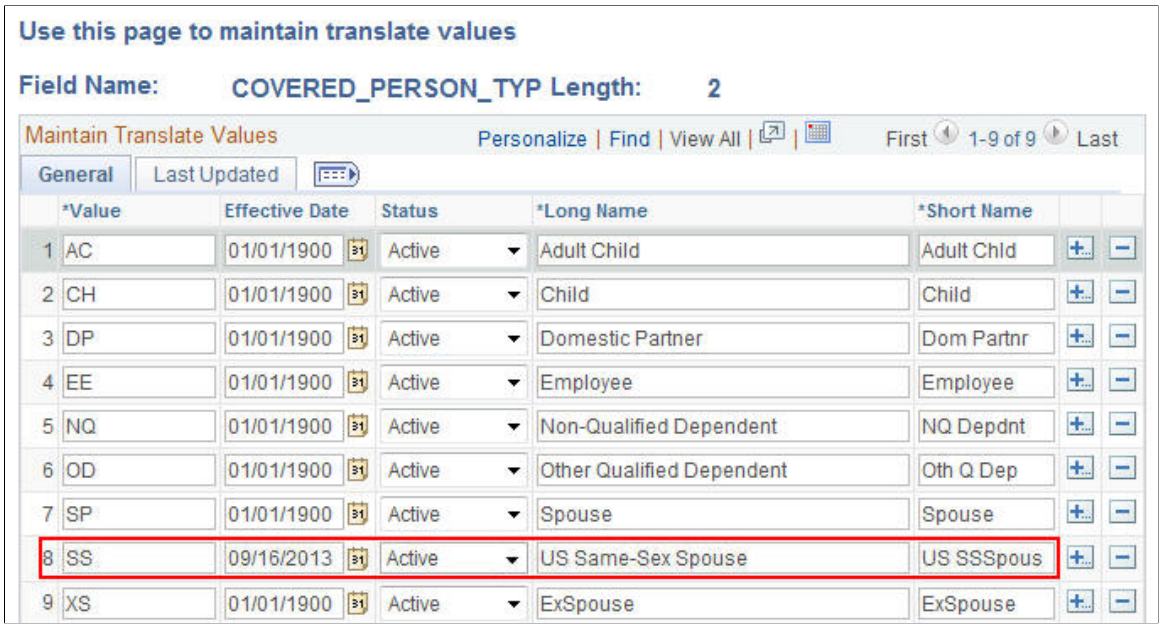
Translate Value — Covered Person Type

Use the translate value SS for the Covered Person Type of US same-sex spouse.

Image: Maintain Translate Values page

This example illustrates the fields and controls on the Maintain Translate Values — Covered Person Type page.



Translate Value — Dependent Relationship

Use the translate value SS for the US same-sex spouse relationship.

Image: Maintain Translate Values page

This example illustrates the fields and controls on the Maintain Translate Values — Relationship page.

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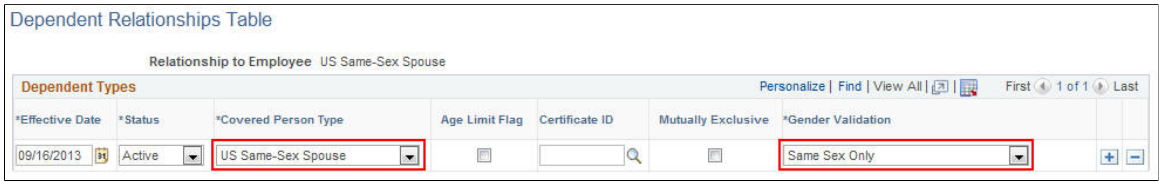
The dependent relationship uses Covered Person Type = US Same-Sex Spouse and Gender Validation = Same Sex Only.

Image: Dependent Relationships Table page

This example illustrates the fields and controls on the Dependent Relationships Table page.



Health Coverage Codes

Use the coverage codes 22 and 24 for the options - employee + same-sex spouse, and family (with same-sex spouse).

Image: Health Coverage Codes page

This example illustrates the fields and controls on the Health Coverage Codes page for coverage code 22.

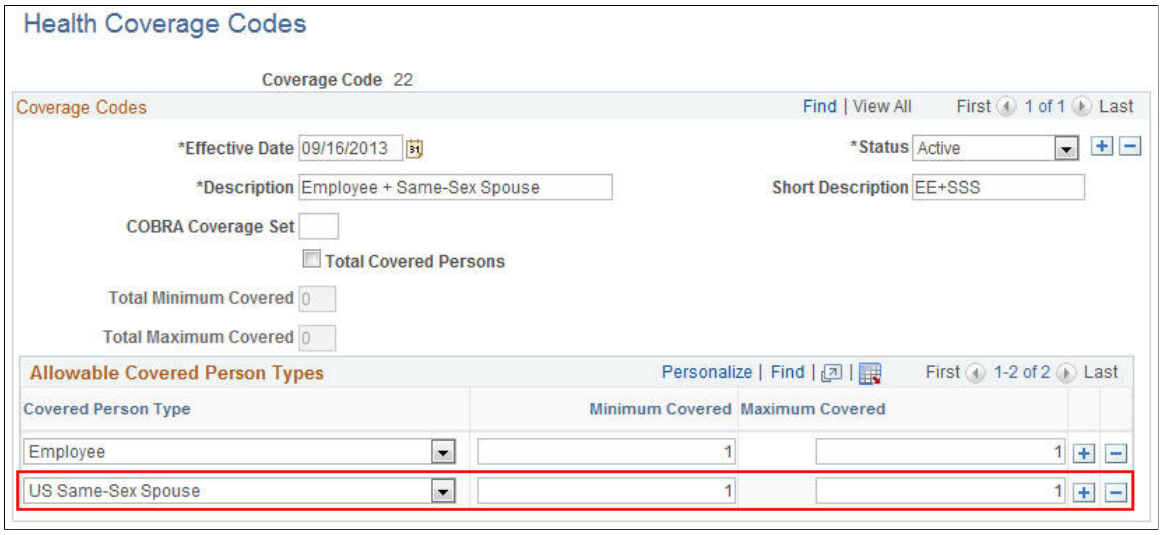


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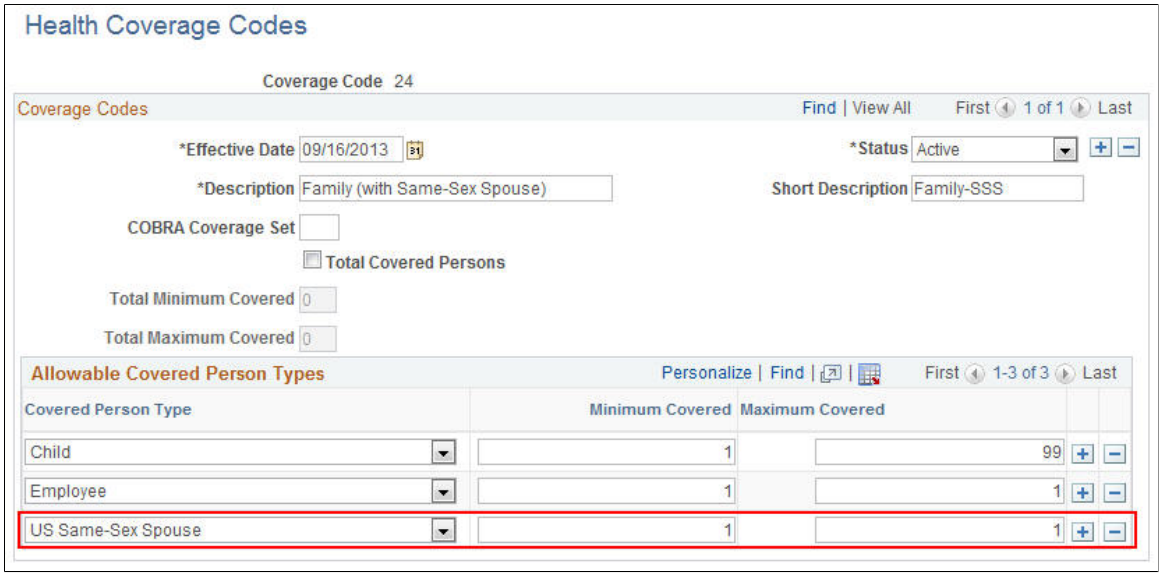
Image: Health Coverage Codes page

This example illustrates the fields and controls on the Health Coverage Codes page for coverage code 24.



Effective Date for US Same-Sex Spouse

For all setup related to the US same-sex spouse feature, an effective date of September 16, 2013 is used.

In Tax Update 13-E, Payroll for North America delivered updates to the Taxable Gross Definition table that includes a new Taxable Gross Component ID *SSS*. The new Taxable Gross Component ID is used in identifying dollar amounts representing benefits provided to an employee's same-sex spouse, which are excluded from U.S. federal taxable wages, but which continue to be included in the definition of taxable wages for state and local tax jurisdictions that do not recognize same-sex marriage. The Taxable Gross Definition table entries delivered in Tax Update 13-E have an effective date of 09/16/2013. The Benefits product uses the same date in the setup to match with Payroll for North America.

Reviewing HIPAA Set Up

The following values have been set up in the EDI 834 Transaction Map Table:

- Mapping values 22 and 24 in the Coverage Code field.

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Image: EDI 834 Transaction Map Table page

This example illustrates the fields and controls on the EDI 834 Transaction Map Table page for coverage code 22.

Image: EDI 834 Transaction Map Table page

This example illustrates the fields and controls on the EDI 834 Transaction Map Table page for coverage code 24.

- Mapping value US Same Sex Spouse in the Relationship field.

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Image: EDI 834 Transaction Map Table page

This example illustrates the fields and controls on the EDI 834 Transaction Map Table page for the mapping value US Same Sex Spouse.

Setting Up US Same-Sex Spouse for Benefits Eligibility and Enrollment

This topic describes how to set up health plans and spousal life insurance plans for the US same-sex spouse feature.

Setting Up Health Plans

For Health Plans, define tax adjustment rates for coverage codes 22 and 24. Other coverage codes do not require tax adjustment rates.

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Image: Benefit Rates page

This example illustrates the fields and controls on the Benefit Rates page.

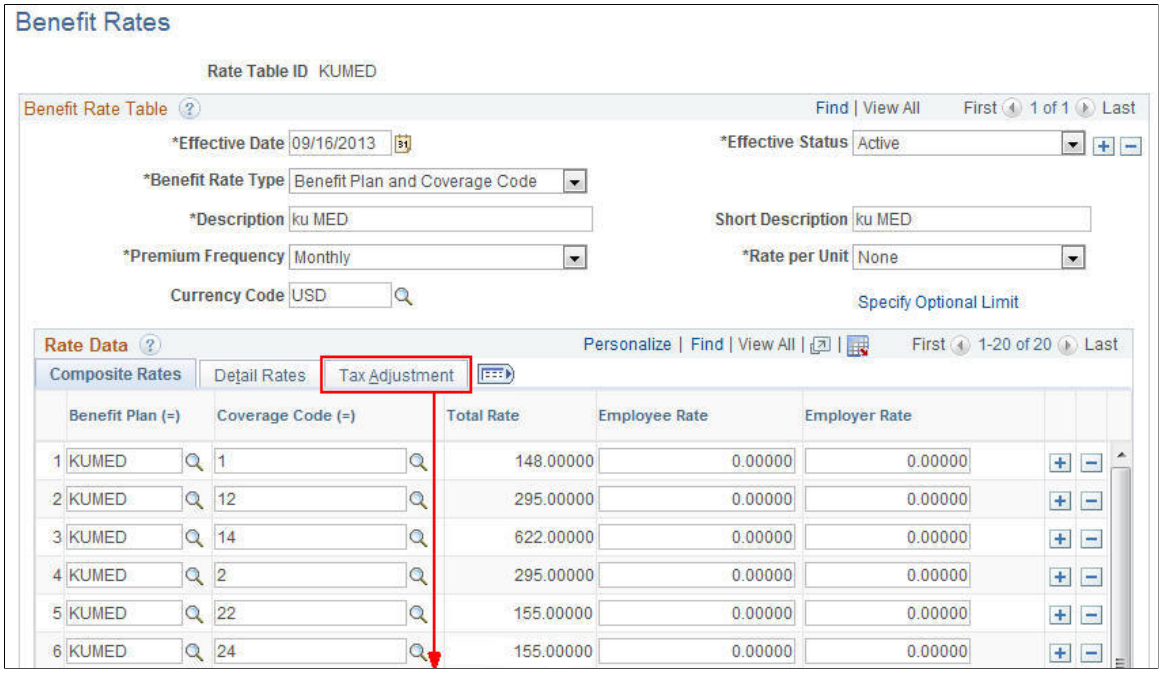
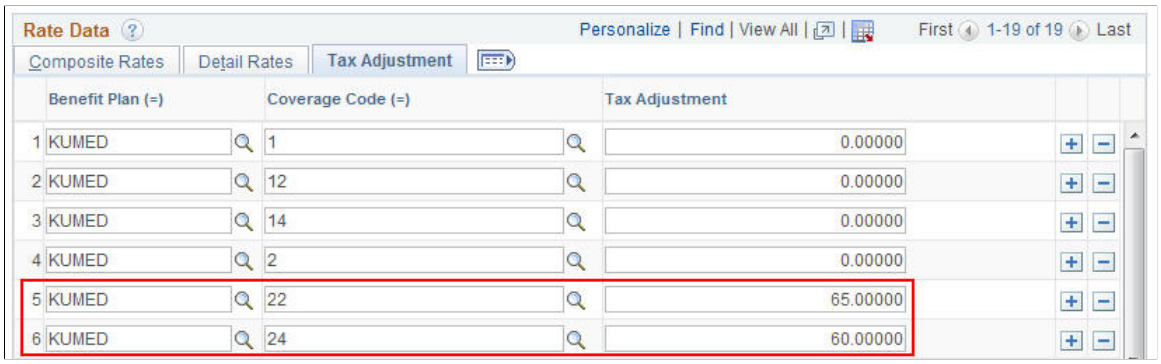


Image: Benefit Rates — Tax Adjustment page

This example illustrates the fields and controls on the Benefit Rates — Tax Adjustment page.



On the Benefits Program Table for Health Plans, add options for coverage codes 22 and 24.

Note: Since coverage codes associated with same sex and heterosexual marriage can be identified, the same Benefit Rates Table can be used for both, but with a different set of tax adjustment rate entries accordingly.

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Image: Benefit Program — Plan Type and Option page

This example illustrates the fields and controls on the Benefit Program — Plan Type and Option page.

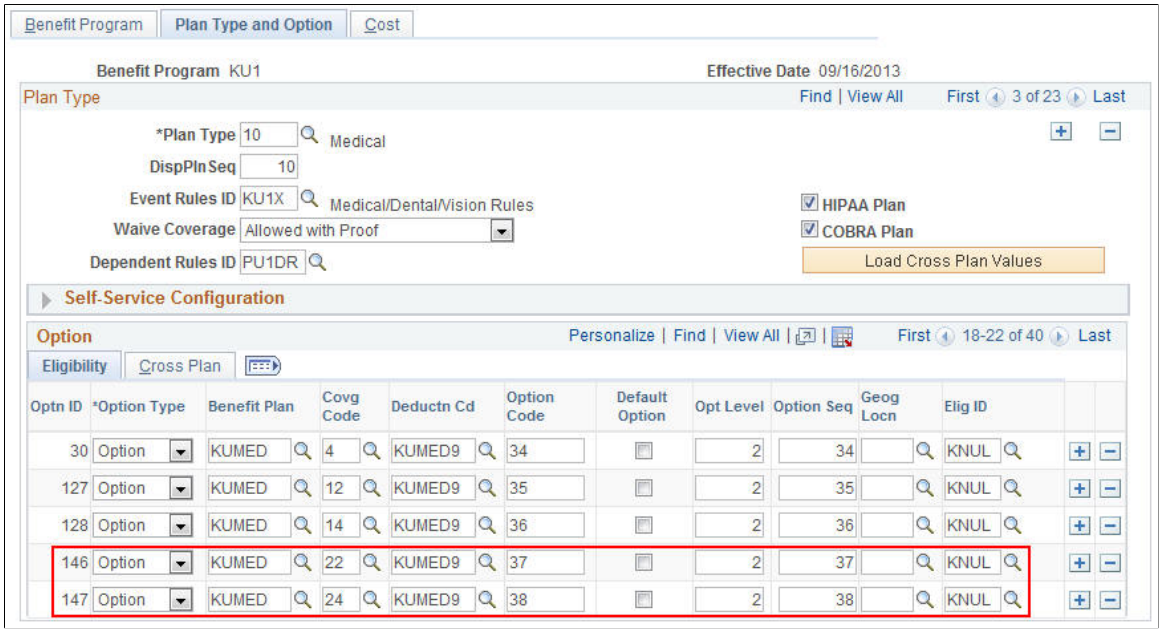
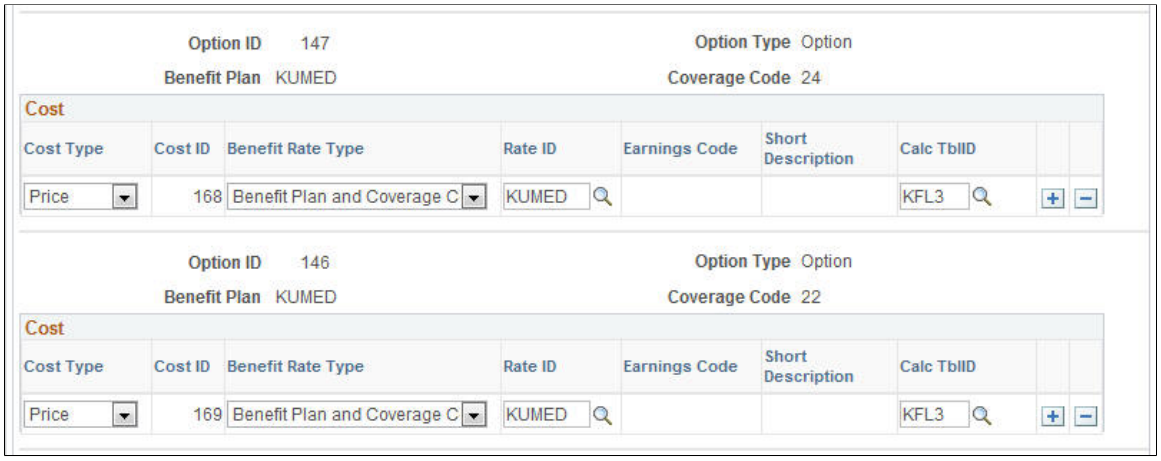


Image: Benefit Program page — Options

This example illustrates the fields and controls on the Benefit Program page for coverage codes 22 and 24.



Setting Up Spousal Life Insurance Plans

Life Insurance 2X plans do not use health coverage codes. Set up separate benefit plans for same-sex spouse in order to use different benefit rates for spouse and same-sex spouse.

Note: The following screenshots provide sample setup for spousal life insurance plans.

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Image: Benefit Plan Table page

This example illustrates the fields and controls on the Benefit Plan Table page.

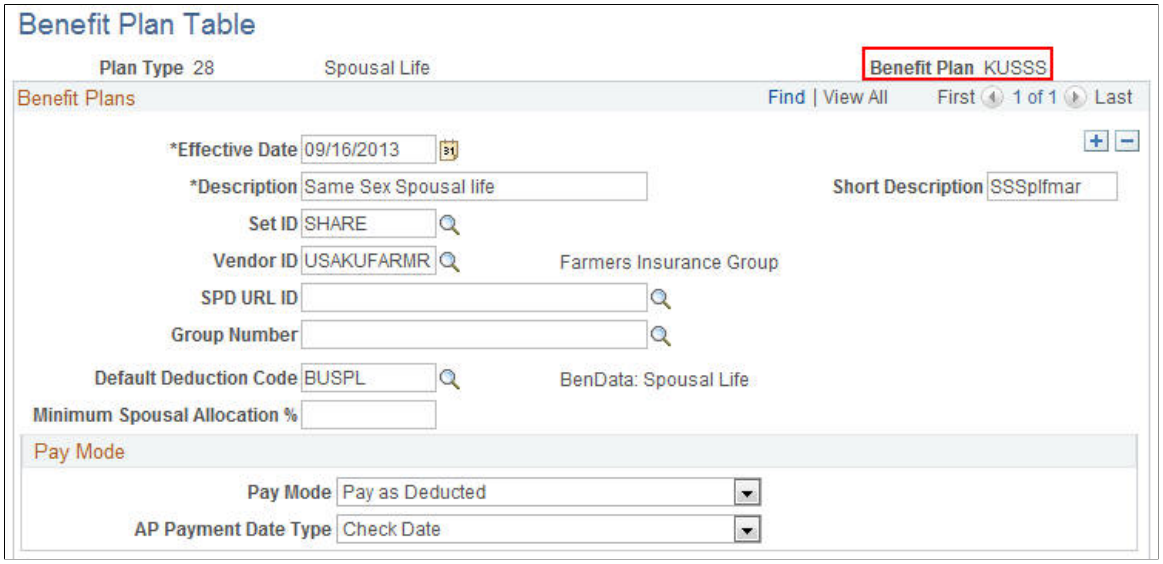
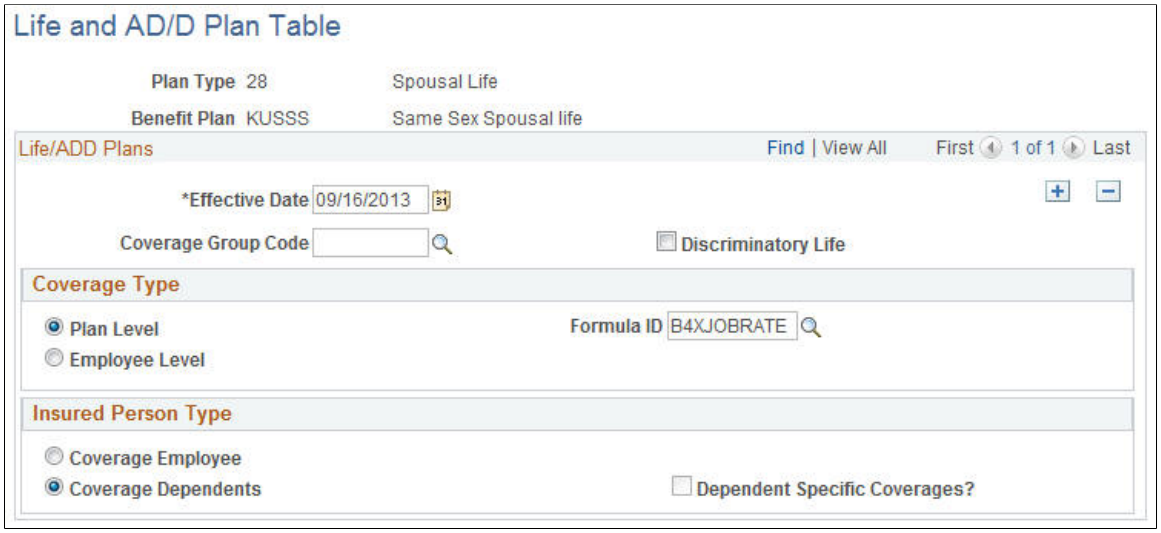


Image: Life and AD/D Plan Table page

This example illustrates the fields and controls on the Life and AD/D Plan Table page.



Additionally, create a new benefit rate ID on the Benefit Rates Table with tax adjustment amounts for same-sex spouse.

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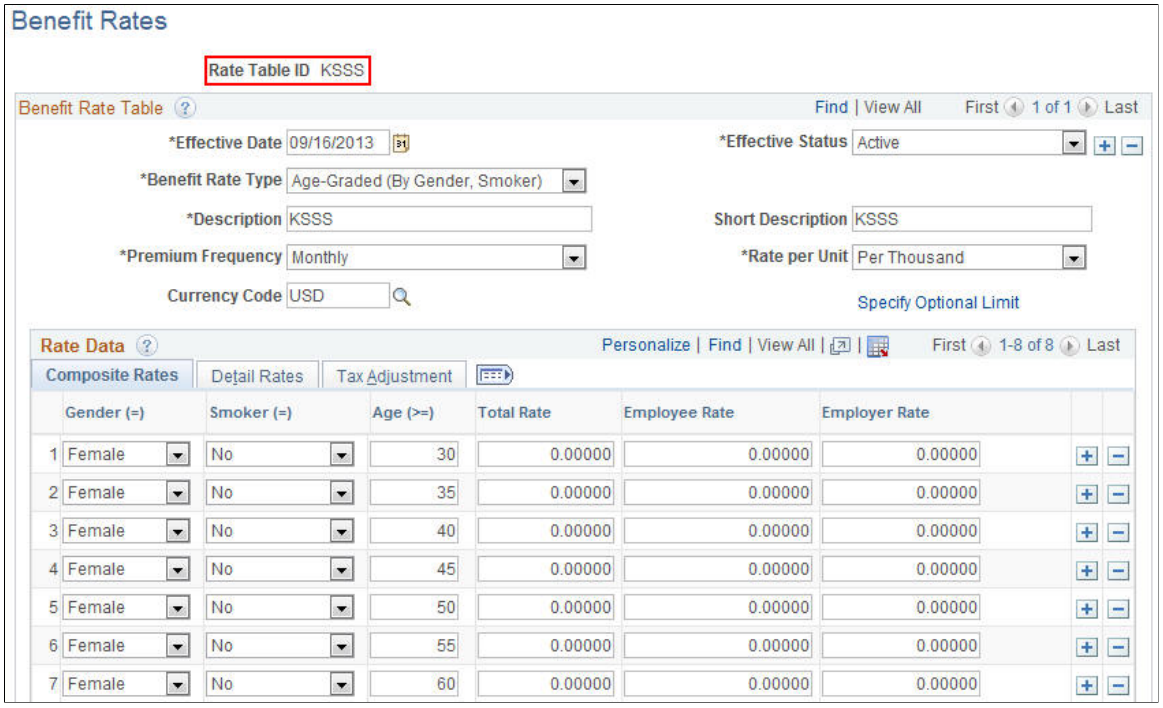
Image: Benefit Rates page

This example illustrates the fields and controls on the Benefit Rates page.



Add option entries for same-sex spouse using a separate benefit plan and different benefit rate ID.

Image: Benefit Program — Plan Type and Option page

This example illustrates the fields and controls on the Benefit Program — Plan Type and Option page.

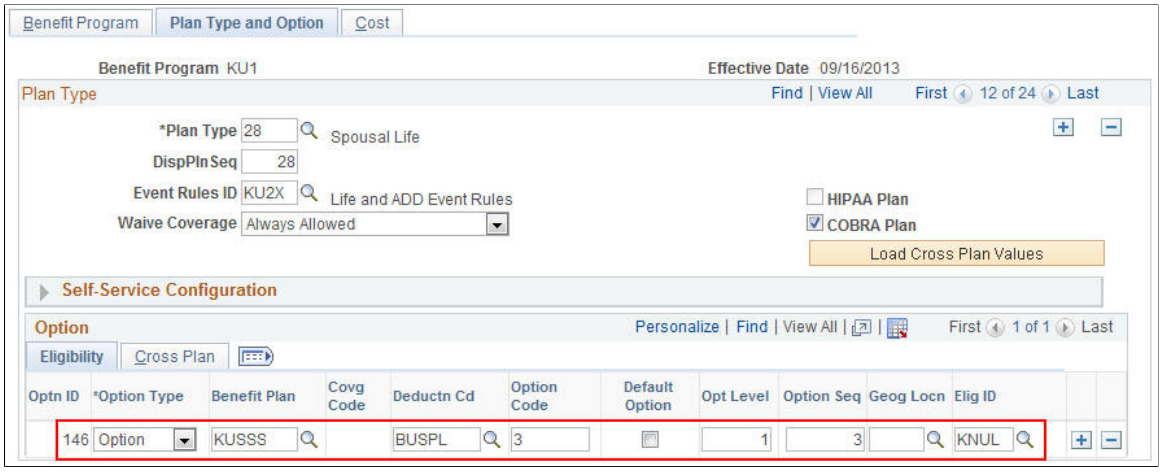


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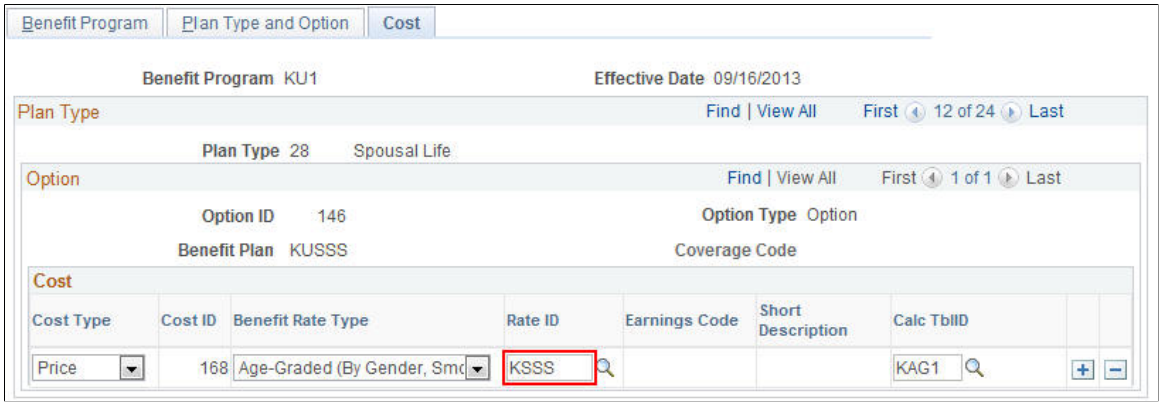
Image: Benefit Program — Cost page

This example illustrates the fields and controls on the Benefit Program — Cost page.



Validating Personal Data

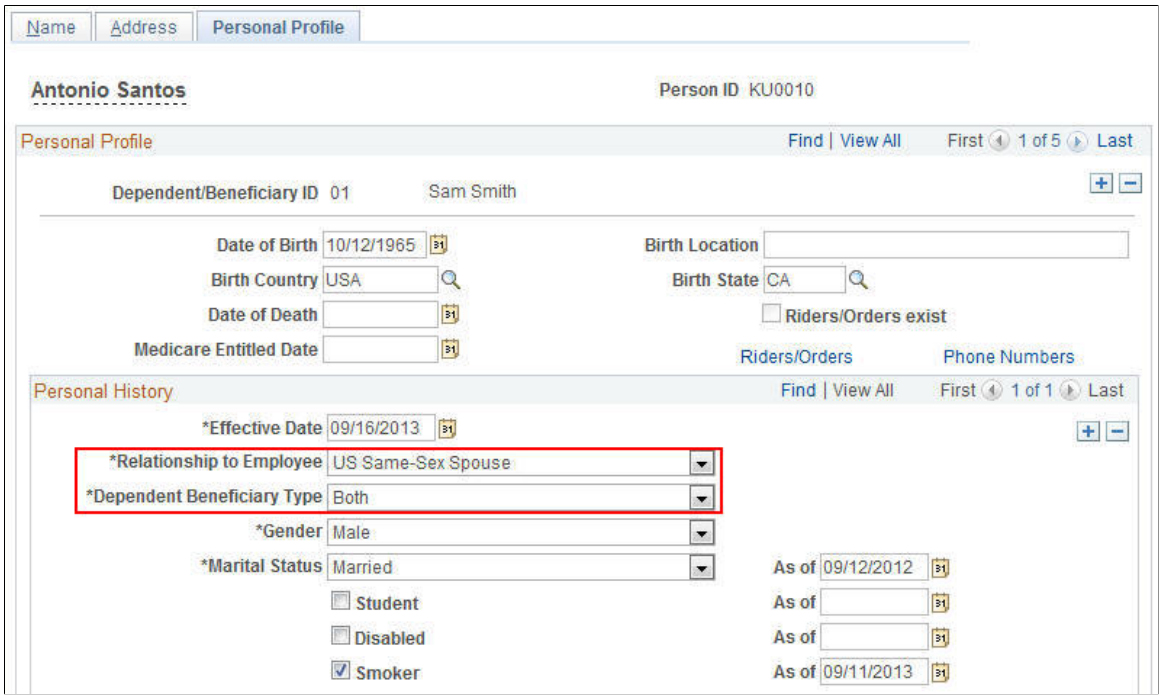
This topic describes how to validate personal data for U.S. Same-sex spouse.

Validating Dependent Beneficiary Type

When updating Dependent/Beneficiary data, select US Same Sex Spouse in the Relationship to Employee field. The Dependent Beneficiary Type filed is automatically set to Both.

Image: Dependent/Beneficiary Data - Personal Profile page

This example illustrates the fields and controls on the Dependent/Beneficiary Data - Personal Profile page.



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When processing a Divorce Life Event using eBenefits, the US Same-Sex Spouse relationship is automatically updated to Ex-Spouse.

Note: The automatic update of relationship to Ex-Spouse when processing a Divorce life event using eBenefits is only applicable to release 9.2.

Validating Spousal Waiver

The ability to check for spousal waiver is available for US same-sex spouses similar to spouses, ex-spouses, and children of employees. Same-sex spouses may have court orders that provide them with a legal right to benefit coverage from those employees. In addition, certain benefit plans may require that a spouse has a required minimum coverage amount.

Enrolling in Benefits

This topic provides an overview of enrolling the U.S. same-sex spouse in benefits.

PeopleSoft HCM provides the ability to validate the U.S. same-sex spouse in base benefits, benefits administration, and eBenefits.

Additionally, the COBRA process applies the same rules applicable to a heterosexual spouse to the US same-sex spouse.

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Chapter 12

Setting Up U.S. ACA Eligibility

Setting Up the Eligibility Rules Table

Use the ACA Eligibility Status field in the Eligibility Rules Table in order to set up benefits plans for employees based on different eligibility rules.

Setting Up the ACA Eligibility Status Field

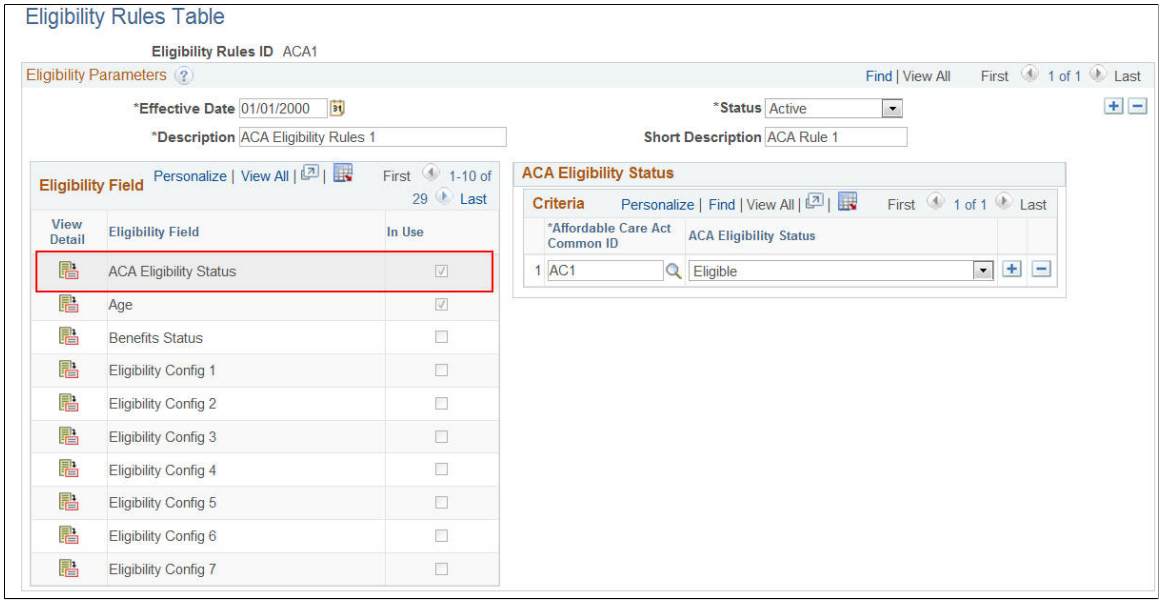
To set the ACA Eligibility criteria for your eligibility rules, select the ACA Common ID and the corresponding ACA Eligibility Status in the Eligibility Rules Table.

Navigation

Set Up HCM > Product Related > Automated Benefits > Eligibility and Event Rules > Eligibility Rules Table

Image: Eligibility Rules Table page

This example illustrates the fields and controls on the Eligibility Rules Table page.



Reviewing Eligibility Results

This section provides an overview of how to review benefits options that an employee is eligible for.

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Review Eligibility Results Page

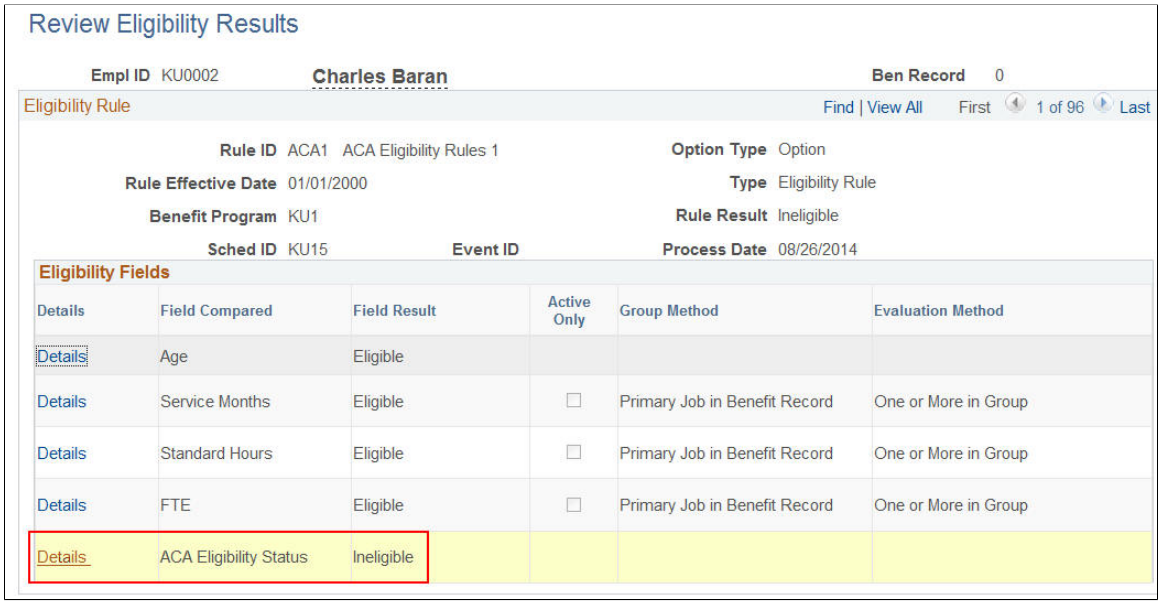
Use the Review Eligibility Results page to view benefits options that the employee is eligible for, after the Benefits Administration event is processed. The employee will be eligible for those options that pass the eligibility rule, i.e., for which the Employee's ACA Eligibility Status matches the corresponding status in the Eligibility Rules table.

Navigation

Benefits > Manage Automated Enrollment > Investigate Exceptions >Review Eligibility Results

Image: Review Eligibility Results page

This example illustrates the fields and controls on the Review Eligibility Results page.



Job Eligibility Evaluation Page

Use the Job Eligibility Evaluation page to view the ACA Eligibility evaluation details.

Navigation

Click the Details link on the Review Eligibility Results page.

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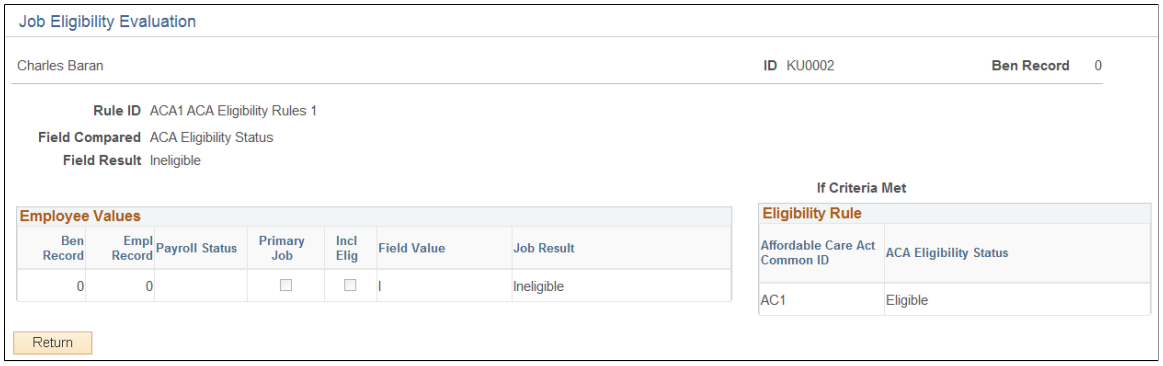
Image: Job Eligibility Evaluation page

This example illustrates the fields and controls on the Job Eligibility Evaluation page.



Reviewing the Benefits Enrollment Snapshot

The Enrollment Reporting Snapshot process extracts data that you specify on theEnrollment Snapshot Options page from the HCM database, and writes it to the *BN_SNAP_PER*, *BN_SNAP_JOB*, and *BN_SNAP_PLAN* tables. The *BN_SNAP_JOB* table contains the employee's ACA Eligibility Status (BN_ACA_ELIG_IND). Ensure that you make any necessary changes to your sqr provider extract if your insurance provider requires this information.

Reviewing the Eligibility Rules Report

This section illustrates how to review the ACA Eligibility Status for different Eligibility Rules using the Eligibility Rules report.

Use the Eligibility Rules report to review the ACA Eligibility Status for different Eligibility Rules.

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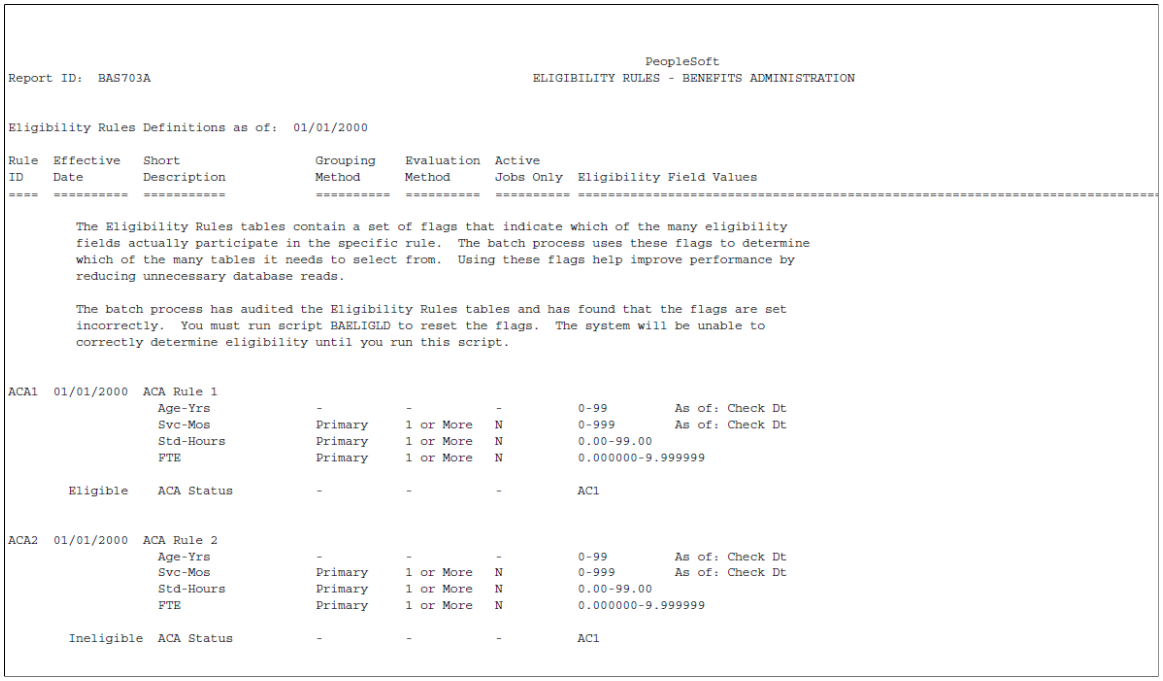
Image: Eligibility Rules report

This example illustrates the Eligibility Rules report.



```
                                                                                  PeopleSoft
Report ID:  BAS703A                                                  ELIGIBILITY RULES - BENEFITS ADMINISTRATION


Eligibility Rules Definitions as of:  01/01/2000

Rule  Effective   Short                 Grouping    Evaluation  Active
ID    Date        Description           Method      Method      Jobs Only  Eligibility Field Values
====  ==========  ===========           ==========  ==========  ========== ==========================================================================

         The Eligibility Rules tables contain a set of flags that indicate which of the many eligibility
         fields actually participate in the specific rule.  The batch process uses these flags to determine
         which of the many tables it needs to select from.  Using these flags help improve performance by
         reducing unnecessary database reads.

         The batch process has audited the Eligibility Rules tables and has found that the flags are set
         incorrectly.  You must run script BAELIGLD to reset the flags.  The system will be unable to
         correctly determine eligibility until you run this script.


ACA1  01/01/2000  ACA Rule 1
                    Age-Yrs              -           -           -          0-99         As of: Check Dt
                    Svc-Mos              Primary     1 or More   N          0-999        As of: Check Dt
                    Std-Hours            Primary     1 or More   N          0.00-99.00
                    FTE                  Primary     1 or More   N          0.000000-9.999999

        Eligible    ACA Status           -           -           -          AC1


ACA2  01/01/2000  ACA Rule 2
                    Age-Yrs              -           -           -          0-99         As of: Check Dt
                    Svc-Mos              Primary     1 or More   N          0-999        As of: Check Dt
                    Std-Hours            Primary     1 or More   N          0.00-99.00
                    FTE                  Primary     1 or More   N          0.000000-9.999999

        Ineligible  ACA Status           -           -           -          AC1
```

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Chapter 13

Preparing for Open Enrollment and Event Maintenance

Understanding the Benefits Administration Preparation Process

The next table outlines the steps that you need to follow to prepare your system for open enrollment and event maintenance processing. Follow these steps only after you have designed your eligibility and event rules and created your benefit programs:

Step	*Purpose*	*Go To*
Double-check benefit program setup.	Look over the benefit programs. Ensure that your event rules and eligibility rules are configured.	Building Automated Benefit Programs Setting Up Eligibility Rules Creating Event Rules
Build pay calendars.	Build pay calendars for the new plan year.	Building Pay Calendars (if needed)
Run the base benefit audit.	Ensure that benefit information is accurate.	BEN733 Base Benefit Audit Report
Define PeopleSoft Benefits Administration group IDs.	Determine which groups of participants are processed by a particular open enrollment or event maintenance schedule.	Identifying Benefits Administration Groups
Define open enrollment IDs and Snapshot IDs (use only for open enrollment and snapshot processing).	Identify the benefit programs to be included in open enrollment or snapshot processing.	Defining Open Enrollment and Snapshot IDs (use if defining Open Enrollment process) Setting Up Snapshot ID (use if defining Snapshot process)
Create schedules for Benefits Administration processes.	Define schedules for your Open Enrollment and Event Maintenance processes and associate a group ID and a company with each one to define the groups of employees they will process. If you are defining an open enrollment or a snapshot process, associate an appropriate open enrollment or snapshot ID with the processing schedule.	Establishing a Processing Schedule

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Reviewing Your Benefit Program Architecture

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

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

Building Pay Calendars

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

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

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

Related Links

"Understanding Deductions" (PeopleSoft HCM 9.2: Payroll for North America)

Running the Base Benefits Audit

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

The next table describes the Manage Base Benefits business process audits and their corrective actions. Perform these audits regardless of whether you use the Manage Base Benefits business process or PeopleSoft Benefits Administration to enroll participants.

Base Benefits Audit	***Audit Functions***	***Corrective Actions***
Benefit Tables	Identifies health plans on the Benefit and Deduction Program Table with rate per unit not set to *None* on the Benefit Rate Table.	Correct the information on the Benefit Rate Table.
Employee Data	Identifies employees with personal data but with no employment data.	Enter employee employment data.

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Base Benefits Audit	*Audit Functions*	*Corrective Actions*
Employee Data	Identifies employees with personal and employment data but with no job data.	Enter employee job data.
Employee Data	Identifies employees with birth dates less than or equal to 16 years from the current date.	Verify that the employee is 16 years old or less or correct the error.
Employee Data	Identifies employees or dependent spouses who have the wrong marital status. This can include married employees who have no spouse on file or employees who are marked as single, but a spouse was entered into the system as dependent data.	Correct the employee's marital status or correct the dependent information (add or remove a spouse).
Enrollment Data	Identifies participants with a nonstandard dependent—not a spouse, son, daughter, father, or mother—enrolled in standard health benefits.	Verify that the person should be a dependent or correct the error.
Enrollment Data	Identifies participants who work in the same company as their dependents, elect the same health coverage in the same plan type as their dependents, and cover the health benefits of their dependents. This audit assumes that Social Security numbers have already been entered on employee personal data and dependent data.	Verify that the enrollments are correct or correct the error.
Enrollment Data	Identifies participants with dependents enrolled in health benefits for whom the dependent is older than 25 (or older than 19 and not a student), not a spouse, and not handicapped. These people are not typically considered dependents.	Correct the dependent information.

Identifying Benefits Administration Groups

This section provides an overview of how to set up Benefits Administration groups, using the Group Identification Table (BAS_GROUP) component.

Pages Used to Identify Benefits Administration Groups

Page Name	*Definition Name*	*Usage*
Group Identification Table	BAS_GROUP	Define BAS (Benefits Administration) group IDs.
Benefit Program Participation Page	JOB_DATA_BENPRG	Assign participants to a benefit group.

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Page Name	*Definition Name*	*Usage*
Benefits/FEHB Data Page	GVT_JOB1	Assign employees to a benefits group during the PAR (Personnel Action Request) hire process.

Understanding Benefits Administration Groups

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

Benefits Administration groups are not required for the operation of Benefits Administration processes, but they are helpful. They enable you to have more control over how you manage open enrollment and event maintenance for your workforce.

Note: Benefits Administration group and company codes work together to define the population of employees by specifying Benefits Administration group, a company, both, or neither, and associating them with a schedule.

Benefit Program Participation Page

Use the Benefit Program Participation page (JOB_DATA_BENPRG) to assign participants to a benefit group.

Navigation

Workforce Administration > Job Information > Job Data

Click the Benefits Program Participation link on the Job Data page.

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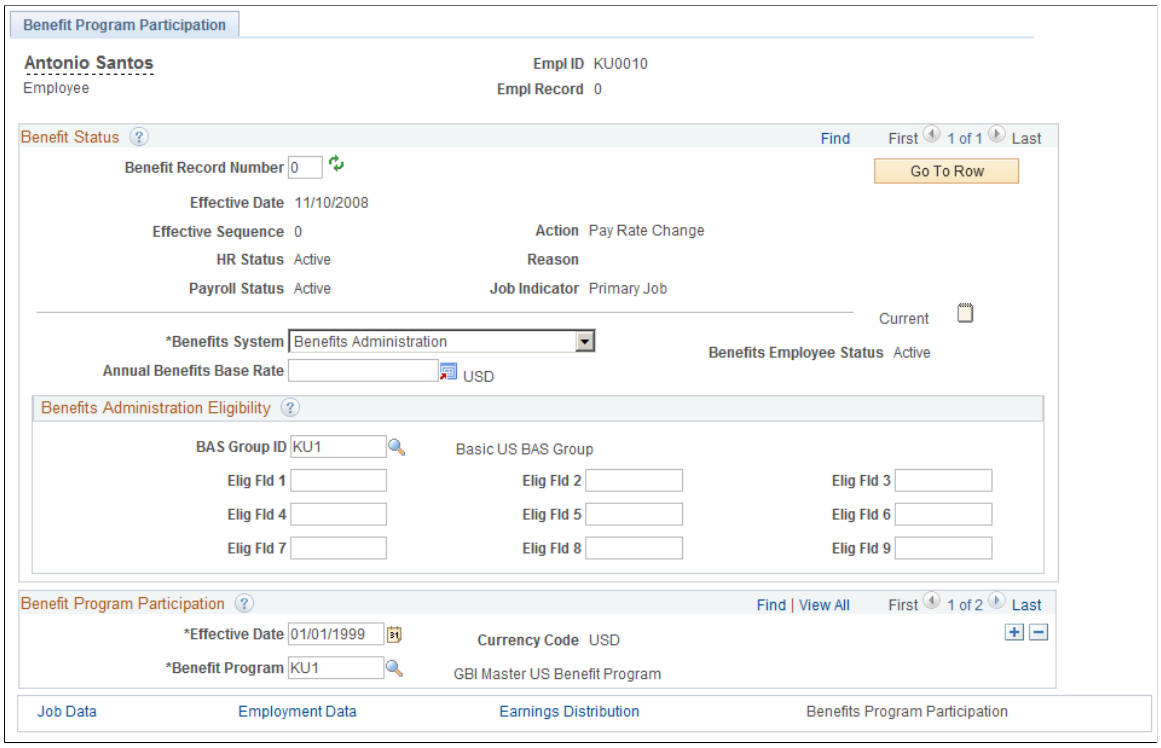
Image: Benefit Program Participation page

This example illustrates the fields and controls on the Benefit Program Participation page. You can find definitions for the fields and controls later on this page.



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

Related Links

"Benefit Program Participation Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

Benefits/FEHB Data Page

Use the Benefits/FEHB Data page (GVT_JOB1) to assign employees to a benefits group during the PAR (Personnel Action Request) hire process.

Navigation

Workforce Administration > Job Information > 1st Rqst Authorization USF > Benefits/FEHB Data

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

Related Links

"Employment Information Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

"Understanding the Administering PAR System" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

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Defining Open Enrollment and Snapshot IDs

This section provides an overview of how to set up open enrollment and snapshot IDs, using the Open Enrollment Definition (BAS_OE_DEFINITION) and Snapshot Definition (BAS_SNAP_DEFINITN) components.

Pages Used to Define Open Enrollment and Snapshot IDs

Page Name	*Definition Name*	*Usage*
Open Enrollment Definition Page	BAS_OE_DEFINITION	Set up the parameters of the open enrollment.
Snapshot Definition Page	BAS_SNAP_DEFINITN	Set up the system to run the Snapshot process.

Understanding Open Enrollment and Snapshot IDs

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

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

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

Related Links

Setting Up a Snapshot ID

Open Enrollment Definition Page

Use the Open Enrollment Definition page (BAS_OE_DEFINITION) to set up the parameters of the open enrollment.

Navigation

Set Up HCM > Product Related > Automated Benefits > Processing Controls > Open Enrollment Definition > Open Enrollment Definition

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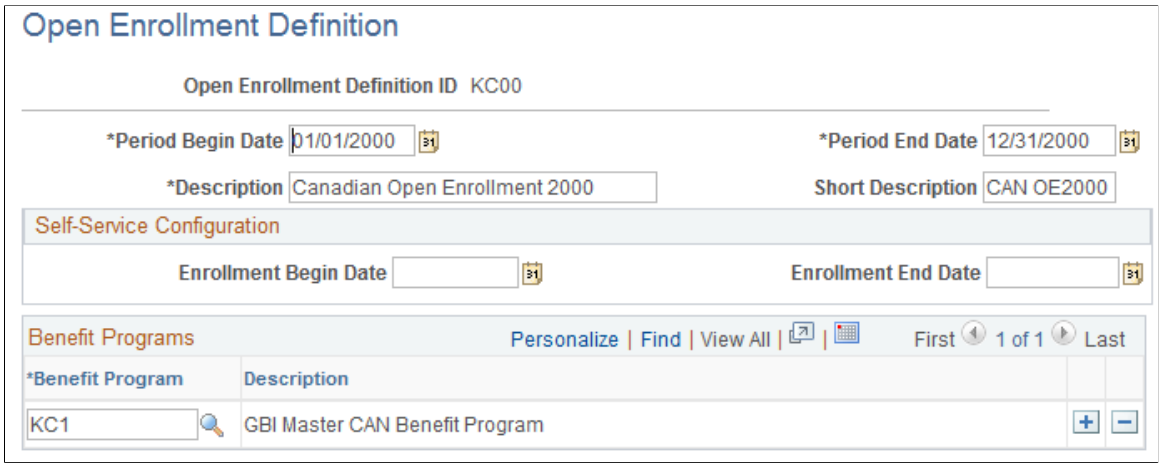
Image: Open Enrollment Definition page

This example illustrates the fields and controls on the Open Enrollment Definition page. You can find definitions for the fields and controls later on this page.



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

When establishing an open enrollment ID, you cannot specify plan types associated with a particular benefit program.

(USF) Defining Multiple, Concurrent Open Enrollment IDs

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

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

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

Setting Up Floating Event Dates for TSP Open Seasons

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

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

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

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

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

Floating Event Dates: An Example

For example, suppose that the first pay period of the new year starts January 4. The open season solicitation period runs from November 18 to January 31. The following diagram illustrates the time span from the beginning of open season on November 18 through the pay period up to the February 1 pay period.

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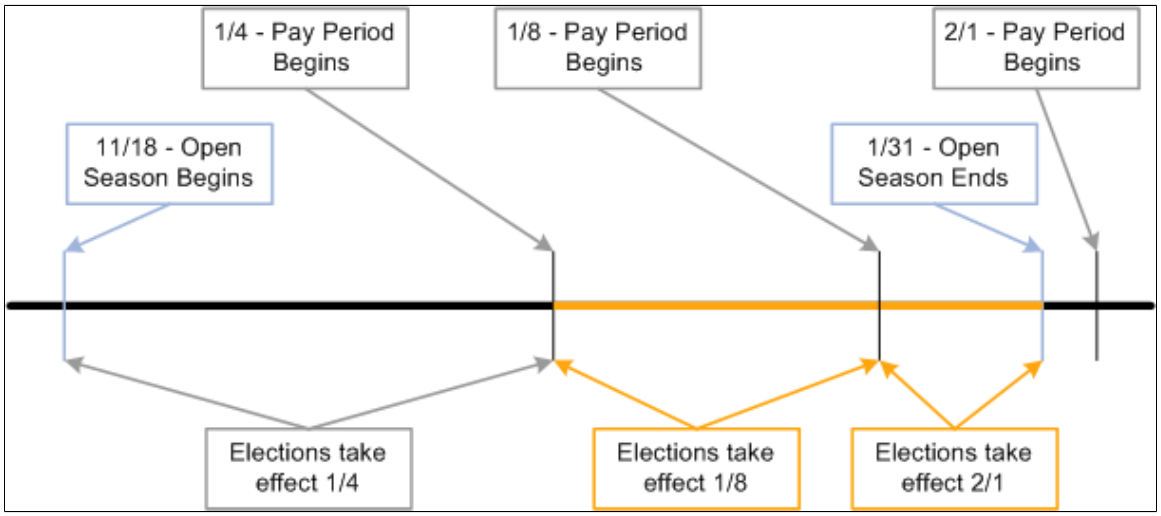
Image: Floating event dates process

This image illustrates the Floating Event Dates process.



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

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

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

Defining Multiple, Concurrent Open Enrollments

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

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Related Links

Defining Event Rules

Setting Up a Snapshot ID

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

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

Snapshot Definition Page

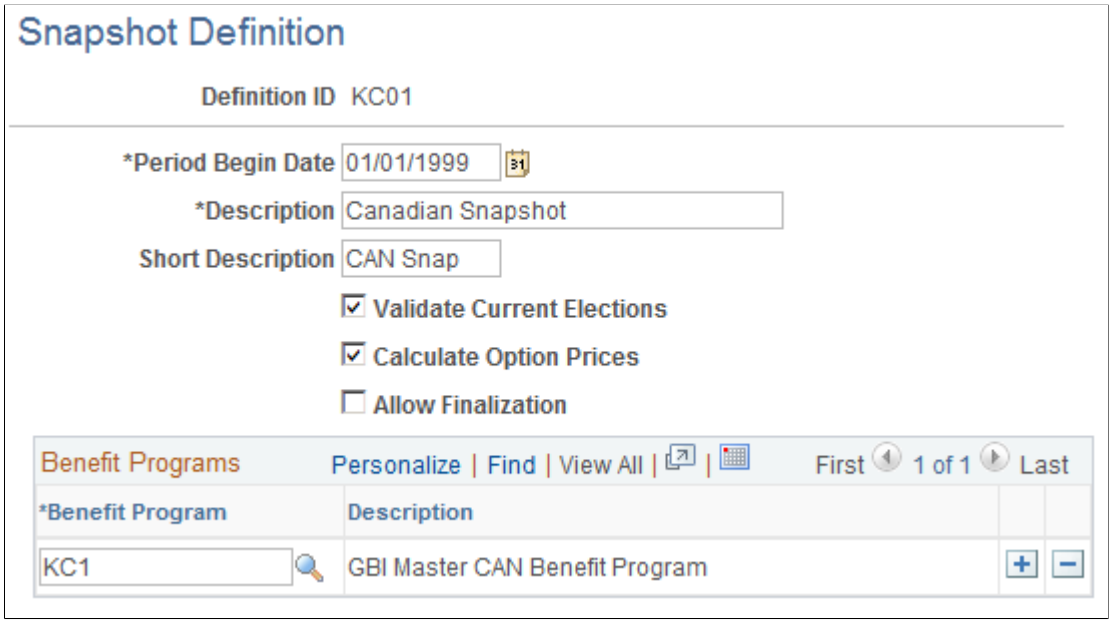
Use the Snapshot Definition page (BAS_SNAP_DEFINITN) to set up the system to run the Snapshot process.

Navigation

Set Up HCM > Product Related > Automated Benefits > Processing Controls > Snapshot Definition > Snapshot Definition

Image: Snapshot Definition page

This example illustrates the fields and controls on the Snapshot Definition page. You can find definitions for the fields and controls later on this page.



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

Presumably, the employee elections were entered through the PeopleSoft HR Base Benefits application or were imported

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from another system. This validation determines whether these current elections are supported by the new eligibility rules that you create.

Calculate Option Prices

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

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

Allow Finalization

Select to make the Snapshot process act exactly like open enrollment.

Use the Data Entry component for last minute corrections and changes. When you finalize the snapshot, the system updates the Base Benefit tables appropriately.

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

Benefit Program Description

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

Note: The Snapshot process works fastest if Validate Current Elections, Calculate Option Prices, and Allow Finalize are not selected. Although the Open Enrollment process gives you the same results as the Snapshot process, you might want to use the Snapshot process when going live with PeopleSoft Benefits Administration to avoid changing open enrollment event rules. For a snapshot run, you do not need to set proof levels; instead, set the default as the current election. Because this might not always be the case with open enrollment, use the Snapshot process to keep your rules separate.

Establishing a Processing Schedule

To set up a processing schedule, use the Schedule Table (BAS_SCHEDULE) component.

This section provides an overview of processing schedules and discusses how to use the BenAdmin schedule to control your processing schedule.

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Page Used to Establish a Processing Schedule

Page Name	Definition Name	Usage
Schedule Table Page	BAS_SCHEDULE	Control your processing schedule.

Understanding Processing Schedules

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

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

Schedule Table Page

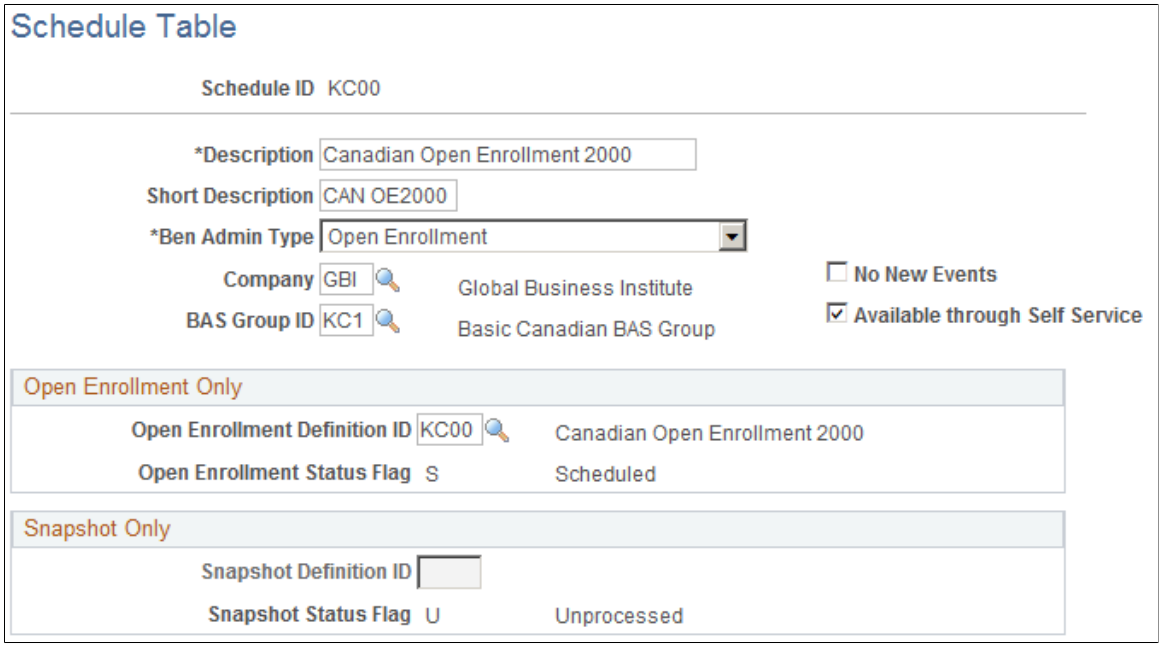
Use the Schedule Table page (BAS_SCHEDULE) to control your processing schedule.

Navigation

Set Up HCM > Product Related > Automated Benefits > Processing Controls > Schedule Table > Schedule Table

Image: Schedule Table page

This example illustrates the fields and controls on the Schedule Table page. You can find definitions for the fields and controls later on this page.



Ben Admin Type (Benefits Administration type) Select from the following values: *Open Enrollment, Event Maintenance,* or *Snapshot.*

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Company	Enter the name of the company. If this field is left blank, all companies will qualify.
BAS Group ID (Benefits Administration schedule group identification)	Enter the BAS group ID. If this field is left blank, all benefits groups will qualify.
No New Events	Select if you don't want any new events assigned to the schedule. Existing events assigned to the schedule will continue to be processed. For example, if you want event maintenance to begin assigning new events to a new schedule that has the same attributes as an existing schedule, you can create a new schedule and select this check box on the old schedule. New events are assigned to the new schedule and you can continue to run the old schedule until all events are finalized.
Available through Self Service	Select if you will enable employees to enter elections for this Benefits Administration process through the PeopleSoft eBenefits application. If this check box is not selected, benefits administrators will have to update the employee elections resulting from this process through the Data Entry pages.
Open Enrollment Definition ID	Enter the open enrollment definition ID if this is to be an open enrollment processing schedule.
Open Enrollment Status Flag	Displays the current processing status of the Open Enrollment process represented by the open enrollment definition ID.
Snapshot Definition ID	Enter the snapshot definition ID if this is to be a Snapshot processing schedule.
Snapshot Status Flag	Displays the current processing status of the Snapshot process represented by the snapshot definition ID.

Note: If you are using the PeopleSoft Benefits Administration for U.S. Federal Government application and this is for an open season period, the schedule ID should match the open enrollment definition ID for that open season period.

Related Links

Defining Open Enrollment and Snapshot IDs

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Chapter 14

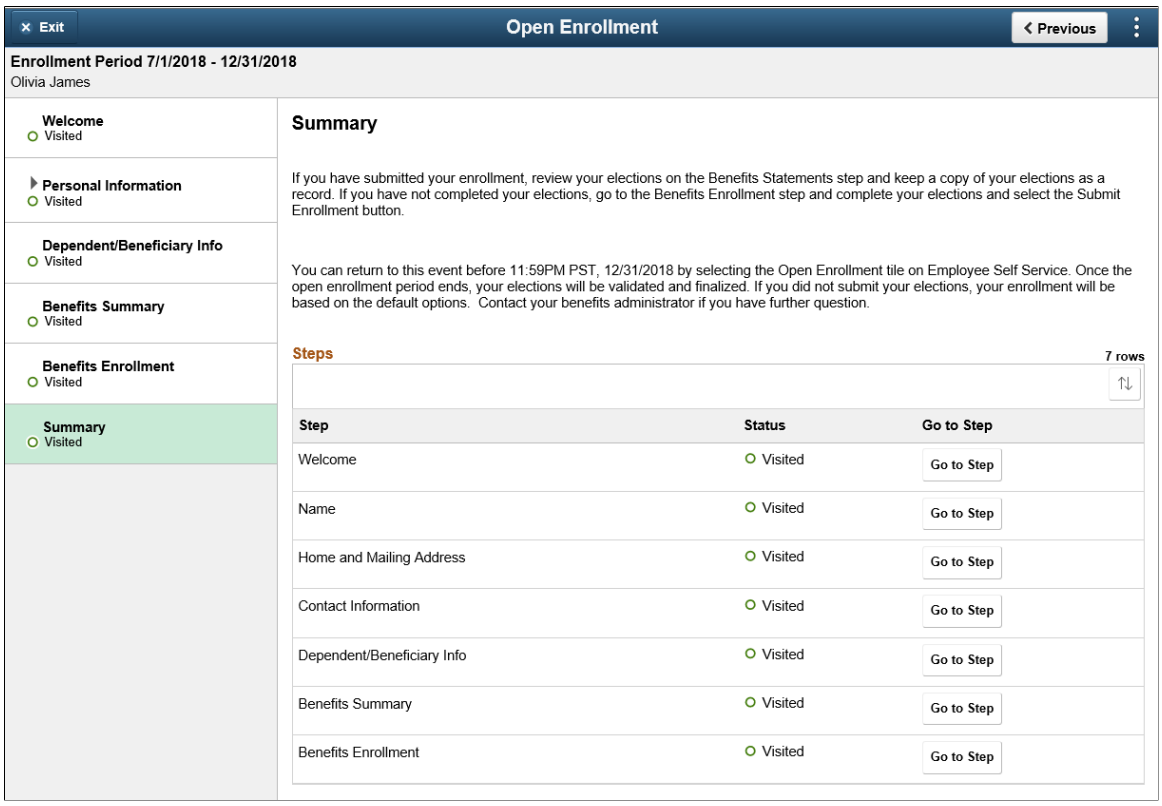
Working with Open Enrollment

Understanding Open Enrollment

Every organization has a certain period in a year during which employees can make updates to their benefit plan choices. PeopleSoft provides you with a delivered Open Enrollment activity guide template to streamline your organization's annual benefits enrollment process. The template administrators can set up templates using the Activity Guide Composer to identify the data required from employees. An Open Enrollment tile can be configured to provide a convenient launching point into the Open Enrollment activity guide. The Open Enrollment activity guide allows your employees to make their benefits-related updates, plan selections and submit enrollment, all from a single place. During the open enrollment period, the employees can revisit the activity guide to review or make modifications to their enrollment data. Once the open enrollment period ends, all elections are validated and finalized.

Image: Example of the Open Enrollment - Summary Page

This example illustrates the layout of the Open Enrollment component showing the Summary page.



Related Links

"Understanding the Activity Guide Composer" (PeopleSoft 9.2: Enterprise Components)
Getting Started with the Activity Guide for Open Enrollment

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Managing Open Enrollment
Using the Open Enrollment Activity Guide

Getting Started with the Activity Guide for Open Enrollment

Open Enrollment uses the PeopleSoft Activity Guide Composer framework that is designed to improve the deployment and management of fluid activity guides. This framework provides utilities and configurable steps that are commonly utilized in activity guides. Activity guides track and maintain a user's progress as he or she performs prescribed tasks, or steps. With the PeopleSoft Open Enrollment activity guide, your employees can easily make all changes to their benefits plan choices from a single place.

Although the PeopleSoft application delivers a ready-to-use Open Enrollment activity guide template, your organization may clone or define your own templates that you can assign to your workforce.

These topics provide an overview of Activity Guide Composer setup tables for Open Enrollment, working with Open Enrollment categories and templates, and configuring templates for your organization.

Related Links

"Understanding the Activity Guide Composer" (PeopleSoft 9.2: Enterprise Components)

Understanding the Activity Guide Composer Setup Tables for Open Enrollment

To support the Open Enrollment process, you will use the following steps to configure and assign the Open Enrollment activity guide template to your employees. For detailed information on these procedures, see the corresponding documentation.

1. Set Up User Profiles

Permission List	*Role*	*Description*
HCAGC1001	AG Composer User	This role is necessary for accessing Self Service Fluid Activity Guide.
HCAGC1000	AG Composer Administrator	This role is necessary for accessing the Fluid Activity Guide Composer to create and maintain activity guide templates.

2. Set Up Activity Guide Categories

   Categories contain the technical components that are utilized to define an activity guide template. For example, categories contain the technical definition of one or more steps that can be included in an activity guide. See the "Setting Up Activity Guide Categories" (PeopleSoft 9.2: Enterprise Components) documentation and the Working with Open Enrollment Categories topic below.

3. Create Activity Guide Templates

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Activity guide templates identify the exact configuration and steps end users will follow to complete their benefits enrollment. Activity guide templates are created and managed by template administrators—functional personnel who are very familiar with your organization's benefits processes. See "Managing Activity Guide Templates" (PeopleSoft 9.2: Enterprise Components) documentation and the Working with Open Enrollment Template topic below.

4. Set Up Open Enrollment Definition

   Use the Open Enrollment Installation table to assign Open Enrollment information to employees. This includes the specific schedule ID and images for the Open Enrollment tile and Open Enrollment templates. See the Managing Open Enrollment documentation.

Working with Open Enrollment Categories

A category definition contains the properties, contextual data, steps, and other options that can be included in an activity guide template. You will use the Categories component to associate these steps to a related content service that navigates the user to an application transaction page to perform a specific task. Not all steps need be included in a template, but all possible steps must be included in the category to be considered for a template.

The PeopleSoft application delivers the *OpenEnrollment* activity guide category.

Delivered Open Enrollment Category Steps

The following table lists the delivered steps for the *OpenEnrollment* category:

Step	***Description***	***Additional Information***
ACKNOWLEDGEMENT	Acknowledgement	The system delivers the *OB1* parameter value as temporary data for this step as the acknowledgement parameter under the Additional Step Content section of the "Categories - Steps Page" (PeopleSoft 9.2: Enterprise Components). **Important!** You will need to change the parameter based on the Acknowledgement ID you create using the Acknowledgement Framework. For information on Acknowledgement Framework, see "Understanding the Acknowledgement Framework" (PeopleSoft 9.2: Enterprise Components).
ADDRESS	Home and Mailing Address	
BENEFIT SUMMARY	Benefits Summary	

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Step	*Description*	*Additional Information*
CONTACT INFO	Contact Information	
DEPENDENTBENEF	Dependent/Beneficiary Info	
ENROLLMENT	Benefits enrollment	
INTRODUCTION	Before the start video	
NAME	Name	
SUMMARY SUMMARY_ONLY	Summary page Summary page without ‘Go to Steps’ option	The OPENENROLLMENT category delivers two summary steps: SUMMARY and SUMMARY_ONLY. SUMMARY lists all the steps in the activity guide and your employees can choose to go to any previous step from here. SUMMARY_ONLY provides a text field and no list of steps. You can modify the delivered template and choose which summary step to include in your Open Enrollment activity guide.
WELCOME_VIDEO	Welcome instruction and Video	

Related Links

"Setting Up Activity Guide Categories" (PeopleSoft 9.2: Enterprise Components)
"Cloning Activity Guide Categories" (PeopleSoft 9.2: Enterprise Components)

Working with Open Enrollment Template

The Activity Guide Composer uses fluid pages to create templates that identify the steps a user should take to perform a transaction or process. You will use the Activity Guide Composer - Templates component to define the activity guide layout, assign a category, identify the security roles that can access the Open Enrollment templates and activity guides, identify actions the user can take, and identify the steps that employees would need to complete during the Open Enrollment process.

PeopleSoft HCM delivers a ready-to-use Open Enrollment activity guide template: ENROLLM

The delivered Open Enrollment template use the vertical non-sequential layout that has the navigation steps appear in the left panel of the page.

Refer the Using the Open Enrollment Activity Guide to view the steps in the delivered Open Enrollment template.

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Related Links

"Managing Activity Guide Templates" (PeopleSoft 9.2: Enterprise Components)

Customizing Categories and Templates

Although the application delivers categories and a template for the Open Enrollment activity guide, you have the ability to:

- Create your own categories and templates.
- Use the delivered data as a starting point for your own categories and activity guide templates.

The fields for delivered data are disabled and unavailable for update. Although you cannot update the delivered data, you can make modifications to delivered or existing categories and templates to suit your organization's needs. This is done by using one of these methods and making the modifications:

- Inserting a new effective dated row.
- Cloning a category or template.

Warning! When you make modifications to a template (by either inserting a row or cloning), you cannot change the activity guide type (layout) or category. To have a template that does not use the same layout type or category, you will need to create a new template instead of cloning or inserting a new effective dated row.
For more information on setting up activity guide categories or templates, see the "Setting Up Activity Guide Categories" (PeopleSoft 9.2: Enterprise Components) and "Managing Activity Guide Templates" (PeopleSoft 9.2: Enterprise Components) documentation.

Considerations for Configuring Categories for Your Environment

If you want to use the delivered categories as a basis for your Open Enrollment categories, or create your own, consider the following:

- You should always have a Summary step that can be included as the last step in the activity guide process where users can review their progress and mark the activity guide as complete.
- To add or remove steps from an existing category, you will need to add a new effective dated Open Enrollment category row and add or delete the steps.

  Important! If you do this for a category that is already associated with a template, you will need to insert a row in the template with a date equal to or later than the row with the new or deleted step to apply those changes to your template. The system will not automatically insert the step into the template, but you can now opt to include this new step into the template.

  For details, refer "Activity Guide Composer - Select Steps Page" (PeopleSoft 9.2: Enterprise Components)

- You can clone the delivered *Open Enrollment* category by accessing the "Clone Category Page" (PeopleSoft 9.2: Enterprise Components) , selecting the category and effective dated row you want to copy, enter the new category details, and click Clone Category to save a copy of the category. You will need to navigate to the Categories component where you can update this new category (see "Setting Up Activity Guide Categories" (PeopleSoft 9.2: Enterprise Components)).

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Considerations for Configuring Templates for Your Environment

If you want to use the delivered template as a basis for your Open Enrollment templates, consider the following:

- In order to make modifications to a delivered template, accessing the "Activity Guide Templates Page" (PeopleSoft 9.2: Enterprise Components) and doing one of the following:
  - Insert a new effective dated row by clicking the Update Template button to access the "Update Template Page" (PeopleSoft 9.2: Enterprise Components) and click the Add button, This will insert a new effective dated row where you can enter the new date. Apply the change and click the Update Template button to access the template and make the changes.
  - Clone the delivered Open Enrollment template by clicking the Clone Template button for the desired template. On the "Clone Template Page" (PeopleSoft 9.2: Enterprise Components) select the effective dated row you want to copy, enter the new template details, and click Continue to save a copy of the template. You will be returned to the Activity Guide Templates page where you can select to update this template.

  Note: These actions will copy all the configuration setup for this template, including the status of the template at the time of inserting a row or cloning. You can change the auto save functionality, security roles, actions, step configuration, and status, but you cannot change the activity guide layout type and category.

  To inactivate a delivered template, insert a row with a new effective date, access the "Activity Guide Composer - Review and Activate Page" (PeopleSoft 9.2: Enterprise Components) and click the Deactivate Activity Guide button.
- If you do not want to use the same category or activity guide type (layout style) as an existing template, create a new template instead of cloning or inserting a new effective dated row.
- You should always have a Summary step that can be included as the last step in the activity guide process where users can review their progress and mark the activity guide as complete.

Managing Open Enrollment

To manage the Open Enrollment process, use the Open Enrollment Definition (BAS_OE_DEFINITION) and Fluid Activity Guide (BAS_OE_DEFN_FLUID) components.

Pages Used to Manage Open Enrollment

Page Name	*Definition Name*	*Usage*
Open Enrollment Definition Page	BAS_OE_DEFINITION	Set up the parameters of the open enrollment.
Open Enrollment Definition - Fluid Activity Guide Tab	BAS_OE_DEFN_FLUID	Set up the tile and activity guide configurations for the open enrollment event.

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Note: You will need to assign the delivered *Open Enrollment Administrator* role to users to grant them access to these pages.

Open Enrollment Definition Page

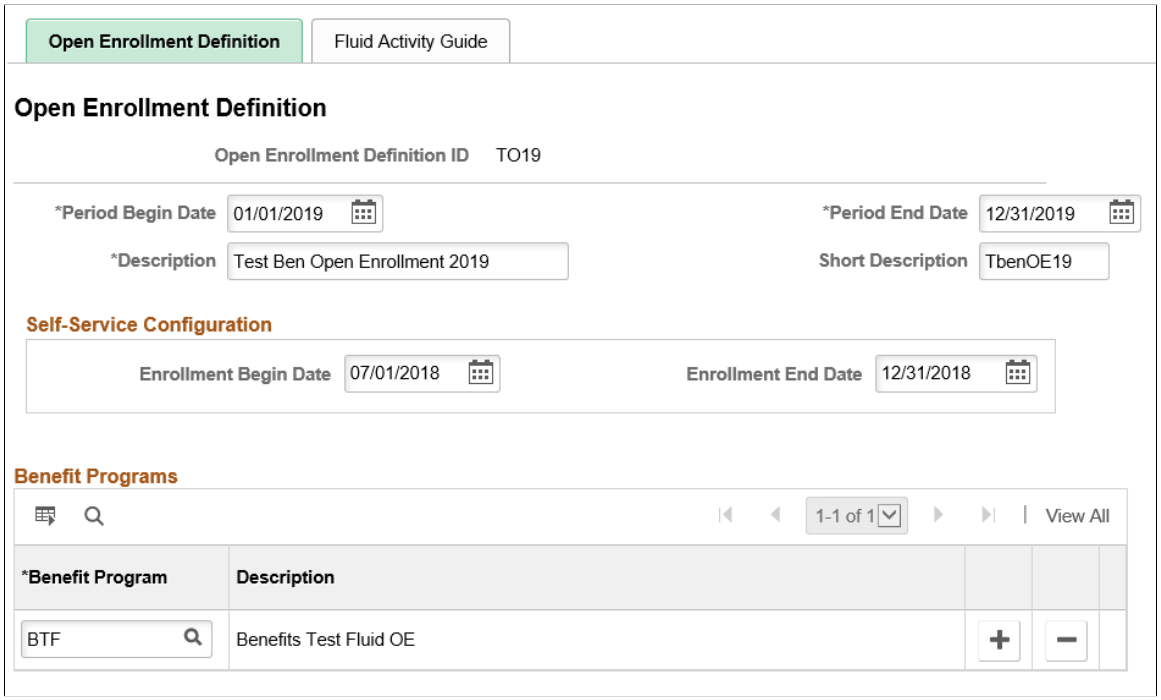
Use the Open Enrollment Definition page (BAS_OE_DEFINITION) to set up the parameters of the open enrollment.

Navigation

Set Up HCM >Product Related >Automated Benefits >Processing Controls >Open Enrollment Definition

Image: Open Enrollment Definition page

This example illustrates the fields and controls on the Open Enrollment Definition page. You can find definitions for the fields and controls later on this page.



Period Begin Date Equals the first day that coverage becomes effective for this Open Enrollment process.

Period End Date Defines the end of the plan year for information purposes only.

Benefit Programs Select benefit programs that will participate in this open enrollment event.

Open Enrollment Definition - Fluid Activity Guide Tab

Use the Fluid Activity Guide page (BAS_OE_DEFN_FLUID) to set up the tile and activity guide configurations for the open enrollment event.

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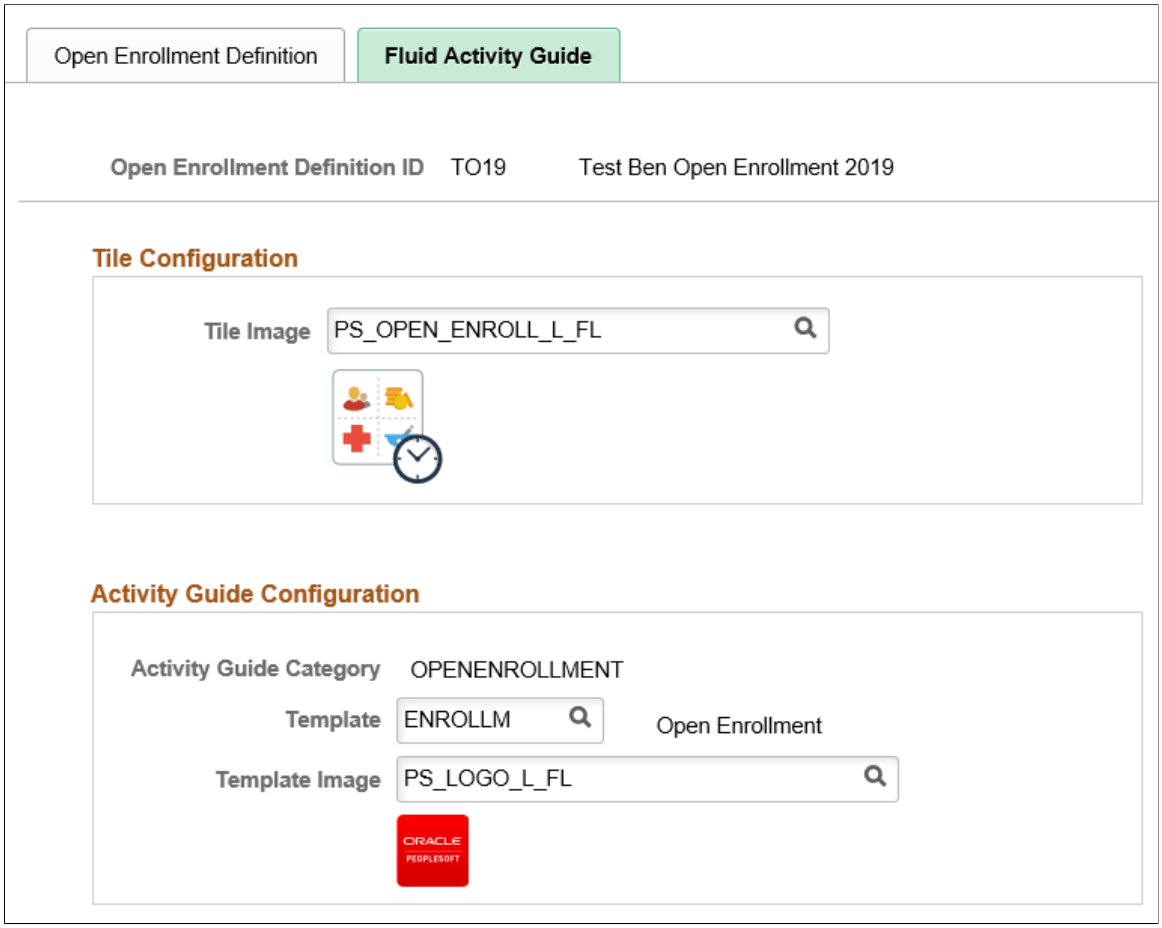
Navigation

Set Up HCM >Product Related >Automated Benefits >Processing Controls >Open Enrollment Definition >Fluid Activity Guide

Image: Fluid Activity Guide page

This example illustrates the fields and controls on the Fluid Activity Guide page. You can find definitions for the fields and controls later on this page.



Tile Image Select the image to be displayed in the Open Enrollment tile in the Employee Self Service homepage.

Template Select the desired open enrollment template.

Template Image Select the image to be displayed on the upper-left corner of the Open Enrollment activity guide.

Using the Open Enrollment Activity Guide

The Open Enrollment feature uses the PeopleSoft Fluid User Interface to provide employees with an open period every year to view and update their benefit plan choices. With the Open Enrollment Activity Guide, employees can view or modify their personal and dependant/beneficiary information, view a

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summary of their current benefits and a comprehensive list of plans available for enrollment, all from one location.

Once the employee accesses the Open Enrollment activity guide, the system displays a series of steps in the left panel with the corresponding page in the right panel, to direct the employee through the benefits enrollment process.

This topic provides an overview of the Open Enrollment tile and discuss the Open Enrollment activity guide steps.

Pages Used in the Open Enrollment Activity Guide

The following table describes the activity steps that are delivered with the Open Enrollment template: *ENROLLM*.

Page Name	***Definition Name***	***Usage***
Open Enrollment Tile	HC_BNE_OE_TILE_FL (this is the cref for the tile) BNE_TILE_CTN1_FL (page for the dynamic data)	Launch the Open Enrollment activity guide from where employees can view and update their benefit plan choices every year during the open enrollment period.
Welcome Page	AGC_VIDEO_FL	Watch a video or read a transcript of the video.
Personal Information – Name Page	HR_EE_NAME_FL	Verify your name and make updates, if needed.
Personal Information – Home and Mailing Address Page	HR_EE_ADDR_FL	Verify your home and mailing address and make updates, if needed.
Personal Information – Contact Information Page	HR_EE_CONTACTS_FL	Review or update your phone numbers, email addresses, and instant messaging IDs, if needed.
"Dependent and Beneficiary Information Page" (PeopleSoft HCM 9.2: eBenefits)	W3EB_DEPBNSMRY_FL	Review or update your dependent/ beneficiary information, if needed.
Benefits Enrollment Page	BNE_CARD_SUMM_FL	Review your benefit plan elections.
Benefits Statements Page	BAS_STMT_LIST_FL	View a list of benefits enrollment preview and confirmation statements.
Summary Page	AGC_SUMMARY_FL	View a summary of your open enrollment activities or return to a specific step in your Open Enrollment activity guide.

Open Enrollment Tile

Use the Open Enrollment tile (HC_BNE_OE_TILE_FL – cref for the tile, BNE_TILE_CTN1_FL – page for the dynamic data) to launch the Open Enrollment activity guide from where employees can view and update their benefit plan choices every year during the open enrollment period.

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Navigation

The Open Enrollment tile is delivered as part of the Employee Self-Service Home Page, but the location can change if you change the delivered home pages or if employees personalize their home pages.

Image: Open Enrollment tile

This example illustrates the Open Enrollment tile.

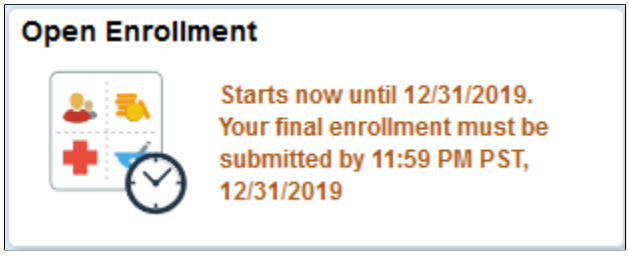
The Open Enrollment tile displays the date by which you have to complete your enrollment. The tile has a countdown timer which displays the number of days, hours, minutes and seconds to the Open Enrollment deadline.

Important! The system time and the My Preferences time (i.e. the time set in the Local Time Zone in My Preferences >General Settings >Regional Settings) must be set to the same time zone for the countdown timer to display accurately.

The default image on this tile is set as per the content reference definitions. For more information see, *PeopleTools: Portal Technology, "Administering Content References"*. This image can be customized using the Open Enrollment Definition - Fluid Activity Guide Tab.

Image: Smartphone_Open Enrollment tile

This example illustrates the Open Enrollment tile as seen on a smartphone.



Note: When an employee has only an Open Enrollment event active, the tile opens the Open Enrollment Activity Guide.
But if an employee has more than one event (it could be an onboarding, family status change or an open enrollment event) active at the same time, and when he/she selects the Open Enrollment tile, the Benefits Enrollment Event Selection page (BNE_SEL_EVENT_FL component) opens listing the events. From this page, the employee can start the open enrollment event to go to the activity guide.

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Welcome Page

Use the Welcome page (AGC_VIDEO_FL) to watch a video or read a transcript of the video. This page may contain custom information about your organization.

Note: The video displayed in the Welcome step is defined in the URLID field of the URL Maintenance page. To replace this video, update the URLID *BNE_OE_VIDEO* with the link of your video.
For more information see, *PeopleTools: System and Server Administration, "Using Administration Utilities"*.

Navigation

Select the Welcome step from the activity guide navigation, or use the Next and Previous buttons to navigate to the page.

Image: Welcome page

This example illustrates the Welcome page in the Open Enrollment activity guide.

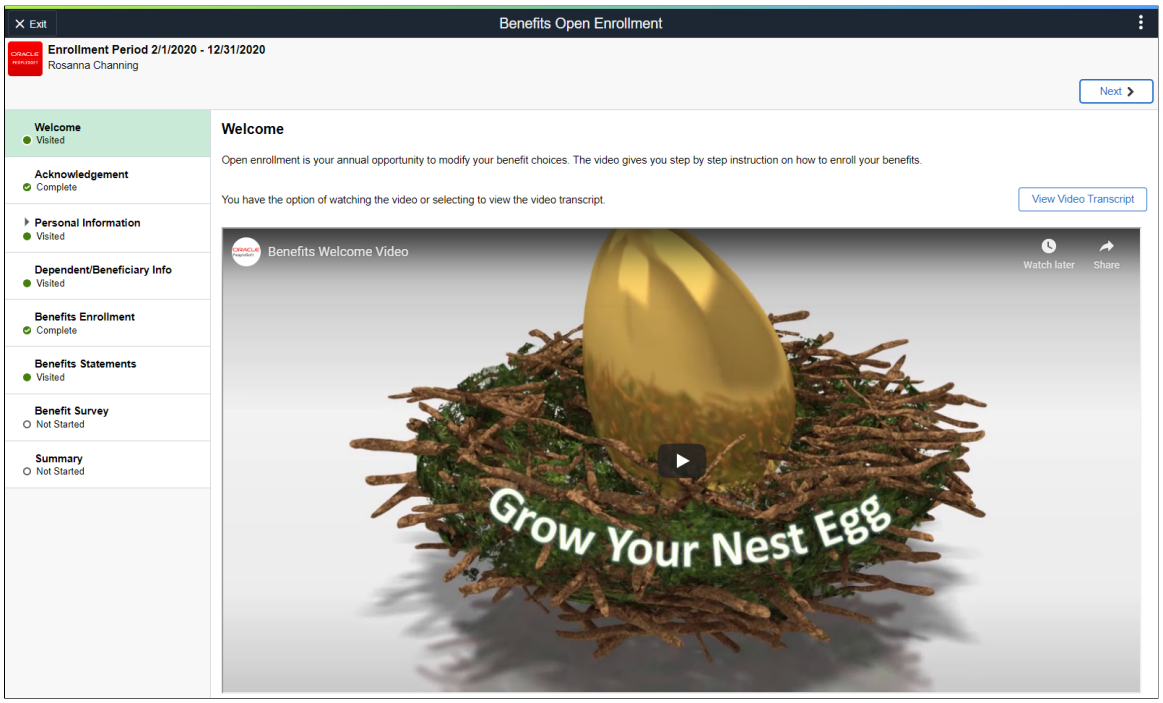
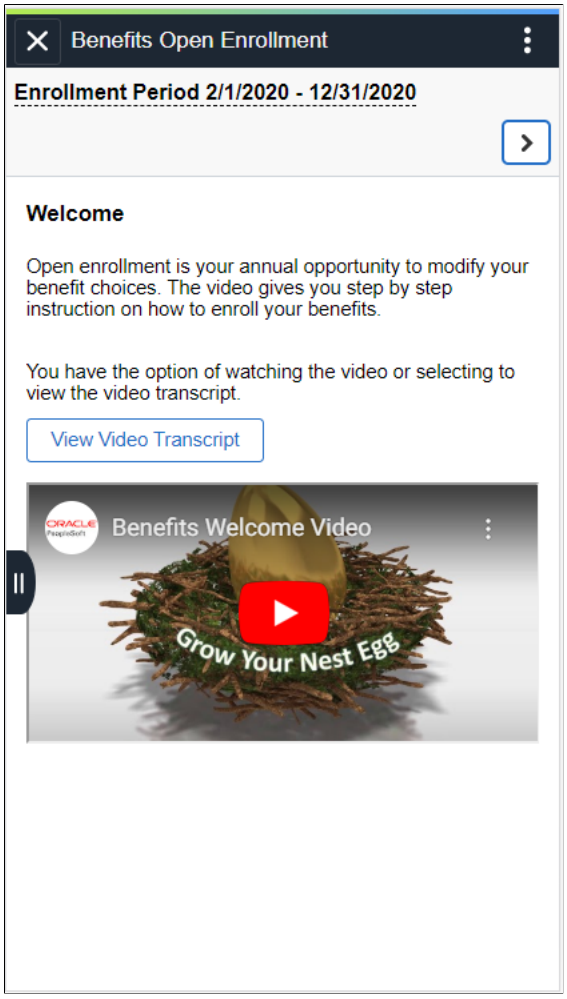


Image: Smartphone_Welcome page

This example illustrates the Welcome page as seen on a smartphone.



Personal Information – Name Page

Use the Personal Information – Name page (HR_EE_NAME_FL) to verify your name and make updates, if needed.

Navigation

Select the Name step from the activity guide navigation, or use the Next and Previous buttons to navigate to the page.

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Image: Personal Information – Name page

This example illustrates the Personal Information – Name page in the Open Enrollment activity guide.

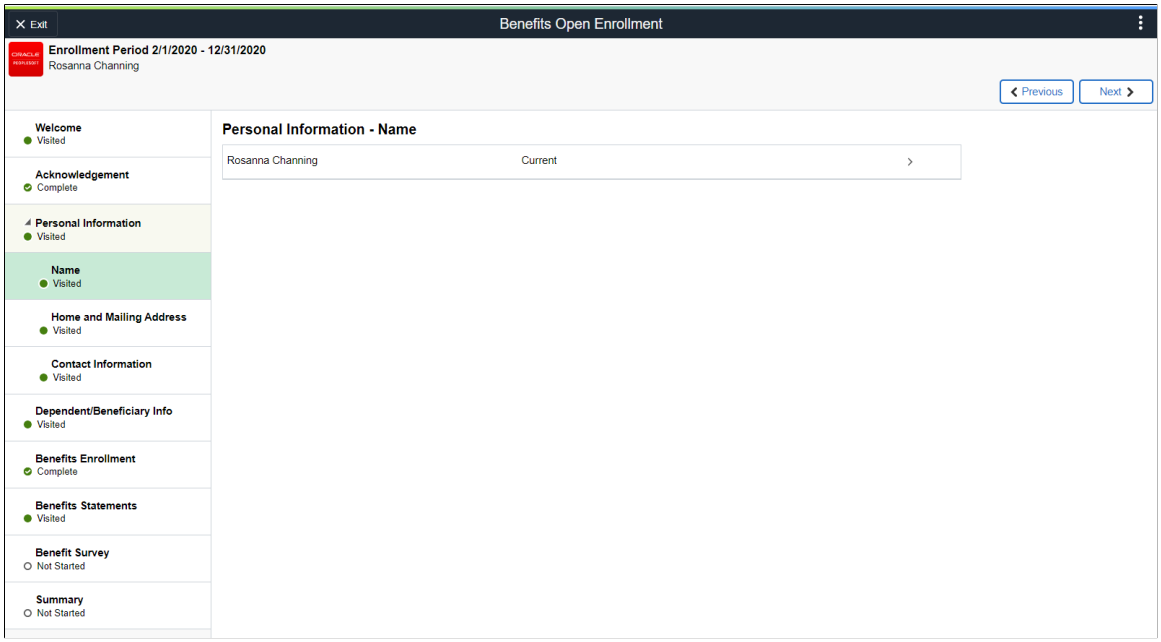

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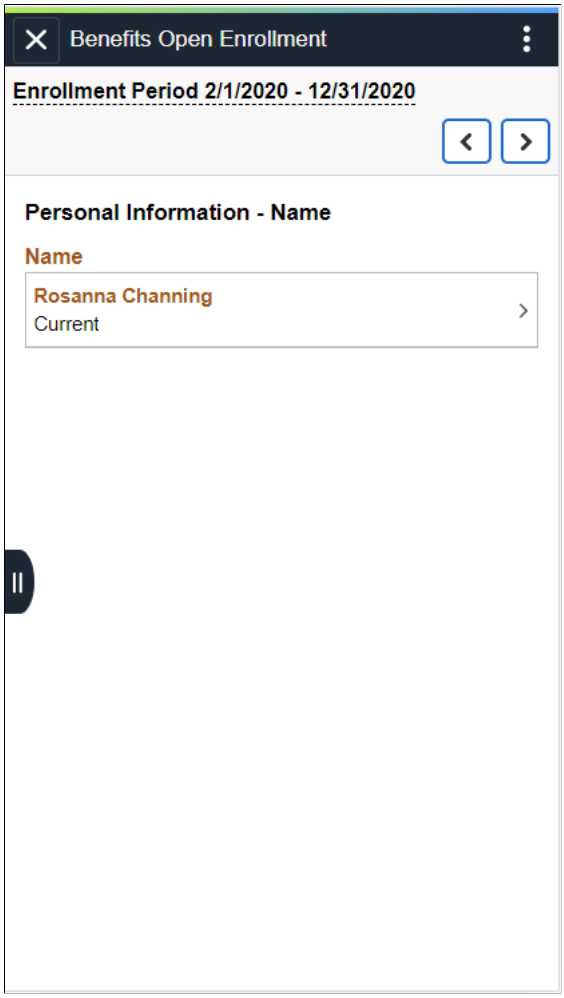
Image: Smartphone_Personal Information – Name page

This example illustrates the Personal Information – Name page as seen on a smartphone.



Personal Information – Home and Mailing Address Page

Use the Personal Information – Home and Mailing Address page (HR_EE_ADDR_FL) to verify your home and mailing address and make updates, if needed.

Navigation

Select the Home and Mailing Address step from the activity guide navigation, or use the Next and Previous buttons to navigate to the page.

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Image: Home and Mailing Address page

This example illustrates the Home and Mailing Address page in the Open Enrollment activity guide.

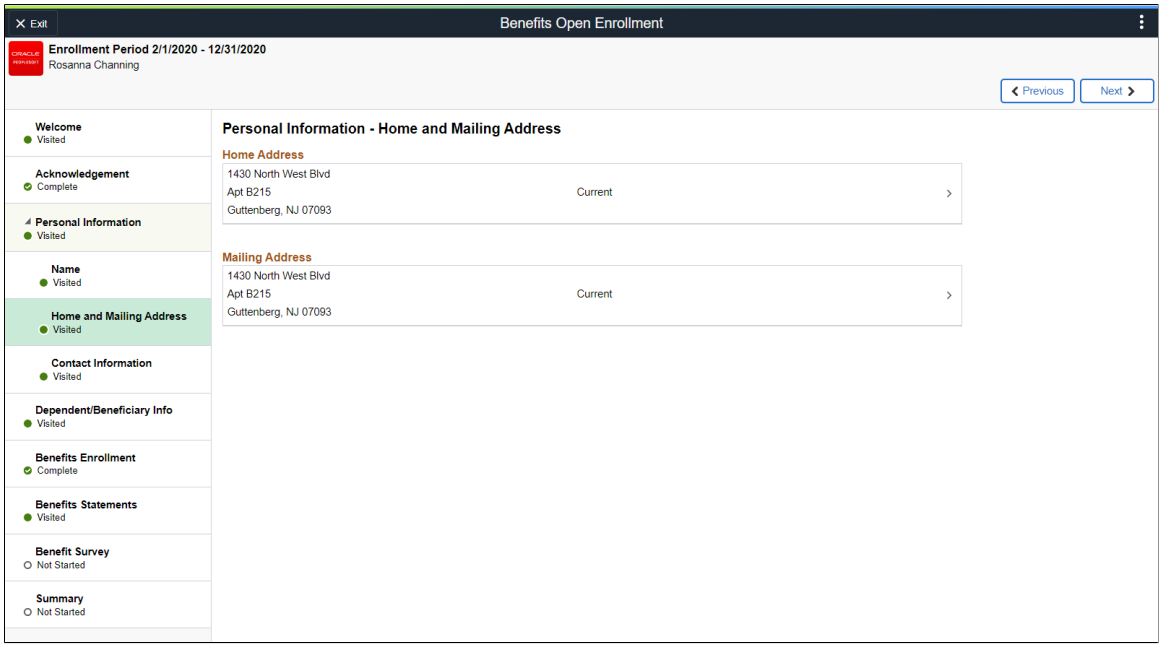

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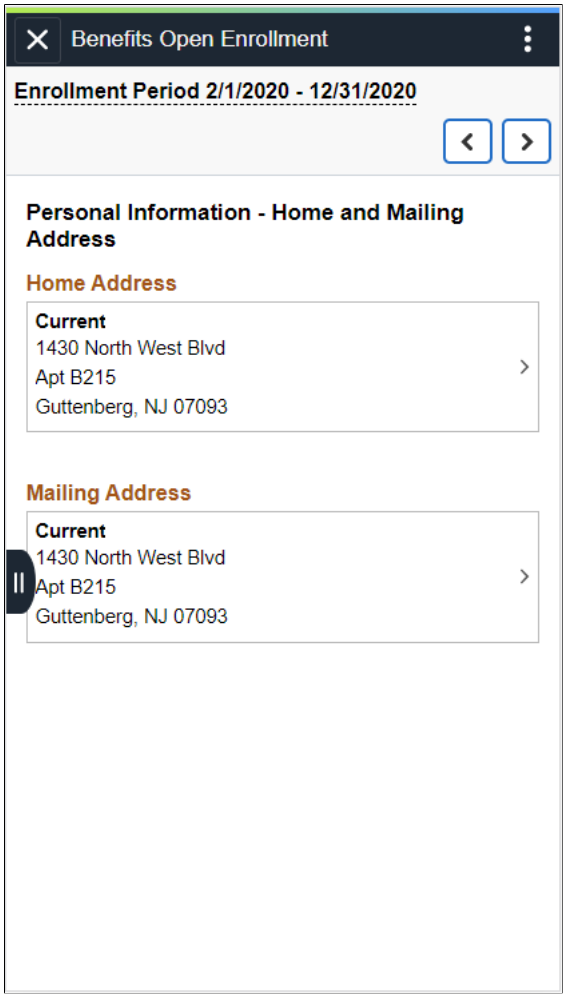
Image: Smartphone_Home and Mailing Address page

This example illustrates the Home and Mailing Address page as seen on a smartphone.



Personal Information – Contact Information Page

Use the Personal Information – Contact Information page (HR_EE_CONTACTS_FL) to review or update your phone numbers, email addresses, and instant messaging IDs, if needed.

Navigation

Select the Contact Information step from the activity guide navigation, or use the Next and Previous buttons to navigate to the page.

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Image: Contact Information page

This example illustrates the Contact Information page in the Open Enrollment activity guide.

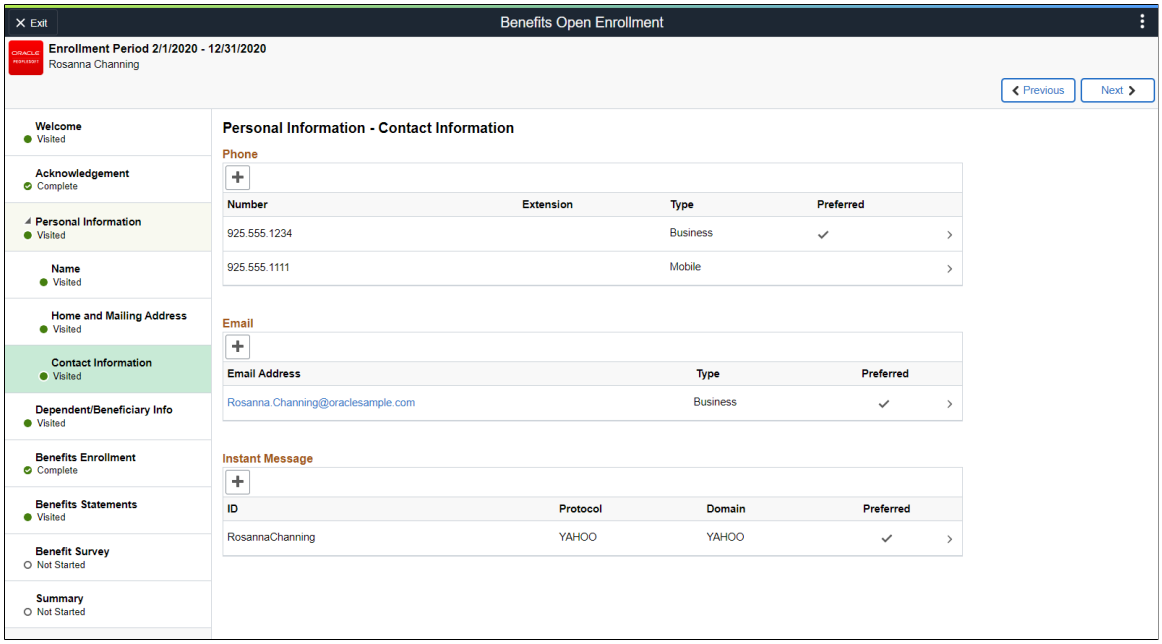

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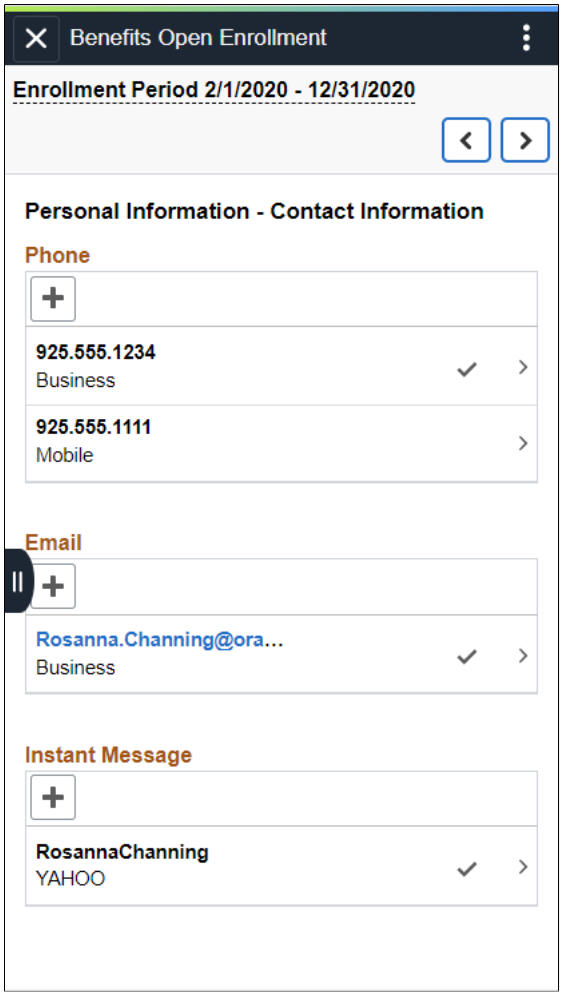
Image: Smartphone_Contact Information page

This example illustrates the Contact Information page as seen on a smartphone.



Dependent/Beneficiary Info Page

Use the Dependent/Beneficiary Info (information) page (W3EB_DEPBNSMRY_FL) to update information about dependents and beneficiaries.

Navigation

Select the Dependent/Beneficiary Info step from the activity guide navigation, or use the Next and Previous buttons to navigate to the page.

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Image: Dependent/Beneficiary Info page

This example illustrates the fields and controls on the Dependent/Beneficiary Info page.

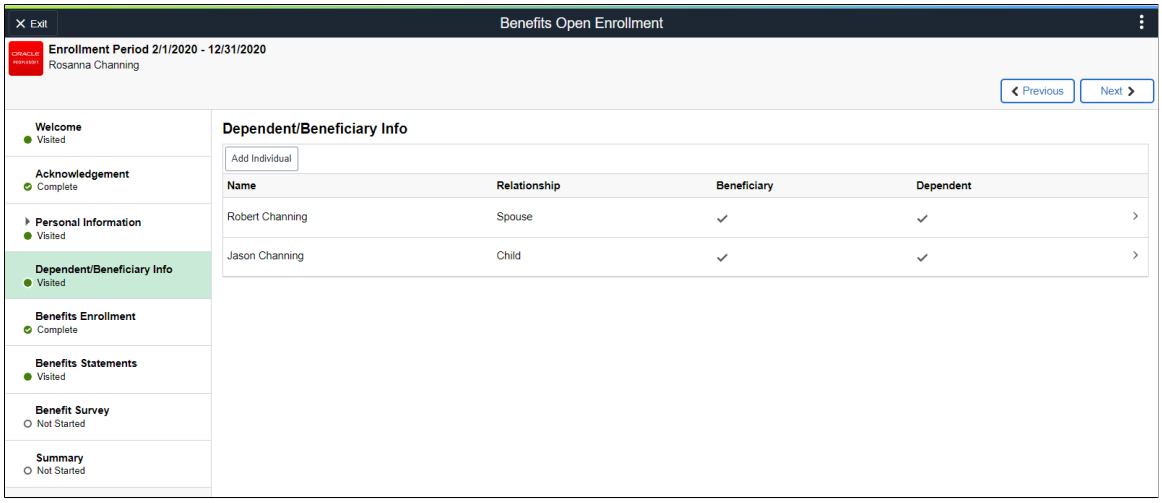
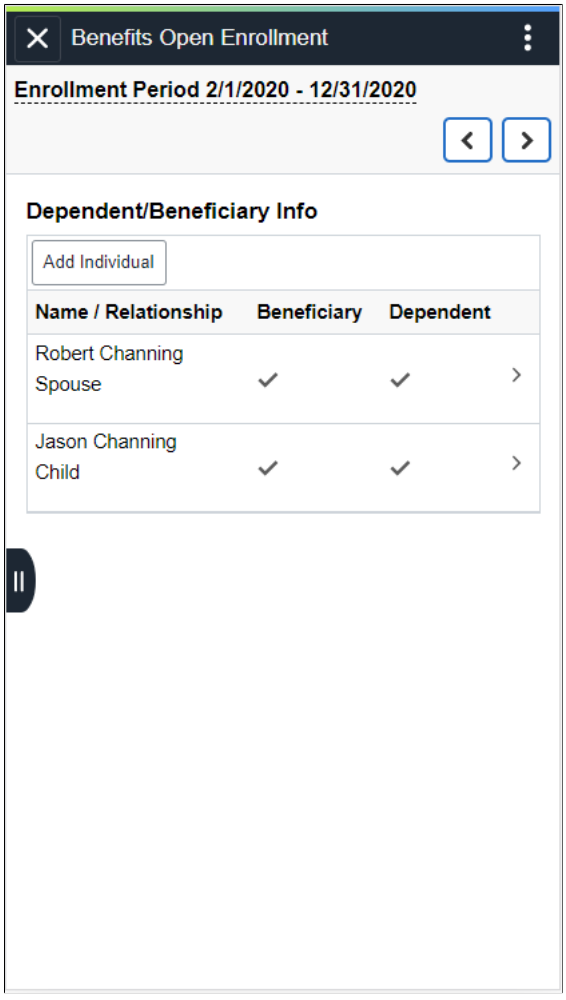


Image: Smartphone_Dependent/Beneficiary Info page

This example illustrates the Dependent/Beneficiary Info page as seen on a smartphone.



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For details on this page, refer "Dependent and Beneficiary Information Page" (PeopleSoft HCM 9.2: eBenefits).

Benefits Enrollment Page

Use the Benefits Enrollment page (BNE_CARD_SUMM_FL) to view the enrollment summary and detailed information about various benefit plans which are open for enrollment or edits.

Navigation

Select the Benefits Enrollment step from the activity guide navigation, or use the Next button to navigate to the page.

Image: Benefits Enrollment Page

This example illustrates the Benefits Enrollment page in the Open Enrollment activity guide.

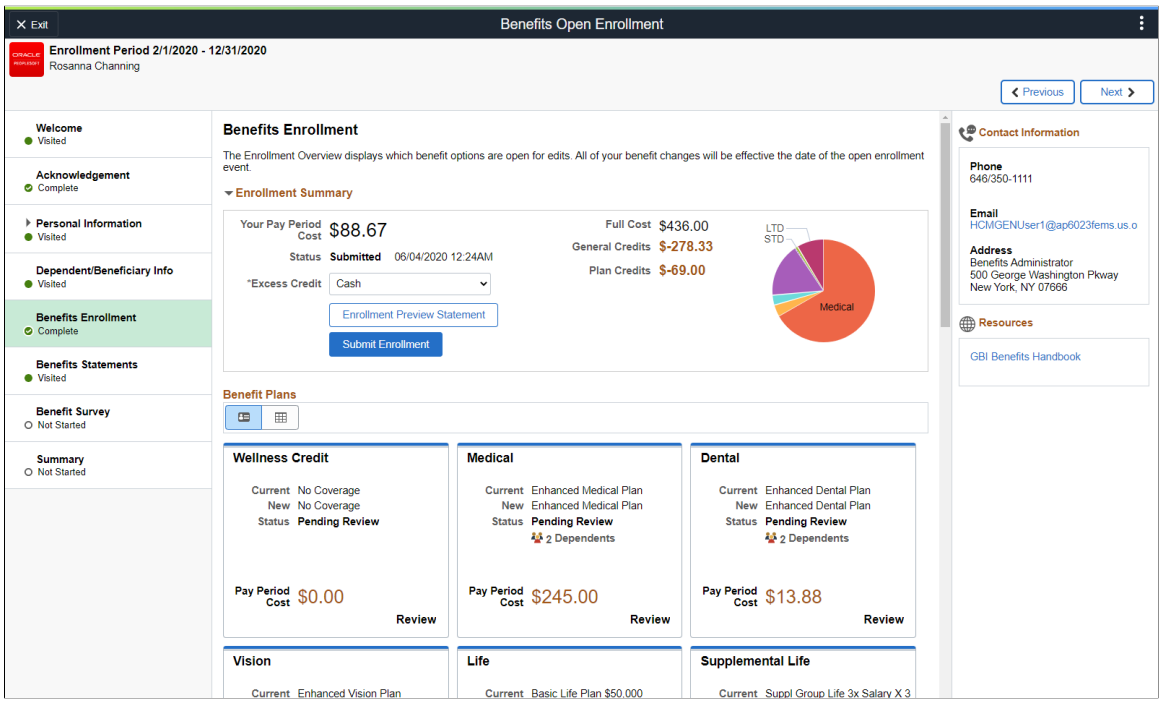

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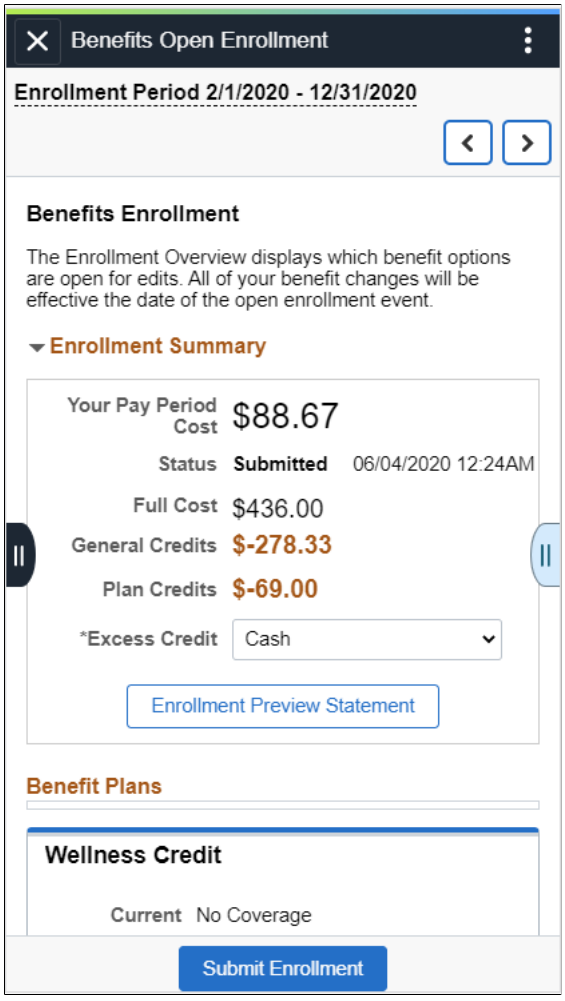
Image: Smartphone_Benefits Enrollment page

This example illustrates the Benefits Enrollment page as seen on a smartphone.



For details on this page, refer Benefits Enrollment Page from the topic, *Using the PeopleSoft Fluid User Interface to Manage Benefits Enrollment as an Employee*.

Benefits Statements Page

Use the Benefits Statements page (BAS_STMT_LIST_FL) to view a list of benefits enrollment preview and confirmation statements.

Navigation

Select the Benefits Statements step from the activity guide navigation, or use the Next button to navigate to the page.

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Image: Benefits Statements page

This example illustrates the Benefits Statements page.

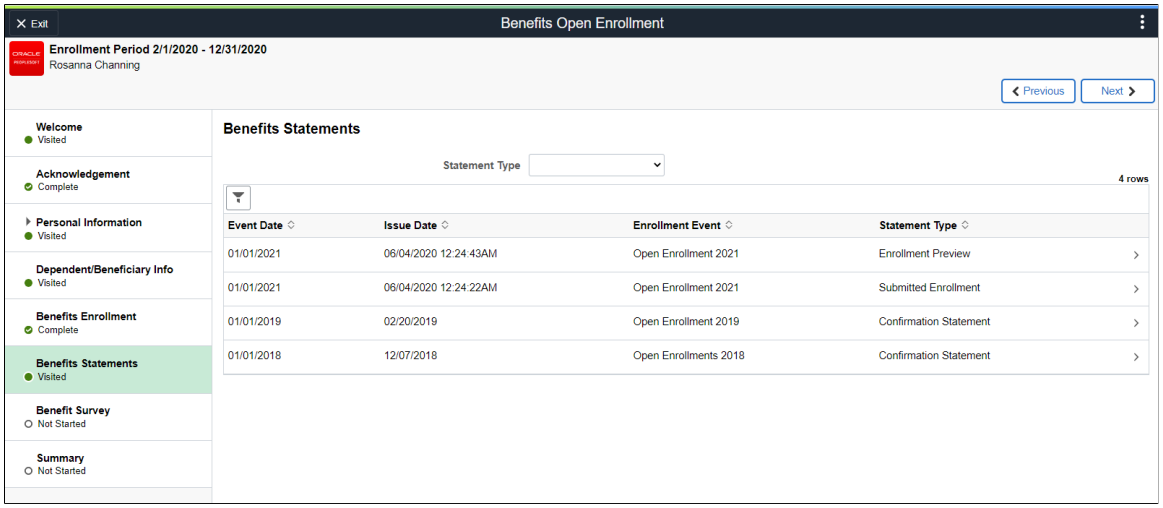
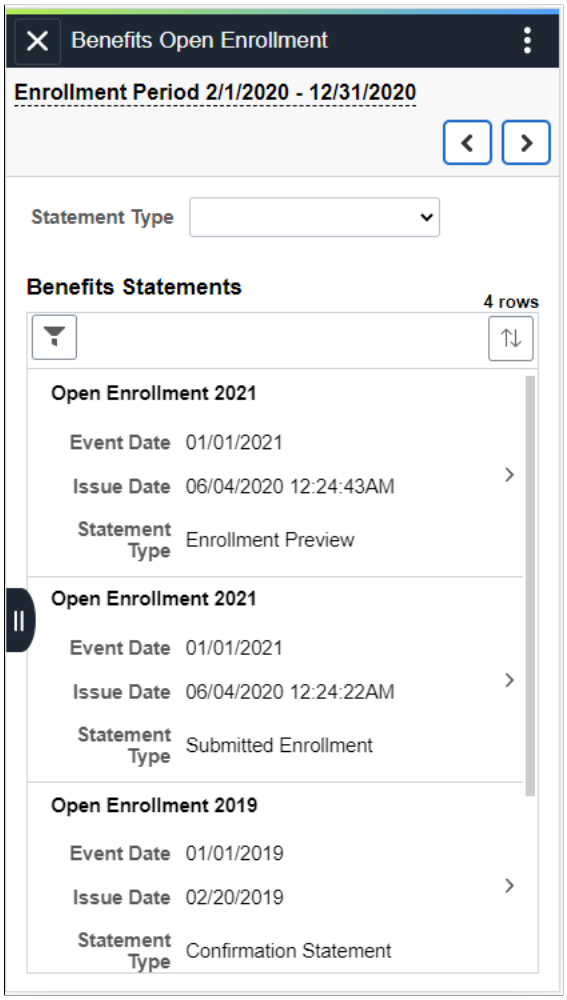


Image: Smartphone_Benefits Statements

This example illustrates the Benefits Statements as seen on a smartphone.



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Summary Page

Use the Summary page (AGC_SUMMARY_FL) to view a summary of your open enrollment activities or return to a specific step in your Open Enrollment activity guide.

Note: Oracle recommends that you add the Summary step as the last step in the activity guide process.

Navigation

Select the Summary step from the activity guide navigation, or use the Next button to navigate to the page.

Image: Summary Page

This example illustrates the Summary Page in the Open Enrollment activity guide.

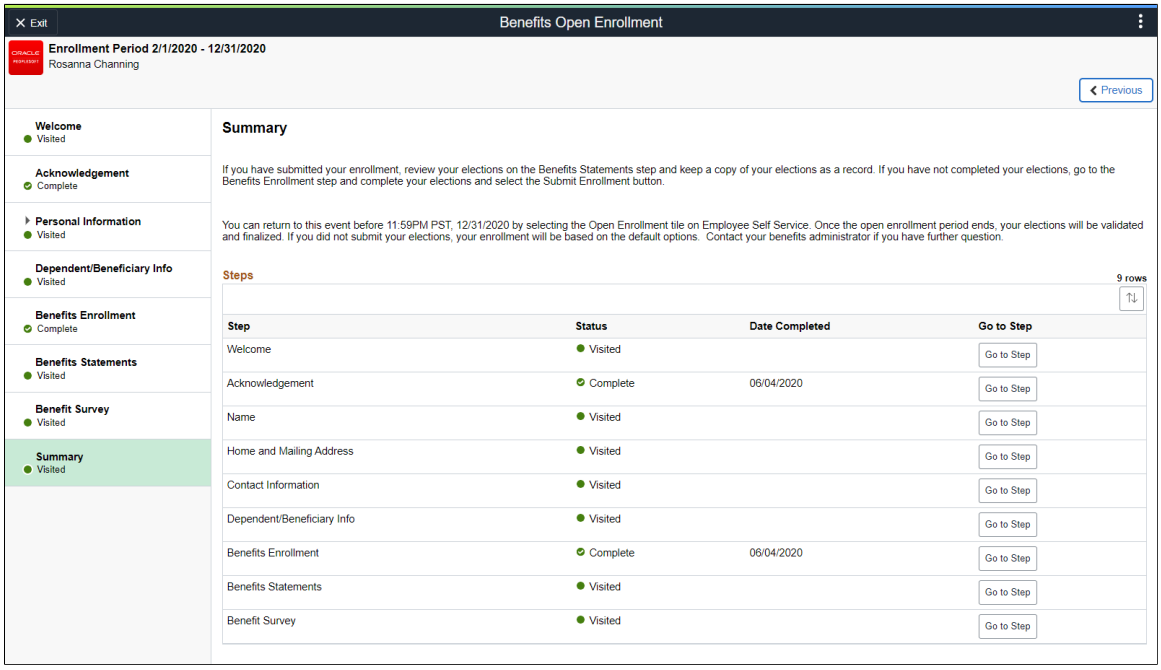

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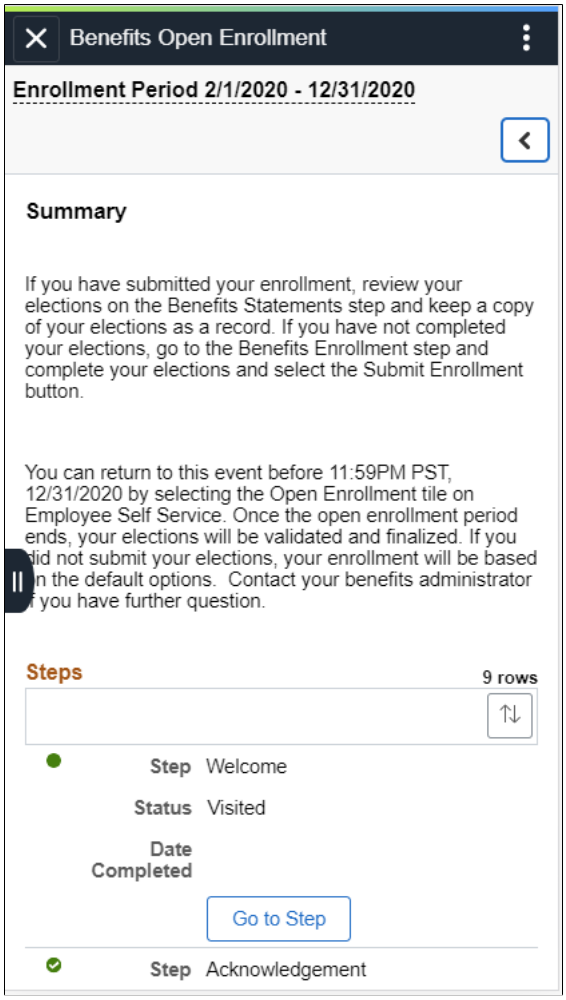
Image: Smartphone_Summary page

This example illustrates the Summary page as seen on a smartphone.



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Chapter 15

Running the PeopleSoft Benefits Administration Process

Understanding the Benefits Administration Process

This section discusses:

- The Benefits Administration process.
- Open enrollment.
- Event maintenance.
- The Snapshot process.

The Benefits Administration Process

You use the PeopleSoft Benefits Administration process to perform:

- Open enrollment.
- Event maintenance.
- The Snapshot process.

Both open enrollment and event maintenance involve a similar cycle of procedures:

- Determination of participant benefits eligibility.
- Calculation of benefit costs and flexible credits.
- Creation and delivery of participant enrollment forms.
- Data entry of participant election choices.
- Validation of employee elections.
- Analysis of processing, enrollment, and election data.
- Loading of elections to the database.
- Creation and delivery of election confirmation forms.

Open Enrollment

You use open enrollment for periodic benefits reenrollment across your employee population.

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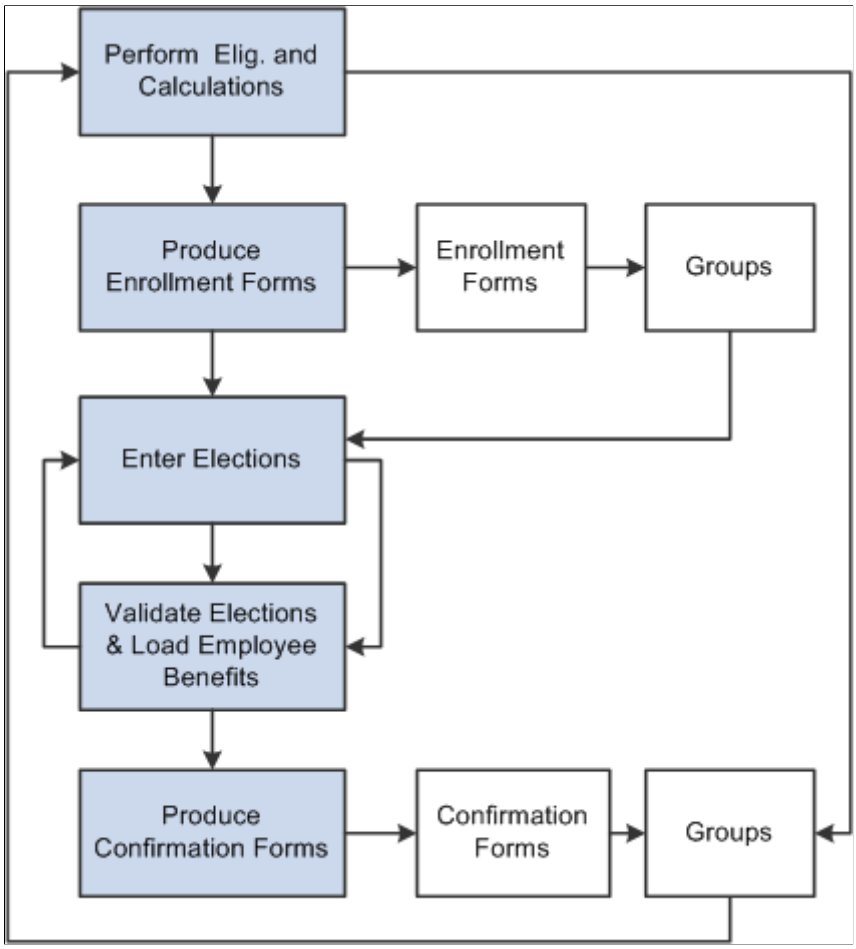
Open enrollment begins by determining the benefit program under which each participant should be managed and the benefit options available to participants, including associated prices and flexible credits. It also identifies default enrollments for participants, such as new hires, who have no current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

Elections are loaded as they are successfully validated. If problems or errors occur, individual participant elections can be rolled back, updated, and reloaded as necessary until the process is finalized. This diagram describes open enrollment processing:

Image: Open enrollment processing for periodic benefits reenrollment across your employee population

This image describes the open enrollment processing for periodic benefits reenrollment across your employee population.



Event Maintenance

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

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

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- Family status events, such as divorce.
- Job-related information changes, such as changes to pay frequency.
- Passive events, such as the reaching of the age of retirement.
- The hiring and termination of employees.

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

From this point on, event maintenance follows the same track as open enrollment.

Event Maintenance and COBRA Administration

PeopleSoft Benefits Administration initiates qualifying COBRA (Consolidate Omnibus Budget Reconciliation Act) events during the Event Maintenance process when a recognized COBRA event is finalized. The only exception to this rule is the Overage Dependent event, which is initiated by the COBRA process for both the Manage Base Benefits business process and Benefits Administration clients.

When Benefits Administration initiates the COBRA event, it populates the COBRA Activity table with the employee ID, employment record number, COBRA event date, COBRA action code (as defined on the Action Reason table) and event ID related to the initiated event. From that point, the activity (event trigger) is further processed only by the COBRA Administration system, not by Benefits Administration.

Related Links

Defining Event Rules

The Snapshot Process

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

Essentially, the snapshot:

- Compares employees' current data to the defined eligibility rules.
- Records the options for which participants are currently eligible.
- Flags instances in which employees are ineligible for their current enrollments.

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

Other Uses of the Snapshot

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

- Test your eligibility rule setup to find employees considered ineligible for their current benefits.

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

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

Understanding the Benefits Administration Process Flow

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

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

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

1. During the first run, the system assigns participant events to a Benefits Administration processing schedule, and scheduled events are, in turn, assigned to a benefit program.

   In addition, Benefits Administration determines benefit program eligibility, options, and defaults, and calculates credits and rates for the participant associated with the event.

2. During the second run, after you've generated enrollment statements for your participants and entered their election choices into the system through the data entry pages, the system validates and loads updated participant plan, dependent, and investment election information.

3. During the final run, Benefits Administration finalizes elections for participants who did not return their enrollment statements and for participants with errors in their records.

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

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

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Related Links

Process Status and Benefit Program Assignment
Scheduling Events and Assigning Benefit Programs
Reviewing Benefits Administration Process Results

Process Flow Details

The next tables describe the general flow of the Benefits Administration process, which is divided into three parts.

Before Running Benefits Administration

This table lists the steps that you should take before running the Benefits Administration process:

Step	*Description*	*Details*	*Pages or Processes Used*
1	Build your benefits administration benefit programs.	Create benefit plan options, calculations rules, rate tables, event rules, eligibility, and flexible credits. Link these building blocks to your benefit program.	See "Building Benefit Programs" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits).
2	Prepare the system for Benefits Administration processing.	Create pay calendars, audit benefit data, create BAS (Benefits Administration System) group IDs, and create process schedules. For Open Enrollment (OE) or Snapshot, create OE IDs or Snapshot (SNP) IDs.	See Understanding the Benefits Administration Preparation Process.
3	For EM (Event Maintenance) only, review, add, or delete unprocessed events.	Use the BAS Activity table to review the list of unprocessed events. Add and delete events as necessary.	BAS Activity.
4	Set up the Benefits Administration run control.		Benefits Administration Run Control.

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

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

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Step	Description	Details	Pages or Processes Used	Process Status Result
5	Assign participants to a processing schedule and prepare options.	Run the Benefits Administration process to assign participants to the processing schedule, determine eligibility, calculate prices and credits, and identify option defaults and terminations. If the process finishes without errors, go to step 7. If the process results in errors, continue with step 6.	Benefits Administration Process Run Control component. Use the Participant Lists run control page to schedule specific participants for processing.	If scheduling is successful: *AS* (Assigned) or *AN* (Assigned None). If scheduling is not successful: *AE* (Assigned Error). If option preparation is successful: *PR* (Prepared), *FA* (Finalized Program None), or *FP* (Finalized Prepared None). No additional processing will occur for participants with an FA or FP Process Status. If option preparation is unsuccessful: *PE* (Prepared Error).
6	Review the results and correct errors from first run of the Benefits Administration process.	Review processing results and correct errors. During the next run of the process, the system will reevaluate participants and attempt to move them through the process. Use the Processing Controls Update to review and reprocess event processing results for individual participants. Use the Review Eligibility Results page to correct eligibility errors.	Processing Messages, Schedule Summary, Employee Event Summary, Processing Controls Update, Eligibility Debugging, Employee Process Status (BAS027), Eligible Participants (BAS001), Ineligible Participants (BAS010).	

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Step	Description	Details	Pages or Processes Used	Process Status Result
7	Create and deliver enrollment forms.		Enrollment Statements (BAS004).	When you create an enrollment form for a participant, their process status is updated to *NT* (Notified).
8	Enter employee elections.	Use the Data Entry pages or eBenefits.	Use the Data Entry pages or eBenefits.	When you enter elections for a participant, their process status is updated to *ET* (Elections Entered).

Validating, Loading, and Finalizing Elections

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

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

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

Understanding the Benefits Administration Process Status

This section discusses:

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- Process status and schedule assignment.
- Process status and benefit program assignment.
- Process status and option preparation.
- Process status and entering, validating, and loading elections.
- Process status and reprocessing finalized events.

Process Status and Schedule Assignment

During schedule assignment, Benefits Administration:

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

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

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

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

Related Links

Establishing a Processing Schedule
Scheduling Events and Assigning Benefit Programs

Process Status and Benefit Program Assignment

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

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

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

Note: You should not see the AN process status when the system completes the first run of the Benefits Administration process. The system uses this status value only during the Schedule and Program Assignment stage of the process. In option preparation, the next stage of the first run of Benefits Administration, the system moves events with an AN process status on to subsequent process status values like FA or PR.
In addition, if you see a set of events at the AS process status after Event Maintenance processing, employees are being processed who have more than one event assigned to them. In event maintenance, the system can assign and schedule all unprocessed events to a status of AS. However, because Benefits Administration can process only one event per participant at a time through option preparation and election validation, it must close those events and leave them behind at AS status until the open events are processed.

Related Links

BenAdmin Processing Controls Page — Reviewing Processing Results for Participant Events

Process Status and Option Preparation

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

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

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

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

When an error occurs, you need to:

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

This table describes option preparation status values:

Process Status	***Description***	***Next Processing Steps***
FA - Finalized - Benefit Program None	Participant event has no program assignment and no current elections. Used for events assigned an AN process status during the Scheduling and Program Assignment and for which associated participants do not have current benefit elections.	No further processing occurs for this event. The online page description for this process status (on the Schedule Summary page, for example) is Program None.
FP - Finalized - Prepared None	System has assigned the participant event to a benefit program, but the associated participant is not allowed to elect any new options.	No further processing occurs for this participant event. The online page description for this process status (on the Schedule Summary page, for example) is Prepare None.
PE - Prepare Error	The system has encountered an error. Events are given a PE process status during option eligibility determination or calculation of credits.	To correct, you should make corrections to the personal, employment, job, and information of the associated participant or to plan and option eligibility information. Each time you run the Benefits Administration process, the system reevaluates PE events.

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

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

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

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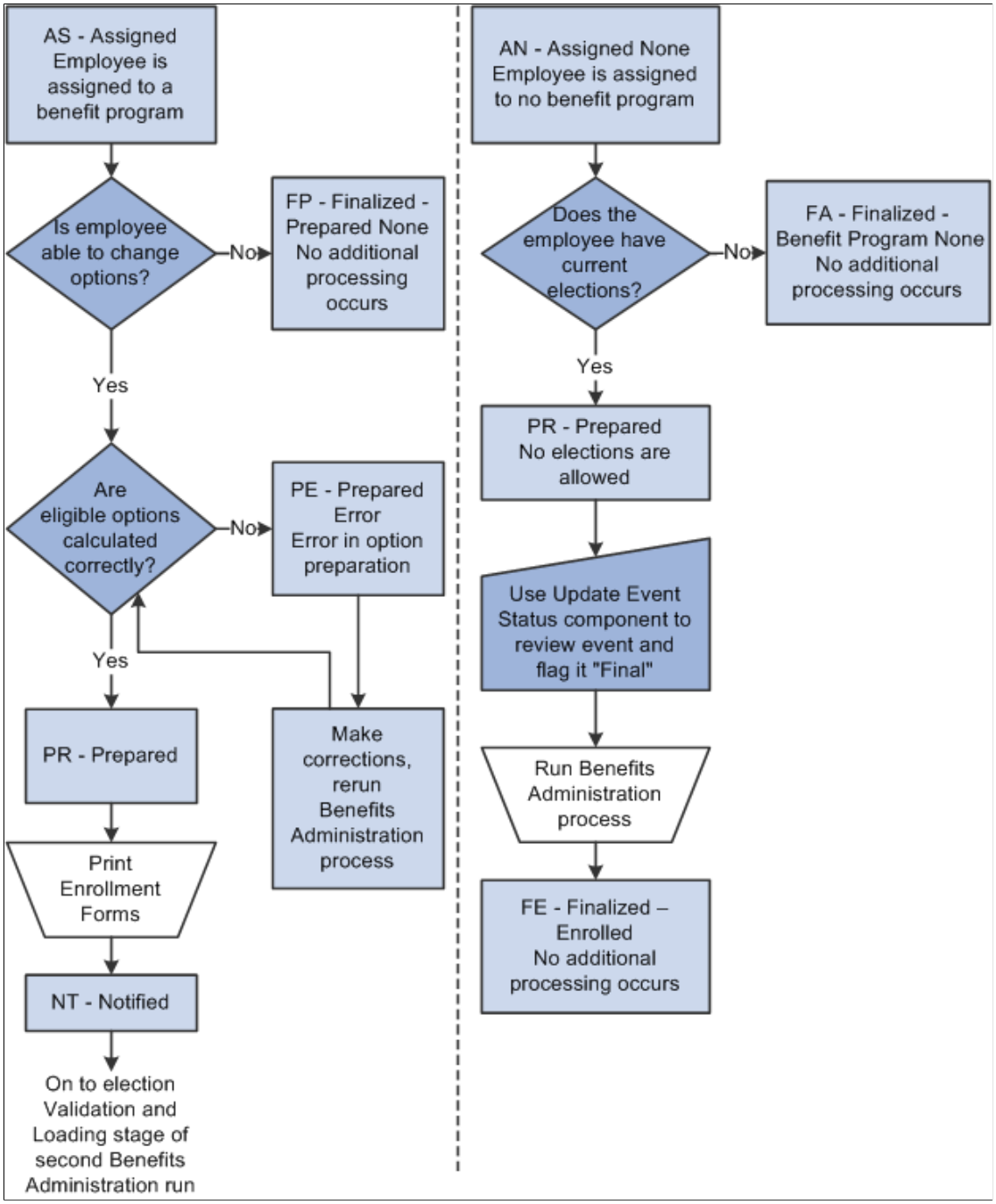
Image: Process status flow for option preparation

The following image illustrates the process status flow for option preparation.



Process Status and Entering, Validating, and Loading Elections

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

This table describes status values that you might encounter:

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Process Status	*Description*	*Next Processing Steps*
ET - Entered	A benefits administrator (or the employee through PeopleSoft eBenefits) has entered the participant's new elections into the system, and they are ready for validation by the Benefits Administration process. Participant events with a process status of ET can have a prior process status of PR, NT, or RE (Reentered).	If no errors occur with the elections, the elections are posted to the appropriate benefit and payroll tables, and the system updates the process status to FE. If errors occur, the status becomes EE. If you run the Benefits Administration process with Finalize selected, EE participant events are brought to FE status, and the system goes through the normal validation and load procedure for all elections. If any of the employee's choices are invalid, event rules are consulted to determine whether current elections or defaults should be loaded.
EE - Election Error	The system encountered an error in processing the elections for the participant associated with the event. No elections are posted to the Manage Base Benefits business process tables. Errors are posted to the Message table and are identified by participant and event. The previous process status was either ET or EE.	No further processing occurs for this participant event. You need to correct the errors by reentering employee elections and run the Benefits Administration process again. Alternatively, you can *force finalize* this participant event to finalize it with errors. The system loads the default values for the associated participant's erroneous benefit option elections. If a dependent/beneficiary or investment choice is in error, the system loads the employee's option choice but does not load the dependent/beneficiary or investment choice. You can generate confirmation statements for participants whose events have an EE process status; the form indicates the plan information in error along with the valid plan choices.
FE - Finalized - Enrolled	Benefits Administration processing is complete for the participant event. All elections have been validated and loaded to the appropriate Manage Base Benefits business process and Payroll for North America tables. Events reach this status either from a process status of ET, EE, or PR, or if you force finalize a participant. If the participant came from a process status of PR due to a loss of all eligibility, the system inserts a termination row for each of the participant's current elections.	You need to generate and deliver a confirmation form to the participant associated with the event. To change a participant's elections after they've been finalized (for example, if a participant wants to correct information on the confirmation statement), you can reprocess them by giving the associated event a process status of RE (reentered) in the Event Status Update page and rerunning the Benefits Administration process.

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Related Links

Process Status and Reprocessing Finalized Events

Process Status and Reprocessing Finalized Events

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

The following table describes the RE process status value:

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

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

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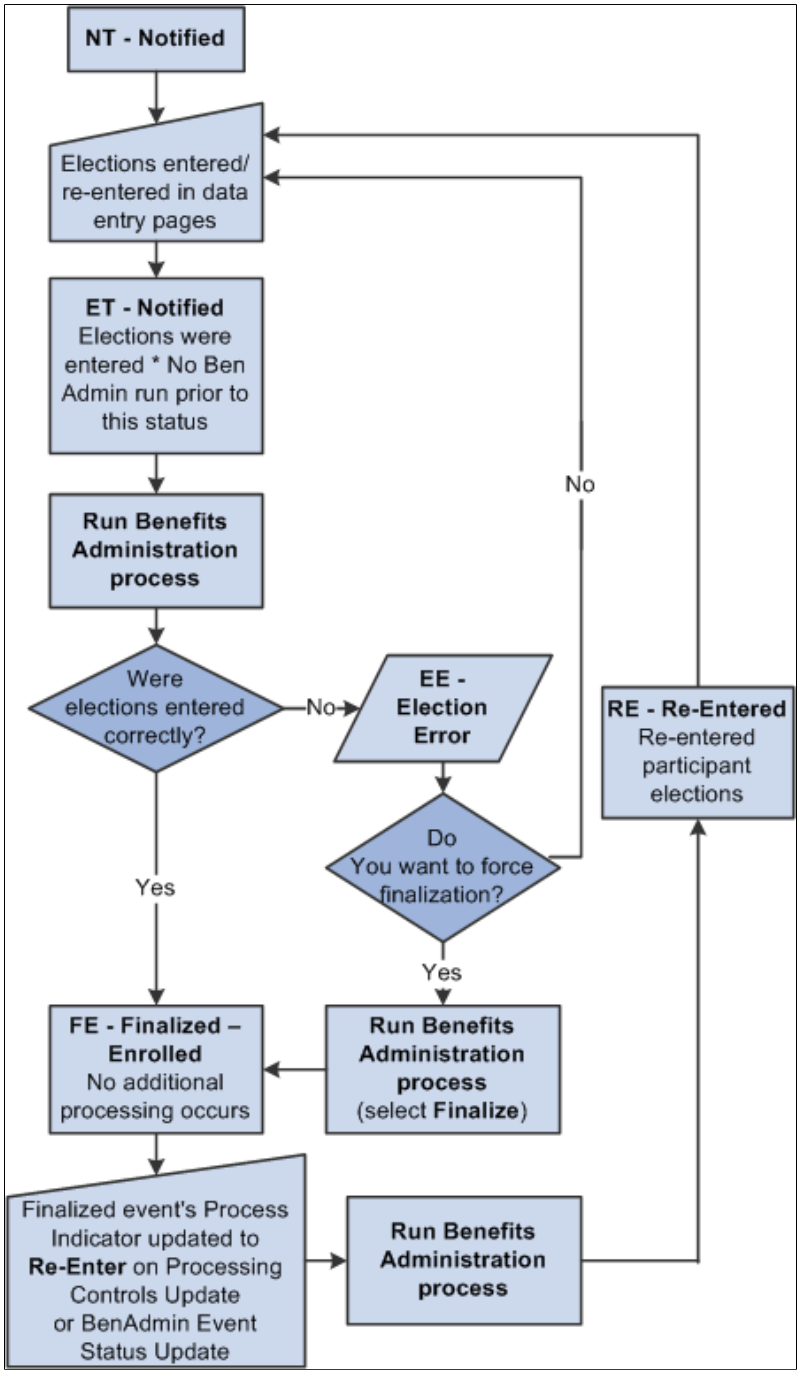
Image: Process status flow for election entry, validation, loading, and reentry

This image describes the process status flow for election entry, validation, loading, and reentry.



Related Links

Process Status and Reprocessing Finalized Events

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Multiple Event Scheduling

This section discusses:

- Multiple event scheduling.
- Event status and retroactive events.

Understanding Multiple Event Scheduling

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

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

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

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

Event Status and Retroactive Events

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

The following table describes event status values:

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

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

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

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

Related Links

Reprocessing Events

Setting Up the Benefits Administration Run Control Process

This section discusses how to set up the Benefits Administration run control process.

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

Pages Used to Set Up the Benefits Administration Run Control Process

Page Name	*Definition Name*	*Usage*
Schedule and Chkpt Restart Page	BAS_RUNCTL1	Specify a process to run by identifying the Open Enrollment, Event Maintenance, or Snapshot schedule for which you're planning to run the Benefits Administration process.

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Page Name	Definition Name	Usage
Participant Lists Page	BAS_RUNCTL2	Add participants to a schedule you're processing, or process a specific set of employees.
OE/Snapshot Page	BAS_RUNCTL3	Set up open enrollment or Snapshot routines. Capture new participants for a specific Open Enrollment or Snapshot schedule already in progress. Finalize and apply defaults for participants in the schedule who have been processed with errors.
Passive Event Processing Page	BAS_RUNCTL4	Process passive events for Event Maintenance schedules. Identify the passive events that have occurred in a defined period of time and create an entry of the events in the BAS_ACTIVITY table.

Schedule and Chkpt Restart Page

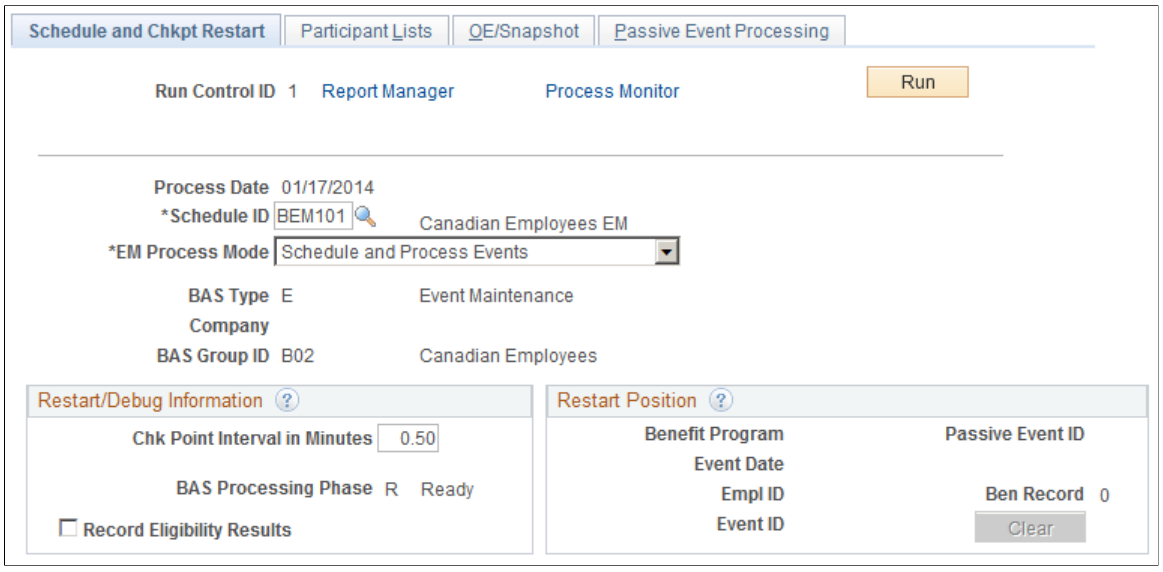
Use the Schedule and Chkpt Restart (schedule and checkpoint restart) page (BAS_RUNCTL1) to specify a process to run by identifying the Open Enrollment, Event Maintenance, or Snapshot schedule for which you're planning to run the Benefits Administration process.

Navigation

Benefits > Manage Automated Enrollment > Events > Run Automated Event Processing > Schedule and Chkpt Restart

Image: Schedule and Chkpt Restart page

This example illustrates the fields and controls on the Schedule and Chkpt Restart page. You can find definitions for the fields and controls later on this page.



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

The page also displays the company and BAS group ID defined on the Schedule table.

EM Process Mode (event maintenance process mode) If you selected an Event Maintenance schedule, select the EM Process Mode:

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

Chk Point Interval in Minutes (check point interval in minutes) Indicate a number of minutes between commits; 60 is a reasonable number.

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

Record Eligibility Results Use to troubleshoot benefits processing errors related to eligibility.

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

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

Clear If a job terminates abnormally, values for the last record processed appear in Restart Position and the run control is locked (all fields are disabled, because the parameters should not be changed when the process is restarted). During implementation, you may encounter many instances of runs that end abnormally as you test your table setup. You may decide not to complete an interrupted schedule—the Clear button will

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unlock the schedule and its run control. This feature would not normally be used in a production environment.

The EM Process Mode allows for more efficient processing of very large participant populations. The Scheduling process is very fast, but it does not allow for multiple concurrent batch runs because of its updating of the BAS Activity table. The assignment, option preparation, validation, and finalization activities are slower and more intensive, but do allow for concurrent processing. Thus you can achieve maximum throughput by performing an initial Schedule Only run followed by several simultaneous Process Existing runs using multiple schedule IDs.

Related Links

Reprocessing Events

Participant Lists Page

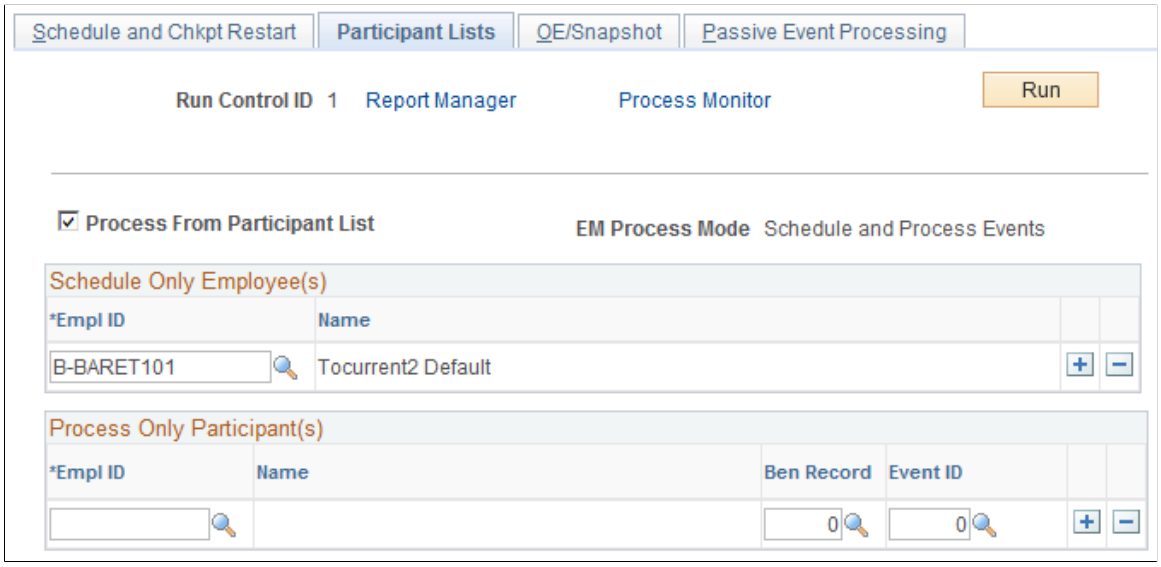
Use the Participant Lists page (BAS_RUNCTL2) to add participants to a schedule you're processing, or process a specific set of employees.

Navigation

Benefits > Manage Automated Enrollment > Events > Run Automated Event Processing > Participants List

Image: Participant Lists page

This example illustrates the fields and controls on the Participant Lists page. You can find definitions for the fields and controls later on this page.



Additional fields appear on this page when you select the Process From Participant List check box.

Process From Participant List Select to use the remaining features on this page.

Schedule Only Employee(s) Indicate which specific employees should have new events added to an Open Enrollment or Event Maintenance schedule.

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Process Only Participant(s)

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

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

OE/Snapshot Page

Use the OE/Snapshot (open enrollment snapshot) page (BAS_RUNCTL3) to set up open enrollment or Snapshot routines.

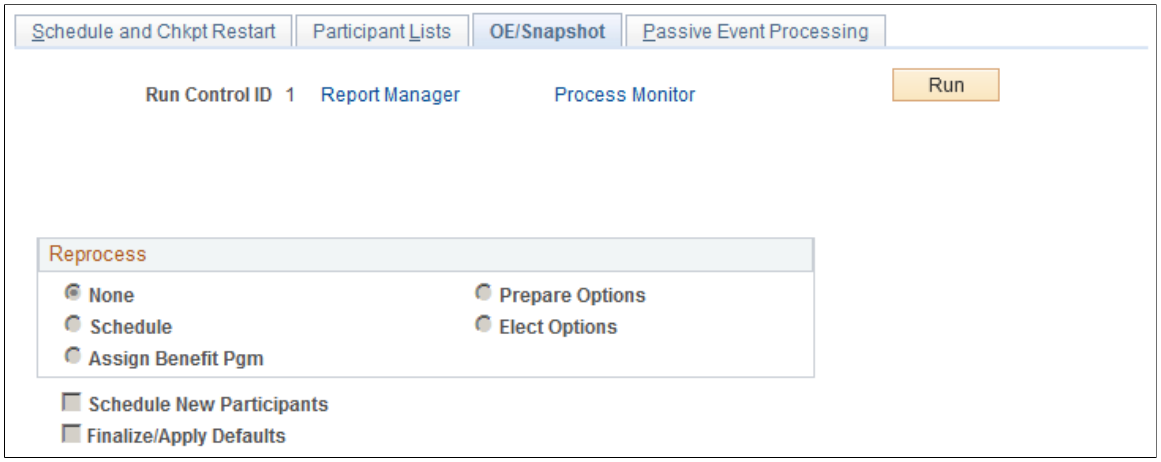
Capture new participants for a specific Open Enrollment or Snapshot schedule already in progress. Finalize and apply defaults for participants in the schedule who have been processed with errors.

Navigation

Benefits > Manage Automated Enrollment > Events > Run Automated Event Processing > OE/Snapshot

Image: OE/Snapshot page

This example illustrates the fields and controls on the OE/Snapshot page. You can find definitions for the fields and controls later on this page.



Use this page to reset the entire population in your Open Enrollment or Snapshot schedule to the selected action.

None

This is the default.

Schedule

Select if you've made changes to scheduling criteria or mass changes to job data that could affect schedule assignment, and you need to run through the Open Enrollment process again, beginning with that step. All existing participant records for the schedule will be deleted.

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Assign Benefit Pgm (assign benefit program)	Select if you've made changes to eligibility rules for benefit program assignment and need to run through the Open Enrollment process again, beginning with that step.
Prepare Options	Select if you've made changes to eligibility rules, event rules, or rate schedules that affect how the system determines eligible options, defaults, and the costs associated with each option. Any elections posted are deleted. All data entry for affected participants is also deleted. Closed and voided participant events are excluded.
Elect Options	Select if you've made changes to the validation rules stored on the Event Rules table. All participants are set back to a process status of PR, but any completed data entry on them is preserved. Any elections posted are deleted.
Schedule New Participants	Select if you missed a large group of participants in your initial run of Open Enrollment—participants who did not get scheduled and therefore do not have records on the participant file for this schedule. Rather than use the Participant Lists page to add the employee IDs one at a time, this check box forces the system to reevaluate all employees against the schedule parameters. If the participant fits that selection, and if the participant does not have a record on the participant file for this schedule, the system creates the record. **Note:** The Schedule New Participants option should not be used for the initial Open Enrollment run.
Finalize/Apply Defaults	Select when you are ready to complete Open Enrollment processing. The system performs the same validations against participant election information but also assigns defaults for participants who still have errors or who have not returned their election forms. This closes open enrollment for data entry. To reopen it, you need to reprocess selected participants. **Note:** The Finalize/Apply Defaults option is not typically used for the initial Open Enrollment run.

Passive Event Processing Page

Use the Passive Event Processing page (BAS_RUNCTL4) to process passive events for Event Maintenance schedules.

Identify the passive events that have occurred in a defined period of time and create an entry of the events in the BAS_ACTIVITY table.

Navigation

Benefits > Manage Automated Enrollment > Events > Run Automated Event Processing > Passive Events Processing

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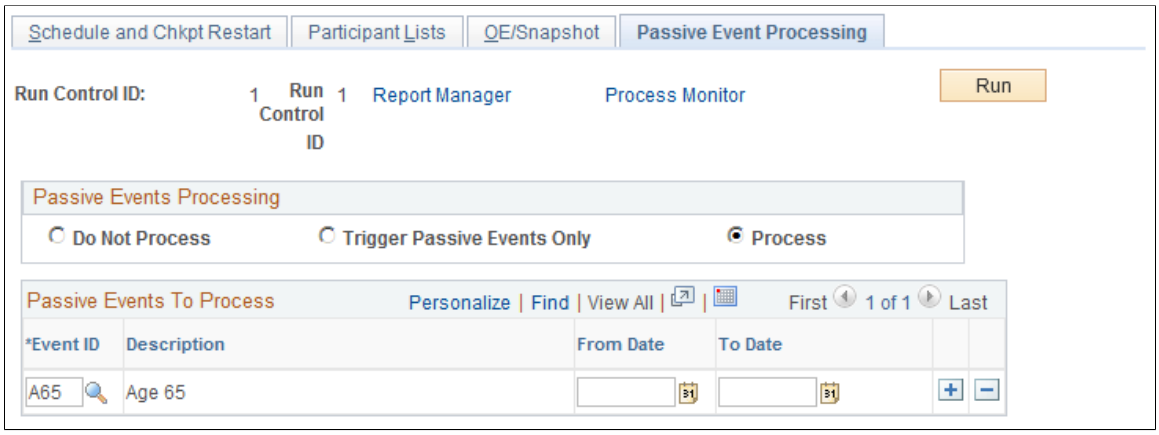
Image: Passive Event Processing

This example illustrates the fields and controls on the Passive Event Processing. You can find definitions for the fields and controls later on this page.



Passive events are not initiated by data entry, but are the result of the passing of a predefined period of time. For example, you might have an eligibility rule set up that enables employees to enroll in a benefit after 10 years of service.

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

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

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

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

From Date and **To Date** — Indicate the time frame during which you want to have the system look for passive events.

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

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Related Links

Passive Event History Page

Reviewing Benefits Administration Process Results

This section discusses how to review Benefits Administration process results.

Pages Used to Review Benefits Administration Process Results

Page Name	*Definition Name*	*Usage*
Process Messages Page	BAS_MESSAGES	Review errors that occurred during the last batch of BenAdmin processing.
Schedule Summary Page	BAS_PARTIC_SUM	Review employee counts for all available status values. Review process results for schedules.
BenAdmin Processing Controls (benefits administration processing controls)	BAS_PARTIC_PRC1	Review the processing status of specific participant event records using the following pages: • BenAdmin Processing Controls Page — Entering Search Criteria to Review Process Results • BenAdmin Processing Controls Page — Reviewing Processing Results for Participant Events
Participant Page	BAS_PARTIC_INQ1	Review status, processing, and eligibility information for a selected participant and event.
Plan Type Page	BAS_PARTIC_INQ2	Review plan type details for a selected participant and event, including dependent and investments information when applicable (through page links).
Option and Cost Page	BAS_PARTIC_INQ4	Review costs and credits for a participant and plan type.
Passive Event History Page	PASSIVE_EVENT_HIST	Review passive event history for a specified process date.

Process Messages Page

Use the Process Messages page (BAS_MESSAGES) to review errors that occurred during the last batch of BenAdmin processing.

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Navigation

Benefits > Manage Automated Enrollment > Review Processing Results > Processing Messages > Processing Messages

Note: You can also run the following reports to review Benefits Administration processing errors: Invalid Benefit Elections, Missing Elections, and Ineligible Participant (for Open Enrollment schedules only). The event ID for Open Enrollment processes is always 0, because the system opens one Open Enrollment event for all participants in the Open Enrollment schedule during the initial run of the OE process.

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

Categories of Errors

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

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

Schedule Summary Page

Use the Schedule Summary page (BAS_PARTIC_SUM) to review employee counts for all available status values.

Review process results for schedules.

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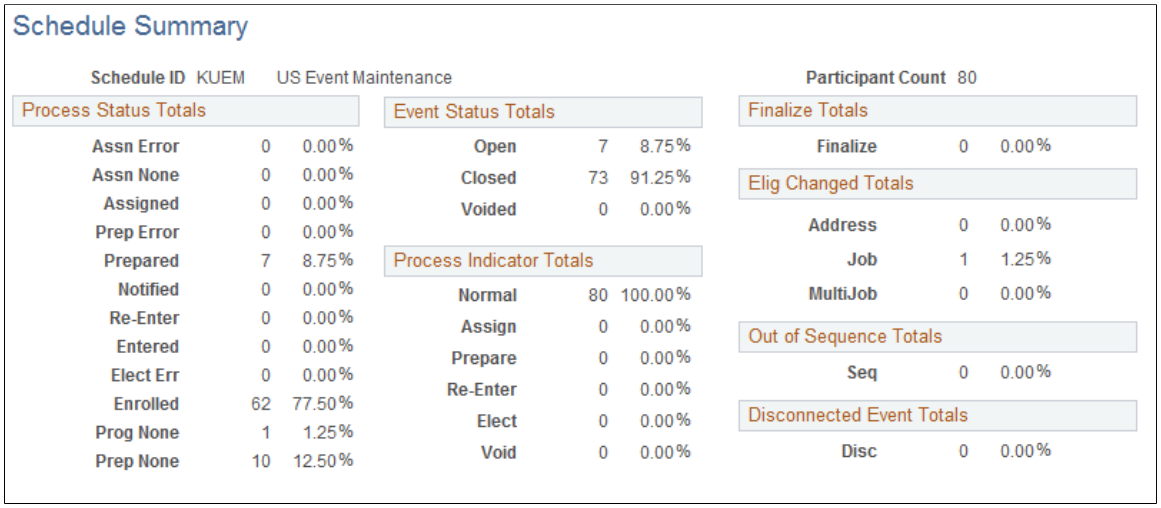
Navigation

Benefits > Manage Automated Enrollment > Review Processing Results > Schedule Summary > Schedule Summary

Image: Schedule Summary page

This example illustrates the fields and controls on the Schedule Summary page. You can find definitions for the fields and controls later on this page.



Note: The Schedule table shows the state of the schedule population at the current moment, so if you have participant events marked for finalization but have not run the process, they will show up in Finalize Totals. Once you run the process for that schedule, all events marked for finalization will be finalized and will not appear in Finalize Totals.
This page shows a cumulative total over the entire history of the schedule. You may occasionally *retire* an Event Maintenance schedule (mark it to allow *No New Events,*) and create a new schedule for new statistics.

Process Status Totals

Only one event can be open for any one participant and benefit record number combination at a time. However, these totals represent the sum of all events, open or closed.

Event Status Totals

Voided events are not considered for any further processing.

Process Indicator Totals

View the participant event totals that currently have been requested to go through reprocessing.

When the system actually reprocesses events, the system removes them from these lists of totals as appropriate.

Finalize Totals

Displays the number of participant events that are currently marked to be finalized or to have defaults applied to them, but which have not yet been run through the Benefits Administration process.

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You can flag individual events to be finalized and to have option defaults applied to them by selecting the Final check box for those events in the Controls page of the Processing Controls Update component.

Elig Changed Totals (eligibility changed totals)

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

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

Three categories of eligibility changes exist: address (state or postal code), job information, and multiple jobs (changes to primary job flags).

Out-of-Sequence Event Totals

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

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

Disconnect Event Totals

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

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

Related Links

Defining Open Enrollment and Snapshot IDs
Reprocessing Events
BenAdmin Processing Controls Page — Reviewing Processing Results for Participant Events
Understanding the Benefits Administration Process Status
Update Event Status Page
Analyzing Disconnected Events

BenAdmin Processing Controls Page — Entering Search Criteria to Review Process Results

Use the BenAdmin Processing Controls (benefits administration processing controls) page (BAS_PARTIC_PRC1) to enter search criteria to review the processing status of specific participant event records.

Navigation

Benefits > Manage Automated Enrollment > Events > Update Processing Controls > BenAdmin Processing Controls

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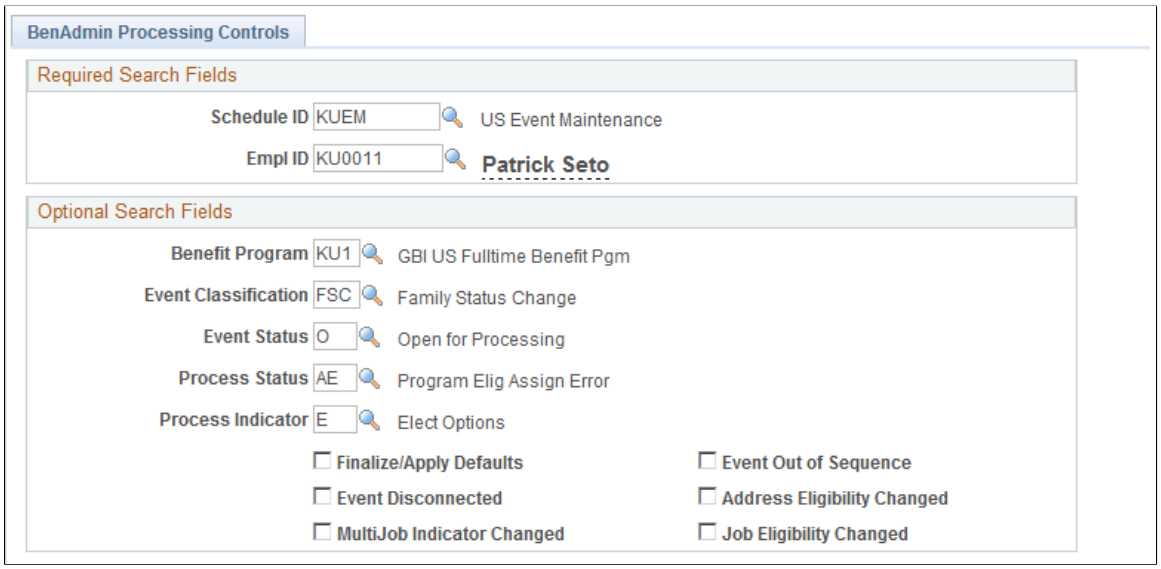
Image: BenAdmin Processing Controls page

This example illustrates the fields and controls on the BenAdmin Processing Controls page to enter search criteria to review process results for participant events. You can find definitions for the fields and controls later on this page.



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

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

Schedule ID and **Empl ID** (employee ID)	You must use one or the other of these options as selection criteria to focus your search on either a participant or a schedule. **Note:** Selecting a particular employee ID locates all event records for that employee with a process status value assigned to him or her: only one event will be open, but multiple ones might be closed or void events.
Finalize/Apply Defaults	Locates events that have been flagged to be finalized or have option defaults applied. You flag events this way with the Final check box on the Processing Controls Update - Controls page.

BenAdmin Processing Controls Page — Reviewing Processing Results for Participant Events

Use the BenAdmin Processing Controls (benefits administration processing controls) page (BAS_PARTIC_PRC1) to review the processing status of specific participant event records.

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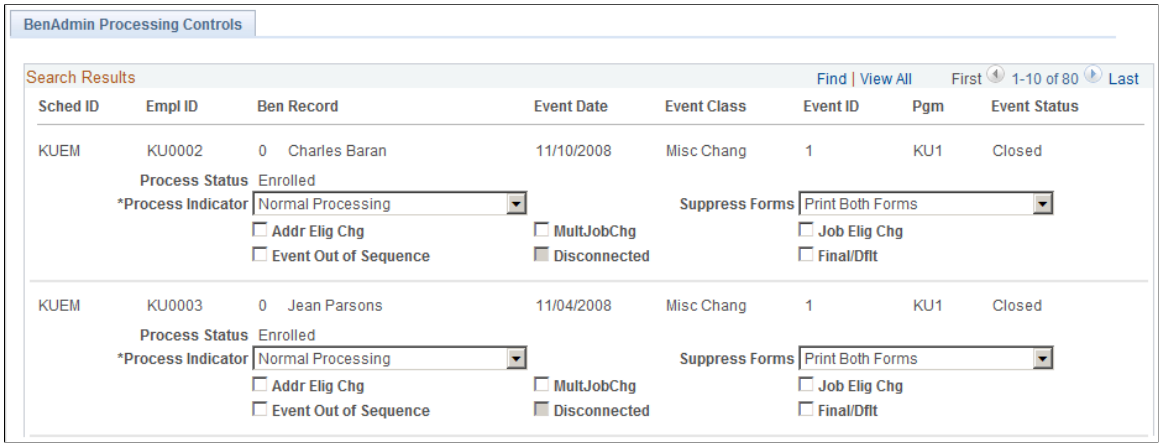
Navigation

Benefits > Manage Automated Enrollment > Events > Update Processing Controls > BenAdmin Processing Controls

Image: BenAdmin Processing Controls page

This example illustrates the fields and controls on the BenAdmin Processing Controls page. You can find definitions for the fields and controls later on this page.



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

Process Indicator	Tells the system the event status to which you want to reprocess the specific participant event on the next Benefits Administration run.
Addr Elig Chg (address eligibility change), **Mult JobChg** (multiple job change), and **Job Elig Chg** (job eligibility change)	Indicates that event eligibility changes, insertions, or deletions have occurred and the participant event may need to be reprocessed. If you determine that the event does not need reprocessing, you can deselect these check boxes to indicate this fact, although these flags are only informational.
Disconnected	Indicates that an event has been disconnected and can no longer be processed. Disconnected events are events that have lost rows in one of the core HR tables: PERSON, PERS_DATA_EFFDT, EMPLOYMENT, or JOB.
Final/Dflt (final/default)	Indicates that you want to finalize default benefit option elections or apply them to a specific participant event on the next run of the Benefits Administration process for the schedule to which the participant event is assigned, or both.

Related Links

Analyzing Disconnected Events
Update Event Status Page
Defining Open Enrollment and Snapshot IDs
Update Event Status Page
"Understanding Multiple Jobs" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

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Participant Page

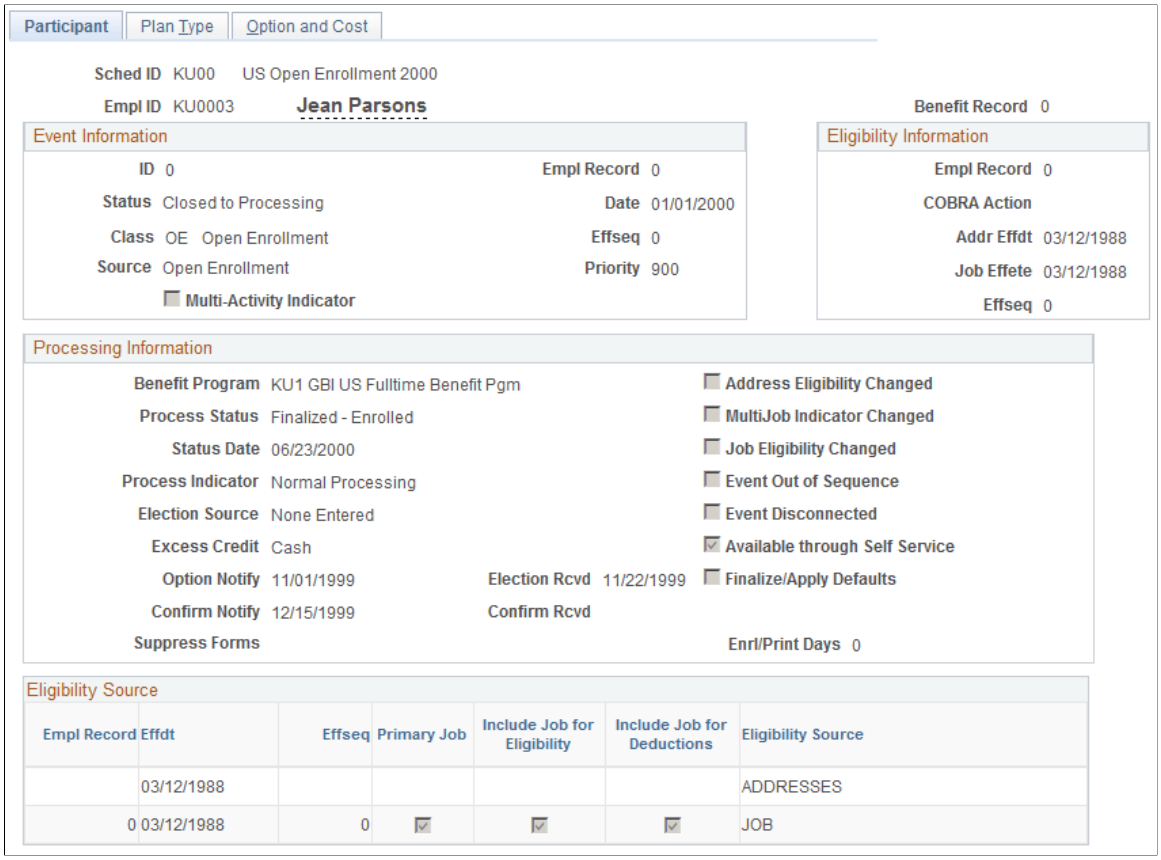
Use the Participant page (BAS_PARTIC_INQ1) to review status, processing, and eligibility information for a selected participant and event.

Navigation

Benefits > Manage Automated Enrollment > Review Processing Results > Employee Event Detail > Participant

Image: Participant page

This example illustrates the fields and controls on the Participant page. You can find definitions for the fields and controls later on this page.



Source Displays the event trigger: a changed employee address, or job information; a passive event; or the insertion of a manual event.

Priority Indicates the order of processing for events with different classes that occur for the same benefit record number on the same event date.

Multi-Activity Indicator Indicates multiple activity records from the BAS Activity table had the same benefit record number, event date, and event class, and were merged into a single participant event.

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COBRA Action	If the event is associated with an action that may make the employee eligible for COBRA coverage, the system displays that action code.
Empl Record (employment record number), **Job Effdt** (job effective date), and **Effseq** (effective sequence)	The keys of the primary job at the time of the event. See the Eligibility Source grid.
Addr Effdt (address effective date)	The effective date of the address (state or postal code) used for eligibility. See Eligibility Source grid.
Election Source	How the system received the employee's elections.
Option Notify, Confirmation Notify, Election Rcvd (election received), and **Confirm Rcvd** (confirm received)	The dates that you sent the employee his or her notification and confirmation letters, and the dates those letters were received.
Available through Self Service	If this option is selected, the participant can enter elections for the option processing results of this event through the PeopleSoft eBenefits application.
Eligibility Source	Shows the source of eligibility data that was used when the event was last processed. The first line is always the effective date of the ADDRESSES table that contributed address data to the eligibility processing. The remaining rows show each job that may have contributed eligibility information and the Primary Job, Include Job for Eligibility, Include Job for Deductions check boxes, used primarily in multiple job processing.

Related Links

Update Event Status Page
Analyzing Disconnected Events
Defining Event Rules
"Understanding Multiple Jobs" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Plan Type Page

Use the Plan Type page (BAS_PARTIC_INQ2) to review plan type details for a selected participant and event, including dependent and investments information when applicable (through page links).

Navigation

Benefits > Manage Automated Enrollment > Review Processing Results > Employee Event Detail > Plan Type

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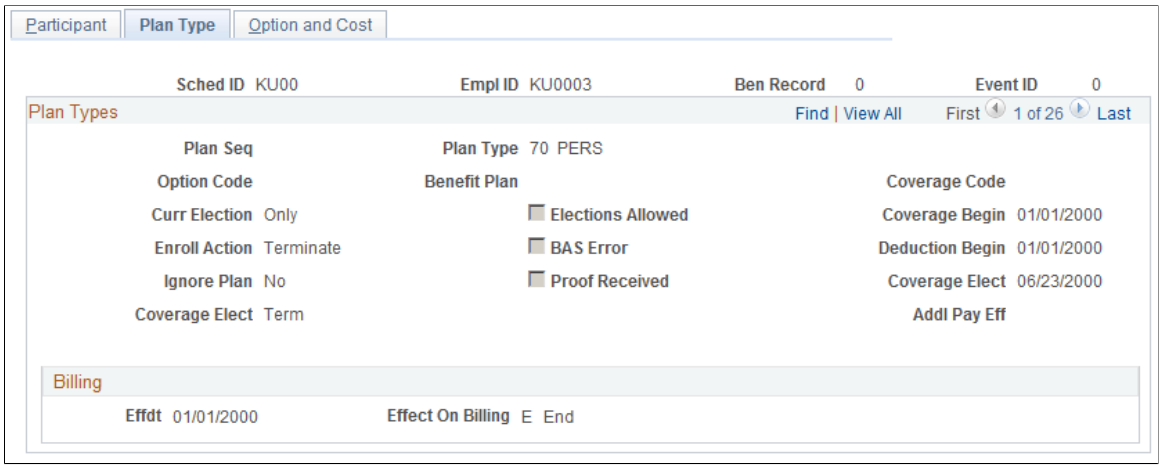
Image: Plan Type page

This example illustrates the fields and controls on the Plan Type page. You can find definitions for the fields and controls later on this page.



Curr Election (current election)

Options are:

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

Enroll Action and **Coverage Elect**

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

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

A participant receives an enroll action of None if the election for the given plan type matches the participant's current election. This way, if the participant stays in the same benefit plan for 20 years, only one enrollment record will exist rather than 20. Participants also receive an enroll action of None if an error occurs with the election, or no current election, when the participant is finalized.

BAS Error (Benefits Administration system error)

An error has occurred during eligibility, event rule, or election processing for this plan type.

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Deduction Begin	The effective date of the coverage.
Ignore Plan	Reflects the setting on the Event Rules Table 1 page.
Billing	If the Enroll Action has triggered Benefits Billing, then billing parameters appear in this group box.

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

Related Links

Defining Event Rules

Option and Cost Page

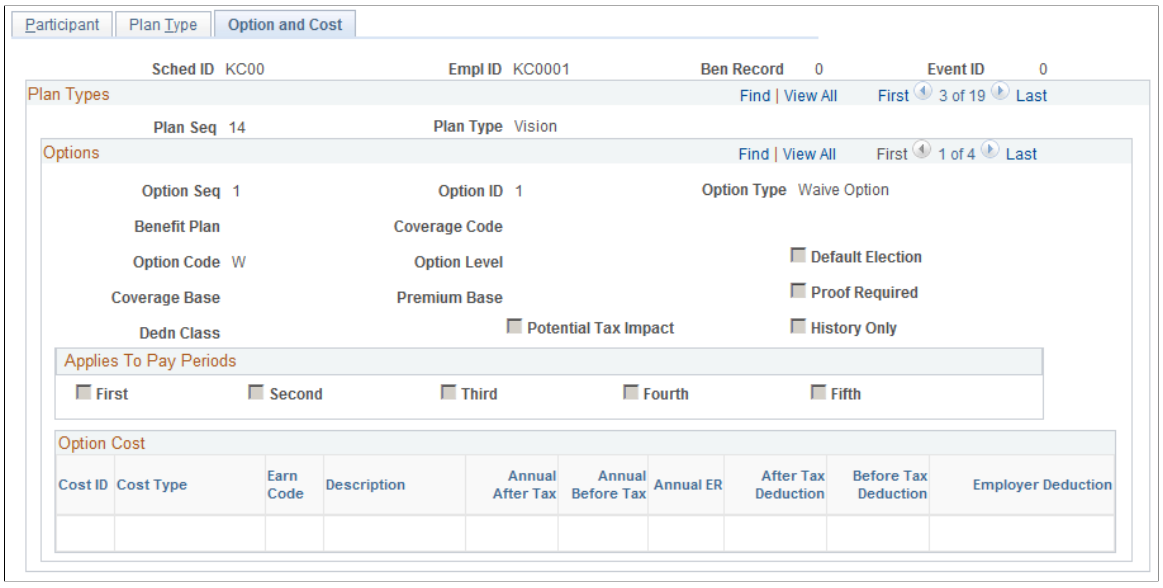
Use the Option and Cost page (BAS_PARTIC_INQ4) to review costs and credits for a participant and plan type.

Navigation

Benefits > Manage Automated Enrollment > Review Processing Results > Employee Event Detail > Option and Cost

Image: Option and Cost page

This example illustrates the fields and controls on the Option and Cost page. You can find definitions for the fields and controls later on this page.



Default Election	When selected, this option indicates that the option will be assigned as a default to participants who fail to make their

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elections. It does not mean that this option has already been assigned to this participant as a default option.

Proof Required — When selected, this option means the participant must pass proof rules to legitimately enroll in the plan. These proof rules are stored in the event rules that you have defined for your Benefits Administration system.

Potential Tax Impact — Select to indicate whether a calculated deduction includes a possible tax effect, such as imputed income from group term life or dependent life.

History Only — Identifies options that the employee is eligible for but are not the result of the current event, and so cannot be chosen.

For example, when a participant undergoes an FSC (family status change) event, such as a marriage, the event rules enable the participant only to choose between options that are available as a direct result of the change in coverage status.

Annual After Tax, Annual Before Tax, and **Annual ER** — These fields display the tax-class detail for an option's annual cost as calculated by Benefits Administration. The *employer* cost represents the sum of any N-Tax and T-Tax cost components.

After Tax Deduction, Before Tax Deduction, and **Employer Deduction** — These fields display the tax-class detail for an option's per-pay-period cost as calculated by Benefits Administration. The *employer* cost represents the sum of any N-Tax and T-Tax cost components. It does not, however, include imputed income from life insurance plans.

Related Links

Defining Event Rules

Passive Event History Page

Use the Passive Event History page (PASSIVE_EVENT_HIST) to review passive event history for a specified process date.

Navigation

Benefits > Manage Automated Enrollment > Review Processing Results > Passive Event History > Passive Event History

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Image: Passive Event History page

This example illustrates the fields and controls on the Passive Event History page. You can find definitions for the fields and controls later on this page.

From Date and **To Date**	The system searched this period for passive events during the run of the Benefits Administration process.
Search	Enter any combination of search criteria and then click this button to retrieve results that appear in a grid below.

Related Links

Passive Event Processing Page

Scheduling Events and Assigning Benefit Programs

Open enrollment and event maintenance differ most in scheduling events and assigning benefits programs.

This section discusses how to schedule events and assign programs for open enrollment and event maintenance.

Page Used to Schedule Events and Assign Benefit Programs

Page Name	*Definition Name*	*Usage*
Update Event Status Page	BAS_PARTIC_STS	Identify event status information for events that are updated or reprocessed.

Scheduling Events and Assigning Programs for Open Enrollment

For each participant, the open enrollment event:

- Assigns the participant to the Open Enrollment schedule and creates an event (BAS_PARTIC).
- Reevaluates current benefit program eligibility and assigns the participant to an appropriate program.

The following flowchart illustrates the process steps for this phase of open enrollment:

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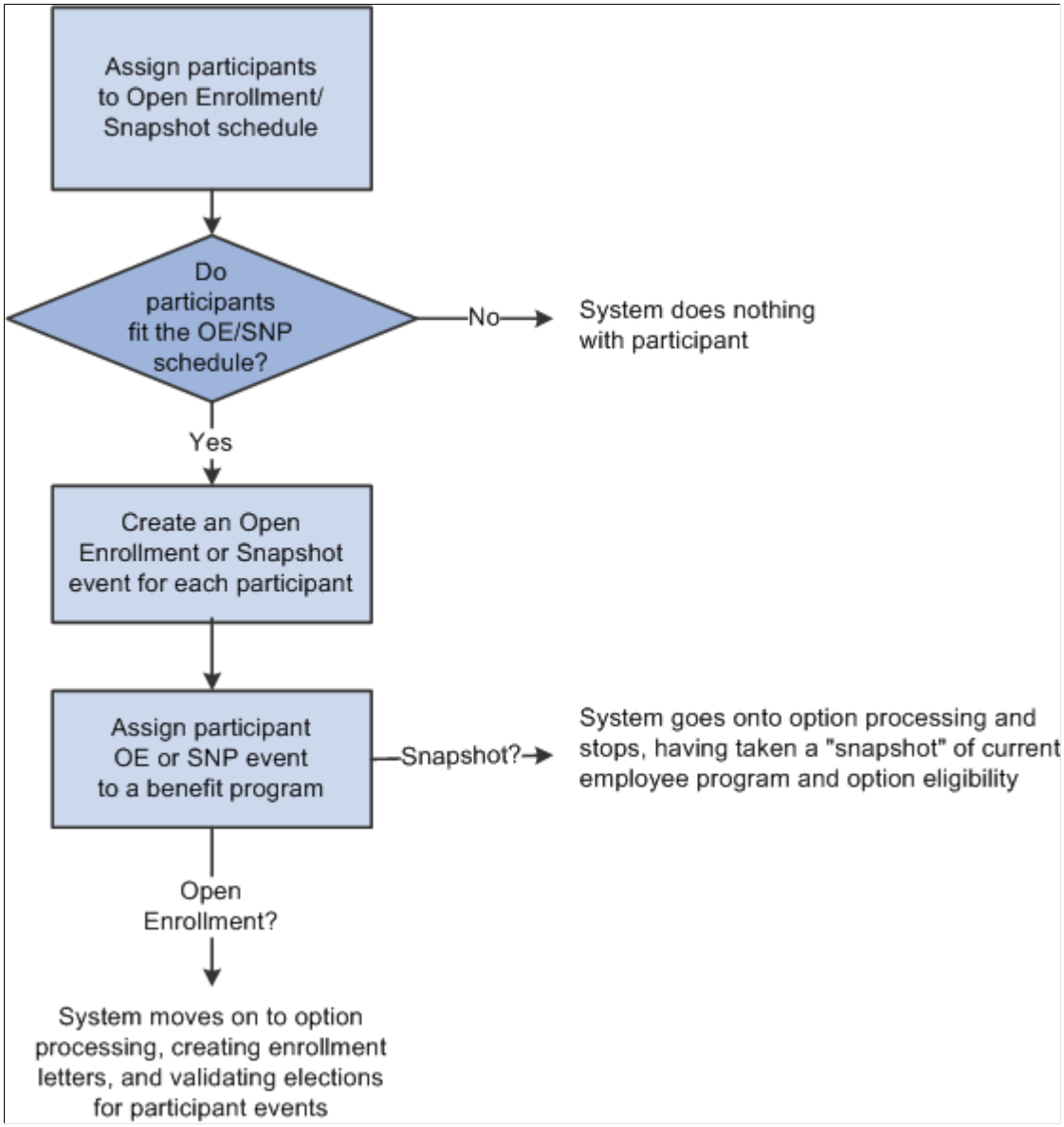
Image: Process steps for Open Enrollment

This image describes the process steps for Open Enrollment.



Related Links

Managing Unprocessed Activities for Event Maintenance

Scheduling Events and Assigning Programs for Event Maintenance

Event maintenance begins by selecting event triggers, including:

- Changes to employee address, employment, and job information.
- Passive events.

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The system creates rows for each event trigger in the BAS Activity table. Each event trigger in the table represents an unprocessed activity that has the potential to be processed into a participant event row on BAS_PARTIC.

Note: When you use the Review Bas Activity page to enter a manual event, you are really entering a row into the BAS Activity table.

The system evaluates each unprocessed activity and determines possible courses of action:

- Create a new participant event for the activity in BAS_PARTIC.
- If the creation of the new participant event affects the eligibility processing for an existing event, flag that event to indicate that it may need reprocessing.
- If the trigger information for the event has been deleted or changed, create a new participant event and flag it as being disconnected.

The event is assigned to the processing schedule that is most appropriate for the participant associated with the event. The system then determines the event's benefit program eligibility, whether it's been assigned to the specific schedule for which you're processing Event Maintenance.

Note: At this stage of event maintenance, the system might assign participant events to schedules other than the one you're processing. This way, when you run Event Maintenance for another schedule, you'll already have a set of participant events that have been assigned to benefit programs and are ready to go on to option processing.
The following flowchart illustrates the scheduling and assignment process for event maintenance:

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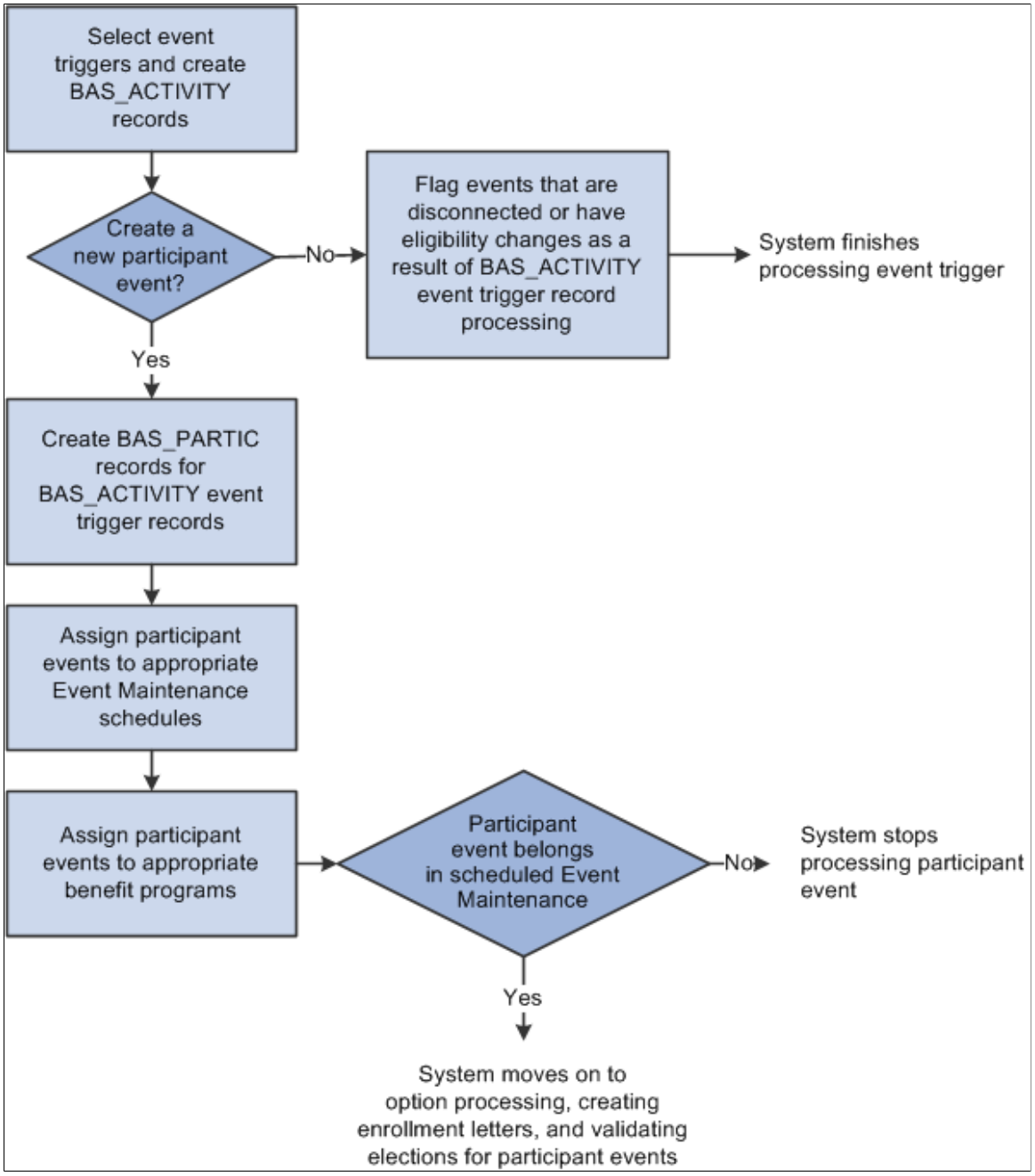
Image: Event maintenanece scheduling and program assignment flowchart

This image illustrates the event maintenanece scheduling and program assignment flowchart.



Related Links

Analyzing Disconnected Events
Managing Unprocessed Activities for Event Maintenance

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Managing Unprocessed Activities for Event Maintenance

Before you run Benefits Administration for an Event Maintenance process, use the Review BAS Activity page Benefits > Manage Automated Enrollments > Events > Review BAS Activity > Review BAS Activity) to:

- Review the unprocessed activities that are currently triggered for your employees.
- Insert manual events for Event Maintenance processing.
- Delete unprocessed activities.

After you've begun processing your participants, you can continue to use the Review Bas Activity page to insert manual events.

You can delete any activity trigger record on the Review Bas Activity page, but only after careful consideration. Events are often triggered that have no effect on benefits; the system is designed to handle these sorts of events, so you should leave them in the system. One example is an annual raise that has no effect on benefits but that affects a great number of employees.

Note: When an activity is processed without error during the Benefits Administration processing cycle, the system deletes it from the BAS Activity table, which means that it no longer shows up on the Review Bas Activity page.

Related Links

Review BAS Activity Page

Update Event Status Page

Use the Update Event Status page (BAS_PARTIC_STS) to identify event status information for events that are updated or reprocessed.

Navigation

Benefits > Manage Automated Enrollments > Events > Update Event Status > Update Event Status

This page displays all of the participant event records currently associated with a specific participant and benefit record number combination.

To open another event for processing, change the event status of the currently open event to *Closed.* Then change the event status of the event you would like to process to *Open.*

Note: The system flags the event that was in process as out of sequence, which means that the event may require reprocessing later.
You cannot manually change an event status to *Void.* You can change an event's event status to *Void* only when you reprocess the event.

Related Links

Reprocessing Events

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Analyzing Disconnected Events

This section provides an overview of event disconnection and discusses how to:

- Investigate and void disconnected events.
- Reconnect open enrollment or Snapshot events.

Understanding Event Disconnection

When the system flags a participant event as being disconnected, it means that information that the system uses to track the event, process it, or both was deleted at some point after the event was triggered. Once an event is disconnected, it can no longer be processed by the system, except to be voided. A participant event can become disconnected in two ways:

- The changed HR record that previously triggered the event is deleted.
- One or more HR records needed for eligibility processing no longer exist.

The disconnection needs to be analyzed to determine any impact on benefit processing of the participant associated with the event. If an event is disconnected after it is finalized, you may want to void the event through reprocessing.

Disconnection Due to Loss of Event Trigger

When the system processes event triggers on the BAS Activity table, it looks at the source of the triggered activity. If the triggered activity results from the change of address, employment, or job information, the system needs to determine what type of change occurred: an information insert, a data change, or a deletion of information.

- When you update employee state, postal code, or job information by inserting new records for that information into the system, the system creates a new participant event in BAS_PARTIC.
- If the trigger was a correction of those same types of information, the system sets an eligibility change flag for any existing participant event that depended on that information, indicating that reprocessing for the flagged event may be necessary.
- If the trigger was a deletion of participant state, postal code, or job information, the system disconnects the participant events associated with that information.

Note: When you correct the effective date of a particular address or job information record, the system simultaneously creates a new participant event and disconnects any participant events that were initially triggered by that address or job record.

Disconnection Due to Loss of Eligibility Information

When the system prepares options or validates elections for participant events, it must access the current HR records that provide the event's eligibility parameters. If eligibility data has been deleted or no longer exists as of the event date (because the effective date of the eligibility data was changed), the system can no longer process the event. It must assume that the event was originally triggered in error or has been superseded. Benefits Administration disconnects these events, preventing them from being processed further by the system.

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Related Links

Managing Unprocessed Activities for Event Maintenance

Investigating and Voiding Disconnected Events

Under most circumstances, you should verify that a disconnected event did not occur due to a data entry error in the HR data associated with the event.

You also want to review the impact of the event's disconnection as well as the impact of the correction of the event disconnection. For example, if the disconnection takes place because HR data was inadvertently deleted, the correction of that mistake will most likely cause the system to create new BAS_ACTIVITY records and possibly a new participant event.

If a participant event is disconnected after it has been finalized (also because eligibility information related to the event was lost), you may have to void the disconnected event to back out any election information it entered.

To void a disconnected event:

1. Access the finalized, disconnected event on the Controls page of the Processing Controls Update component or the Event Status Update page.
2. Select a Process Indicator value of *Void.*
3. Reprocess the event.

   When you do this, the system backs out elections associated with the event, sets the event status to *Void,* and sets the event's process status to *RE.*

Related Links

Reprocessing Participant Events

Process Status and Reprocessing Finalized Events

Reconnecting Open Enrollment or Snapshot Events

Disconnected open enrollment or Snapshot events can be reconnected with the Schedule New Participants feature, which enables the automatic scheduling of participants who were added to the system after open enrollment or Snapshot processing for a selected schedule has begun.

The following sample sequence illustrates how a disconnected open enrollment participant event can be reconnected:

1. During scheduling and assignment for an Open Enrollment schedule, the system processes Open Enrollment events for three participants with the following employee IDs: 8001, 8002, and 8003.
2. The system disconnects the open enrollment event for employee 8003 because job eligibility information associated with the event has been lost.

   Employees 8001 and 8002 are scheduled, and assigned, and have their options prepared.
3. While employees 8001 and 8002 are reviewing their enrollment forms and making their new elections, you fix the event trigger information for participant 8003, resulting in a reinsertion of a record for 8003 in the job row.

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At the same time, a new employee, with an employee ID of 8012, is hired.

4. When you next run the Benefits Administration process for this Open Enrollment schedule with Schedule New Participants selected, the system picks up the new employee, 8012, and assigns an open enrollment event.

   The system also picks up the reinserted record for participant 8003, resulting in a reconnection of the disconnected open enrollment event for that employee.

Related Links

Defining Open Enrollment and Snapshot IDs

Performing Options Processing

During the option processing phase of the Benefits Administration process, the system evaluates participant events for eligibility and applies event rules to determine the appropriate benefit plan options that are available to the participant as of the event's event date. The system determines the following things for the participant:

- Plan eligibility and available options.
- Option pricing and credits.
- Coverage and deduction dates (or terminations, if appropriate).
- Default options.
- Evidence-of-Insurability requirements, and coverage limits for Life and AD/D plans.

The results of the participant event evaluation depend entirely on the event and eligibility rules that you set up for the event classifications, benefit plan types, and benefit plan options involved.

Processing errors generally indicate that a problem exists with the design of the eligibility rules or event rules involved. They could also indicate that a problem exists with the HR information of the participant associated with the event. If errors occur, you need to evaluate the error to determine what (if anything) needs to be fixed. After you correct errors that result from program, rate, or rule design issues, you need to reprocess the events.

One of the most common classes of errors is an unexpected eligibility status. This is discussed in the following section.

When an event reaches a process status of *PR* (prepared), you may want to create enrollment statements for the participant.

Note: Option processing is the same regardless of whether the event is linked to an Event Maintenance or an Open Enrollment schedule.

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Event Maintenance Only: Prepared Participant Events That Qualify for Termination

During Event Maintenance processing, participant events that qualify for termination of all coverages receive a process status of *PR* rather than being terminated automatically by the system. Full termination is a rather drastic event, and because it can occur inadvertently through a data change that causes an unexpected loss of eligibility to a benefit program, the system takes the conservative approach of stopping in *PR* status to give the administrator a chance to review the event. You must complete these termination events manually by flagging them to be force-finalized.

PeopleSoft Benefits Administration provides a workflow process called Find Terminations that searches for and delivers a list of participant events with a *PR* process status that qualifies their associated participants for termination.

Related Links

Setting Up Eligibility Rules
Defining Event Rules

Investigating Participant Eligibility

This section provides an overview of participant eligibility processing.

Pages Used to Investigate Participant Eligibility

Page Name	*Definition Name*	*Usage*
Review Eligibility Results Page	BAS_ELIG_DEBUG	Review the results of program eligibility processing for specific employees.
Job Eligibility Evaluation Page	BAS_ELIG_JOB_VAL	Review details for a specific field on an eligibility check.
Employee Process Status Rpt (Employee Process Status Report)	RUNCTL_BAS027	Lists all participants in a particular process status or set of status levels.
Report on Flagged Items Page	RUNCTL_BAS008	Lists events that have had job, address, or union eligibility information changed, events that have been processed out of sequence, and events that have been disconnected during processing.
Eligible Participants Rpt	RUNCTL_BAS001	Lists, by schedule and benefit program, employees who are eligible to participate in company benefit programs with details on plan and option eligibility.
Ineligible Participants Rpt (ineligible participants report	RUNCTL_BAS_SCHED	Lists all participants who are ineligible for any benefit program (events processed to AN status) and their eligibility parameters, such as birth date and status.

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Page Name	*Definition Name*	*Usage*
Invalid Elections Rpt	RUNCTL_BAS_SCHED	Lists, by schedule and event, participants and their dependents, showing any errors such as coverage over the maximum or under the minimum, invalid choices, failure to meet eligibility requirements, and so on.
Missing Elections Rpt	RUNCTL_BAS_SCHED	Lists and provides location information for participants who did not return enrollment statements.

Understanding Participant Eligibility Processing

When you run the Benefits Administration process with the Record Eligibility Results check box selected on the Schedule and Checkpoint Restart page of the Benefits Administration Run Control component, the system performs an eligibility check for all employees who have not yet had their options prepared. The results of that eligibility check are displayed on the Review Eligibility Results page. You can use this information to correct errors in your eligibility rule or benefit program setup.

The system records only benefits eligibility that is appropriate to the process status of the event. For example, if the event is at a status of *AS* or later, the system does not record program eligibility checks, because program eligibility is determined before events are assigned. And if the event is at a process status of *PR* or later, the system does not record option eligibility for that event because its options have already been prepared.

The system follows these procedures when it makes eligibility checks and records their results:

- The system starts by checking eligibility for eligibility rules associated with benefit programs.

  If a benefit program fails the eligibility check, the system records that eligibility check but then moves on to the next benefit program in the sequence.

- After all benefit program eligibility has been processed, and if eligibility for only one program has been met, the system begins testing all the option-level eligibility rules associated with that benefit program.

Related Links

Setting Up Eligibility Rules
Building Benefit Programs with the Benefit Program Table
Setting Up the Benefits Administration Run Control Process

Review Eligibility Results Page

Use the Review Eligibility Results page (BAS_ELIG_DEBUG) to review the results of program eligibility processing for specific employees.

Navigation

Benefits > Manage Automated Enrollment > Investigate Exceptions > Review Eligibility Results > Review Eligibility Results

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Type	Indicates a standard eligibility rule or a geographic rule.
Rule Result	Indicates the participant's overall eligibility for the benefit program or option according to the eligibility rule being reported. It is the logical result of all of the individual field tests.

Eligibility Fields

This group box displays each eligibility field tied to the eligibility rule and indicates whether the participant failed or passed the eligibility check for that particular field.

Field Compared	Click a field name to display the corresponding Job Eligibility Evaluation page. This page presents the evaluation results for each job that contributes to eligibility, along with details of the eligibility rule being applied.
Field Result	Indicates whether the employee passed or failed the criteria set for this eligibility field. Location Postal Code may appear next to the result if the eligibility field is State, Postal, or Geographic Location. This means that the criteria for the eligibility field was set up to match either the employee's home or work address.
Active Only	Indicates whether the eligibility check was made on only the employee's active jobs.
Group Method	If multiple jobs are active, displays the grouping method setup for the eligibility field.
Evaluation Method	If multiple jobs are active, displays the evaluation method setup for the eligibility rule.

Job Eligibility Evaluation Page

Use the Job Eligibility Evaluation page (BAS_ELIG_JOB_VAL) to review details for a specific field on an eligibility check.

Navigation

Benefits > Manage Automated Enrollment > Investigate Exceptions > Review Eligibility Results > Review Eligibility Results

Click a link in the Eligibility Fields group box to access the Job Eligibility Evaluation page.

Pri Job (primary job)	If multiple jobs are active, this check box indicates whether this employee job record for the listed benefit record is the primary job.
Incl Elig (include eligibility)	If multiple jobs are active, this check box indicates whether the Include for Eligibility check box is enabled or disabled for the listed employee job record.

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Field Value	The system displays the value that the participant has in that field that is being compared against the eligibility rule.
Job Result	Possible values include: • *Eligible:* The job passed the eligibility check. • *Ineligible:* The job did not pass the eligibility check. • *Not evaluated:* The job did not contribute any data to the eligibility check. This could be because the group method was set to Primary and this was not the primary job for the benefit record, or the Include for Eligibility setting was not set for this job, or job status was set to Active Jobs Only and the job status was inactive.
Maximum Service Months and **Maximum Service Months**	Display the parameters that are set up for the eligibility field on the Eligibility Rules table.

Report on Flagged Items Page

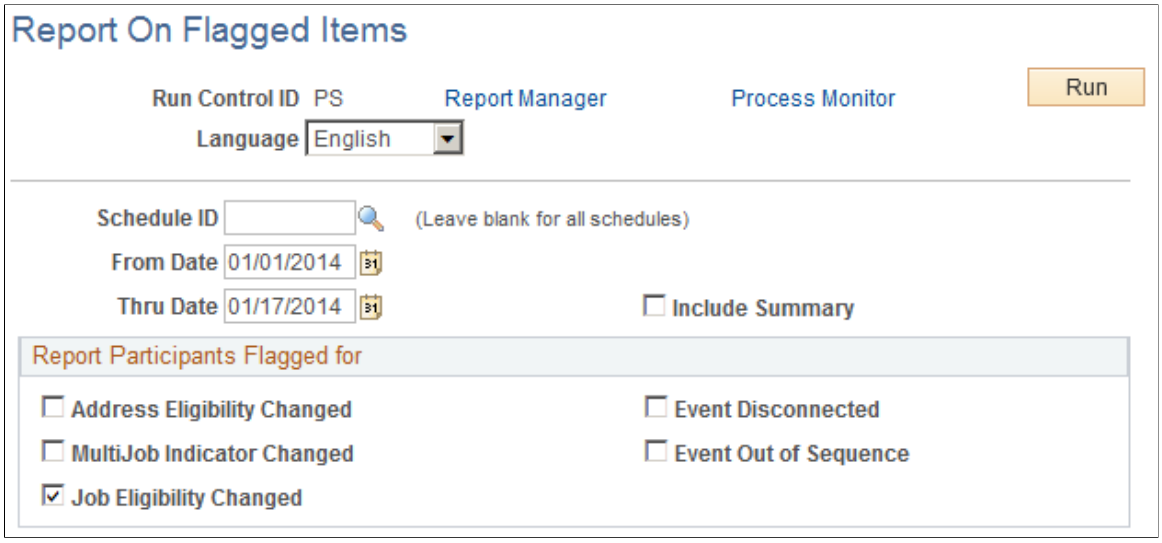
Use the Report on Flagged Items page (RUNCTL_BAS008) to lists events that have had job, address, or union eligibility information changed, events that have been processed out of sequence, and events that have been disconnected during processing.

Navigation

Benefits > Manage Automated Enrollment > Investigate Exceptions > Report on Flagged Items > Report on Flagged Items

Image: Report on Flagged Items page

This example illustrates the fields and controls on the Report on Flagged Items page. You can find definitions for the fields and controls later on this page.



Schedule ID	To print flagged events from all schedules, leave this field blank.

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Include Summary	Select to include summary information on all flagged participant events.
Reports Participants Flagged for	Select all of the criteria in this group box to use when reporting on selected participants.

Printing Enrollment Statements

This section provides an overview of enrollment statements.

Pages Used to Print Enrollment Statements

Page Name	*Definition Name*	*Usage*
Print Enrollment Statements Page	RUNCTL_BAS004	Enter the parameters for printing enrollment statements.
Reprint Selected Statements Page	BAS_PRINT	Set up print IDs for reprinting statements.
Print Mailing Labels	RUNCTL_BAS002	Print a set of 4-across mailing labels for employees participating in benefit programs. Benefit mailing labels compile lists from the BAS Participant tables created during open enrollment or event maintenance processing.

Understanding Enrollment Statements

Enrollment statements are an optional communication to the employee regarding his or her election options in response to open enrollment or other personal or employment-related events. If your company has gone completely paperless by means of self-service enrollment, you can choose to not generate paper forms. Enrollment forms can be created for each open event that has had options processed to at least a *PR* status.

Enrollment statements provide participants with a report of their:

- Current elections.
- Eligible options.
- Prices and credits associated with eligible options.
- Current dependent, beneficiary, and savings investment information.

You can modify the forms as necessary to meet the unique requirements of your company.

Note: To retain ease of data entry when you get your enrollment statement forms back from participants, order the options displayed on the statements the same way you'll enter them into the data entry pages. That is, make use of the display sequence entered for each plan and option when building your benefit programs.

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The system prints new enrollment statements for participant events that have:

- A process indicator value of *Normal.*
- An event status of *Open.*
- A process status of *PR, ET,* or *EE.*
- A blank Option Notification Date field.

After the system prints an enrollment statement for a participant and participant event combination, the system updates the participant event's process status to *NT* (notified) and the option notification date to the date that the statement was printed.

Related Links

Entering Participant Benefit Elections

Print Enrollment Statements Page

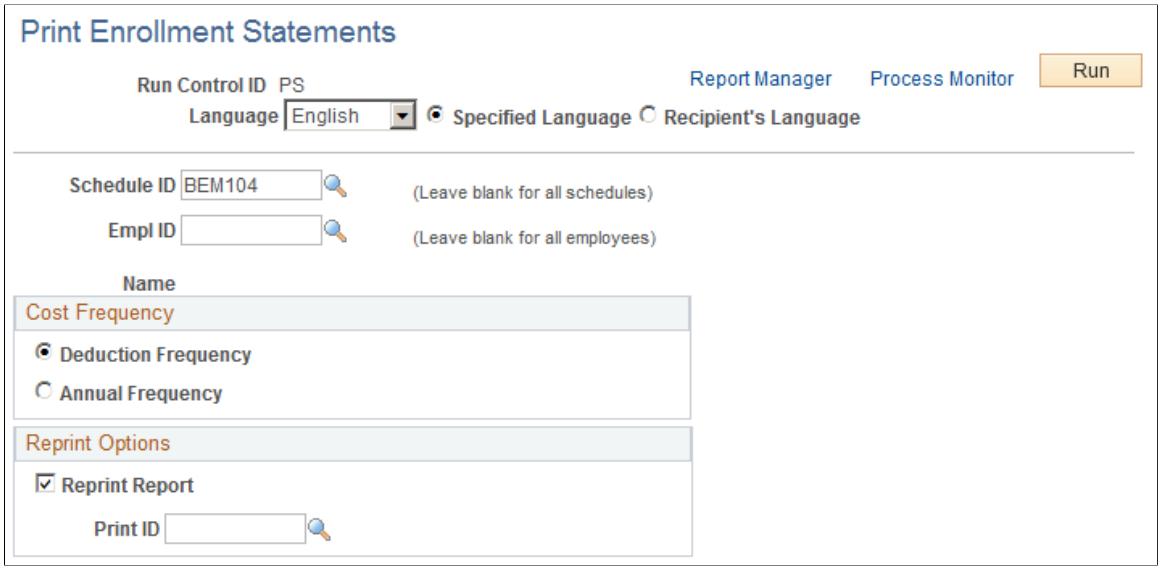
Use the Print Enrollment Statements page (RUNCTL_BAS004) to enter the parameters for printing enrollment statements.

Navigation

Benefits > Manage Automated Enrollment > Participant Enrollment > Print Enrollment Statements > Print Enrollment Statements

Image: Print Enrollment Statements page

This example illustrates the fields and controls on the Print Enrollment Statements page. You can find definitions for the fields and controls later on this page.



The Benefits Administration Enrollment Form prints a generic enrollment statement for each eligible benefit program participant in the BAS Participation table. This enrollment statement includes the name and address of each participant, which options the participant is eligible for, and the associated price tags and credits (if applicable) for the options.

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Schedule ID and **EmplID** (employee ID)	To print statements for all eligible participants in your system, leave both fields blank. To print out statements for eligible participants that belong to a specific schedule, enter a schedule ID. To print enrollment statements for an individual (and eligible) participant, enter the participant's employee ID. Remember that some participants may have events in more than one schedule. An employee can be in only one schedule at a time, but may have been in different schedules in the past.
Cost Frequency	Options are: Deduction Frequency: Print, for each available option, the cost of the benefit per pay period. Annual Frequency: Print the annual cost of the benefit option. The system calculates the annual frequency by multiplying the option's deduction frequency by the number of pay periods the employee experiences in a year.
Reprint Options	To reprint reports, select Reprint Report and enter the print ID. You create print IDs on the Reprint Selected Statements page. When the system finishes reprinting a set of enrollment or confirmation statements, it deletes the associated print ID. **Note:** When enrollment statements are reprinted, the participants' option notification date is updated to the reprint date.

Reprint Selected Statements Page

Use the Reprint Selected Statements page (BAS_PRINT) to set up print IDs for reprinting statements.

Navigation

Benefits > Manage Automated Enrollment > Participant Enrollment > Reprint Selected Statements > Reprint Selected Statements

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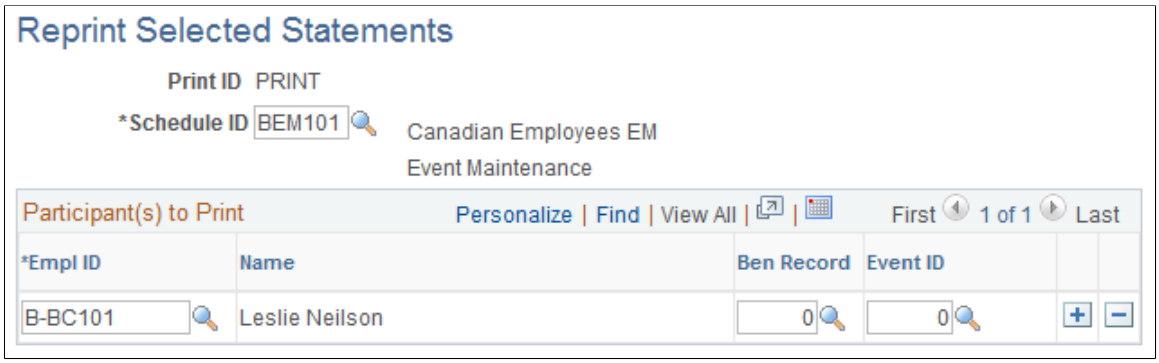
Image: Reprint Selected Statements page

This example illustrates the fields and controls on the Reprint Selected Statements page. You can find definitions for the fields and controls later on this page.



The system reprints enrollment and confirmation statements only for participant events with a Process Indicator value of *Normal* and a process status value of *PR, NT, RE, ET, EE,* or *FE.*

Schedule ID — Required. The system uses the schedule ID to narrow down the set of eligible participant and participant event combinations for which statements can be reprinted.

Event ID — Each employee ID must be associated with an event ID of *1* or higher for an Event Maintenance schedule.

An event ID of *0* is acceptable only for an Open Enrollment schedule I.

If the participant is associated with multiple event IDs, you can enter records for each.

Ben Record (benefit record number) — If the participant has multiple jobs with different sets of benefit elections, you can enter the benefit record number.

You can have a benefit record number of *0.*

Related Links

"Understanding Multiple Jobs" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Entering Participant Benefit Elections

This section provides an overview of data entry for participant benefit elections.

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Pages Used to Enter Participant Benefit Elections

Page Name	*Definition Name*	*Usage*
Event/Participant Selection Page	BAS_ELECT_EVENT	Select schedule or participant mode. If a participant has multiple jobs, select the events in order to enter a participant's benefit elections.
Option Election Page	BAS_ELECT_ENROLL2	Enter benefit elections.
Dependents/Beneficiaries Page	BAS_ELECT_DEPBENEF	Enroll dependents and assign beneficiaries.
Supplemental Enrollment Page	BAS_ELECT_DEPBENWK	Enter dependent or beneficiary data.
Dependent/Beneficiary Election	RUNCTL_BAS_SCHED	Lists all dependents with current or new elections.

Understanding Participant Benefit Elections Data Entry

You use the data entry pages to enter benefit elections that your participants make after reviewing their available options. Once you enter this election information into the system, you can have the system validate the elections without leaving the data entry component.

Note: The data entry validation process checks only to ensure that data has been entered correctly. It does not validate employee elections for participant events using eligibility and event rules. You have to run the Benefits Administration process to validate benefit information updates and finalize participant events.

Data entry needs can differ depending on the type of Benefits Administration schedule that you're processing and the volume of participants for whom you're entering benefits election data. To provide for these different needs, two data entry modes are available. You can enter election data by schedule or by participant.

Entering data by schedule is designed for open enrollment. This mode has been designed so that benefits clerks with a minimal amount of training in the Benefits Administration process can use it to quickly enter batches of employee elections in the order that they receive them. Validation is performed only on demand, with the rationale that the entry clerk would not be authorized (or trained) to correct employee errors.

Entering data by participant is typical for event maintenance. This mode might best be used by experienced benefits administrators who are processing events on an employee-by-employee basis. Each employee's data is validated before opening a new page for the next participant, with the rationale that a trained administrator would immediately correct errors.

Note: In both components, no functional edits are applied during data entry to maximize the ability to perform rapid entry. Functional edits are made only when validation is performed—during Save or on demand. All data entry errors are presented as warnings so that the pages can always be saved without loss of data.

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Event/Participant Selection Page

Use the Event/Participant Selection page (BAS_ELECT_EVENT) to select schedule or participant mode.

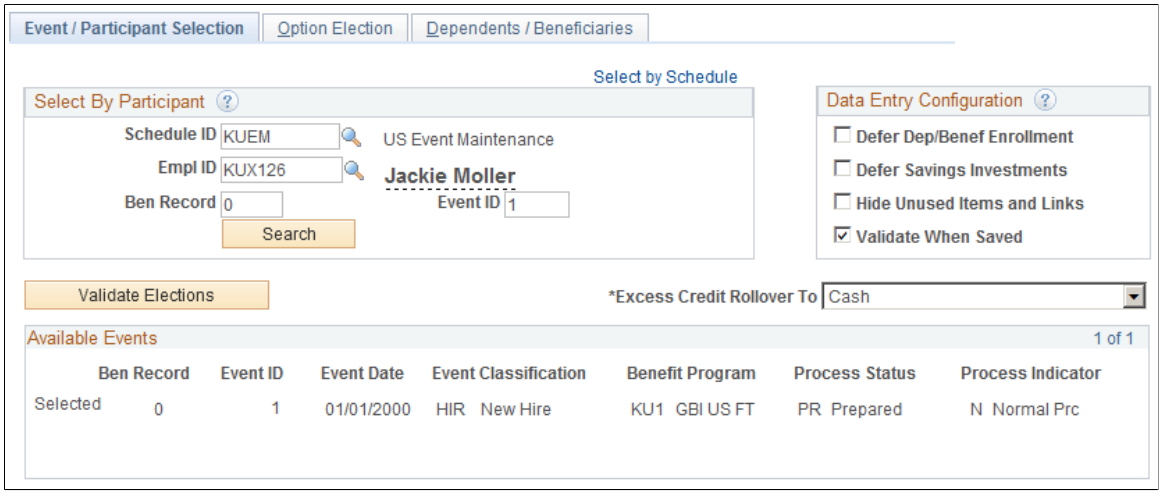
If a participant has multiple jobs, select the events in order to enter a participant's benefit elections.

Navigation

Benefits > Manage Automated Enrollment > Participant Enrollment > Perform Election Entry > Event/Participant Selection

Image: Event/Participant Selection page

This example illustrates the fields and controls on the Event/Participant Selection page. You can find definitions for the fields and controls later on this page.



Select by Schedule	Click to switch between Select By Participant mode and Select by Schedule mode.
Ben Record (benefit record number)	Used by the participant mode only.
Event ID	Used by the participant mode only.
Search	Click to locate event information for this participant.
Defer Dep/Benef Enrollment (defer dependent/beneficiary enrollment)	Select to defer dependent and beneficiary enrollment until after the entry of employee elections is complete. This hides the Dependent/Beneficiary grid for each plan on the Option Election page to streamline data entry. Dependent and beneficiary enrollment would be performed from the Dependents/Beneficiaries page instead.
Defer Savings Investments	Select to defer savings investment enrollment until after the entry of employee elections is complete. This hides the Investment Allocation grid for each savings plan on the Option Election page to streamline data entry. Investment allocation would be performed from the Dependents/Beneficiaries page instead.

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Hide Unused Items/Links	Select to streamline data entry by not displaying certain fields and navigation links if they are not applicable to a plan or option. This reduces the need to press Tab to move over unused fields, but it may break the data entry rhythm by varying the number of fields per plan.
Validate When Saved	Select to have data entry validated automatically when you save the record. When this check box is deselected, data entry is validated only on demand, when you click the Validate Elections button.
Excess Credit Rollover To	Overrides the default destination of excess benefit credits for the participant.
Validate Elections	Validates all plans and options for correct and sufficient entry. These are the same validations that are automatically performed when the page is saved if that feature is selected. All discrepancies are presented as warnings only, so the employee's elections can always be successfully saved for later correction.

Available Events

This group box displays the event associated with the selected schedule ID and employee ID after it's accessed by the system. For multiple jobs, more than one event might be found. Select the event on which you want to perform data entry.

Option Election Page

Use the Option Election page (BAS_ELECT_ENROLL2) to enter benefit elections.

Navigation

Benefits > Manage Automated Enrollment > Participant Enrollment > Perform Election Entry > Option Election

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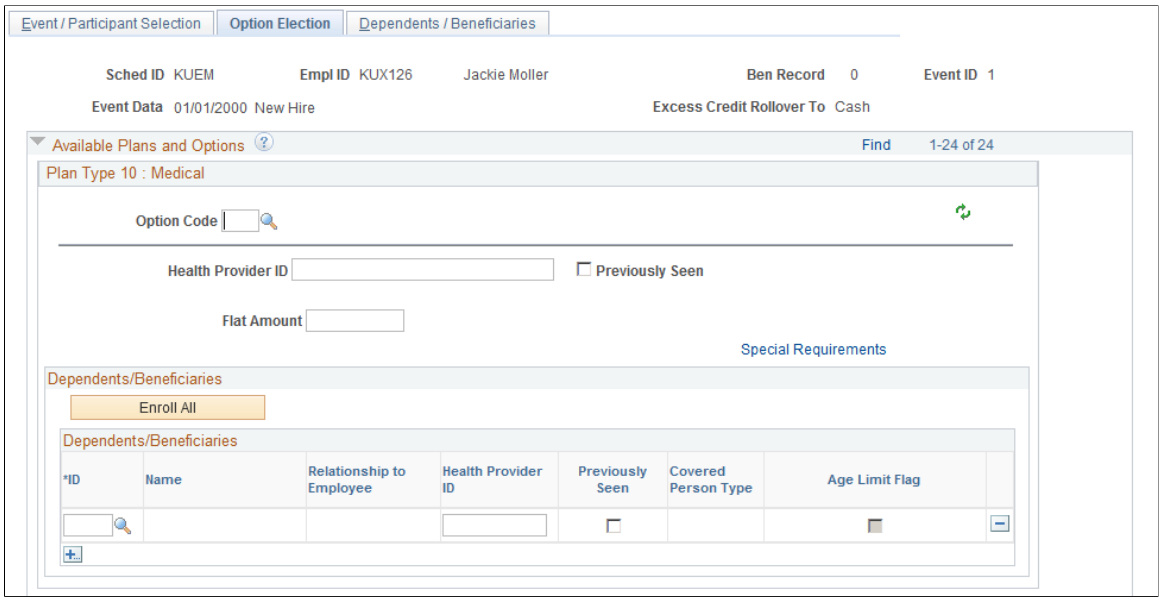
Image: Option Election page

This example illustrates the fields and controls on the Option Election page. You can find definitions for the fields and controls later on this page.



Option Code Select or update the benefit plan option currently assigned to the participant.

Special Requirements Click to view the option's special requirements:

- Elect Required (election required): When selected, this indicates that an election is required for this plan type, based on the results of event rule processing.
- Proof Received: If this check box is available for selection, you can select it to indicate to the system that any required proof of insurability has been received from the employee. Until proof is received the system does not grant the employee's selected option.
- Cross-Plan Required: If the program rules for this option have cross-plan requirements, the system summarizes them here:
  - XType (cross plan type): The employee must also make an election in this controlling plan type.
  - XPlan (cross benefit plan): The employee must also make an election of this controlling benefit plan.
  - Limit: Coverage cannot exceed the indicated percentage of the employee's coverage under the XType plan.
  - DpndChk (dependent check): Indicates whether dependents must also be covered under the XType plan.

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Enroll All

Click to enroll all available dependents or beneficiaries in a particular plan type.

The system looks at the list of dependents and beneficiaries currently associated with the participant and validates enrollment eligibility against two things:

- Whether the dependent is eligible for the plan type based on the eligibility criteria as of the Coverage Begin date.
- Whether the dependent should be present in the grid based on the coverage code rules.

The system inserts the new dependent and beneficiary rows for each plan type and overwrites all dependent and beneficiary records currently assigned to the benefit plan type in question.

Plan-Specific Election Fields

In addition to the standard data entry fields described previously, each plan type may have its own special fields required to complete the election of an option. Plan-specific detail information appears for *Health* (1x), *Life* (2x), *Savings* (4x), *FSA* (6x), *Pension* (8x), and *Vacation* (9x) plan types. These detail fields may appear for all plans within a category for consistency; your benefit plan definitions control whether entry is allowed or required, and these rules are enforced during final validation.

Health Plans

When entering information for health plans (plan type 1x), you may need to enter the health provider ID associated with the participant's medical plan and indicate whether the participant has previously seen the identified provider.

Life and ADD Plans

Life and Accidental Death plans that are defined as having their coverage amount specified by the employee as part of their election may require additional entry. You specify the coverage amount as either a multiple of salary or a flat amount (or both), depending on the benefit plan definition. You also indicate what benefit base (salary source) to use in the coverage calculation.

Savings Plans

When entering benefits election information for savings plans (plan type 4x), you may be able to determine before and after tax matching information and specify savings rollover information for the savings plan if the plan was set up to allow for the adjustment of these values at the employee level.

Each Flat Amount and % of earnings combination of fields is available if an applicable limit is entered on the corresponding fields in the Savings Plan table for before-tax and after-tax contribution percentages.

You can also allocate investments as long as the participant has not selected a waive option for this plan type. The Allocate Savings Investments grid will be displayed if applicable.

You can also specify how employee contributions should roll over when plan or regulatory limits are reached. The link to this Specify Rollover page is available only if the plan has been defined as one that enables rollover options to be specified at the employee level in the Savings Plan table.

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FSA Plans

Flexible spending account plans (plan type 6x) require enrollment entry of an annual pledge amount. An additional Employee Contribution field may or may not be required. The way this Employee Contribution field appears and acts depends on whether you implement PeopleSoft Payroll for North America.

The field is labeled Employee Contribution Override if you use Payroll for North America and Employee Contribution, if you do not.

When you enter a value in the optional field Employee Contribution Override, the system uses that to calculate the employee's FSA (Flexible Spending Account) contribution, rather than dynamically calculating the paycheck deduction from the Annual Pledge value. When Payroll for North America is not being used, then the Employee Contribution field is required, because the system does not have sufficient information to dynamically calculate the paycheck deduction from the Annual Pledge.

Use the FSA Contribution Worksheet to determine the exact amount of money the participant will need to contribute per month and pay period to reach a desired annual pledge goal.

The available fields differ depending on whether or not your organization currently implements PeopleSoft Payroll for North America or whether the event in process is an OE (open enrollment) or HIR (hire) event.

- If you do implement Payroll for North America or you are processing an OE or HIR event, the Annual Pledge, Pay Period Amount, and Employee Contribution Amount fields are open for entry. The contributions year-to-date are known to be either zero or can be derived from the employee's paycheck balances.
- If you do not use Payroll for North America, and you are not processing an OE or HIR event, the Contributions Year-To-Date field is also open for entry. In this situation, the system cannot reliably know the contributions year-to-date, so that value must be supplied to complete the equation.

In either situation, you can open all fields for change by selecting the Open Protected Fields for Change check box. Because the system normally calculates the values in the protected fields dynamically, you should use this option carefully.

Note: The Employee Contribution Amount field represents the amount that the employee is contributing in terms of the FSA plan's frequency as set up on the FSA Benefit table, not in terms of the employee's own paycheck deduction frequency.

Pension Plans

You can enter values for the Voluntary Percent (voluntary contribution percentage) and Voluntary Amount (voluntary contribution amount) fields only if the plan option has been defined on the Pension Plan table as one that enables voluntary contributions.

The Pension Base (base salary for pension calculations) field is always available. Use this field to calculate the pension using a salary other than the employee pay rate.

Vacation Plans

When you're entering benefits election information for participant Vacation Buy or Sell plans (Plan Type 9x), you must enter the vacation buy and sell hours. The value that you enter in the Vacation Hours field represents the number of hours that an employee buys or sells for the plan year.

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Related Links

"Defining Benefit Plans" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

"Enrolling Participants in Benefit Programs and Plans" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Dependents/Beneficiaries Page

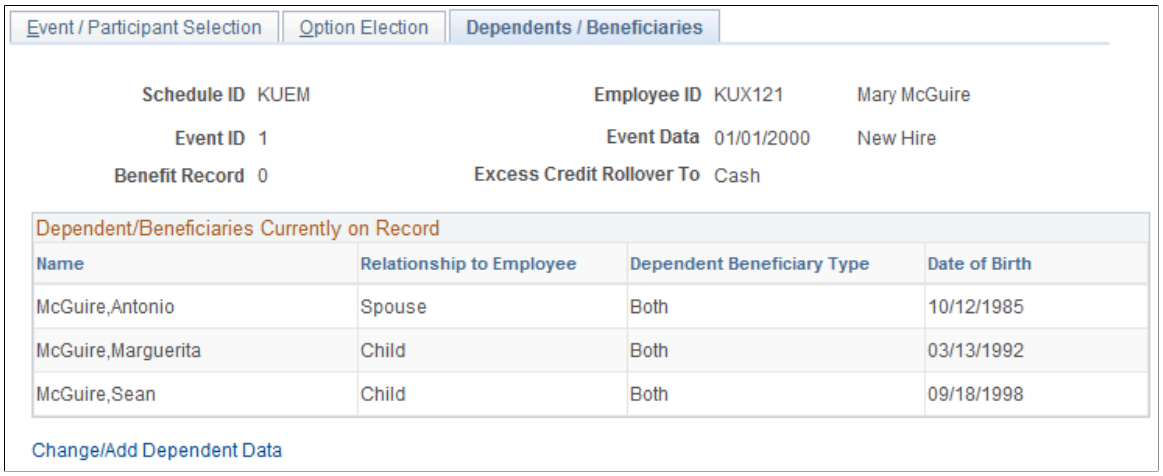
Use the Dependents/Beneficiaries page (BAS_ELECT_DEPBENEF) to enroll dependents and assign beneficiaries.

Navigation

Benefits > Manage Automated Enrollment > Participant Enrollment > Perform Election Entry > Dependents/Beneficiaries

Image: Dependents/Beneficiaries page

This example illustrates the fields and controls on the Dependents/Beneficiaries page. You can find definitions for the fields and controls later on this page.



Dependent/Beneficiaries Currently on Record

This group box summarizes, for review only, all of the dependents and beneficiaries currently associated with the participant.

Change/Add Dependent Data

Click the Change/Add Dependent Data link to open the Update Dependent/Beneficiary (DEPEND_BENEF) component. The participant's current dependents can be edited, or new individuals added when you have correction authorization to the Update Dependent/Beneficiary component.

Note: When you are adding new dependents because of a life event such as birth or marriage, the effective date for the new dependents should be the same as the Benefits Administration event date.

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Elections Requiring Supplemental Information

Displays links to all plan types requiring additional dependent, beneficiary, or savings investment information to complete the employee's election choices. This information can also be entered from the Option Election page, but is repeated here to provide an alternate method of data entry.

Enroll Dependents	Click to open the Supplemental Enrollment page. This link appears for: • Health plan types (plan type 1x). • Dependent AD/D plans (plan type 24). • Dependent life plans (plan type 25).
Assign Beneficiaries	Click to open the Supplemental Assignment page. This link appears for: • All other life and AD/D plan types (plan type 2x). • Savings and pension plan types (plan types 4x and 8x).
Allocate Investments	Click to open the Supplemental Allocation page. This link appears for Savings plans (plan types 4x).

Related Links

"Entering Dependent and Beneficiary Information" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Supplemental Enrollment Page

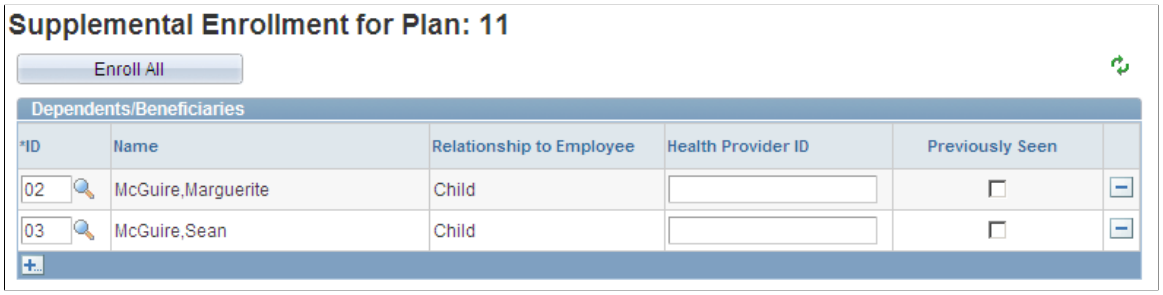
Use the Supplemental Enrollment page (BAS_ELECT_DEPBENWK) to enter dependent or beneficiary data.

Navigation

Click Enroll Dependents or Assign Beneficiaries on the Dependents/Beneficiaries page.

Image: Supplemental Enrollment page

This example illustrates the fields and controls on the Supplemental Enrollment page. You can find definitions for the fields and controls later on this page.



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The information displayed on this page depends on the plan type being accessed. This page presents essentially the same field layout as found on the Option Election page for enrolling dependents, assigning beneficiaries, and allocating savings investments.

Validating and Loading Elections

This section provides an overview of validation and loading and discusses how to:

- Force-finalize participant events.
- Find prepared participants who qualify for termination.
- Find employees with late enrollment forms.
- Post elections to Base Benefit tables.

Understanding Validation and Loading

When the Benefits Administration process validates and loads elections associated with participant events, it reevaluates the events in much the same way that it did during the option preparation phase. The difference is that the participants have had a chance to update their benefit election information and their choices have been entered into the system.

The system evaluates the updated benefits information using the same set of eligibility rules and event rules that it used to determine options. It also recalculates benefit election defaults where appropriate. This is important because these defaults may possibly have changed if events are processed out of sequence, or if changes are made to Base Benefit tables in the interim between runs of the Benefits Administration process. In this case, the recalculated defaults may not match the defaults shown on enrollment forms or inquiry pages.

During finalization, the system also assigns excess credits to plans in which the participant is enrolled. If the participant event processes correctly, it loads the new option elections and related information to the Base Benefits tables that store benefits information for the associated participant. It creates rows for new, changed, or terminated benefit option enrollments, but only if the new enrollment is different from the existing enrollment. (That is, simply reelecting an existing coverage does not generally cause a new row to be inserted into Base Benefit tables if all election-related data is the same).

Processing errors during validation and loading might be caused by:

- Problems with the new election information that was entered into the system during data entry.
- HR information linked to the participant event.
- The design of the related eligibility rules, the event rules, or benefit program associated with the event.

You need to evaluate the error to determine whether anything needs to be fixed. If only the employee's election data needs to be corrected, then an event in *EE* status will be picked up for further processing during the next run of the schedule. However, if you need to correct the employee's HR data (which could affect his benefits eligibility), or if you need to correct the underlying benefits rules or setup, then the event must be specifically reprocessed back to the first phase of benefits processing (scheduling, event assignment, or option preparation).

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Note: Event Maintenance and Open Enrollment schedules are processed the same way during validation and loading.

Related Links

Defining Event Rules
Reviewing Benefits Administration Process Results
Entering Participant Benefit Elections

Force-Finalizing Participant Events

When you tell the system to finalize a participant event, it brings that event to an *FE* process status, even if it has been processed with errors. If the event is at a process status of *ET* or *EE* (election error), the system loads the participant's valid elections to the Manage Base Benefits business process tables. If the event is at any other process status, the system applies the appropriate default elections and loads them into the Base Benefit tables. The system also applies and loads default elections to replace elections that have been made in error.

You can force-finalize individual participants with the Final check box on either the Event Status Update page or the Controls page of the Processing Controls Update component. On the next run of the Benefits Administration process, the system automatically force-finalizes all participants with the Final check box selected.

If you're processing an Open Enrollment schedule, you can force-finalize all of the participants within that schedule. You'll arrange this when you set up the run control for the Benefits Administration process.

Open Enrollment schedules can be force-finalized because this method fits in with the nature of the Open Enrollment process, which has a finite set of start and end points. At the end of the enrollment period, you would force-finalize any employees who hadn't yet made their elections. Presumably, the open enrollment event rules that you create would enforce your business policies regarding failures to make positive elections (or reelections) in certain critical or regulated plan types.

Event Maintenance schedules, on the other hand, are processed on an ongoing basis. Each employee in a typical Event Maintenance schedule can be associated with a variety of different events and triggered actions at a given point in time. As you process certain events for the participant, more events are triggered for later Event Maintenance processing. The Event Maintenance procedure has no end, so enabling the forced finalization of an entire Event Maintenance schedule does not make sense isn't reasonable.

Related Links

BenAdmin Processing Controls Page — Reviewing Processing Results for Participant Events
Update Event Status Page
Defining Open Enrollment and Snapshot IDs

Finding Prepared Participants Who Qualify for Termination

When the Event Maintenance process is run, participants can be identified as qualifying for termination when their participant events reach a process status of PR. The benefits administrator must terminate these employees manually by force-finalizing them.

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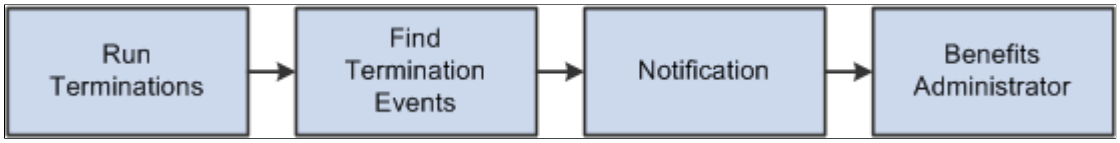
The Find Terminations Workflow process locates participant events at a process status of PR that qualify for termination after Event Maintenance processing but who have not yet been manually terminated. It then makes a list of these participant events and sends it to the benefits administrator.

Set this workflow in action through the Process Scheduler by selecting Benefits > Manage Automated Enrollments > Events > Find Terminations to Finalize.

This chart illustrates the Find Terminations Workflow process:

Image: Find Terminations Workflow process

This image describes the Find Terminations Workflow process.



Finding Employees with Late Enrollment Forms

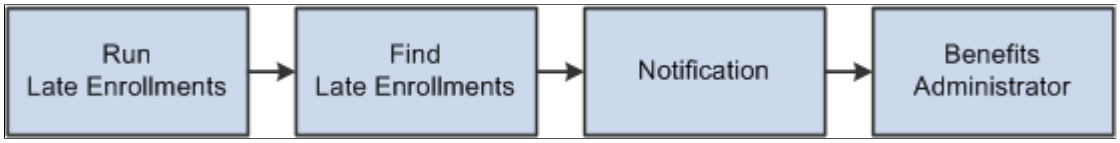
When event maintenance is run, a set of notification letters and election forms are sent out to new employees and to employees whose coverage has changed due to a specific event. The Find Late Enrollments workflow retrieves a list of the employees who have not returned their benefits enrollment forms. Find Late Enrollments brings you to the Event Status Update page, where you can select the Final check box to assign default coverage for these employees.

Set this workflow in action through the Process Scheduler by selecting Benefits > Manage Automated Enrollments > Events > Find Non-Respondents.

This chart illustrates the Find Late Enrollments Workflow process:

Image: Find Late Enrollments Workflow process

This image illustrates the Find Late Enrollments Workflow process.



For additional information, see the product documentation for: *PeopleTools: Workflow Technology*

Posting Elections to Base Benefit Tables

As elections are prepared for posting to the Base Benefit tables, Benefits Administration determines the proper coverage begin dates and deduction begin dates based on event rules defined by plan type. Future-dated elections are inserted into Base Benefit tables as the participant elections are validated or finalized.

Payroll processes such as the Payroll for North America Pay Calculation process select elections based on effective date, using future-dated elections only when they become effective for the current pay period. If the election for a given plan type is equal to the current election, no entry is posted. If a participant is no longer eligible for a given plan type, that participant's current elections are terminated by the insertion of a row into the Base Benefit table for the plan type.

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Inserting termination rows into the Base Benefit tables (rather than making a current row inactive) facilitates rolling back or reprocessing elections that have been posted to the Base Benefit tables. You can reverse Individual elections—or groups of participant elections—out of the Base Benefit tables by identifying those participants for reprocessing.

Note: If you were to look at the physical record structures underlying the Base Benefits election tables, you might notice that it still contains the fields Coverage End Date and Deduction End Date. This is for historical reasons only, and their use is discontinued, having been replaced by the approach of inserting superseding Termination, Waive, or Election rows. You should not create any processes that update these end date fields or any fields that rely on them.

Printing Confirmation Statements

This section provides an overview of confirmation statements and discusses how to generate confirmation statements.

Page Used to Print Confirmation Statements

Page Name	*Definition Name*	*Usage*
Print Confirmation Statements Page	RUNCTL_BAS005	Run confirmation statements and enter parameters for the confirmation statement printing process.

Understanding Confirmation Statements

You typically create a confirmation statement when an event reaches *FE* status. Confirmation statements provide participants with a report of their current elections, dependent and beneficiary information, and investment information after event maintenance or open enrollment processing has finished.

You can modify the forms as necessary to meet the unique requirements of your company. The confirmation statement printing process is similar to the enrollment form printing process.

Note: You can also print confirmation statements for events with *EE* status. Confirmation statements are printed only for events with a Process Indicator value of *Normal.* Unless you are reprinting forms, statements are printed only for participant events for which the Confirmation Notify Date field is either blank (no form has been previously printed) or contains a date that is before the last processing date (the event has been reprocessed since the form was printed).

Print Confirmation Statements Page

Use the Print Confirmation Statements page (RUNCTL_BAS005) to run confirmation statements and enter parameters for the confirmation statement printing process.

Navigation

Benefits > Manage Automated Enrollment > Participant Enrollment > Print Confirmation Statements > Print Confirmation Statements

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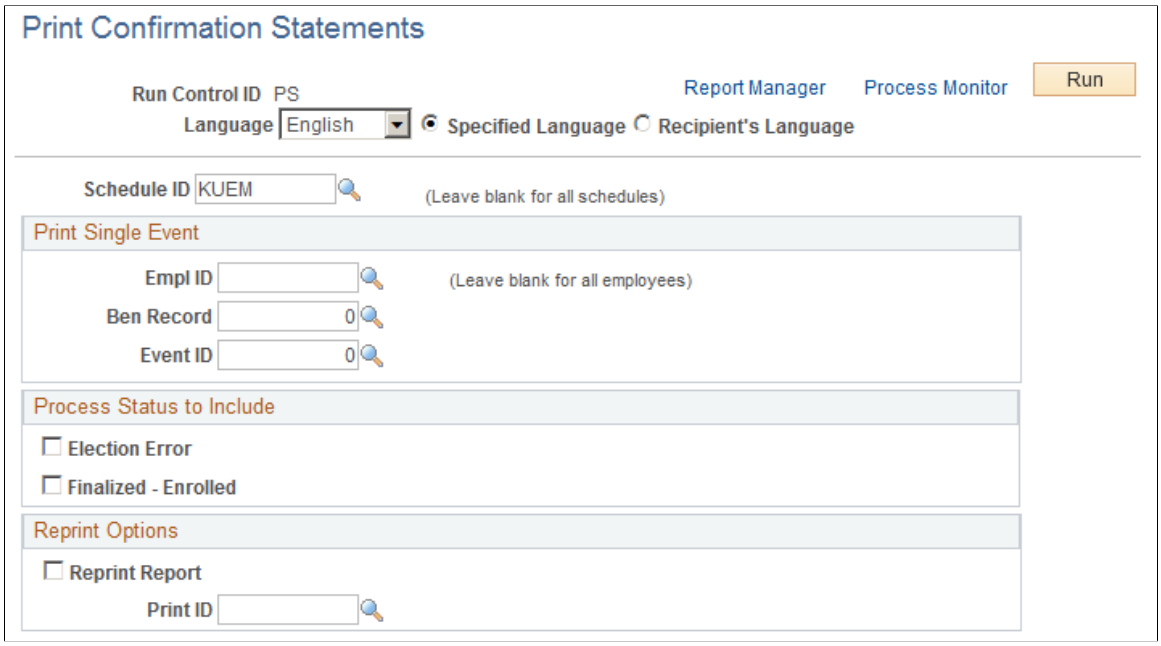
Image: Print Confirmation Statements page

This example illustrates the fields and controls on the Print Confirmation Statements page. You can find definitions for the fields and controls later on this page.



The options on this page are almost identical to those on the Print Enrollment Statements page.

To create print IDs, you use the Reprint Selected Statements page, exactly as you do for enrollment forms.

Reprocessing Events

This section provides an overview of event reprocessing.

Pages Used to Reprocess Events

Page Name	*Definition Name*	*Usage*
Update Event Status Page	BAS_PARTIC_STS	Reprocess individual participant events.
BenAdmin Processing Controls (results) Page	BAS_PARTIC_PRC2	Update event status, queue reprocessing, and finalize events.

Understanding Event Reprocessing

Reprocessing may be necessary in a number of instances. For example, you may want to reprocess an event when it is processed out of order or when eligibility information related to the event has been changed. You may also need to reprocess finalized events in cases in which employees find errors in their confirmation statements.

You can reprocess events to any previous stage of the Benefits Administration cycle. You can reprocess entire open enrollment schedules as well as individual events.

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Analyze the situation carefully before you reprocess: in some cases, reprocessing can have an adverse effect on employee data, especially when you reprocess large numbers of employees without analyzing the situation beforehand.

Reprocessing Flow

When you reprocess a participant event, the system backs the event out to the stage that you indicate on the Controls page of the Process Status Update component, the Event Status Update page, or the Open Enrollment/Snapshot run control page. So if you have an ET event and you reprocess it to an AS status, the system backs out all of the election information that you entered for the event and disregards all of the prepared options.

Then the system moves the event through the process again. If an event is reprocessed back to *AS* process status, the system then attempts to process the event all the way to the *PR* process status, where it will await the printing of enrollment forms and data entry of employee elections. Option eligibility, costs, credits, defaults, and preentry values are rechecked.

RE Status

Events that have already been finalized and loaded can be reprocessed to *RE* status, which acts as a stand-in for the *NT* process status. After you reenter data for the participant event, the system attempts to validate and load the elections to get the event back to the *FE* status.

Related Links

Process Status and Reprocessing Finalized Events

Update Event Status Page

Use the Update Event Status (benefits administration event status update) page (BAS_PARTIC_STS) to reprocess individual participant events.

Navigation

Benefits > Manage Automated Enrollments > Events > Update Event Status > Update Event Status

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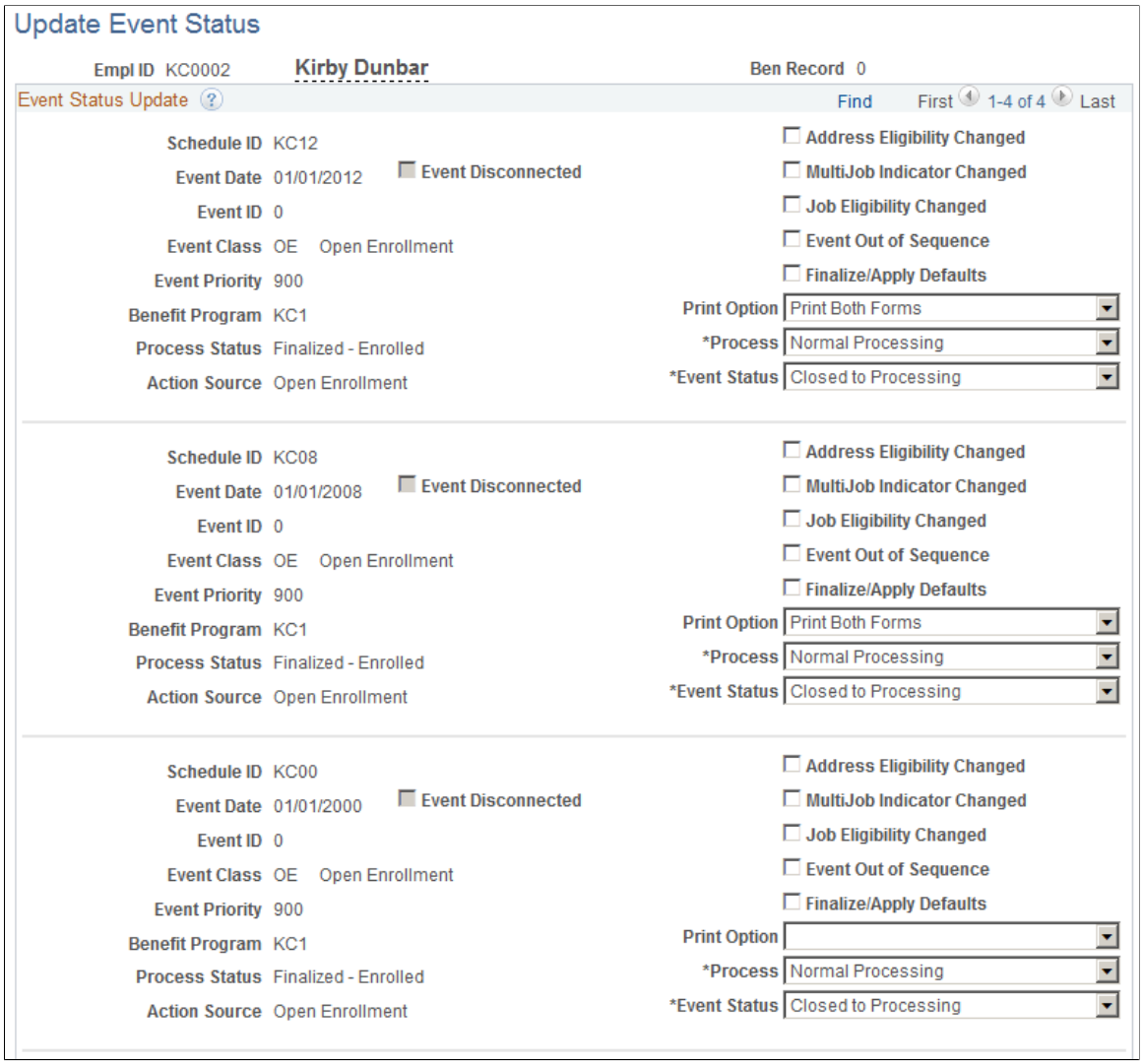
Image: Update Event Status page

This example illustrates the fields and controls on the Update Event Status page. You can find definitions for the fields and controls later on this page.



You see all events currently in BAS_PARTIC for the participant and benefit record number combination that you select in descending date order, so the current events are at the top. The event currently in process has an event status of *Open.*

Note: Only one event can have an event status of *Open.* You cannot change another event to *Open* status until the current event is closed.

Event Disconnected (disconnected event)	If selected, this option indicates that the event is disconnected and can no longer be processed, with the exception of finalized and disconnected events, which can be reprocessed to a Void status.
Address Eligibility Change, MulitJob Indicator Changed (multiple job indicator change), **Job**	These check boxes indicate that changes have occurred since the event was scheduled; the event may have been affected and may need to be reprocessed.

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Eligibility Changed, and **Event Out of Sequence** — If you determine that the event does not need reprocessing, deselect these check boxes.

Note: These check boxes remain selected until you deselect them. After you reprocess the event or otherwise correct the problem that caused the system to select the check box, you should return to this page to deselect the check boxes.

Finalize/Apply Defaults — When this option is selected, the system attempts to finalize and apply defaults for the participant event on the next run of the Benefits Administration process.

Process Indicator

You use the Process Indicator options to indicate how the event is to be reprocessed on the next run of the Benefits Administration process. The following table describes Process Indicator values.

Process Indicator	***Processing***
Assign Pgm (assign benefit program)	Event status must be *Open.* Elections for participant events are rolled back (deleted) from the Base Benefit enrollment tables. Election choices are not retained in BAS_PARTIC tables for the participant events. Schedule assignment is not reviewed. Program eligibility is checked and option eligibility, cost credits, defaults, and preentry are recalculated. The system attempts to reprocess participants to a *PR* status.
Elect Optn (elect options)	Event status must be *Open.* The system rolls back elections from Base Benefit enrollment tables. Schedule assignment, program assignment, and option eligibility are not reviewed. The system revalidates elections for this event and loads them, if errors occur, back into the Base Benefit enrollment tables, resetting the final process status to *FE.* If errors occur, the process status will be *EE.*
Normal Prc (normal processing)	Standard processing for Benefits Administration. Nothing is reprocessed.

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Process Indicator	*Processing*
Prep Optn (prepare options)	Event status must be *Open*. Elections for participant events are rolled back (deleted) from the Base Benefit enrollment tables. Election choices are not retained in the BAS_PARTIC table for the participant events. Schedule assignment and program assignment are not reviewed. The system recalculates option eligibility, cost credits, defaults, and preentry information. The system attempts to reprocess participants to a *PR* status.
Re-Enter	Use to correct election errors for finalized events with enrollment information that has been loaded to benefit tables. Event status must be *Open*. The system rolls back elections from Base Benefit enrollment tables. It retains elections in the BAS_PARTIC table. The system leaves the event at a process status of RE. Schedule assignment, program assignment, and options are not reviewed. When you post election changes to the data entry pages, the system updates the process status to *ET*.
Void	If the event is in a process status of Enrolled, elections are rolled back from Base Benefit enrollment tables. The system retains prior election choices for this event in the BAS_PARTIC table. The system leaves the event at a process status of *RE*. The system does not review schedule assignment, program assignment, and option eligibility. The system updates the event status to Void and removes the event from further processing.

Related Links

Scheduling Events and Assigning Benefit Programs
Analyzing Disconnected Events
Update Event Status Page
Investigating and Voiding Disconnected Events

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BenAdmin Processing Controls (results) Page

Use the BenAdmin Processing Controls (benefits administration processing controls) page (BAS_PARTIC_PRC2) to update event status, queue reprocessing, and finalize events.

Navigation

Benefits > Manage Automated Enrollment > Events > Update Processing Controls > BenAdmin Processing Controls

The fields on this page are similar to those on the Update Event Status page, described in the previous section, except that you can set reprocessing indicators for multiple participants.

Related Links

Scheduling Events and Assigning Benefit Programs
Analyzing Disconnected Events
Defining Open Enrollment and Snapshot IDs
Reprocessing Participant Events
Validating and Loading Elections
"Understanding Multiple Jobs" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Reprocessing Open Enrollment Schedules

You can use the Open Enrollment/Snapshot page of the Run Control component to reprocess every participant in an open enrollment schedule. Select a reprocessing value in the Reprocess group box and run the Benefits Administration process again.

The following table summarizes the processing performed by the system in response to your reprocess request. Only participant events on this schedule will be included. In general, the system excludes participant events with an event status of *Closed* or *Void* from Open Enrollment run control reprocessing.

Reprocess Indicator Value	***Processing***
None	Standard processing for Benefits Administration.

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Reprocess Indicator Value	*Processing*
Schedule (reassign schedules)	This restarts Benefits Administration processing. You might use this when you work through test runs during implementation, for example. No participant events on the selected Benefits Administration schedule can be in a process status of *NT, EE, ET, RE,* or *FE.* The system checks this at the start of the run and terminates processing if this condition is not met. The system ignores the participant events' process indicator status and event status—all events, open and closed, are included. The system deletes all participant event data for this schedule and then recalculates it through option preparation. This includes reevaluating the employee population for inclusion in the schedule, and subsequent program assignment, and the determination of eligible options and defaults. The system attempts to process participant events to a *PR* process status.
Assign Benefit Program	The system rolls back (deletes) elections for participant events from the Base Benefit enrollment tables. The system does not retain participant event election information in the BAS_PARTIC table. The system does not review schedule assignment. The system rechecks program eligibility and recalculates option eligibility, cost credits, defaults, and preentry information. The system attempts to process participant events to a *PR* process status.
Prepare Options	The system rolls back (deletes) elections for participant events from the Base Benefit enrollment tables. The system does not retain participant event election information in the BAS_PARTIC table. Schedule assignment and program eligibility and assignment are not reviewed. Option eligibility, cost credits, defaults, and preentry are recalculated. The system attempts to process participant events to a *PR* process status.

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Reprocess Indicator Value	*Processing*
Elect Options	The system rolls back elections from Base Benefit enrollment tables. The system retains participant event election information in the BAS_PARTIC table. The system does not review or reprocess schedule assignment, program assignment, or option eligibility. It revalidates elections for this event and loads them, if no errors occur, back into the Base Benefit enrollment tables, resetting the final process status to *FE*.

Related Links

Defining Open Enrollment and Snapshot IDs

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Chapter 16

Processing Event Maintenance On Demand

Understanding On-Demand Event Maintenance Processing

The administration of an event maintenance or open enrollment schedule can extend from several days to several weeks, depending upon the number of employees involved. This can involve time correcting processing errors, delivering enrollment forms, entering employee elections as the forms are returned, validating elections, and sending out confirmation notices.

With on-demand event maintenance, you can run an individual participant through the entire Benefits Administration process—from participant event scheduling to enrollment confirmation—with a single page.

Using on-demand event maintenance, you can:

- Process participant events quickly, without setting up run controls.
- Correct processing errors as they occur.
- Link to Benefits Administration pages to review processing information and enter option elections.

On-Demand Event Scenarios

You might use on-demand event maintenance for an employee who has been promoted and is transferring offices in a few days. In one day, you could:

- Produce a benefits package.
- Enter elections.
- Produce a confirmation statement.

You can also integrate the On-Demand Event Maintenance page into the standard Benefits Administration processing cycle. For example, a new hire is typically scheduled as a participant event during a regularly scheduled Event Maintenance batch process. However, what if the new employee needs to submit an enrollment form right away to make a doctor's appointment and show proof of medical insurance? You can use the On-Demand Event Maintenance page to produce the enrollment statement on demand. The employee makes elections that same day using the company's interactive voice response system or self-service website with eBenefits, and the system finalizes the elections and prints a confirmation statement during the next run of the Benefits Administration process for the normal event maintenance schedule.

Related Links

Moving Events Through the Process

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Beginning the On-Demand Event Maintenance Process

This section discusses how to start the On-Demand Event Maintenance process and select an activity to process.

Pages Used to Begin the On-Demand Event Maintenance Process

Page Name	*Definition Name*	*Usage*
On-Demand Event Maintenance Page	BAS_ON_DEM_EM	Process a single participant through all stages of the Benefits Administration process.
BAS Activity Page	BAS_ACTY_EMPL	Review the list of activities waiting to be processed for a particular employee ID and benefit record number combination and select one to be processed.

On-Demand Event Maintenance Page

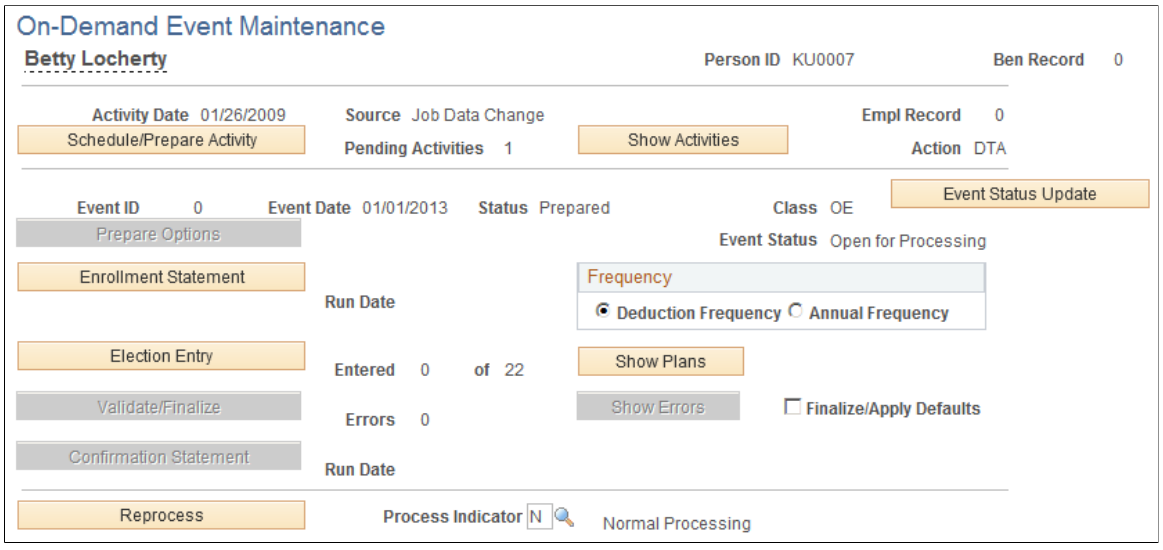
Use the On-Demand Event Maintenance page (BAS_ON_DEM_EM) to process a single participant through all stages of the Benefits Administration process.

Navigation

Benefits > Manage Automated Enrollment > Events > On-Demand-Event Maintenance > On-Demand Event Maintenance

Image: On-Demand Event Maintenance page

This example illustrates the fields and controls on the On-Demand Event Maintenance page. You can find definitions for the fields and controls later on this page.



Empl Record (employee record number) Used for employees with multiple jobs.

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	Employees with multiple jobs can have different sets of benefits elections. The system keeps track of the different sets of elections by assigning benefit record numbers for each benefits package.
Activity Date and **Show Activities**	This is the date on which the trigger activity for the Benefits Administration event occurred. If the system finds only one activity for the employee, the system automatically displays the date. If more than one activity exists, click the Show Activities button to select an activity to process.
Source	Displays the type of action that triggered the activity record: a change to the employee address, multiple job flags, or job data; manually adding an event through the Review Bas Activity page; or a passive event.
Schedule/Prepare Activity	Click to run the Schedule/Prepare Activity process.
Pending Activities	Displays the number of activities waiting to be processed into participant events for this employee ID and benefit record number combination. As activity triggers are processed into participant events, they are deleted from the Review Bas Activity page. If no activities are waiting to be processed, the Pending Activity field is blank and the Show Activities button is not available.
Action	Displays the type of job action associated with the action trigger. For example, if the triggering action is a hire of an employee, the action is HIR. When the system processes the activity into a participant event, it uses the action to determine which event classification governs the event.

The remaining features, discussed in the following sections, are unavailable until the activity is scheduled.

BAS Activity Page

Use the BAS Activity (Benefits Administration System Activity) page (BAS_ACTY_EMPL) to review the list of activities waiting to be processed for a particular employee ID and benefit record number combination and select one to be processed.

Navigation

Click the Show Activities button on the On-Demand Event Maintenance page.

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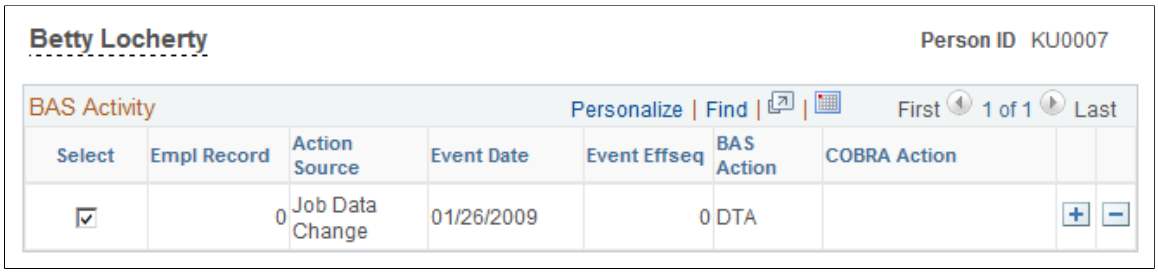
Image: Show Activities - BAS Activity page

This example illustrates the fields and controls on the Show Activities - BAS Activity page. You can find definitions for the fields and controls later on this page.



Select — Select to process the activity.

When you select an activity record, information from that record populates the Activity Date, Source, Empl Rcd#, Pending Activity, and Action fields on the On-Demand Event Maintenance page.

Event Effseq (event effective sequence) — If more than one event for this employee occurred on the same day, this field indicates the order in which it occurred.

COBRA Action — This indicates whether this is a COBRA qualifying activity.

Moving Events Through the Process

This section discusses how to:

- Schedule and assign activities.
- Prepare options.
- Print enrollment statements for on-demand event maintenance.
- Enter elections.
- Validate and finalize elections.
- Generate confirmation statements.

Scheduling and Assigning Activities

To schedule the activity record as a participant event and assign the event to a benefit program, click the Schedule/Prepare Activity button on the On-Demand Event Maintenance page.

The Schedule/Prepare Activity button is active only if an activity is waiting to be processed.

If the activity record is processed successfully, it is:

- Scheduled as a participant event.

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- Deleted from the list of activities waiting to be processed.
- Added to the BAS Participant table.
- Assigned to a specific benefit program where event classifications are determined.
- Prepared (option eligibility and costs are calculated).

Note: In certain cases, the system processes the event to FP status, in which case the event is closed and processing stops. This can happen, for example, when event processing rules have Use History selected and no change has occurred in eligible options.
The system always assumes that you intend the selected activity on the On-Demand Event Maintenance page to be the event currently in process. So if you're working with a participant who currently has an event midway through the Benefits Administration process cycle and a pending activity record selected for on-demand maintenance, the system closes the current event by changing its event status to *Closed,* converts the activity trigger into a new participant event, and gives that event an event status of *Open.*

Related Links

Scheduling Events and Assigning Benefit Programs

Preparing Options

Typically, after the event has been scheduled and assigned, options and costs are automatically prepared (so long as no errors occur during scheduling and program assignment). However, if errors occur and need further resolution, click the Prepare Options button to continue automated processing and to prepare benefit options and election defaults.

Due to an error during the scheduling and assignment, the Prepare Options button is available only when the event's process status is *AS, AE,* or *PE.*

Related Links

Process Status and Option Preparation

Printing Enrollment Statements for On-Demand Event Maintenance

After options have been prepared, click Enrollment Statement on the On-Demand Event Maintenance page to generate an enrollment statement for the participant. The Enrollment Statements button is available only when the process status is *PR* or *NT.*

The Run Date field displays the date that an enrollment statement was last run for the participant event currently in process.

In the Frequency group box, you can indicate how to display benefit option cost information on the enrollment statement. Use Deduction Frequency to print the cost of the benefit per pay period for each available option. Use Annual Frequency to print the annual cost of the benefit option.

Note: If you're using eBenefits, this step may be optional (because the employee has access to enrollment choices directly from the self-service website).

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Entering Elections

After options have been prepared and you've received the participant's election choices, click the Election Entry button to access the Benefits Administration data entry pages. The button is available only when the process status is *PR, NT, EE, RE,* or *ET.*

On the On-Demand Event Maintenance page, the Entered ... Of ... field tells you how many plan election choices have been entered for the participant versus the total number of plan election choices the participant can make. When an election has been entered, you can also click Show Plans to review changes.

Related Links

Entering Participant Benefit Elections

Validating and Finalizing Elections

After entering elections, click the Validate/Finalize button on the On-Demand Event Maintenance page to validate and load the information to benefit tables. The button is available if the process status of the event is*ET, EE,* or *RE.*

Note: If a participant's elections have not been updated and event rules dictate that the participant cannot keep some or all current elections, the system determines default elections for the participant and enrolls them.
Select the Finalize/Apply Defaults check box to force-finalize a participant's elections and enroll the participant in default elections, even if the current elections are in error. Events with a process status of *PR* and *NT* can be force-finalized, as well as events at *ET, EE,* or *RE.*

Related Links

Validating and Loading Elections

Generating Confirmation Statements

After validating and finalizing the participant's elections, click the Confirmation Statement button on the On-Demand Event Maintenance page to generate a confirmation statement. The Confirmation Statement button is available when the process status is *FE* or *EE.*

The Run Date field displays the date that a confirmation statement was last printed for the participant event in process.

Related Links

Online Printing Page

Reprocessing Participant Events

If an event requires reprocessing, click the Reprocess button on the On-Demand Event Maintenance page to reprocess the event to a previous stage of the Benefits Administration process. The Reprocess button is not available for events with *AS* status.

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As with the normal Benefits Administration process, use the Event Status Update page to identify events that may need reprocessing. To open the Event Status Update page from the On-Demand Maintenance page, click the Event Status button.

Note: If you need to reprocess an event that has been closed, open Event Status Update, close the currently open event, and open the event that you want to reprocess. When you return to the On-Demand Event Maintenance page, the system displays the event that you reopened for processing.
Use the Process Indicator menu to indicate the level to which you want the system to reprocess the event. The following table describes Process Indicator values:

Process Indicator	***Processing***
A (assign benefit program)	Event status must be *Open.* Schedule assignment is not reviewed or changed. Elections for participant events are rolled back (deleted) from the Base Benefit enrollment tables. Elections are not retained in the BAS_PARTIC table. Program eligibility is determined again. Option eligibility, cost credits, defaults, and preentry are recalculated. The system attempts to reprocess participants to *PR* status.
E (elect options)	Event status must be *Open.* Schedule assignment, program assignment, and option eligibility are not reviewed or changed. The system rolls back elections from Base Benefit enrollment tables. Elections are retained in the BAS_PARTIC table. The process revalidates elections for this event and loads them, if no errors occur, back into the Base Benefit enrollment tables, resetting the final process status to *FE.*
N (normal processing)	Standard processing for Benefits Administration.
P (prepare options)	Event status must be *Open.* Schedule assignment and program assignment are not reviewed or changed. Elections for participant events are rolled back (deleted) from the Base Benefit enrollment tables. Elections are not retained in the BAS_PARTIC table. The system recalculates option eligibility, cost credits, defaults, and preentry information. The system attempts to reprocess participants to *PR* status.

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Process Indicator	Processing
R (reenter)	Use to correct election errors for finalized events when enrollment information has been loaded to benefit tables. Event status must be *Open.* Schedule assignment, program assignment, and option eligibility are not reviewed or changed. The system rolls back elections from Base Benefit enrollment tables. It retains elections for this event in the BAS_PARTIC table. The system leaves the event at a process status of RE. When you post election changes to the data entry component, the system updates the process status to *ET.*
V (void)	The system updates the event status to *Void* and removes the event from processing. The system does not review schedule assignment, program assignment, and option eligibility. If the event is in a process status of *FE-Enrolled,* elections are rolled back from Base Benefit enrollment tables. The system retains prior elections for this event in the BAS_PARTIC table. The system leaves the event at a process status of *RE.*

Related Links

Analyzing Disconnected Events
Reprocessing Events

Setting Up and Managing On-Demand Event Maintenance

To set up online printing, use the Online Printing (BAS_ODEM_PRINT_PG) component.

This section discusses how to set up and manage on-demand event maintenance.

Pages Used to Set Up and Manage On-Demand Event Maintenance

Page Name	Definition Name	Usage
Online Printing Page	BAS_ODEM_PRINT	Set the print destination for on-demand enrollment and confirmation forms.
Elections Page	BAS_PARTIC_EMPLINQ	Review the plan types for which elections were entered or changed and the plan types that the participant is eligible to change but for which no changes have been entered.

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Page Name	Definition Name	Usage
Update Event Status Page	BAS_PARTIC_STS	Review the plan types for which elections were entered or changed and the plan types that the participant is eligible to change but for which no changes have been entered.
On Demand EM - Error Messages	BAS_MESS_EMPL	Review on-demand event maintenance error messages.

Online Printing Page

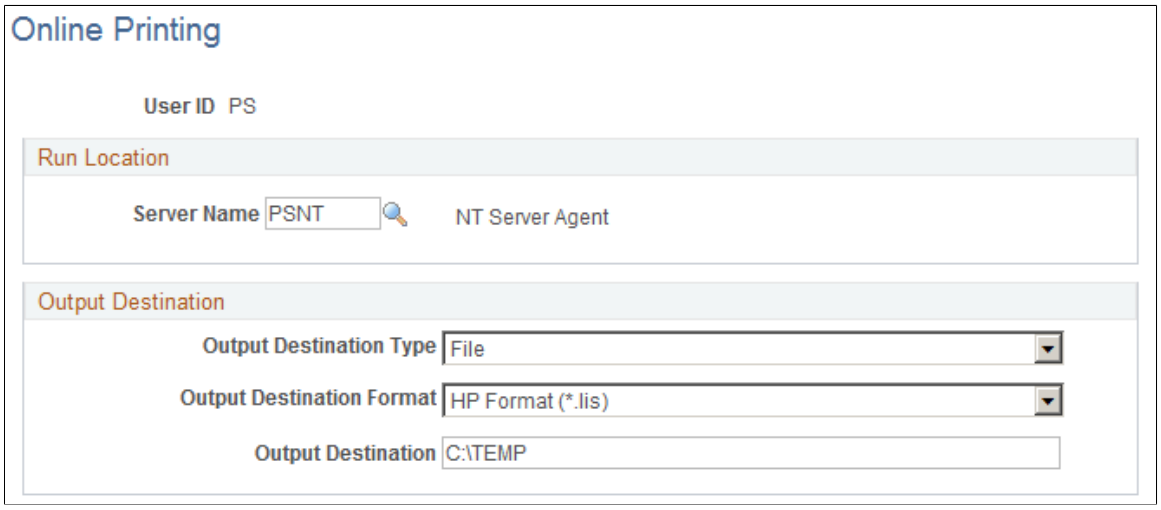
Use the Online Printing page (BAS_ODEM_PRINT) to set the print destination for on-demand enrollment and confirmation forms.

Navigation

Set Up HCM > Product Related > Automated Benefits > Processing Controls > Online Printing > Online Printing

Image: Online Printing page

This example illustrates the fields and controls on the Online Printing page. You can find definitions for the fields and controls later on this page.



You set up print options only once for each user ID. Use the fields in the Output Destination group box to determine the output destination of the enrollment and confirmation forms that you print with the On Demand Event Maintenance facility. If you want to print the report on a printer, select *Printer.* If you want the system to generate the form as a text file, select *File.* In File/Printer, enter either the path to the directory in which you want the system to save the file (if you've selected *File*), or the printer to which you want the system to send the form (if you've selected *Printer*).

Note: Reports are always run from the client.

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Elections Page

Use the Elections page (BAS_PARTIC_EMPLINQ) to review the plan types for which elections were entered or changed and the plan types that the participant is eligible to change but for which no changes have been entered.

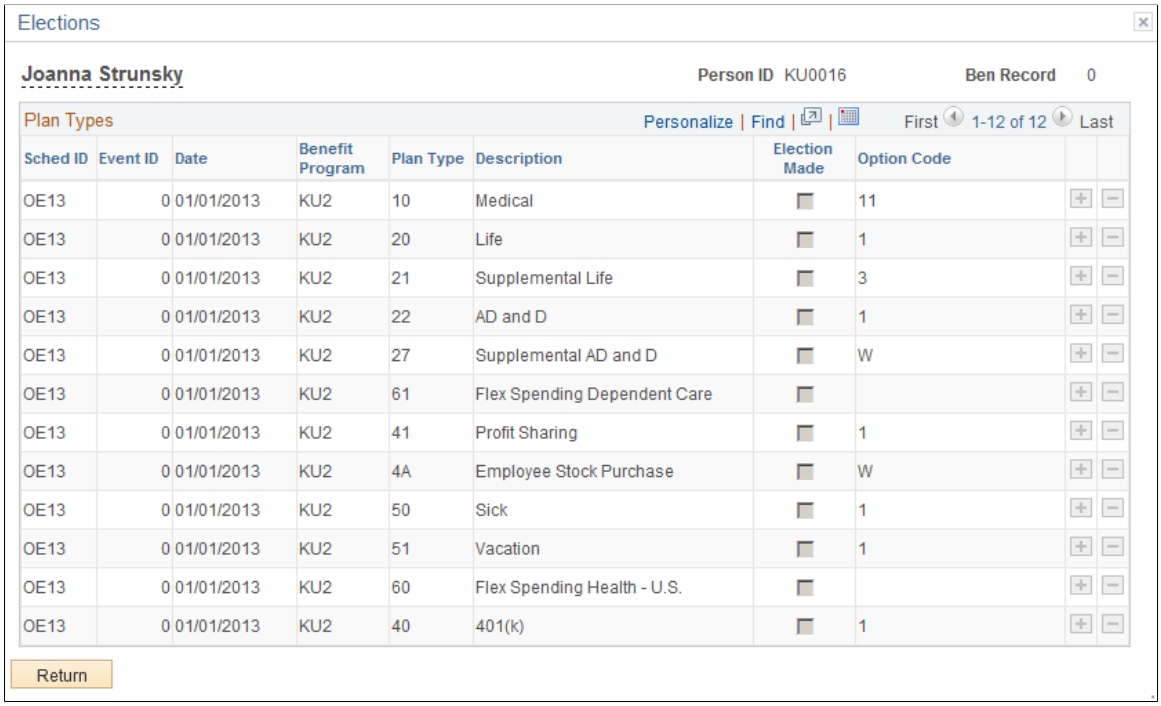
Navigation

Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance > On-Demand Event Maintenance

Click the Show Plans button on the On-Demand Event Maintenance page.

Image: Elections page

This example illustrates the fields and controls on the Elections page. You can find definitions for the fields and controls later on this page.


Elections

Joanna Strunsky Person ID KU0016 Ben Record 0

Plan Types Personalize | Find | First 1-12 of 12 Last

Sched ID	Event ID	Date	Benefit Program	Plan Type	Description	Election Made	Option Code
OE13	0	01/01/2013	KU2	10	Medical		11
OE13	0	01/01/2013	KU2	20	Life		1
OE13	0	01/01/2013	KU2	21	Supplemental Life		3
OE13	0	01/01/2013	KU2	22	AD and D		1
OE13	0	01/01/2013	KU2	27	Supplemental AD and D		W
OE13	0	01/01/2013	KU2	61	Flex Spending Dependent Care		
OE13	0	01/01/2013	KU2	41	Profit Sharing		1
OE13	0	01/01/2013	KU2	4A	Employee Stock Purchase		W
OE13	0	01/01/2013	KU2	50	Sick		1
OE13	0	01/01/2013	KU2	51	Vacation		1
OE13	0	01/01/2013	KU2	60	Flex Spending Health - U.S.		
OE13	0	01/01/2013	KU2	40	401(k)		1

Return

Election Made A value of *Y* indicates that election has been entered or changed.

Option Code The benefit option code can also indicate that the participant has waived a certain option.

Note: The Elections page displays only the plan types for which the participant is currently eligible to choose or change benefit option elections. It might not display all of the plan types in which the participant is currently enrolled.

Update Event Status Page

Use the Update Event Status page (BAS_PARTIC_STS) to review the plan types for which elections were entered or changed and the plan types that the participant is eligible to change but for which no changes have been entered.

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Navigation

Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance > On-Demand Event Maintenance

Click the Show Plans button on the On-Demand Event Maintenance page.

Click the Event Status Update button on the On-Demand Event Maintenance page.

Just as in the normal Benefits Administration process, you can use the Event Status Update page to open and close events and reprocess events. You can also use the Event Status Update page to review the participant events currently associated with the participant and benefit record number combination with which you are working.

Related Links

Update Event Status Page
Reprocessing Events

Reviewing Error Messages

Use the On Demand EM - Error Messages page (BAS_MESS_EMPL) to review on-demand event maintenance error messages.

Navigation

Click the Show Errors button on the On-Demand Event Maintenance page.

The error messages generated by the last processing action that you initiated appear in the Messages area. Each time you run the Benefits Administration process, the system deletes the error messages generated by the previous run. If errors from a previous run are not corrected, the error messages are generated again with the new run of the process.

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Chapter 17

Archiving Benefits Administration Data

Understanding the Delivered Data Archive Templates for Benefits Administration

Data archiving is necessary to manage the increasing amount of event data created in Benefits Administration. PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager. To use this tool to archive Benefits Administration data correctly, you should have a good understanding of the data you are trying to archive and the corresponding table structures. To aid you in archiving your result data, PeopleSoft Benefits Administration delivers predefined archive objects, queries, and templates.

Note: Please use extreme caution when making changes to delivered archive objects, queries, or templates. Any modifications can result in the loss of important data.
See "Using PeopleSoft Data Archive Manager" in *PeopleTools: Data Management* product documentation.

Delivered Archive Objects

An archive object is a collection of tables that you archive. The object definition determines how you archive data from a table.

PeopleSoft Benefits Administration delivers one archive object (BAS_PARTIC_ARCHIVE) that contains a list of all of BAS_PARTIC transaction tables and transaction history tables. BAS_PARTIC is the base record.

Delivered Archive Query

PeopleSoft Data Archive Manager uses queries to define selection criteria from the base table of the base archive object. PeopleSoft Benefits Administration delivers the archive query, BAS_PARTIC_AR_QRY.

Delivered Archive Template

Archive templates link archive objects and archive queries together. PeopleSoft Benefits Administration delivers one archive template (BAS_PART) that references the Benefits Administration Core archive object and the two archive queries.

Delivered Archive Jobs

PeopleSoft Data Archive Manager uses queries to define archive jobs to archive data to history. Before you submit an archive job, you must first define the archive job information including the Archive Template, Archive Process, and Commit Processing. You can submit archive jobs in a batch using the process scheduler. As part of the process, PeopleSoft Data Archive Manager prompts you for run time parameters such as bind variables and the query to use.

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Delivered Archive Restore Query

PeopleSoft Data Archive Manager uses queries to define restore jobs to restore any subset of archived data to production tables. As with Archive Jobs, you must first define the job information, and then run the job using the process scheduler. PeopleSoft Benefits Administration delivers the archive restore query, BAS_PARTIC_RS_QRY.

Managing the Data Archive Manager

Pages Used to Manage the Data Archive Manager

Page Name	*Definition Name*	*Usage*
Manage Archive Objects Page	PSARCHOBJDEFN	Group archive records into archive objects.
Manage Archive Templates Page	PSARCHTEMPDEFN	Define archive templates.

Manage Archive Objects Page

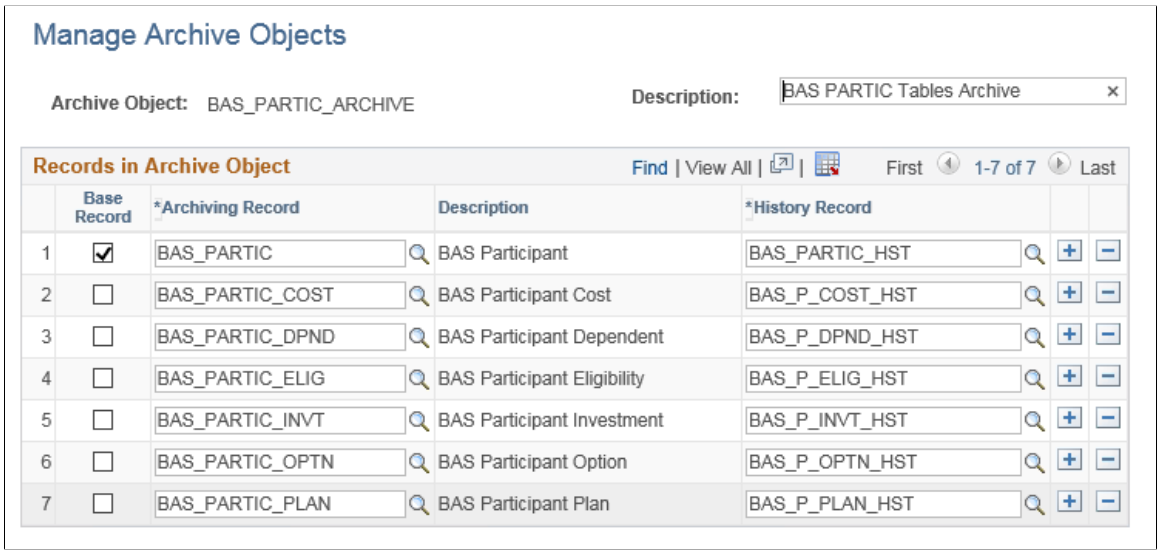
Use the Manage Archive Objects page (PSARCHOBJDEFN) to group archive records into archive objects.

Navigation

PeopleTools, > Data Archive Manager >Manage Archive Objects

Image: Manage Archive Objects page

This example illustrates the fields and controls on the Manage Archive Objects page.



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Manage Archive Templates Page

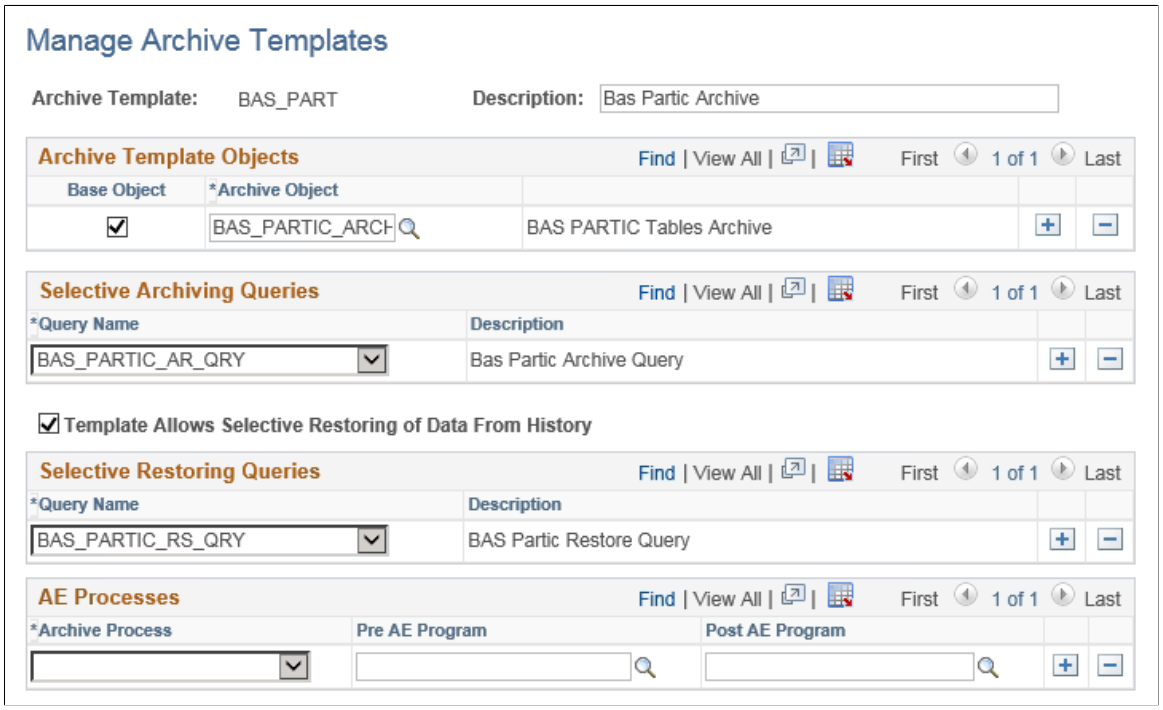
Use the Manage Archive Templates page (PSARCHTEMPDEFN) to define archive templates.

Navigation

PeopleTools > Data Archive Manager > Manage Archive Templates > Manage Archive Templates

Image: Manage Archive Templates page

This example illustrates the fields and controls on the Manage Archive Templates page.



Running the Data Archive Manager

Pages Used to Run the Data Archive Manager

Page Name	*Definition Name*	*Usage*
Archive Data To History Page	PSARCHRUNCNTL	Define archive jobs.
Audit Archiving Page	PSARCHIVEAUDIT	View the results of an archive job.

Archive Data To History Page

Use the Archive Data To History page (PSARCHRUNCNTL) to define archive jobs.

Navigation

PeopleTools > Data Archive Manager > Archive Data To History

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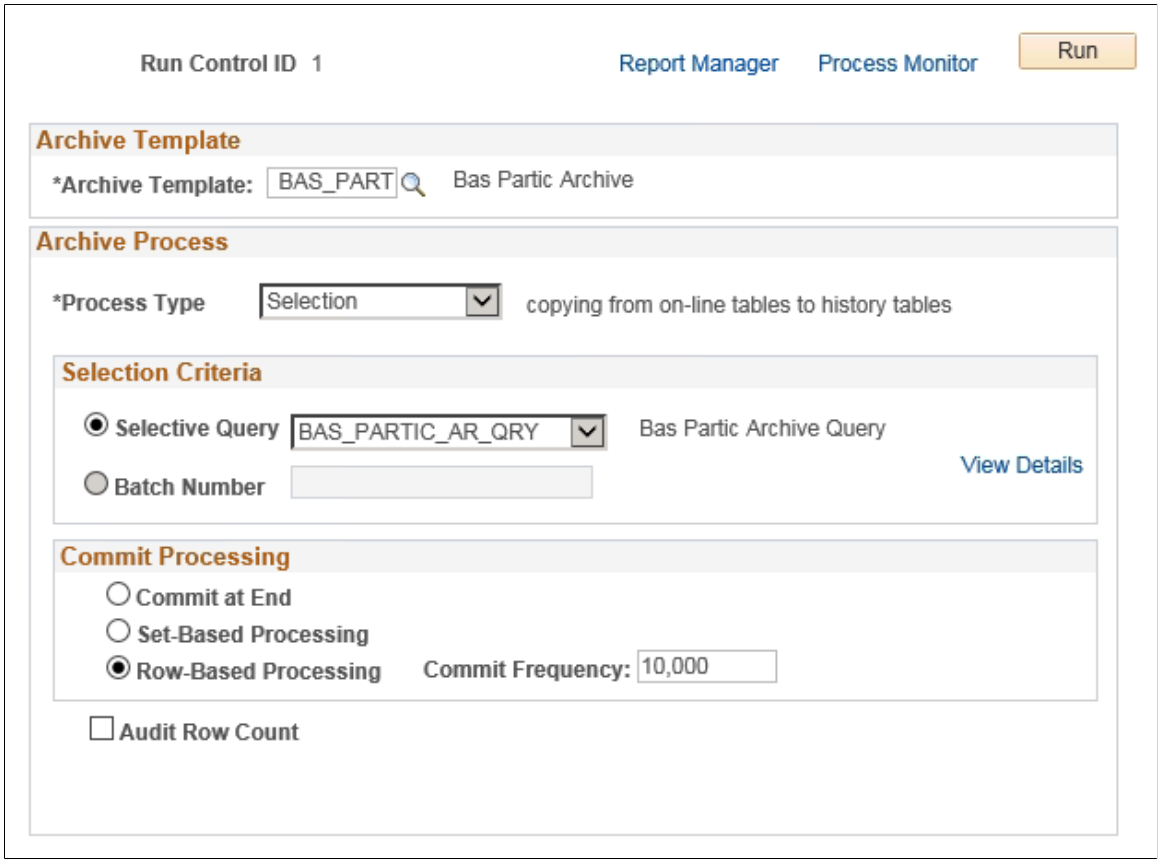
Image: Archive Data To History page

This example illustrates the fields and controls on the Archive Data To History page.



Data Archiving Processes

You can use the Archive Data To History page to run four different processes:

- Selection: Copies data from transaction tables to history tables.
- Delete: Deletes data from transaction tables only if they have already been archived in the history tables.
- Rollback: Copies data from history tables back to transaction tables.
- Remove from History: Deletes data from the history tables.

Typically, you run the archive process with Selection to load your history tables, and then run the archive process with Delete to delete data from the transaction tables.

Warning! If you run the archive process with Remove from History, then you will not be able to Rollback data from the history tables to the transaction tables.

Note: You can grant query security access to the benefit event archive history tables in order to support any historical reporting requirements via the Query Manager.

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Audit Archiving Page

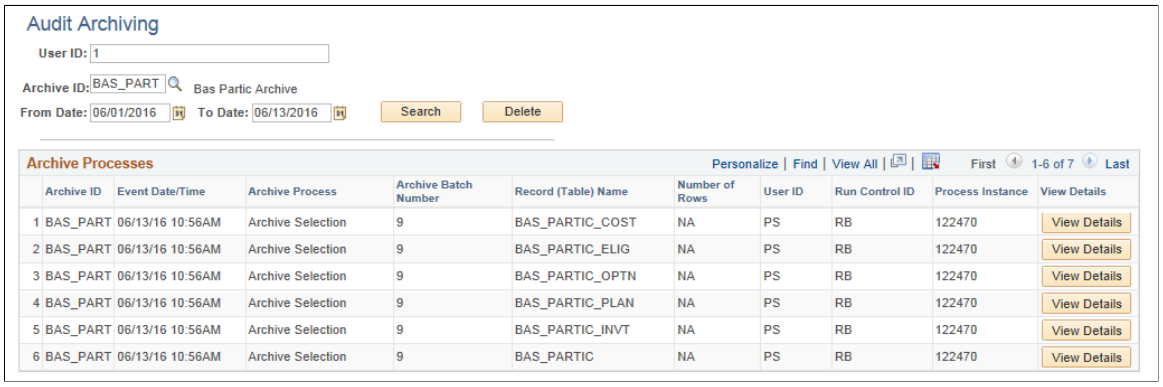
Use the Audit Archiving page (PSARCHIVEAUDIT) to view the results of an archive job.

Navigation

PeopleTools > Data Archive Manager > Audit Archiving

Image: Audit Archiving page

This example illustrates the fields and controls on the Audit Archiving page.



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Chapter 18

Managing Life Events

Understanding Life Events

Life Events transactions can streamline the life event process for employees by enabling them to update personal data and then change their benefit enrollments, all from one self-service transaction. PeopleSoft eBenefits, by default, delivers four major life event transactions that have immediate impact on benefits enrollment of an employee:

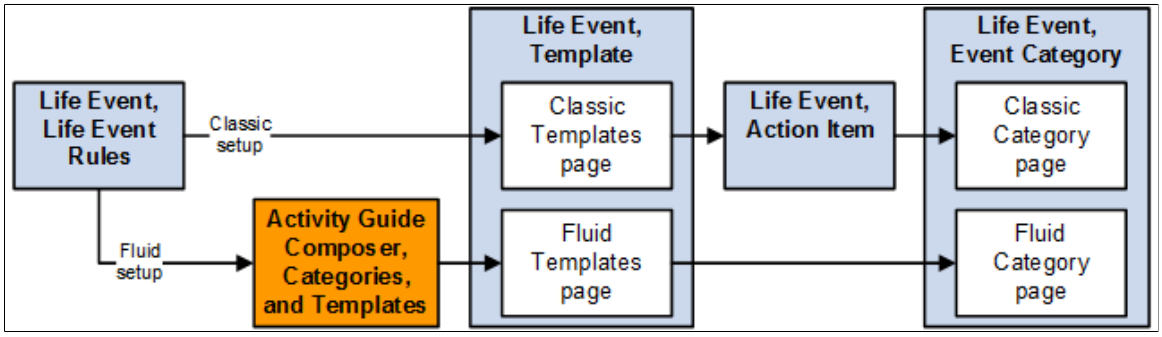
- Getting married
- Giving birth to a child
- Adopting a child
- Getting divorced

Oracle's PeopleSoft eBenefits has two user interfaces:

- PeopleSoft Classic User Interface, which was designed to be used on a laptop and desktop.
- PeopleSoft Fluid User Interface, which was designed to be used on mobile devices, but can also be used on a laptop and desktop.

Image: Defining Life Events varies slightly between classic and fluid users

While most of the setup tables are located within the Life Event menu category (Set Up HCM >Product Specific >eBenefits >Life Events) you will used different pages within the components to set up Life Events for classic versus Life Events for fluid. Regardless of the interface you choose to use, you will start by defining rules in the Life Event Rules table. If you are setting up life events for fluid, you will use the Activity Guide Composer pages (to set up your templates and steps. Next, you will access the Template component to identify the template as a Life Event template. This component consists of two pages: one for classic setup and one for fluid setup. To define the steps for classic life events, use the Action Item pages. Finally, use the Event Category pages to set up life event categories for the employee self service Life Event selection menu landing page.



In addition to the out-of-the-box life events, benefits administrators can create other life events based on the requirements of their organization. To create a life event, benefits administrators can:

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- Define and maintain life event templates and then create action items or steps that form part of the template.
- Clone an existing life event to create a new life event with similar requirements.

Defining Life Event Rules

These topics provide overview and setup information for life event rules.

Use the Life Event Rules (W3EB_LE_RULES) component to set up life event rules.

Page Used to Define Life Event Rules

Page Name	*Definition Name*	*Usage*
Life Event Rules Page	W3EB_LE_RULES	Set up rules that control how data and information is processed for life events such as changes in marital status, birth, or adoption.

Understanding Life Event Rules

Life Event Rules enable organizations to control what an employee can perform on a life event. By default, PeopleSoft eBenefits supports four Life Event Types: Marriage, Birth, Adoption, and Divorce. Customers can add new life event types and define a set of rules for each life event type according to the practices established by the organization.

Life event rules enable organizations to control whether an employee can automatically update the HR database while processing a life event, based on the practices established by the organization.

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

Update to HR Database	*Requirement*
Create BAS_ACTIVITY trigger	• Benefits Administration is selected on the Installation Table. • The employee has at least one job managed by PeopleSoft Benefits Administration as of the life event effective date. • Allow Event Creation is selected on the Life Event Rules page. • The employee enters the transaction within the period described by the Maximum Days to Notify parameter.

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Update to HR Database	*Requirement*
Create COBRA_ACTIVITY trigger	If an employee is managed by PeopleSoft Base Benefits, a COBRA activity is triggered when: • COBRA Administration is selected on the Installation Table. • Benefits Administration is not selected on the Installation Table. • Proof Requiredis not selected on the Life Events Rules page. If the employee is managed by PeopleSoft Benefits Administration, a COBRA Activity is triggered when: • Benefits Administration is selected on the Installation page. • The employee has at least one job managed by PeopleSoft Benefits Administration as of the Life Event effective date. • Proof Required is not selected on the Life Event Rules page. • Allow Event Creation is selected on the Life Event Rules page. • A COBRA action code is entered on the Life Event Rules page. • The Benefits Administration event finalizes.
Employee's marital status is updated in the PERS_DATA_EFFDT table	• For marital status change only. • Proof Required is not selected on the Life Event Rules page.
Current spouse's marital status is changed to Divorced and relationship is changed to Ex Spouse in the DEPENDENT_BENEF table	• The Life Event Type is *Divorce.* • Proof Required is not selected on the Life Event Rules page.

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

Life Event Rules Page

Use the Life Event Rules page (W3EB_LE_RULES) to set up life event rules that affect how data and information is processed for changes in marital status, birth, or adoption.

Navigation

Set Up HCM > Product Related > eBenefits >Life Event > Life Event Rules > Life Event Rules

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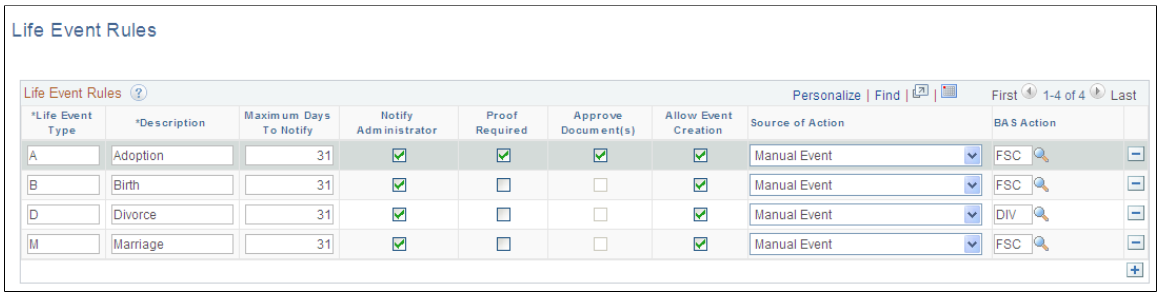
Image: Life Event Rules page

This example illustrates the fields and controls on the Life Event Rules page. You can find definitions for the fields and controls later on this page.



Life Event Type

Specify the life event type. Four different types of life events are available by default - Adoption, Birth, Divorce, and Marriage. You can modify existing life event types or define new life event types according to your organization's needs.

Maximum Days To Notify

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

Notify Administrator

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

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

Proof Required

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

Approve Document(s)

Select to enable the benefits administrator to approve, deny, or push back the uploaded life event documents. The employee can proceed to benefits enrollment only after the benefits administrator approves the document.

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.

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	Selecting this field indicates that you want the system to trigger a BAS Activity for this type of life event and allows the employee to change benefit election through the eBenefit election pages.
Source of Action	This field is available and is required if Benefits Administration is selected on the Installation table and Allow Event Creation is selected. For a BAS Activity trigger to be created, you must enter *Manual* in the field.
BAS Action	This field is available and required if Benefits Administration is selected on the Installation table and Allow Event Creation is selected. Enter a BAS action code that is appropriate for this life event. Typically, this is *FSC* - Family Status Change.
COBRA Action	This field is available if both COBRA Administration andBenefits Administration are selected on the Installation table. This field is used only when the life event is for an employee managed by PeopleSoft Benefits Administration,Create Event is selected, and the resulting Benefits Administration event should create a COBRA Activity trigger when it finalizes.

Configuring A Life Event

Configuring a life event includes setting up templates and steps for a template. How you go about setting up templates and steps varies slightly based on whether end users will use the classic or fluid pages to enter life event changes:

- For classic life events:

  1. Use the Template (W3EB_LE_LIST) component to identify life event templates for classic users.
  2. After setting up templates, use the Action Item (W3EB_LE_ITEM02) component to set up life event action items for classic life events.

- For fluid life events:

  1. Set up the Activity Guide Composer Categories and Templates components to define the respective life event templates and steps. See the "Understanding the Activity Guide Composer" (PeopleSoft 9.2: Enterprise Components) documentation for the setup of these components.
  2. Use the Template (W3EB_LE_LIST) component to identify life event templates for fluid users.

  Note: Fluid life events does not use action items as described in these topics. Instead it uses the Activity Guide Composer Template to identify steps.

These topics provide an overview of life event templates and discusses the Life Events configuration pages in Benefits.

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Pages Used to Configure Life Event Templates and Action Items in Benefits

Page Name	*Definition Name*	*Usage*
Classic Templates Page	W3EB_LE_LIST	Define life event templates for the classic Life Event pages.
Fluid Templates Page	W3EB_LE_FLU_LIST	Associate an Activity Guide Composer template with the Benefits Life Event template for the fluid Life Event pages.
Action Item Page	W3EB_LE_ITEM02	Create action items that define the steps an employee will perform to record and complete a life event using the classic Life Events pages.
Child Action Item Page	W3EB_LE_ITEM_SEC	Create sub-steps for a life event action item using the classic Life Events pages.
Dependent Action Item Page	W3EB_LE_DEPEND_SEC	Specify which life event action items must be completed by the employee prior to completing this action item when using the classic Life Events pages.

Understanding Life Event Templates (Including Action Items / Steps)

A template corresponds to a life event category type, such as a birth, death, marriage, or divorce. You can define a life event template and then specify action items or steps that form part of the template, based on your business requirements. For example, you can define an *Adoption Event* template and specify action items or steps that need to be processed to complete the adoption life event. Employees can then use the available life event template to process their life events.

The PeopleSoft application delivers the *Adoption Event*, *Birth Event*, *Divorce Event*, and *Marriage Event* templates for both classic and fluid users.

Action items or steps constitute the individual tasks that an employee needs to perform in order to complete a life event. When using classic Life Events, you will create action items. When using fluid Life Events, you will assign steps to your templates. Customers can define and group action items or steps to configure a life event based on their business needs. You can assign the order these should appear within a life event, indicate whether a task is required or not, define parent and child (subsidiary) relationships, and specify a dependent relationship to indicate if an action item or step can be started only after completing another item.

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Note: In addition to defining a life event template and creating action items or steps for the template manually, you can also duplicate an existing life event with similar action items by cloning a life event.
– (Classic) Use the Benefit Cloning Utility in Benefits. Select the *Life Event Template* type to clone, and then modify the cloned life event to suit the business needs. For more information, see "Cloning Benefit Programs, Coverage Formulas, Eligibility Rules, Event Rules, or Life Event Templates" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits).
– (Fluid) Use the "Clone Template Page" (PeopleSoft 9.2: Enterprise Components) in the Activity Guide Composer. Click the Clone Template button for a template, enter the new template ID (following the naming format guidelines for life events), a description, and the effective date. The system will take you to the Activity Guide Composer Template pages to make modifications. For more information, see "Managing Activity Guide Templates" (PeopleSoft 9.2: Enterprise Components).

The setup steps for templates are different based on whether you are a classic or fluid user. Use the following information to set up templates and action items or steps for your life events.

Classic Setup Steps

Follow these steps to create templates and action items for a classic life event:

1. Define a life event template on the Classic Templates Page from the eBenefits, Life Event setup menu.
2. Create action items that form the steps of the template using the Action Item Page within the eBenefits, Life Event setup menu.

Note: You cannot delete or modify the delivered Life Event templates or action items. To make changes to a delivered template and its action items, copy the delivered templates by using the "Benefit Clone Utility Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits) to copy and update the template. You can also create your own Life Event templates for classic.

Fluid Setup Steps

Follow these steps to create templates and steps for a fluid life event:

1. Create Activity Guide Composer categories using the Categories component (see "Setting Up Activity Guide Categories" (PeopleSoft 9.2: Enterprise Components)).

   Categories contain the technical components that are utilized to define an activity guide template. This also means the category definition contains the steps that can be included as steps to define a Life Event template (activity guide).

   The PeopleSoft application delivers the *LIFEEVENT* Activity Guide Category. You can use this category for your Life Events template needs, update it through new effective dated rows, clone a category using the Activity Guide Composer "Clone Category Page" (PeopleSoft 9.2: Enterprise Components), or create your own categories. To modify the delivered system data, you will need to insert a new effective dated record of the Life Event category or clone a category, and make the changes. You cannot modify the initial row of the system delivered data.

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Important! When you include a change like adding additional steps in a category, you will need to clone or insert a new effective dated row in the templates that use this category with an effective date equal to or greater than the effective date of the category to utilize the new step in your templates. The system will not automatically insert steps into the template. By inserting a new effective dated row that is equal to or greater than that of the category, you can now opt to include the new steps into the template.

The following table lists the delivered steps for the *LIFEEVENT* category:

Step	***Description***
ADDRESS	Home and Mailing Address
BENEFIT ENROLL	Benefit Enrollment
BENEFIT SUMMARY	Benefit Summary
BIRTH DATE	Birth/adoption Date
CONTACT INFO	Contact Information
DEPBENE SUMMARY	Dependent/Beneficiary Coverage
DEPENDENTBENEF	Dependent and Beneficiary
DIRECT DEPOSIT	Direct Deposit
DOCUMENT UPLOAD	Document Upload
ELECTION REVIEW	Benefit Election Review
EMERGCONTACT	Emergency Contact
MARITAL STATUS	Marital/Divorce Status
NAME	Name
SUMMARY	Summary
TAX WITHHOLDING	Tax Withholding
WELCOME	Welcome

2. Define Activity Guide Composer templates using the "Activity Guide Templates Page" (PeopleSoft 9.2: Enterprise Components).

   This process has you identify the layout of the activity guide, security roles to access the template, and determine the exact steps and their order within the template. The PeopleSoft application delivers the following Life Event templates and documentation that list the delivered steps for the Life Event templates:

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- *Life Event: Adoption Event* (Processing the Adoption Event)
- *Life Event: Birth Event* (Processing the Child Birth Event)
- *Life Event: Divorce Event* (Processing the Divorce Event)
- *Life Event: Marriage Event* (Processing the Marriage Event)

Note: You cannot delete or modify the delivered Life Event activity guide templates. To make changes to a delivered template, insert a new effective dated row or use the cloning option through the Activity Guide Composer to copy and update the template. You can also create your own Life Event templates for fluid.

Important! Life events *must* use the following seven (7) character template ID naming convention to ensure that Life Event activity guides are processed correctly:
EF_x (where *x* equals either **A** for adoption, **B** for birth, **D** for divorce, or **M** for marriage) followed by three additional numbers or characters to uniquely identify the template.
The first four characters of the template ID are used during processing of Life Event activity guides and you can use the remain three characters for your own tracking purposes.
When creating classic Life Event templates in the Benefits application, the system automatically generates a unique template ID base on the template type (A, B, D or M). For example, a classic Life Event template ID could be *EF_M5LLLLL* - where *EF_M* specifies it to be a Marriage life event, *5* is an incremental number, and the system pads it with *LLLLL*. Fluid Life Event templates are created and cloned using the Activity Guide Composer, where the administrator defines the template ID. However, this same formatting must be used to correctly process the life event.
For example, the template administrator may create the Activity Guide composer template ID *EF_B100* for a birth, or *EF_D200* for a divorce life event. This naming convention, with the first 4 characters starting as such, *must* be followed to ensure that the Life Event templates are processed correctly. .

---

3. Identify the template as a fluid Life Event template in Benefits on the Fluid Templates Page in the eBenefits, Life Event setup pages.

Note: If you create your own Activity Guide Composer Life Event templates, it is recommend that you do *not* opt to display the templates on the "My Processes Page" (PeopleSoft 9.2: Enterprise Components), which is a centralized location where you can deploy various activity guide templates to your users. Instead, have your users access it only through the Benefit Details Tile.

Classic Templates Page

Use the Classic Templates page (W3EB_LE_LIST) to define a life event template for the classic Life Event pages.

Navigation

Set Up HCM >Product Related >eBenefits >Life Event >Template >Classic Templates

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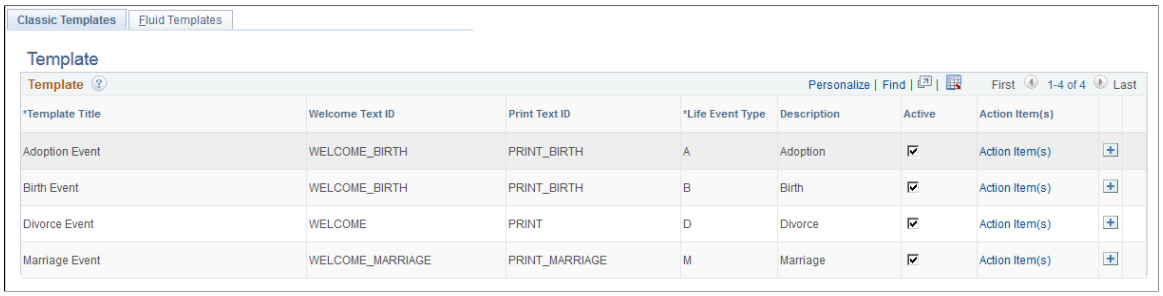
Image: Classic Templates page

This example illustrates the fields and controls on the Classic Templates page. You can find definitions for the fields and controls later on this page.



Template Title

Enter a description for the life event template. The template title is the high level key you will use to create action items for a life event. Action items define the transactions a user may need to process to record a life event change, such as updating marital status, changing benefits enrollment, or uploading a life event document.

The template title will also be displayed as the header of the Life Event component.

Welcome Text ID

Specify the text to be displayed on the Welcome page of the Life Event component. Text IDs and the corresponding text are maintained in the Text Catalog.

Note: Only those text IDs where the owner ID is equal to *HEB* and the sub ID is equal to *LE* on the Text Catalog are available for selection.

Print Text ID

Specify the text to be displayed on the completion and exit page of the Life Event component.

Life Event Type

Specify a life event type for each template. The HCM application provides Marriage, Birth, Adoption, and Divorce life events by default. In addition, you can create other life events specific to your organization using the Life Event Rules table.

Description

Displays the description for the selected life event type.

Active

Select whether this template is active or inactive. Only active templates will be available for selection on the Event Category - Classic Category Page, and therefore eligible to be included in the life event selection menu for the end user.

For more information, see: Setting Up the Life Event Selection Menu

Action Item(s)

Select this link to access the Action Item component to create a list of transaction pages that should be part of the life event

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template. Action items are the various tasks a user may need to complete to record a life event change.

Fluid Templates Page

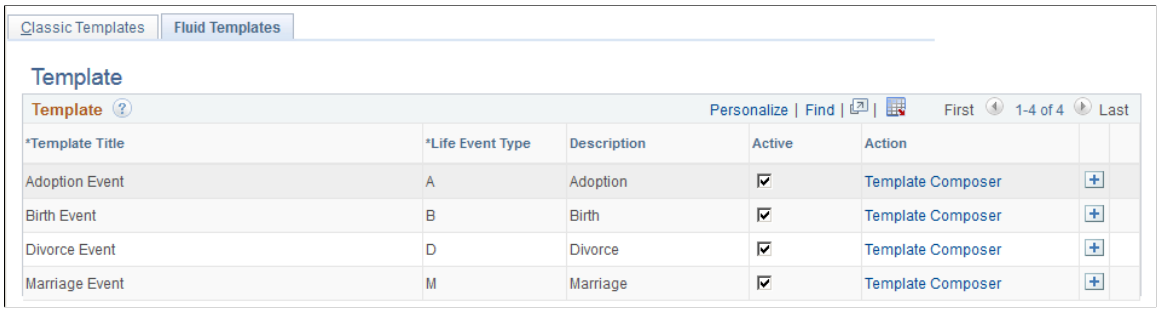
Use the Fluid Templates page (W3EB_LE_FLU_LIST) to associate an Activity Guide Composer template with the Benefits Life Event template for the fluid Life Event pages.

Navigation

Set Up HCM >Product Related >eBenefits >Life Event >Template >Fluid Templates

Image: Fluid Templates page

This example illustrates the fields and controls on the Fluid Templates page. You can find definitions for the fields and controls later on this page.



The page will display the delivered life event templates and any templates you have added. To add additional templates click the Add (+) button at the end of a row.

Template Title

Note: Life event templates for fluid must first be created using the Activity Guide Composer (AGC).

Select from a list of active life event template descriptions. Only active Activity Guide Templates are available for selection. The PeopleSoft application delivers the following life event templates for fluid:

- *Adoption Event*
- *Birth Event*
- *Divorce Event*
- *Marriage Event*

To create, update, delete, or clone an existing template, use the "Activity Guide Templates Page" (PeopleSoft 9.2: Enterprise Components).

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Important! Strict template ID formatting must be used to ensure that the life event templates are processed correctly in Benefits. See the Important note under the Fluid Setup Steps section of Understanding Life Event Templates (Including Action Items / Steps) for more information.

The template contains activity guide steps for a life event. Activity guide steps define the transactions a user may need to update to record a life event change, such as update marital status, change benefit enrollments, or have the ability to upload a document. This title will also appear in the header of the fluid Life Events pages.

Life Event Type Specify a life event type for each template. The PeopleSoft HCM application delivers the Marriage, Birth, Adoption, and Divorce life events, but you can create other life events specific to your organization using the Life Event Rules table.

Description Displays the description for the selected life event type.

Active Select whether this template is active or inactive. Only active templates will be available for selection on the Event Category - Fluid Category Page, and therefore eligible to be included in the life event selection menu for the end user. Likewise, you cannot inactivate a template that is already assigned on the Fluid Category Page. For more information on event categories, see: Setting Up the Life Event Selection Menu.

Note: Inactivating a fluid life event template from this page does not inactivate the template in the Activity Guide Composer, just as an option from Event Categories. To inactivate an actual template, click the Template Composer link to access the Activity Guide Composer - Templates component and change the status. You cannot inactivate the delivered life event templates within the Activity Guide Composer.

Template Composer Select this link to access the Activity Guide Composer - Templates pages for this template to view or modify aspects of the template, such as steps. Steps are the various tasks a user should complete to record a life event change.

Action Item Page

Use the Action Item page (W3EB_LE_ITEM02) to create action items that define the steps an employee will perform to record and complete a life event using the classic Life Events pages.

Important! This page is for classic life events. Do not use this page if you are creating templates and steps for fluid Life Events. Use the "Activity Guide Composer - Select Steps Page" (PeopleSoft 9.2: Enterprise Components) to add steps to a fluid template.

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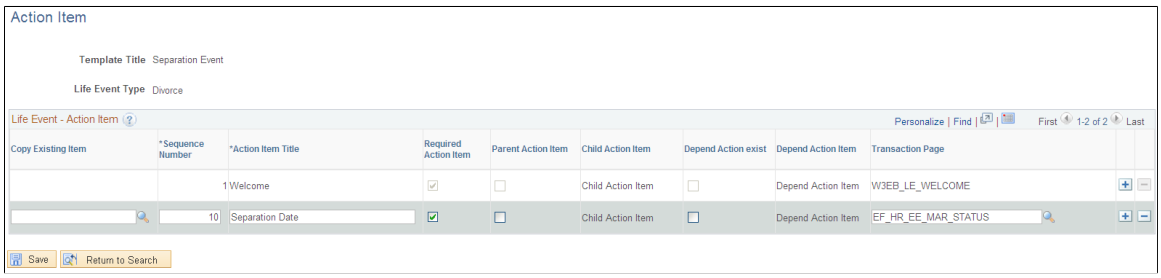
Navigation

- Set Up HCM >Product Related >eBenefits >Life Event >Action Item >Action Item
- Click the Action Item(s) link from the Classic Templates Page.

Image: Action Item page

This example illustrates the fields and controls on the Action Item page. You can find definitions for the fields and controls later on this page.



Copy Existing Item

Copy an existing action item for reuse. To copy, select the action item from a list of all action items that have been created for other templates. This will copy all the fields from the selected action item with the exception of the Depend Action Exist and the Depend Action Item fields.

The Copy Existing Item field is available only when you are managing a template created by your organization.

Sequence Number

Enter the order in which the list of action items, or pagelets, should appear in the Life Event component navigation in self service. The action items are listed in the increasing order of sequence number. When an action item is identified as a parent action item and has child action items associated with it, the sequence number of the parent action item must be lesser than that of the child action items.

Action Item Title

Enter the name of the action item. These titles will appear as links on the left-hand side navigation tree in the employee self service home page for this life event type.

Required Action Item

Select to indicate that the user is required to complete this transaction in order to save and complete the life event. If not selected, the user may complete the action item, but completing it is not mandatory in order to complete the life event.

Parent Action Item

Select to indicate that this action item has sub-steps. The parent action item serves as a heading that groups the child items. When you select this check box, the Transaction Page field is no longer available for the parent action item.

Child Action Item

Select this link when the Parent Action Item check box has been selected to open the Child Action Item page and enter the sequence numbers and transaction page information for each child item. Child items appear as subset items of a parent item.

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	Child item sequence numbers must be greater than that of the parent item.
Depend Action Exist	Select this check box to indicate that the user must complete another task prior to the current task. For example, an employee may need to enter a child's birth date before being eligible to change benefit elections. This check box is not available until at least one other action item has been defined for this template.
Depend Action item	Select this link to open the Dependent Action Item page and select from a list of other action items you have identified for this template. The link and valid options are not available until at least one other action item has been defined for this template with a sequence number lower than this action item. The dependency item you select here must be completed by the user prior to completing this action item.
Transaction Page	Enter the transaction page that the user will access to perform this action item. For more information about transaction/application pages and related content, see:*PeopleTools: Applications User's Guide*

For more information about developing and deploying action items, see: *PeopleTools: Portal Technology*

Child Action Item Page

Use the Child Action Item page (W3EB_LE_ITEM_SEC) to define sub-steps of a life event action item when using the classic Life Events pages. Child item sequence numbers should have a number greater than the parent item.

Note: This page if for classic life events. Do not use this page if you are creating templates and steps for fluid Life Events. Use the "Activity Guide Templates Page" (PeopleSoft 9.2: Enterprise Components) to create fluid life event templates. Use the "Activity Guide Composer - Organize and Configure Steps Page" (PeopleSoft 9.2: Enterprise Components) to manage steps for fluid.

Navigation

Select the Child Action Item link on the Action Item page.

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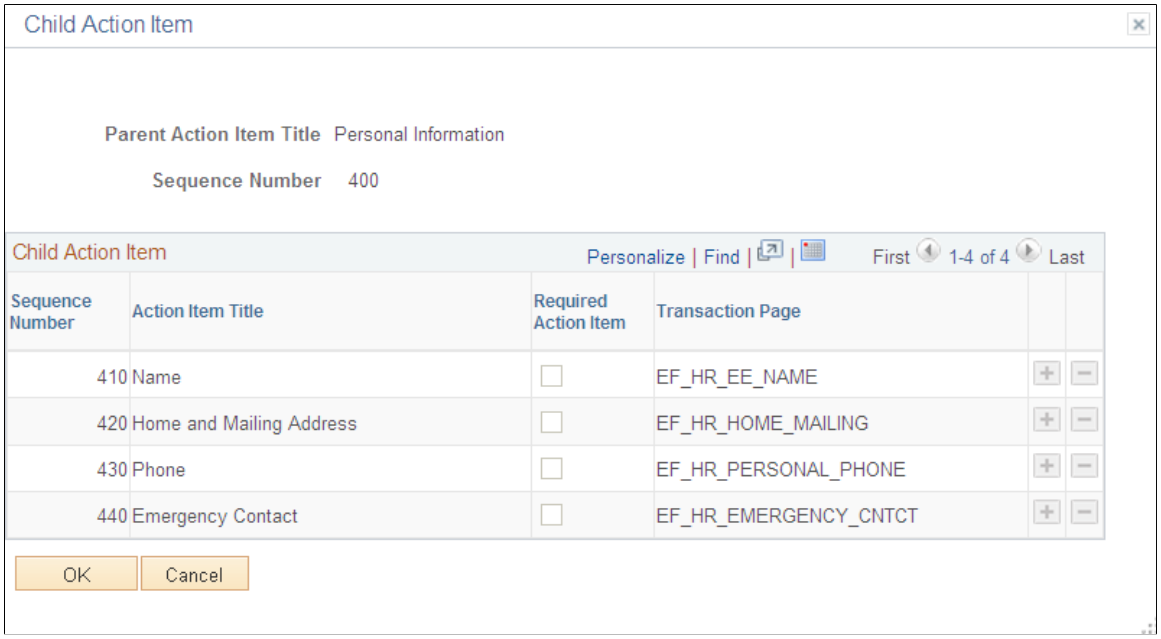
Image: Child Action Item page

This example illustrates the fields and controls on the Child Action Item page.



Sequence Number Enter the order in which the child action items should be listed within the action item. The sequence number of the child action items must be greater than that of the parent action item.

Action Item Title Enter the name of the action item. These titles will appear as pagelet links on the left-hand side navigation tree in the employee self service home page for this life event type.

Required Action Item Select to indicate that the user is required to complete this transaction in order to save and complete the life event. When deselected, the user has the option to complete this task but does not need to in order to complete the event.

Transaction Page Specify the transaction pagelet that the user will access to perform this action item.

Dependent Action Item Page

Use the Dependent Action Item page (W3EB_LE_DEPEND_SEC) to indicate if another action item must be completed by the user prior to processing this action item when using the classic Life Events pages. The action item can be processed only after completing the action item on which it is dependent.

Note: This page if for classic life events. Do not use this page if you are creating templates and steps for fluid Life Events. Use the "Activity Guide Templates Page" (PeopleSoft 9.2: Enterprise Components) to create fluid life event templates. Use the "Activity Guide Composer - Organize and Configure Steps Page" (PeopleSoft 9.2: Enterprise Components) to manage steps for fluid.

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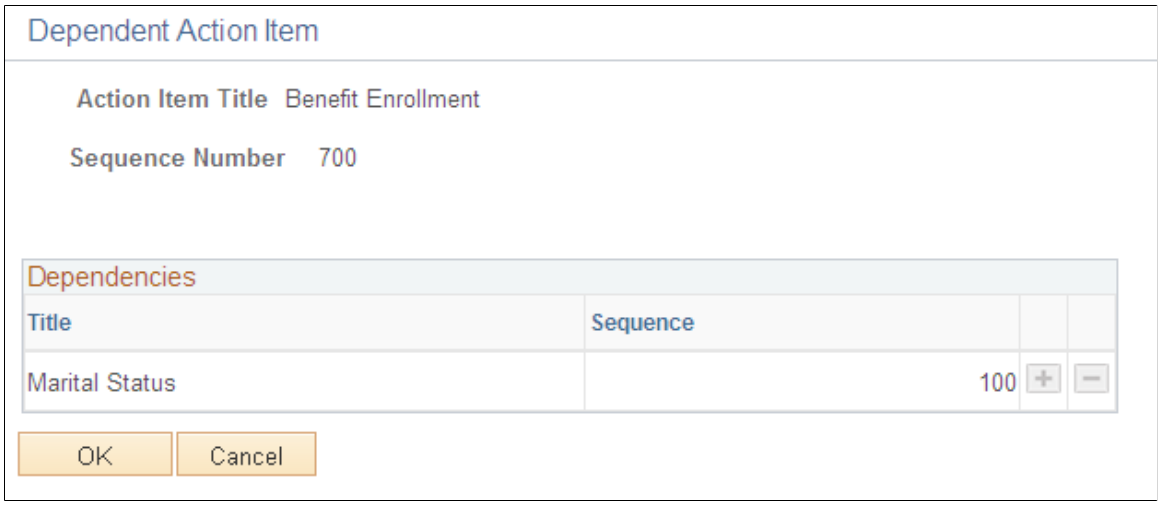
Navigation

Select the Depend Action Item link on the Action Item page.

Image: Dependent Action Item page

This example illustrates the fields and controls on the Dependent Action Item page. In this example, the Marital Status action item must be completed before starting Benefit Enrollment.



Title Select the action item which the current action item is dependent on.

Sequence Indicates the sequence number of the selected action item.

Configuring Fluid Life Event Document Upload

Use the PeopleSoft Fluid Attachment Framework to configure life event document upload for fluid interface.

Pages Used to Configure Fluid Life Event Documents Upload

Note: Refer the documentation for "Configuring Attachments in Fluid Framework" (PeopleSoft HCM 9.2: Application Fundamentals) for detailed information on configuring the common attachment framework.

Page Name	*Definition Name*	*Usage*
"Define Attachments Page" (PeopleSoft HCM 9.2: Application Fundamentals)	HR_ATT_CNFG	Create configuration ID based on the required attachment type.

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Page Name	Definition Name	Usage
Maintain Definitions Page	HR_ATT_DEFN	Associate the configuration ID to a specific Life Event. You can also specify upload and approval requirements for each configuration ID. **Note:** To configure life event attachments, access this page for the HBN owner ID.
Review Benefits Attachment Page	BEN_ATTACH_EVNT_FL BEN_ATTACH_IDE_FL	View the documents attached by the employees.

Understanding Fluid Life Event Document Upload

Employees are required to upload life event documents like, certificates of marriage, adoption, divorce etc when processing their life events. As an administrator, you can:

- Define categories for document upload based on each life event type.
- Specify if the document upload is mandatory for a specific life event type
- Specify If approval is required for a specific life event type.
- Access the uploaded document

Note: The Fluid Review Benefits Attachment component can be accessed by administrator through the Benefits WorkCenter Tile if the employee has granted ‘Benefits Administrator Fl WC’ role.

Roles and Permission List

Roles	Permission List
My Benefits Fluid This role is necessary for employees accessing the Benefits Attachment in Benefits Details tile.	HCCPSS1021
My Benefits Fluid	HCCPSS1022 This permission list is necessary for employees to use the Benefits Details Dashboard Tile.
Benefits Administrator Fluid This role is necessary for administrator accessing the Review Benefits Attachment in Benefits Administrator tile.	HCCPBN1020

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Roles	*Permission List*
Benefits Administrator Fluid	HCCPBN1050 This permission list is necessary to use the Benefits WorkCenter.

Maintain Definitions Page

Use the Maintain Definitions page (HR_ATT_DEFN) to link the configuration ID to a specific life event. You can indicate the upload requirement and approval requirement for each configuration ID.

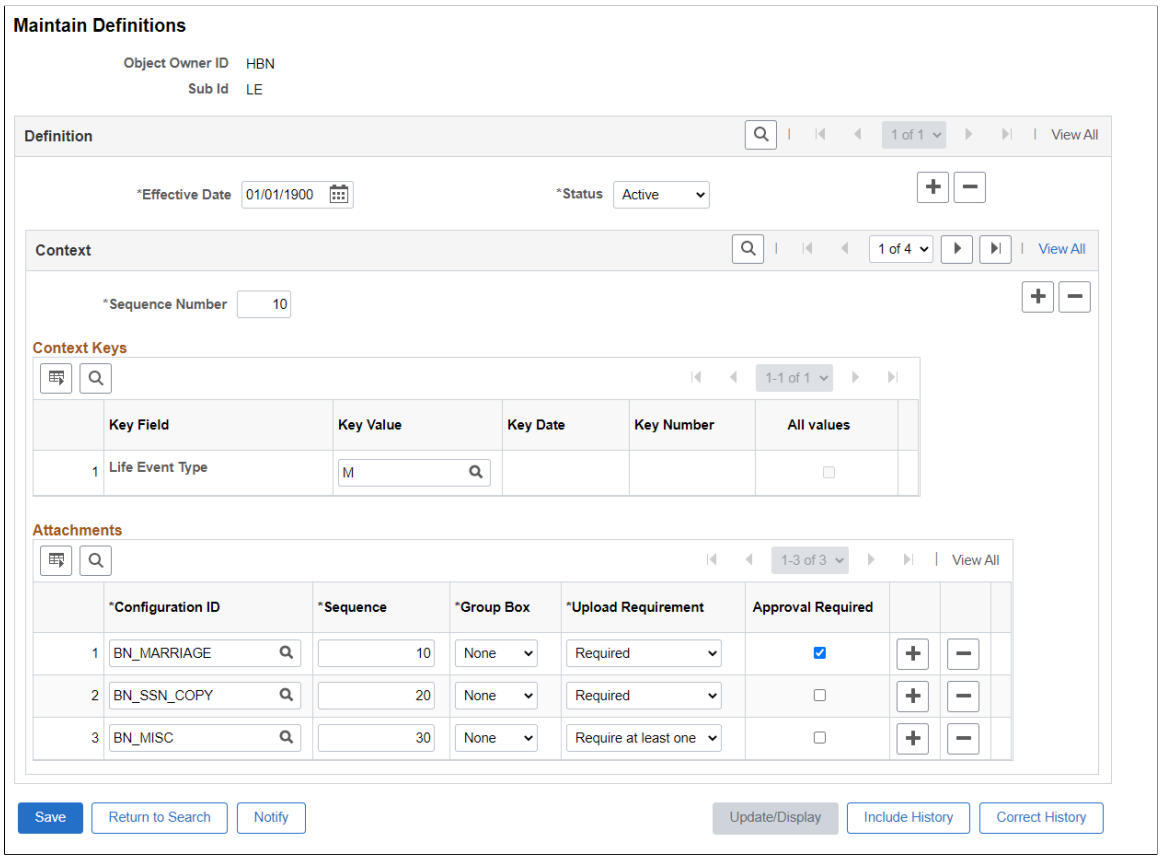
Establish the contexts in which the defined attachment types are to be available and associate specific attachments with each context.

Navigation

Set Up HCM >Common Definitions >Attachments >Maintain Definitions >Maintain Definitions

Image: Maintain Definitions Page

This example shows the fields and controls on the Maintain Definitions page when Object Owner ID is selected as HBN and Sub Id is selected as LE. This is specific to Life Event.



In the Key Value field, select the required life event type. Here, in this example ‘M’ – Marriage is selected as the Life Event Type.

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Attachments

Configuration ID Select the required configuration ID. This indicates the documentation type.

Upload Requirement Select the option to indicate the requirement for document upload under this category. Available options are:

- If the status is ‘Required’, it is mandatory to upload a document under this category for the selected life event.
- If the status is ‘Optional’, it is optional to upload a document under this category for the selected life event.
- If the status is ‘Required at least one’, it is mandatory to upload at least one document under this category for the selected life event.

Approval Required Specify if this document requires approval. If selected, the document will be send to the approver(s) based on the configured approval framework. The system marks the Upload Document step as complete only if all the documents that are required to upload are uploaded and all the documents that require approval are approved.

For more information on other fields and controls, see "Maintain Definitions Page" (PeopleSoft HCM 9.2: Application Fundamentals)

Review Benefits Attachment Page

Use the Review Benefits Attachment page to view the documents uploaded by the employees.

Note: To activate the Review Benefits Attachment component on the Benefits WorkCenter, activate the Link section.
Go to Enterprise Component > WorkCenter/Dashboards > Configure Pagelets
Configuration ID = BEN_FL Table

Navigation

- Benefits WorkCenter >Links >Employee Dependent Information >Review Benefits Attachment
- Workforce Administrator >Benefits Administrator >Review Benefits Attachment

Administrator can search for the required employee.

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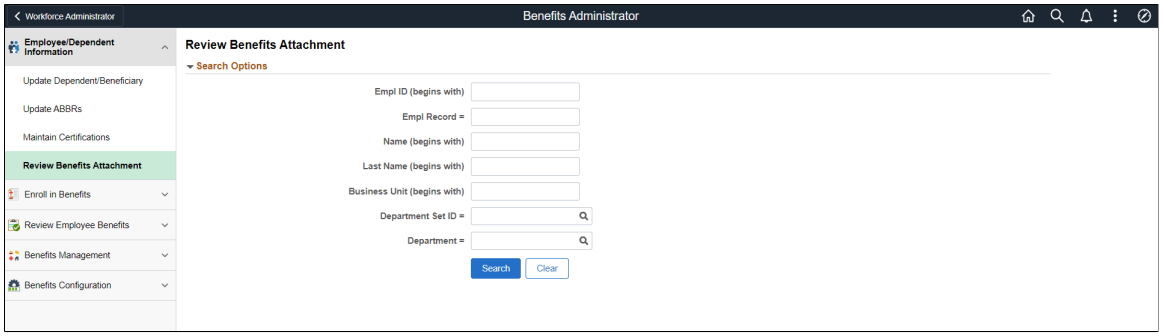
Image: Review Benefits Attachment_Search Page

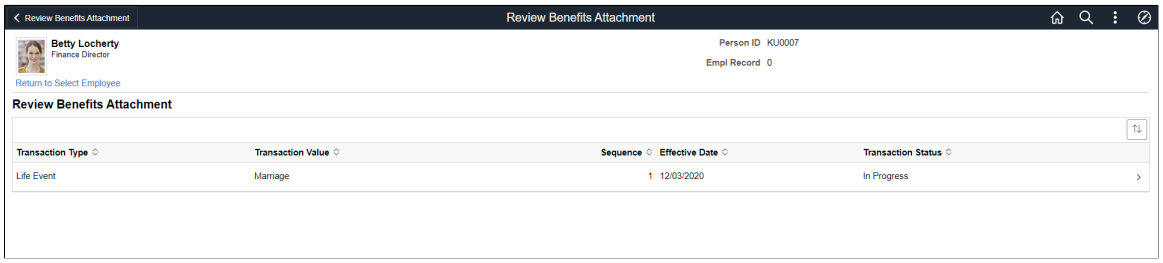
This example illustrates the Review Benefits Attachment page.



Attachment details of the selected employee is displayed.

Image: Review Benefits Attachment Page

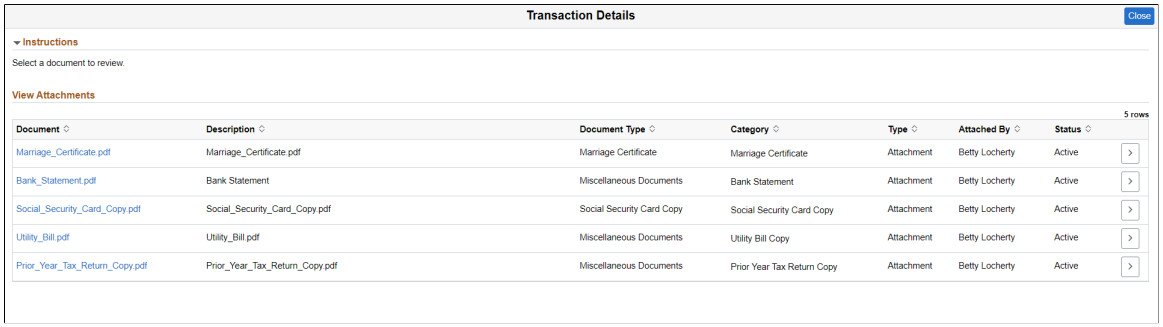
This example illustrates the Review Benefits Attachment page.



Click the row to open the Transaction Details page.

Image: Transaction Details page

This example illustrates the Transaction Details page



This page lists the documents uploaded by the employee with details like document type, category and status. Click the document to open the attachment.

Setting Up the Life Event Selection Menu

This topic discusses how to set up the Employee Self Service Life Event Selection menu.

The Employee Self Service Life Event Selection menu is the menu available to employees on the Life Event main page. You can define life event categories and link life event templates to each category, to set

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up the employee self service life event selection menu. The life event categories define the menu groups and the templates linked to them define the menu items. Employees can then select which life event to process from the available menu.

PeopleSoft eBenefits provides one category *EMPL* (Employee) by default, but you can define other categories relevant to your organization.

To set up the life event selection menu, use the Event Category (W3EB_LE_EVT_CAT) page.

Page Used to Define the Life Event Selection Menu

Page Name	*Definition Name*	*Usage*
Classic Category Page	W3EB_LE_EVT_CAT	Set up life event categories for the classic employee self service Life Event selection menu.
Fluid Category Page	W3EB_LE_FLU_CAT	Set up life event categories for the fluid employee self service Life Event selection menu.

Classic Category Page

Use the Classic Category page (W3EB_LE_EVT_CAT) to set up life event categories for the classic employee self service Life Event selection menu.

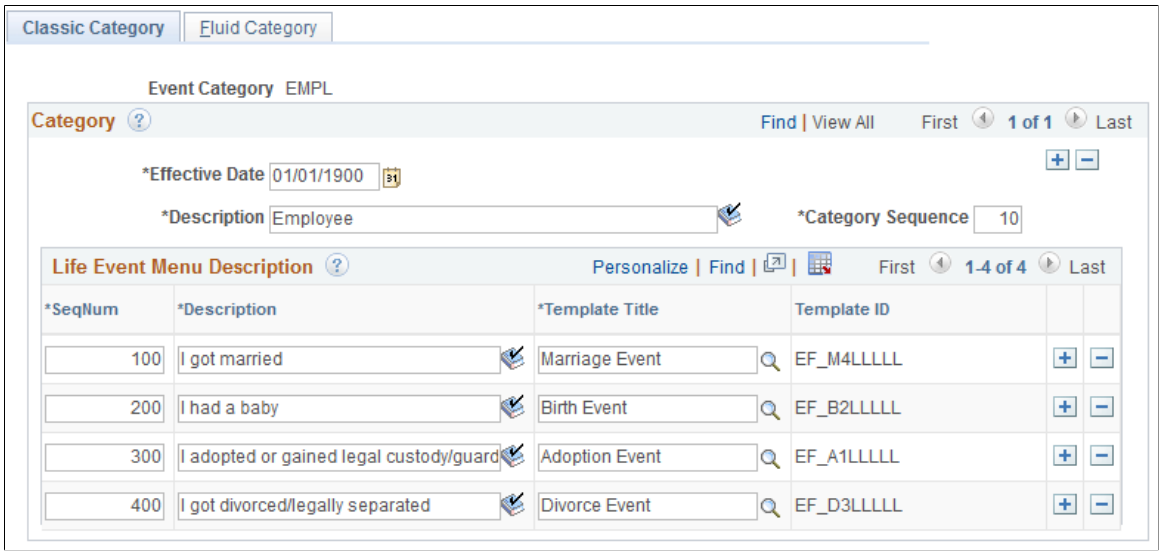
Note: This page is for classic setup. If you want to set up categories for fluid Life Events, use the Fluid Category Page.

Navigation

Set Up HCM > Product Related > eBenefits >Life Event > Event Category > Classic Category

Image: Classic Category page

This example illustrates the fields and controls on the Classic Category page.



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Use this page to set up the templates that should appear for this category on the classic life event self-service home page.

Category Sequence Enter the order in which the event categories should appear on the classic employee self service life event home page. The categories will be displayed on the home page based on the increasing order of the sequence number.

SeqNum Enter a number to determine the order in which a life event should be displayed within the category, in the self service selection menu.

Description Enter a description for the life event change that the user needs to perform. The class life event home page displays these descriptions as radio buttons from which a user selects the required life event.

Template Title Select from a list of active life event templates defined on the Classic Templates Page that have action items defined.

Note: A template associated with an event category cannot be modified or made inactive.

The same template may be used for multiple life event descriptions.

Fluid Category Page

Use the Fluid Category page (W3EB_LE_FLU_CAT) to set up life event categories for the fluid employee self service Life Event selection menu.

Note: This page is for fluid setup. If you want to set up categories for classic Life Events, use the Classic Category Page.

Navigation

Set Up HCM > Product Related > eBenefits >Life Event > Event Category > Fluid Category

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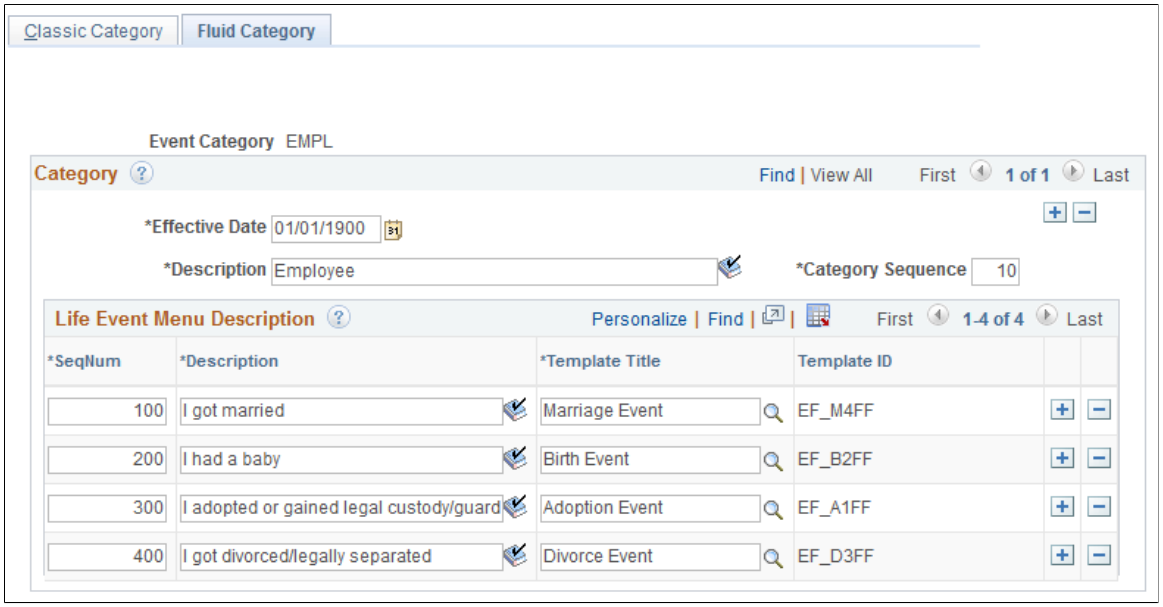
Image: Fluid Category page

This example illustrates the fields and controls on the Fluid Category page.



Use this page to create fluid self service event categories and link templates to the category. The Life Events landing page in fluid displays the life event template descriptions you associate with this category.

Category Sequence

Enter the order in which the event categories should appear on the Employee Self Service, Life Events landing page in fluid. The categories will appear on the landing page based on the increasing order of the sequence number.

SeqNum

Enter a number to determine the order in which a life event should appear within the category. The page displays the life events with the lowest numbers first.

Description

Enter a description for the life event change that the user may need to perform. The fluid Life Events home page displays these descriptions as radio buttons from which a user selects the required life event. For example, for a birth event you can enter the text, 'I had a baby'.

Template Title

Select from a list of active templates that have activity guide steps defined. Template titles are defined using the "Activity Guide Templates Page" (PeopleSoft 9.2: Enterprise Components).

Note: A template associated with an event category cannot be modified or made inactive on the Fluid Templates Page.

The same template may be used for multiple life event descriptions.

Template ID

Displays the ID that was used when creating the template in the Activity Guide Composer.

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Important! Strict template ID formatting must be used to ensure that the life event templates are processed correctly in Benefits. All fluid Life Event template IDs must start with the following four characters: *EF_*, *x* (where *x* equals *A* for adoption, *B* for birth, *D* for divorce, or *M* for marriage). For example, an organization may create the template ID *EF_B100* for a birth, or *EF_D200* for a divorce life event. This naming convention, with the first 4 characters starting as such, must be followed to ensure that the Life Event templates are processed correctly. Activity Guide Composer template IDs must be seven characters in length so you can use the remain three characters for your own purposes.

Related Links

"Managing Activity Guide Templates" (PeopleSoft 9.2: Enterprise Components)

Creating Life Event Descriptive Pages

These topics describe how to create life event descriptive pages.

Understanding Life Event Descriptive Pages

Create life event descriptive pages to guide employees through the action items (pages) that they will need to complete for a self-service life event. After selecting a life event on the Life Event main page, the employee needs to follow a vertical pagelet containing action items to process the event. You can create descriptive Life Event pages such as a Welcome page to include a greeting, a brief description of the steps involved in this event, and any additional information the employee may want to read before proceeding to the actual event, or a custom Exit page to conclude the life event.

Page Used to Create Life Event Descriptive Pages

Page Name	*Definition Name*	*Usage*
Maintain Text Catalog Page	HR_SSTEXT_TEXT	Create life event descriptive pages.

Maintain Text Catalog Page

Use the Maintain Text Catalog page (HR_SSTEXT_TEXT) to create the descriptive pages. The Maintain Text Catalog page provides the flexibility to present custom instructions to the employees.

Navigation

Set Up HCM >Product Related >eBenefits >Maintain Text Catalog >Maintain Text Catalog

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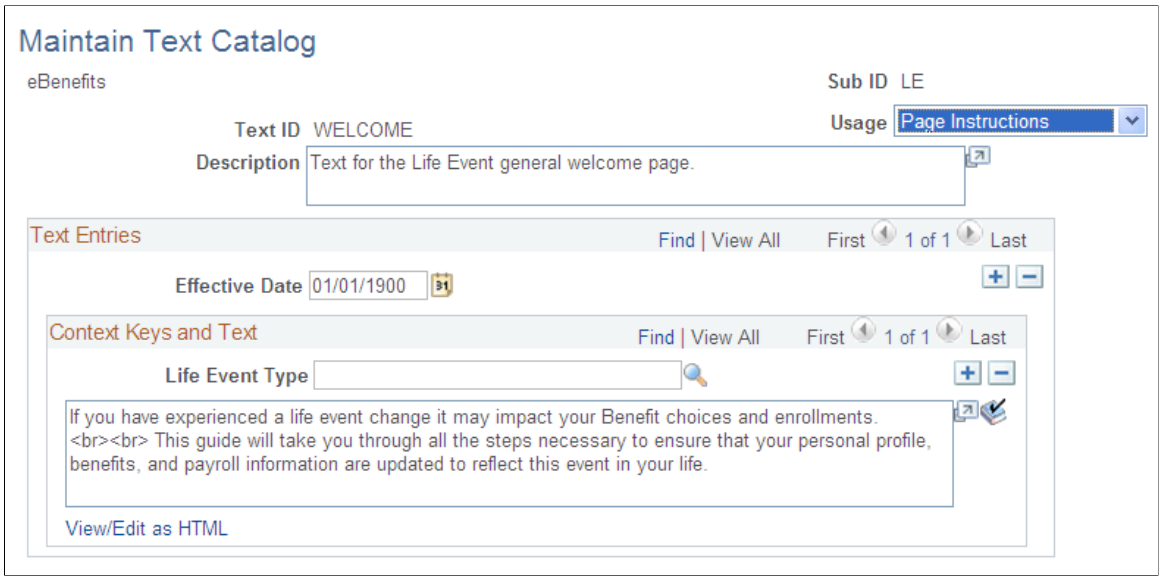
Image: Maintain Text Catalog Page

This example illustrates the fields and controls on the Maintain Text Catalog page. You can find definitions for the fields and controls later on this page.



Field and Control Definitions

Field and Control Definitions

Description Enter the description for the text ID displayed on the life event descriptive page.

The text ID identifies a life event descriptive page. Different text IDs can be created for different life events. For example, you can set up a custom welcome text ID for Marriage and a different welcome text id for Birth. Additionally, you can modify the default text IDs for the welcome page (Welcome) and the exit page (Print).

Effective Date Select a date from which the descriptive page is active.

Context Keys and Text

Life Event Type Select the life event type for which the descriptive page is being created. If the life event type is left blank, the text that you enter will be applicable to all life event types.

In the descriptive text box, enter the custom text to be displayed to the employee on the life event page.

For more information about Text Catalog, see: "Establishing Text Catalog Data" (PeopleSoft HCM 9.2: eBenefits)

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Configuring the Employee Enrollment Summary Statement

These topics describe how to configure the Employee Enrollment Summary Statement.

Understanding the Enrollment Summary Statement

After an employee completes a life event, a new Benefit Preliminary Enrollment Summary Statement report will be generated.

This report provides a summary of the employee's benefit election data and enables the employee to view the new elections after a life event change. The enrollment statement displays four main sections - the personal information, dependent information, investment, and dependent/beneficiary sections. You can configure the report to display or hide any of the four sections using the Enrollment Statement Controls setup page. The Enrollment Statement Controls setup page enables you to display or hide sections based on the life event type.

Page Used to Configure the Employee Enrollment Summary Statement

Page Name	*Definition Name*	*Usage*
Enrollment Statement Controls Page	W3EB_SMRY_CNTRL	Configure the preliminary benefit enrollment summary statement.

Enrollment Statement Controls Page

Use the Enrollment Statement Controls page (W3EB_SMRY_CNTRL) to configure the Benefit Preliminary Enrollment Summary Statement.

Navigation

Set Up HCM >Product Related >eBenefits >Enrollment Statement Controls >Enrollment Statement Controls

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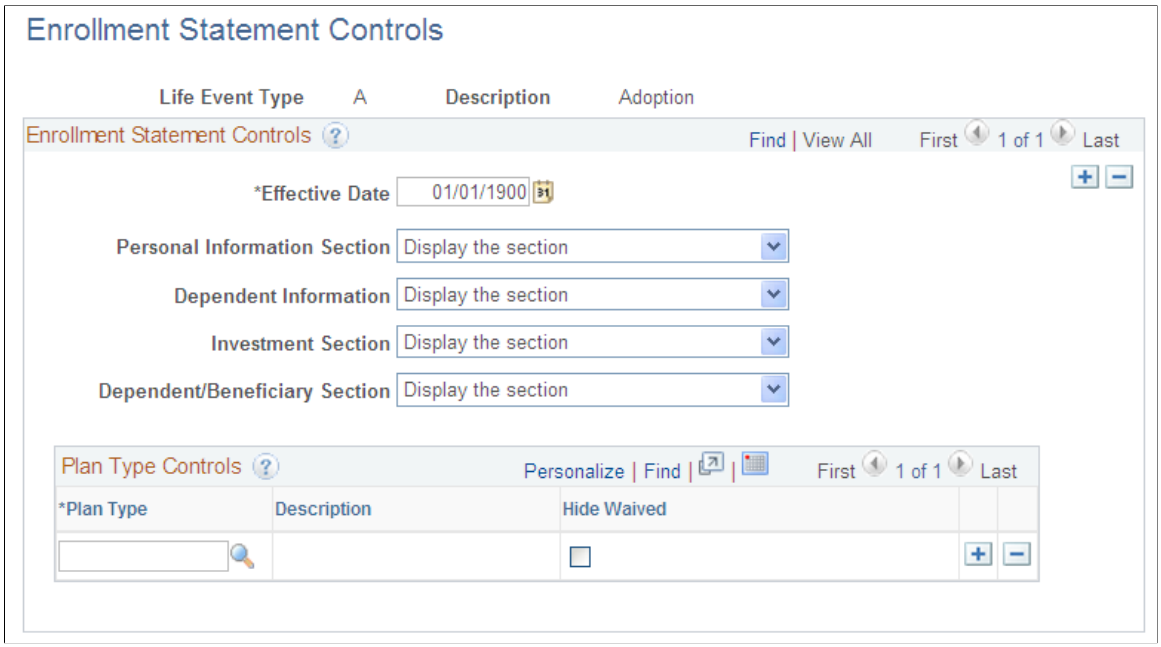
Image: Enrollment Statement Controls Page

This example illustrates the fields and controls on the Enrollment Statement Controls page. You can find definitions for the fields and controls later on this page.



Enrollment Statement Controls

Effective Date Select the effective date from which the enrollment statement controls take effect.

Personal Information Section Select to always display or always hide this section in all reports.

Dependent Information Select to always display this section, hide this section in all reports, or hide this section only when the employee does not have dependent or beneficiary information recorded in the system.

Investment Section Select to always display this section or to hide this section when no investment allocations have been specified.

Dependent/Beneficiary Section Select to always display this section or to hide this section when there are no dependents or beneficiaries enrolled under this employee's benefit package.

Plan Type Controls

Plan Type Select a specific benefit plan type to be excluded from the Enrollment Summary Statement when an employee has opted to waive coverage.

Hide Waived Select to exclude the plan from the Enrollment Summary report when coverage is waived.

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Understanding Life Event Processing

Employees process a self service life event when there is a change in their benefits enrollment as a result of a life event, for example, change in marital status, child birth or adoption. An employee will access the Life Events pages differently based on the interface they are using:

- Classic Life Events

  To access the classic Life Events pages, select the NavBar Navigator to select Employee Self Service, eBenefits, Life Events (see "Using PeopleSoft eBenefits Pages" (PeopleSoft HCM 9.2: eBenefits)).

- Fluid Life Events

  To access the fluid Life Events pages, from the fluid Employee Self Service landing page (or the landing page where you have placed the tile), select the Benefit Details Tile, and then select the Life Events option.

To process a life event, select your life event from the list of available life event on the selection page. An activity guide process guides you through the required sub-steps or action items to complete the life event. An activity guide page lists all the steps, or action items, within the life event. The status of each action item in the activity guide page changes as you navigate through the activity guide. The system provides easy navigation through the activity guide steps. You can stop processing a life event temporarily and continue at a later point, or you can completely cancel (delete) the life event instance. When you complete a life event, the activity guide provides a visual indication that all the action items and steps are complete.

You can perform the following activities while processing a life event:

- Upload documents required to process the life event. Based on the type of the employee life event being processed, the system displays the required document type(s) to be uploaded.
- Change benefits enrollment.
- Review your benefits election and go back to previous steps to make additional changes if necessary.

Note: At any given time, you can execute only one instance of a life event at a time (in either classic or fluid).

These topics describe how to process the following out-of-the-box life events:

- Marriage
- Child birth
- Adoption
- Divorce

Note: By default, four life events — Marriage, Child birth, Adoption, and Divorce are available out-of-the-box. Life events available to you will vary depending on the life events defined by your organization based on your business needs. Additionally, the action items within each life event may also vary depending on the modifications made to them by your organization.

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Processing the Marriage Event

Employees begin the Marriage life event process by navigating to the Life Events page and then selecting the marriage transaction.

After the employee accesses the transaction, the system displays the Change Status Date page on which the employee needs to enter the date of the marital status change. The Change Status Date page indicates the maximum number of days after the life event within which the employee needs to complete the self service life event. A series of pages that direct the employee through the life event process will be displayed. Rules that are set on the Life Event Rules page and the Action Items for the marital status change transaction determine which pages will be displayed by the system.

Pages Used to Process the Marriage Event

Classic Page Name	*Classic Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Welcome Page	W3EB_LE_ WELCOME	Welcome to <Transaction Name> Event Page	AGC_INFO_FL	Read the instructions on the Welcome page to initiate your Marriage life event. This page contains custom information about the life event.
Marital Status Change Page	HR_EE_MAR_ STATUS	Marital Status Page (Marital Status or Divorce Status Page)	HR_EE_MARITAL_ FL	Enter changes for a marital status and submit the changes.
Life Events — Document Upload Page	HR_ATT_DD_HDR	"Life Events - Document Upload Page" (PeopleSoft HCM 9.2: eBenefits)	HR_ATT_DD_HDR	Upload a proof document, for example, marriage certificate for the life event, or enter a note relevant to the marriage event.
Benefits Summary Page	W3EB_GRID	Benefits Summary Page	BEN_SUMM_GRID_ FL	Review current benefits.
Name Change Page	HR_EE_NAME	Personal Information - "Name (Summary) Page" (PeopleSoft HCM 9.2: eProfile)	HR_EE_NAME_FL	Enter name change information.
Home and Mailing Address Page	HR_HOME_MAILING	Personal Information - Home and mailing Addresses Page (see "Addresses (Summary) Page" (PeopleSoft HCM 9.2: eProfile))	HR_EE_ADDR_FL	Enter valid home and mailing addresses.

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Classic Page Name	*Classic Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Phone Numbers Page	HR_PERSONAL_PHONE	Personal Information - Contact Information Page (see "Contact Details Page" (PeopleSoft HCM 9.2: eProfile))	HR_EE_CONTACTS_FL	Enter valid phone numbers.
Emergency Contacts Page	HR_EMERGENCY_CNTCT	Personal Information - "Emergency Contacts (Summary) Page" (PeopleSoft HCM 9.2: eProfile))	HR_EMERG_CNTCT_FL	Enter emergency contact information.
Add/Review Dependent/Beneficiary Page	W3EB_DEPBEN_RVW	Dependent/Beneficiary Info Page	W3EB_DEPBNSMRY_FL	Update dependent/beneficiary information.
W-4 Withholding Certificate Page	PY_IC_W4_DATA_2020	Pay and Compensation - "Tax Withholding Page" (PeopleSoft HCM 9.2: ePay)	PY_IC_W4_FL	Review and change tax information.
Direct Deposit Page	PY_IC_DD_LIST	Pay and Compensation - Direct Deposit Page	PY_IC_DIR_DEP_FL	Review direct deposit information.
Benefit Enrollment Page	W3EB_LE_ENROLL	Benefits Enrollment Page	BNE_LE_ENROLL1_FL	Start benefits enrollment and enroll for available benefits. **Note:** A dependency relationship is defined on the Marital Status Change action item and benefit enrollment. Hence, benefits enrollment will be available only if you have updated and submitted the martial status.

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Classic Page Name	*Classic Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Benefits Election Review Page	W3EB_LE_CONFIRM	Benefits Statement Page	BAS_STATMNTS_FL	Review benefits election. Click Print to generate a preliminary Benefits Enrollment Summary Statement containing your personal information and information about dependent/ beneficiary enrollment, benefits elections, and investment choices. Go back to any previous steps and make additional changes before completing the benefits enrollment.
Event Completion and Exit Page	W3EB_LE_PRINT	Summary Page	AGC_SUMMARY_FL	Complete and exit the life event. View confirmation of the life event process completion. Additionally, view custom information about any additional tasks that you need to do related to this life event. When you click Complete, the system verifies whether all the required action items have been completed and displays an error message if any are incomplete.

See product documentation for *PeopleTools: Workflow Technology* for related information.

Processing the Child Birth Event

Employees begin the Child Birth transaction by navigating to Life Events and then selecting the I had a baby radio button. The system displays the Change Status Date page on which the employee needs to enter the date of child birth.

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

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After the employee accesses the transaction, the system displays a series of pages that direct the employee through the life event process. The system determines which pages will be displayed according to the rules that are set for the *Child Birth* transaction on the Life Event Rules Page and:

- (Classic) Action Item Page.
- (Fluid) Activity Guide Composer pages (see "Managing Activity Guide Templates" (PeopleSoft 9.2: Enterprise Components), the Life Event Rules page and the Action Items for the Child Birth transaction).

Pages Used to Process the Child Birth Event

Classic Page Name	*Classic Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Welcome Page	W3EB_LE_WELCOME	Welcome to <Transaction Name> Event Page	AGC_INFO_FL	Read the instructions on the Welcome page to initiate your child birth event. This page contains custom information about the life event.
Birth Date Page	W3EB_BRTH_ADPT_DT	Birth Date Page (Birth Date or Adoption Date Page)	W3EB_BR_ADPT_FL	Enter the date of child birth and submit.
Life Events — Document Upload Page	HR_ATT_DD_HDR	"Life Events - Document Upload Page" (PeopleSoft HCM 9.2: eBenefits)	HR_ATT_DD_HDR	Upload a proof document, for example, birth certificate for the life event, or enter a note relevant to the event.
Benefits Summary Page	W3EB_GRID	Benefits Summary Page	BEN_SUMM_GRID_FL	Review your current benefits.
Dependent and Beneficiary Coverage Summary Page	W3EB_DEPBEN_SUM	Dependent and Beneficiary Coverage Summary Page	W3EB_DEPBEN_SUM	Review summary information about dependent/beneficiary benefits.
Add/Review Dependent/Beneficiary Page	W3EB_DEPBEN_RVW	Dependent/Beneficiary Info Page	W3EB_DEPBNSMRY_FL	Update dependent/beneficiary information.
W-4 Withholding Certificate Page	PY_IC_W4_DATA_2020	Pay and Compensation - "Tax Withholding Page" (PeopleSoft HCM 9.2: ePay)	PY_IC_W4_FL	Review and change W-4 tax information.
Direct Deposit Page	PY_IC_DD_LIST	Pay and Compensation - Direct Deposit Page	PY_IC_DIR_DEP_FL	Review and change direct deposit information.

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Classic Page Name	*Classic Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Benefit Enrollment Page	W3EB_LE_ENROLL	Benefits Enrollment Page	BNE_LE_ENROLL1_FL	Start benefits enrollment and enroll for available benefits. **Note:** A dependency relationship is defined on the Birth Date action item and benefit enrollment. Hence, benefits enrollment will be available only if you have updated and submitted the birth date.
Benefits Election Review Page	W3EB_LE_CONFIRM	Benefits Statement Page	BAS_STATMNTS_FL	Review benefits election. Click Print to generate a preliminary Benefits Enrollment Summary Statement containing your personal information and information about dependent/ beneficiary enrollment, benefits elections, and investment choices. Go back to any previous steps and make additional changes before completing the benefits enrollment.
Event Completion and Exit Page	W3EB_LE_PRINT	Summary Page	AGC_SUMMARY_FL	View confirmation of the child birth event completion. Additionally, view custom information about any additional tasks that you need to do related to this life event. When you click Complete, the system verifies whether all the required action items have been completed and displays an error message if any are incomplete.

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Processing the Adoption Event

Employees begin the Adoption transaction by navigating to Life Events and then selecting the I adopted or gained legal custody/guardianship of a child radio button. The system displays the Change Status Date page on which the employee needs to enter the date of adoption.

After the employee accesses the transaction, the system displays a series of pages that direct the employee through the adoption process. Rules that are set on the Life Event Rules page and the Action Items for the Adoption transaction determine which pages will be displayed by the system.

Pages Used to Process the Adoption Event

Page Name	*Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Welcome Page	W3EB_LE_ WELCOME	Welcome to <Transaction Name> Event Page	AGC_INFO_FL	Read the instructions on the Welcome page to initiate the adoption event. This page contains custom information about the life event.
Adoption Date Page	W3EB_BRTH_ADPT _DT	Adoption Date Page (Birth Date or Adoption Date Page)	W3EB_BR_ADPT_FL	Enter the date of adoption and submit.
Life Events — Document Upload Page	HR_ATT_DD_HDR	"Life Events - Document Upload Page" (PeopleSoft HCM 9.2: eBenefits)	HR_ATT_DD_HDR	Upload a proof document, for example, adoption certificate, or enter a note relevant to the event. When you upload a document, a notification is sent to the Benefits Administrator to approve the document. After the document is approved, you will receive an e-mail notification to return to the Adoption event to continue benefits enrollment.
Benefits Summary Page	W3EB_GRID	Benefits Summary Page	BEN_SUMM_GRID_ FL	Review your current benefits.
Dependent and Beneficiary Coverage Summary Page	W3EB_DEPBEN_ SUM	Dependent and Beneficiary Coverage Summary Page	W3EB_DEPBEN_ SUM	Review summary information about dependent/beneficiary benefits.

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Page Name	Definition Name	Fluid Page Name	Fluid Definition Name	Usage
Add/Review Dependent/Beneficiary Page	W3EB_DEPBEN_RVW	Dependent/Beneficiary Info Page	W3EB_DEPBNSMRY_FL	Update dependent/beneficiary information.
W-4 Withholding Certificate Page	PY_IC_W4_DATA_2020	Pay and Compensation - "Tax Withholding Page" (PeopleSoft HCM 9.2: ePay)	PY_IC_W4_FL	Review and change W-4 tax information.
Direct Deposit Page	PY_IC_DD_LIST	Pay and Compensation - Direct Deposit Page	PY_IC_DIR_DEP_FL	Review and change direct deposit information.
Benefit Enrollment Page	W3EB_LE_ENROLL	Benefits Enrollment Page	BNE_LE_ENROLL1_FL	Start benefits enrollment and enroll for available benefits. **Note:** A dependency relationship exists between the Adoption Date action item and benefit enrollment. Hence, benefits enrollment will be available only if you have updated and submitted the adoption date.
Benefits Election Review Page	W3EB_LE_CONFIRM	Benefits Statement Page	BAS_STATMNTS_FL	Review benefits election. Click Print to generate a preliminary Benefits Enrollment Summary Statement containing your personal information and information about dependent/beneficiary enrollment, benefits elections, and investment choices. Go back to any previous steps and make additional changes before completing the benefits enrollment.

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Page Name	Definition Name	Fluid Page Name	Fluid Definition Name	Usage
Event Completion and Exit Page	W3EB_LE_PRINT	Summary Page	AGC_SUMMARY_FL	View confirmation of the adoption event completion. Additionally, view custom information about any additional tasks that you need to do related to this life event. When you click Complete, the system verifies whether all the required action items have been completed and displays an error message if any are incomplete.

Processing the Divorce Event

Employees begin the Divorce transaction by navigating to Life Events and then selecting the I got divorced/legally separated radio button. The system displays the Change Status Date page on which the employee needs to enter the date of divorce.

After the employee accesses the divorce transaction, the system displays a series of pages that direct the employee through the life event process. Rules that are set on the Life Event Rules page and the Action Items for the Divorce transaction determine which pages will be displayed by the system.

Pages Used to Process the Divorce Event

Classic Page Name	Classic Definition Name	Fluid Page Name	Fluid Definition Name	Usage
Welcome Page	W3EB_LE_ WELCOME	Welcome to <Transaction Name> Event Page	AGC_INFO_FL	Read the instructions on the Welcome page to initiate the divorce event. This page contains custom information about the life event.
Marital Status Change Page	HR_EE_MAR_ STATUS	Divorce Status Page (Marital Status or Divorce Status Page)	HR_EE_MARITAL_ FL	Enter the date of divorce and the changed marital status.
Life Events — Document Upload Page	HR_ATT_DD_HDR	"Life Events - Document Upload Page" (PeopleSoft HCM 9.2: eBenefits)	HR_ATT_DD_HDR	Upload a proof document for the life event, or enter a note relevant to the event.

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Classic Page Name	*Classic Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Benefits Summary Page	W3EB_GRID	Benefits Statement Page	BEN_SUMM_GRID_FL	Review your current benefits.
Name Change Page	HR_EE_NAME	Personal Information - "Name (Summary) Page" (PeopleSoft HCM 9.2: eProfile)	HR_EE_NAME_FL	Enter name change information.
Home and Mailing Address Page	HR_HOME_MAILING	Personal Information - Home and mailing Addresses Page (see "Addresses (Summary) Page" (PeopleSoft HCM 9.2: eProfile))	HR_EE_ADDR_FL	Enter home and mailing address changes.
Phone Numbers Page	HR_PERSONAL_PHONE	Personal Information - Contact Information Page (see "Contact Details Page" (PeopleSoft HCM 9.2: eProfile))	HR_EE_CONTACTS_FL	Enter valid phone numbers.
Emergency Contacts Page	HR_EMERGENCY_CNTCT	Personal Information - "Emergency Contacts (Summary) Page" (PeopleSoft HCM 9.2: eProfile))	HR_EMERG_CNTCT_FL	Enter emergency contact information.
Add/Review Dependent/Beneficiary Page	W3EB_DEPBEN_RVW	Dependent/Beneficiary Info Page	W3EB_DEPBNSMRY_FL	Update dependent/beneficiary information.
W-4 Withholding Certificate Page	PY_IC_W4_DATA_2020	Pay and Compensation - "Tax Withholding Page" (PeopleSoft HCM 9.2: ePay)	PY_IC_W4_FL	Review and change W-4 tax information.
Direct Deposit Page	PY_IC_DD_LIST	Pay and Compensation - Direct Deposit Page	PY_IC_DIR_DEP_FL	Review and change direct deposit information.
Benefit Enrollment Page	W3EB_LE_ENROLL	Benefits Enrollment Page	BNE_LE_ENROLL1_FL	Start benefits enrollment and enroll for available benefits. **Note:** A dependency relationship is defined on the Marital Status Change action item and benefits enrollment. Hence, benefits enrollment will be available only if you have updated and submitted the marital status.

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Classic Page Name	Classic Definition Name	Fluid Page Name	Fluid Definition Name	Usage
Benefits Election Review Page	W3EB_LE_CONFIRM	Benefits Statement Page	BAS_STATMNTS_FL	Review benefits election. Click Print to generate a preliminary Benefits Enrollment Summary Statement containing your personal information and information about dependent/ beneficiary enrollment, benefits elections, and investment choices. Go back to any previous steps and make additional changes before completing the benefits enrollment.
Event Completion and Exit Page	W3EB_LE_PRINT	Summary Page	AGC_SUMMARY_FL	View confirmation of the divorce event completion. When you click Complete, the system verifies whether all the required action items have been completed and displays an error message if any are incomplete.

Using the PeopleSoft Fluid User Interface to Enter Life Events

This topic discusses how employees use the PeopleSoft Fluid User Interface to enter life event changes.

For general information about Fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals)

PeopleSoft Fluid User Interface Experience in HCM

Pages Used to Enter Life Events Using the PeopleSoft Fluid User Interface

These pages are available for all life event transactions unless otherwise noted.

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Page Name	Definition Name	Usage
Benefit Details Tile	HC_EBEN_SS_NAVCOLL_FL (cref for the tile) W3EB_ENR_TILE_FLU (page for dynamic data)	Access benefits-related self-service transactions.
Life Events Page	W3EB_SEL_EVNT_FLU	Initiate processing for a life event that affects benefits.
The Activity Guide Composer Framework for Life Events (common elements on pages used to apply for jobs)	N/A	In the Life Events fluid pages, the application appears within the context of the Activity Guide Composer framework. The Activity Guide Composer shows the steps in the Life Events transactional process and provides navigation buttons for proceeding through the steps.
Welcome to <Transaction Name> Event Page	AGC_INFO_FL	Read the instructions on the Welcome page to initiate your life event.
Marital Status or Divorce Status Page	HR_EE_MARITAL_FL	(Marriage and Divorce events) Enter the new marital status and as of date.
Birth Date or Adoption Date Page	W3EB_BR_ADPT_FL	(Birth and Adoption events) Enter the date of child birth or the date of adoption and submit.
Document Upload Page	BEN_ATTACH_FL	Upload a proof document, for example, marriage certificate for the life event, or enter a note relevant to the event. When document approval is required, the system uses the Fluid Approval framework to notify the appropriate parties that you have uploaded a document. For more information, see Approving Life Event Documents Using Fluid Approvals
Benefits Summary Page	BEN_SUMM_GRID_FL	Review current benefit enrollments.
Personal Information - "Name (Summary) Page" (PeopleSoft HCM 9.2: eProfile)	HR_EE_NAME_FL	(Marriage and Divorce events) View your current name, any pending name change submissions, and initiate a name change.
"Name (Detail) Page" (PeopleSoft HCM 9.2: eProfile)	NAME_EDIT_SCF	(Marriage and Divorce events) Enter name change information.
Personal Information - Home and mailing Addresses Page (see "Addresses (Summary) Page" (PeopleSoft HCM 9.2: eProfile))	HR_EE_ADDR_FL	(Marriage and Divorce events) View your home address and mailing address, or initiate updates to an address.
"Address (Detail) Page" (PeopleSoft HCM 9.2: eProfile)	ADDRESS_DFT_SCF	(Marriage and Divorce events) Update address information.

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Page Name	*Definition Name*	*Usage*
Personal Information - Contact Information page (see "Contact Details Page" (PeopleSoft HCM 9.2: eProfile))	HR_EE_CONTACTS_FL	(Marriage and Divorce events) Review your phone numbers, email addresses, and instant messaging IDs and initiate a change to your contact information.
"Phone Number Page" (PeopleSoft HCM 9.2: eProfile)	HR_CNCT_PHONE_SCF	(Marriage and Divorce events) Add, update, or delete a phone number.
"Email Address Page" (PeopleSoft HCM 9.2: eProfile)	HR_EMAIL_ADDRS_SCF	(Marriage and Divorce events) Add, update, or delete an email address.
"Instant Message Page" (PeopleSoft HCM 9.2: eProfile)	HR_IM_CHAT_SCF	(Marriage and Divorce events) Add, update, or delete an instant messaging ID.
Personal Information - "Emergency Contacts (Summary) Page" (PeopleSoft HCM 9.2: eProfile)	HR_EMERG_CNTCT_FL	(Marriage and Divorce events) View a list of your emergency contacts.
"Emergency Contact (Detail) Page" (PeopleSoft HCM 9.2: eProfile)	HR_EMERG_CNTCT_SCF	(Marriage and Divorce events) Add, update, or delete an emergency contact.
Dependent and Beneficiary Coverage Summary Page	W3EB_DEPBEN_SUM	(Birth and Adoption events) Review dependent/beneficiary summary coverage information.
Dependent/Beneficiary Info Page	W3EB_DEPBNSMRY_FL	Review a summary of dependent/ beneficiary information or add new dependents or beneficiaries.
Add Individual Dependent/Beneficiary Information Page	W3EB_DEPBEN_DTL_FL	Review and update detailed dependent and beneficiary personal information.
Pay and Compensation - "Tax Withholding Page" (PeopleSoft HCM 9.2: ePay)	PY_W4_MAIN_FL	Review and change tax information. View a list of the tax withholding information and access their Tax Withholding Forms page for a jurisdiction.
"Federal Tax Withholding Forms Page" (PeopleSoft HCM 9.2: ePay)	PY_W4_MAIN_FED_SCF	View a list of updateable federal tax forms and additional agency links, if any, and access the form or URL.
"State Tax Withholding Forms Page" (PeopleSoft HCM 9.2: ePay)	PY_W4_MAIN_ST_SCF	View a list of updateable state tax forms for that jurisdiction and additional agency links, if any, and access the form or URL.
Pay and Compensation - Direct Deposit Page	PY_IC_DIR_DEP_FL	Review and update direct deposit information.

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Page Name	Definition Name	Usage
Benefits Enrollment Page	BNE_CARD_SUMM_FL	Start the benefits enrollment process and enroll for available benefits. **Note:** A dependency relationship exists between either the marital status, adoption date, or birth date and the benefit enrollment, depending upon the transaction you are performing. Hence, Benefit Enrollment will be available only if you have updated and submitted the marital status, adoption or birth date for the life event you are entering.
Benefits Statement Page	BAS_STMT_LIST_FL	View a list of benefits enrollment previews, submitted enrollments and confirmation statements.
Summary Page	AGC_SUMMARY_FL	Complete and exit the life event.

See product documentation for *PeopleTools: Workflow Technology* for related information.

The Activity Guide Composer Framework for Life Events

In the Life Events fluid pages, the application appears within the context of an Activity Guide Composer framework to display the steps a user has to perform.

The Activity Guide Composer framework shows a list of application steps in the left panel and the page that corresponds to the current step in the right panel. The Activity Guide also provides navigation buttons in the page banner.

To set up templates using the Activity Guide Composer, see the "Understanding the Activity Guide Composer" (PeopleSoft 9.2: Enterprise Components) documentation.

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Image: (Tablet) Life Events Page Layout

This example illustrates the layout of the Life Events pages for a large form factor device.

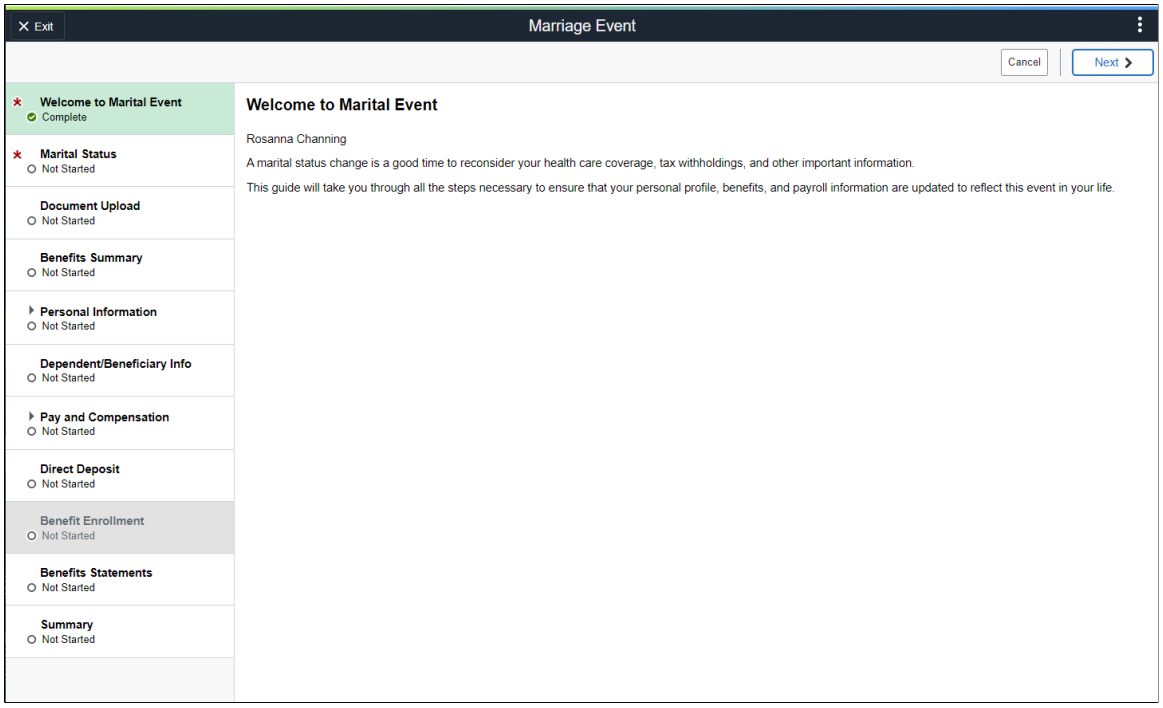

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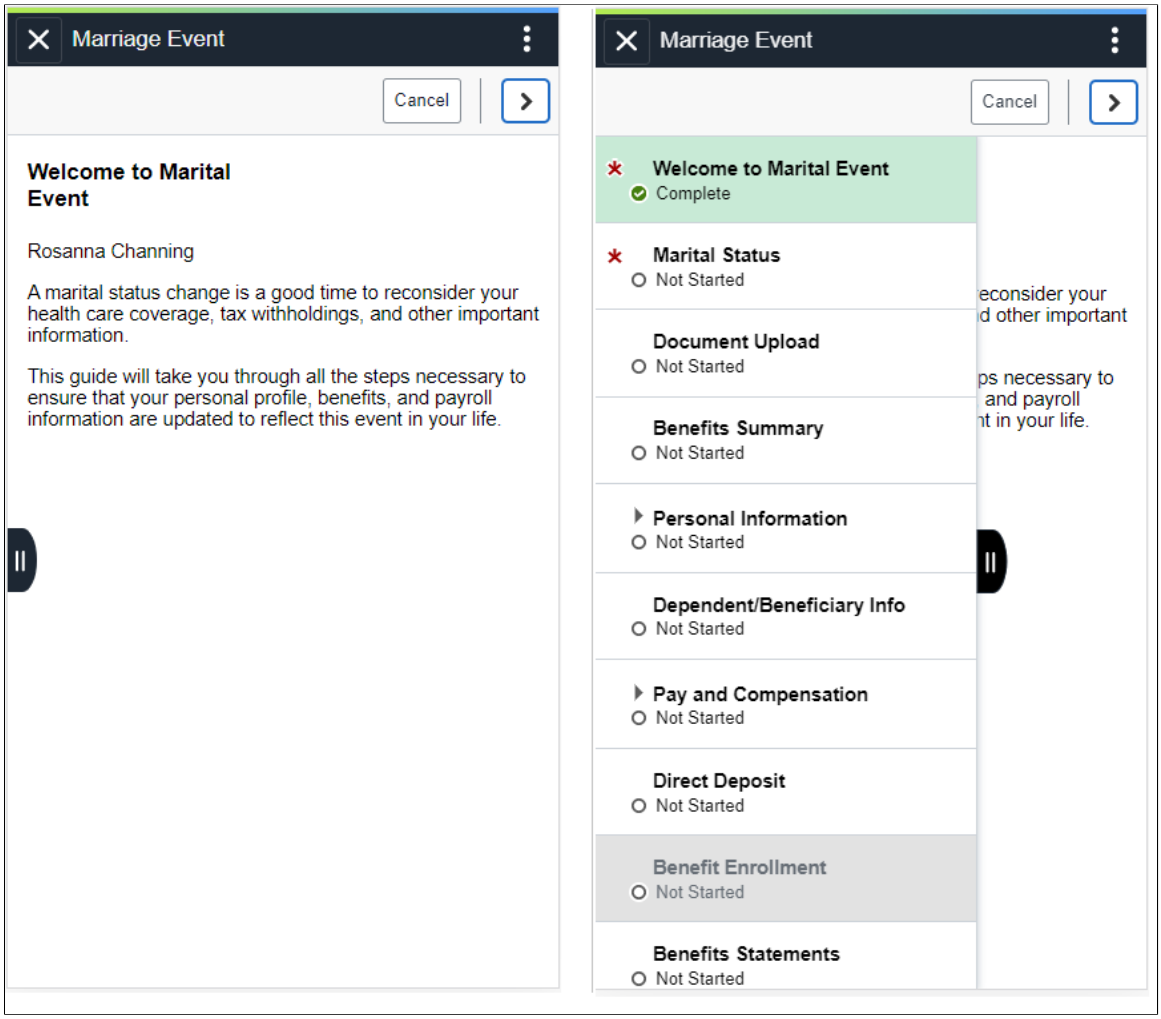
Image: (Smartphone) Life Events Page Layout

This example illustrates the layout for the Life Events page on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.



Note: Throughout this topic, the page illustrations show the page sections of the Life Events process without the context of the Activity Guide Composer step list. Even though the Activity Guide Composer framework is not illustrated, remember that all steps appear within that framework.

Page Banner

The top of PeopleSoft pages is called the page banner. In other PeopleSoft applications, the banner displays several standard icon buttons. The banner will display the name of the life event transaction you are performing.

On most pages, users see the standard set of banner icon buttons.

or
Exit button

Click this button to exit the Life Events data entry and summary pages. If you have not clicked the Complete button on the Summary page before exiting, you can resume this life event data entry at a later time. You cannot start another life event transaction until you have either completed this life event

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transaction or cancelled this transaction by selecting the Cancel menu list option from the Actions Menu, which will delete this enter life events transaction and everything you have entered.

or Previous button

Click this button to save changes to the current step and navigate to the previous step or substep. The button is not visible on the first step in the request.

or Next button

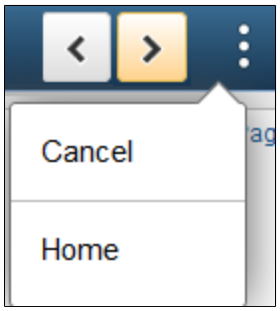
Click this button to save changes to a current step or substep and navigate to the next step or substep.

On the last step of the request (the Summary step), the Next button does not appear. The page displays a Complete button on the Summary page to complete and submit the life event transaction request.

Complete button

This button appears only on the Summary step page. This button will not appear until all required steps are completed.

Click this button to submit the life event details to Benefits. You cannot make any further changes to a life event that has been submitted.



Cancel menu item from the Actions Menu list

Select the Cancel menu item to delete all items you have entered on these pages thus far and cancel this life event transaction.

List of Steps

The Activity Guide Composer framework includes a left panel that lists the steps in the life event process. This panel appears on the left of larger devices. On a small form factor such as phone, the panel is initially hidden. Click the Item/Sub-Item Section tab to expand and view the steps and navigate to other step pages.

<Step or Substep Name>

The left panel has individual steps that are labeled. The delivered life event templates do not require a sequential order to complete steps, however, your organization may define life event templates that require the user to follow a prescribed order. In this case, the steps are numbered and labeled. To define sequential or non-sequential steps, see the "Activity Guide Composer - Activity Guide Type Page" (PeopleSoft 9.2: Enterprise Components) documentation.

Some steps will have substeps. Steps with substeps are indicated by an expand/collapse icon before the step name. The step is automatically expanded when you reach it. You can also click

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the parent step at any time to expand or collapse it. The page will highlight the current step or substep.

When a step is grayed out and unavailable for selection, you need to complete a required step prior to accessing this step page. Click the step to receive a message stating the required step or steps you need to complete first to access this page.

Required icon

This icon represents that the step is required. You cannot complete and submit a life event transaction until all required steps are completed.

<Step Status>

Each step and substep has a status. These statuses include:

- *Not Started*: These are unvisited steps.
- *Visited*: When you first reach a step, the status changes to this.
- *Complete*: In some instances, the system will automatically mark the step as *Complete* where the system can correctly infer that the task for the step is done. If it is uncertain whether a step is complete, the system will mark it as *Visited*.
- *In Progress*: This status appears for required steps that you have visited, but you have not entered the required data and saved.

Users can return to steps and substeps by clicking the step.

For more information on how to display steps and selecting and organizing steps, see the "Activity Guide Composer - Activity Guide Type Page" (PeopleSoft 9.2: Enterprise Components), "Activity Guide Composer - Select Steps Page" (PeopleSoft 9.2: Enterprise Components), and "Activity Guide Composer - Organize and Configure Steps Page" (PeopleSoft 9.2: Enterprise Components).

<Transaction Name> Pages

Within the Activity Guide Composer framework, the right main panel displays the page for the current step in the life event transaction.

<Title Text>

Displays a page title that includes the step name.

For substeps, the page title includes both the step and substep name, separated by a hyphen. For example, *Pay and Compensation - Direct Deposit* indicates that the step title is *Pay and Compensation* and the substep title is *Direct Deposit.*

Welcome to <Transaction Name> Event Page

Use the Welcome to <Transaction Name> Event page (AGC_INFO_FL) to read the instructions on the Welcome page to initiate your life event.

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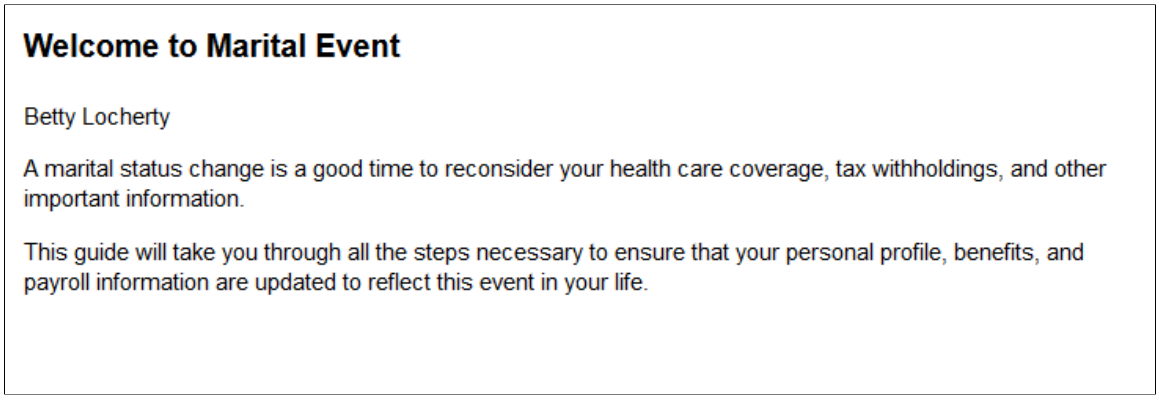
Navigation

- Click the Benefit Details Tile from the Employee Self Service home page in fluid. Select the Life Events tab category from the left panel of the Benefits Details page. Then select the appropriate life event., enter an as of date, and click Continue Life Event.
- From the <Transaction Name> Event pages, click the Welcome to <Transaction Name> Event step from the left panel, or use the Previous button, as needed.

Image: Welcome to <Transaction Name> Event page

This example illustrates the Welcome to <Transaction Name> Event page.



This page contains custom information about the specific life event.

Marital Status or Divorce Status Page

Use the Marital Status page (HR_EE_MARITAL_FL) to enter the new marital status and as of date.

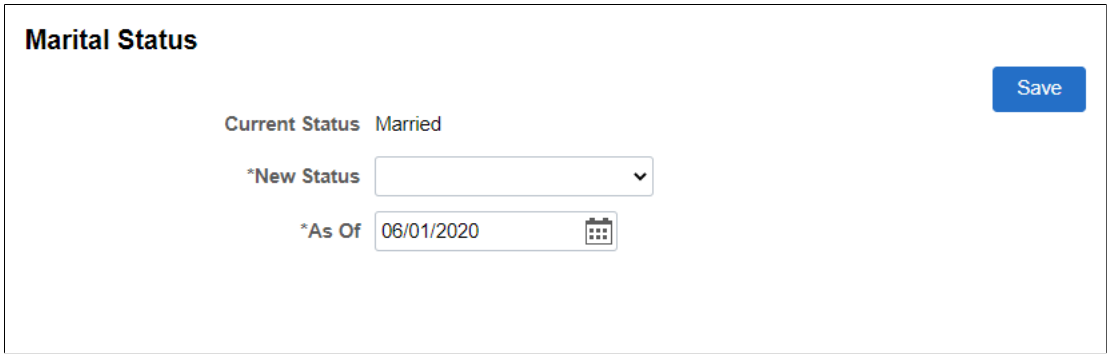
Note: The delivered marital and Divorce events display this step.

Navigation

Select the Marital Status or Divorce Status step from the left panel or use the Next and Previous buttons to navigate to the page.

Image: Marital Status Page

This example illustrates the Marital Status page.



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Note: The Marital Status and Divorce Status pages display the same information. The Marital Status page is depicted in the previous example.

New Status	Enter marital status change information, such as married or divorced, and submit the changes directly from this page.
As Of	Enter the event date in the As Of field and click the Save button. If another step is contingent only upon this step, when you save this page that step will become available.
Save	Click this button to submit your new marital status. **Note:** By clicking the Save button on this page, you are updating your marital status in the system, even if you do not submit this life event transaction.

For information about the pages used for the two delivered marital status change events, see the following topics:

- Processing the Marriage Event
- Processing the Divorce Event

Birth Date or Adoption Date Page

Use the Birth Date or Adoption Date page (W3EB_BR_ADPT_FL) to enter the date of child birth or the date of adoption and submit.

Note: The delivered Birth and Adoption events will display this step.

Navigation

Select the Birth Date or Adoption Date step from the left panel or use the Next and Previous buttons to navigate to the page.

Image: Birth Date page

This example illustrates the Birth Date page.

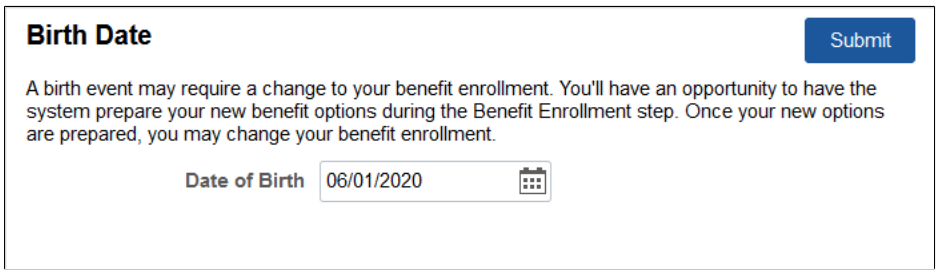

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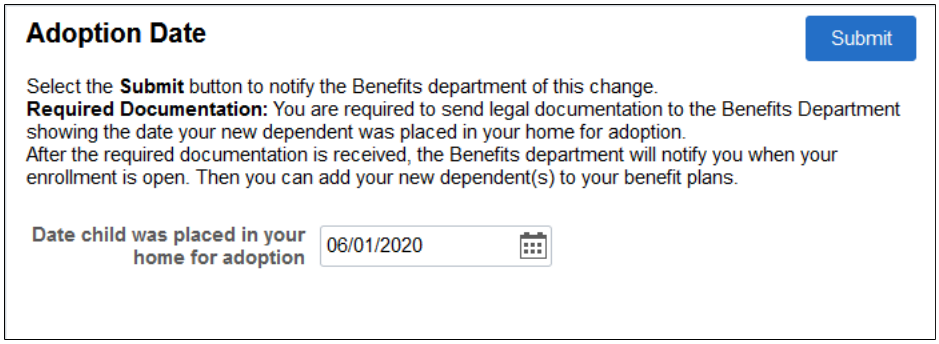
Image: Adoption Date page

This example illustrates the Adoption Date page.



Enter the event date, such as the birth date of your child or the date the child was placed in your home for adoption, in the date field and click the Submit button.

Note: If your organization's Life Events Rules setting has the Notify Administrator checkbox selected, then when an employee enters the Birth or Adoption date and submits the date, the Benefits Administrator receives an alert in the Notifications area of the top banner and an email notification.
If your organization's Life Events Rules setting has the Proof Required checkbox selected, then when an employee enters the Birth or Adoption date and submits the date, the Benefits Administrator receives an action notification, as well as an email notification.

Image: Alert

This example illustrates the alert displayed when the Benefits Administrator clicks the Notification icon.

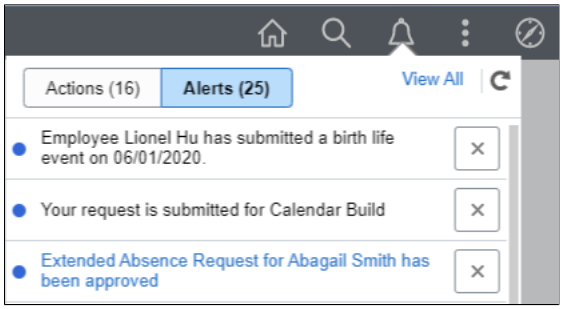
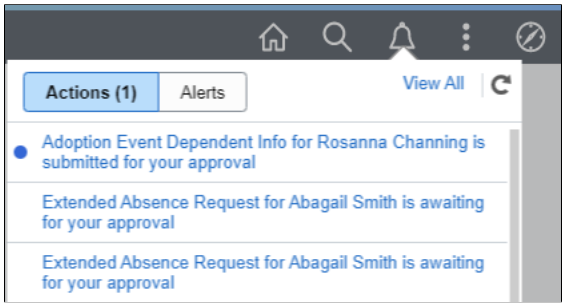


Image: Action notification

This example illustrates the action notification displayed when the Benefits Administrator clicks the Notification icon.



For information about the pages used for the two delivered marital status change events, see the following topics:

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- Processing the Adoption Event
- Processing the Child Birth Event

Dependent and Beneficiary Coverage Summary Page

Use the Dependent and Beneficiary Coverage Summary page (W3EB_DEPBEN_SUM) to review dependent/beneficiary summary coverage information.

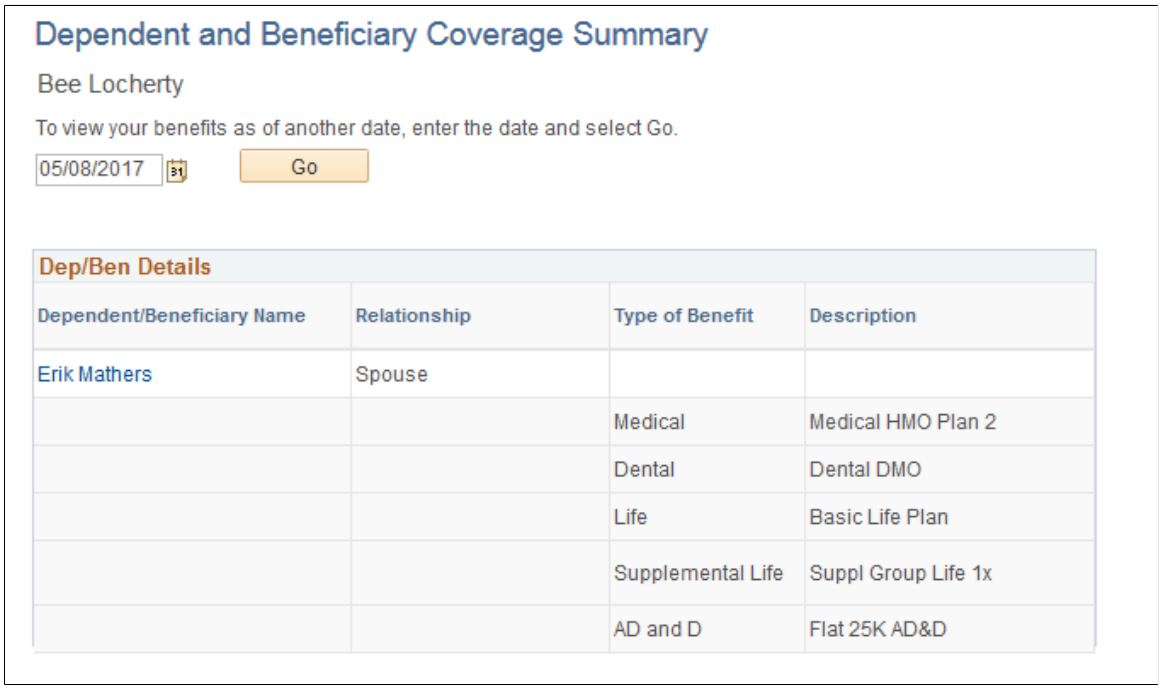
Note: The delivered Adoption and Birth events display this step.

Navigation

Select the Dependent and Beneficiary Coverage Summary step from the left panel, or use the Next and Previous buttons to navigate to the page.

Image: Dependent and Beneficiary Coverage Summary page

This example illustrates the Dependent and Beneficiary Coverage Summary page.



As Of Date Initially, the page displays benefits as of the current date. To view dependent and beneficiary coverage as of a different date, choose a new as of date and click the Go button.

The grid that summarizes the employee's dependent and beneficiary benefit coverage shows the type of benefit and a description of the benefit.

Click an existing dependent or beneficiary name link to access the Add Individual Dependent/Beneficiary Information Page and view and update the person's information.

To add a dependent or beneficiary, access the Dependent/Beneficiary Info Page step.

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Add Individual Dependent/Beneficiary Information Page

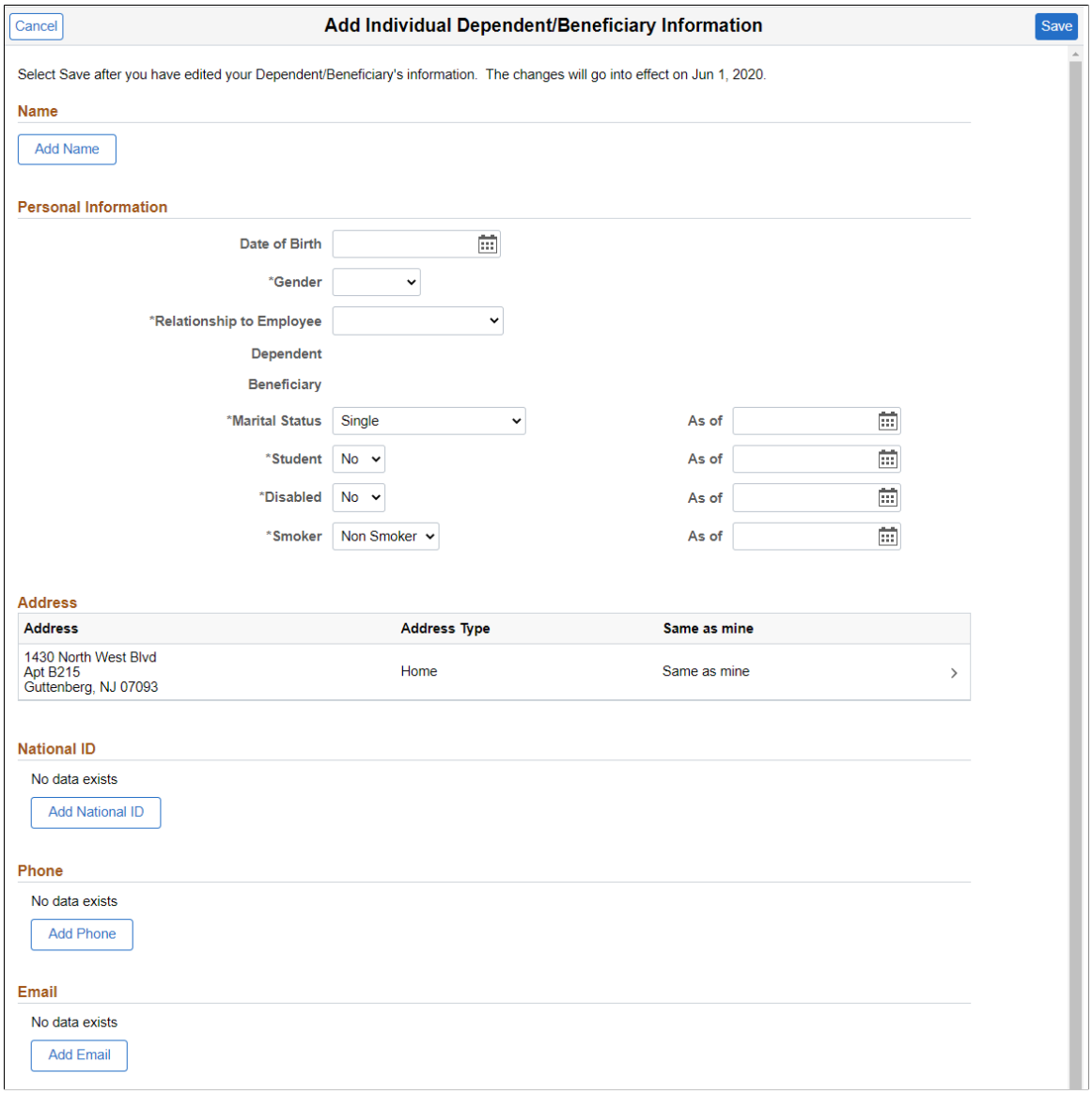
Use the Add Individual Dependent/Beneficiary Information page (W3EB_DEPBEN_DTL_FL) to review and update detailed dependent and beneficiary personal information.

Navigation

- Select a name row or click the Add Individual button from the Dependent/Beneficiary Info Page.
- Select a name link from the Dependent and Beneficiary Coverage Summary Page.

Image: Add Individual Dependent/Beneficiary Information page

This example illustrates the Add Individual Dependent/Beneficiary Information page.



Use this page to enter personal details, status information, and contact information for a dependent or beneficiary.

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Pay and Compensation - Direct Deposit Page

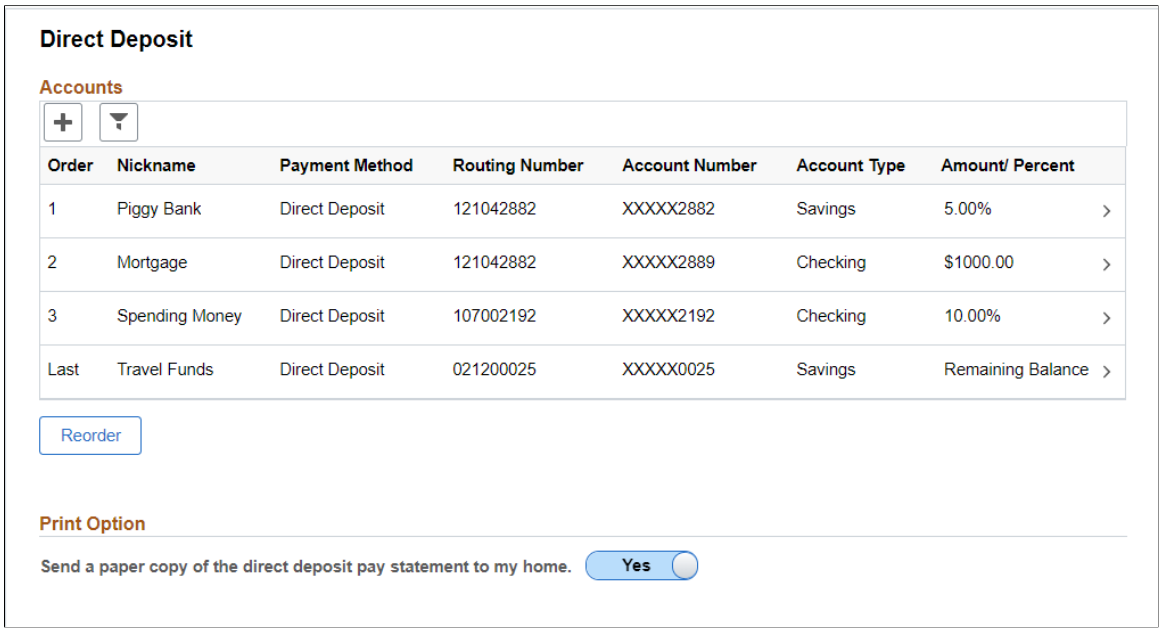
Use the Pay and Compensation - Direct Deposit page (PY_IC_DIR_DEP_FL) to view current direct deposit information.

Navigation

Select the Pay and Compensation step, then the Direct Deposit substep from the left panel, or use the Next and Previous buttons to navigate to the page.

Image: Pay and Compensation - Direct Deposit page

This example illustrates the Pay and Compensation - Direct Deposit page.



Use this page to view your direct deposit elections or add new direct deposit information.

Select the account row to access the Edit Account Page and view details about each item. Select the Edit (pencil) icon to update information for an existing entry.

Click the + (Add Account) button to add a new direct deposit.

Note: Multiple direct deposit changes are not allowed in the same day.

Select ‘Yes’ in the Print Option for a paper copy of the direct deposit pay statement.

Summary Page

Use the Summary page (AGC_SUMMARY_FL) to complete and exit the life event.

Navigation

Select the Summary step from the left panel, or use the Next button to navigate to the page.

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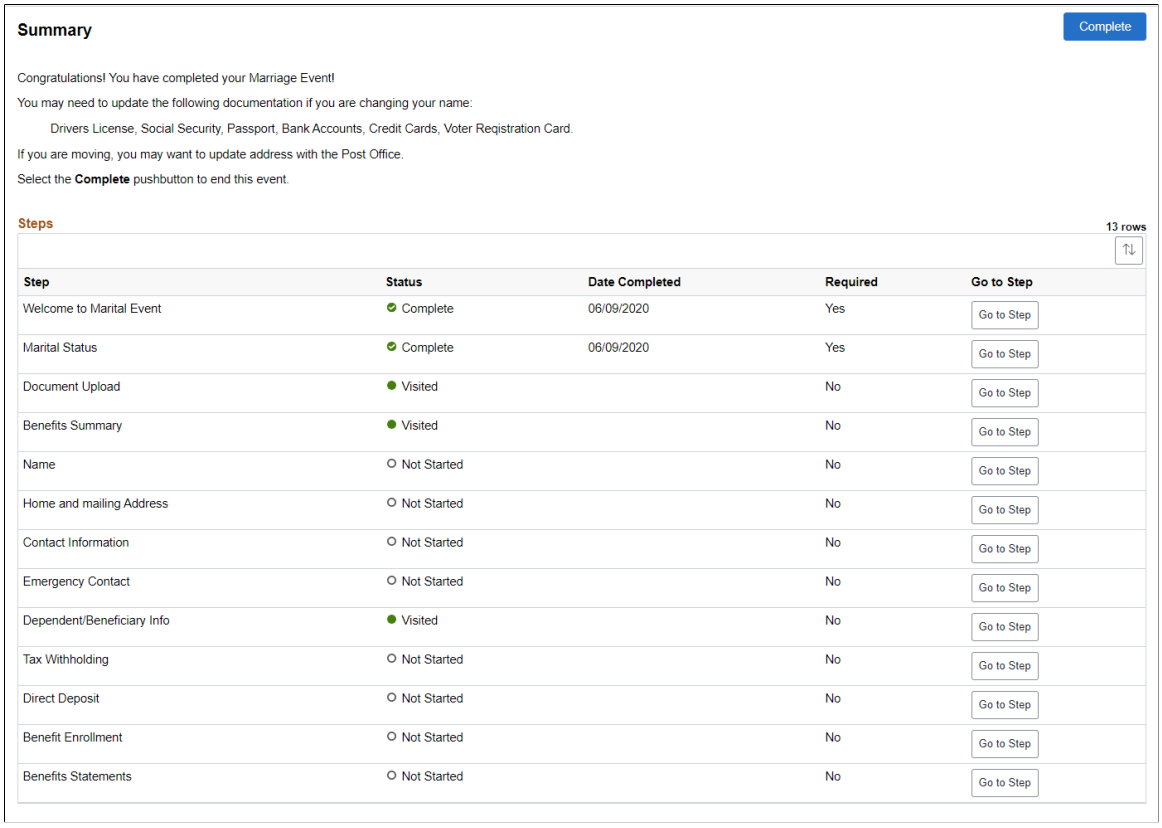
Image: Summary page

This example illustrates the Summary page.



View confirmation of the life event process completion. Additionally, view custom information about any additional tasks that you need to do related to this life event.

Use the Steps section to view a summary of the statuses of each step in this life event process and what is required and when.

Mark Complete — When available, click this button to indicate that a step is complete.

Go to Step — Easily navigate back to a step by clicking this button. If you select to go to a step that's due date has passed, the system will issue the message that the task is overdue.

Complete — When you click this button, the system verifies whether all the required action items have been completed and displays a message if any are incomplete. This closes the life event transaction.

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Uploading Fluid Life Event Documents

As an employee, while creating a life event, you can attach multiple documents at the same time based on customized classification. You can also view the uploaded documents and status using the Benefits Attachment Page.

This topic discusses how employees upload life event documents using fluid interface.

Page Used to Upload Fluid Life Event Documents

Page Name	*Definition Name*	*Usage*
Document Upload Page	HR_ATT_CNFG	Define attachment types as configuration ID.

Document Upload Page

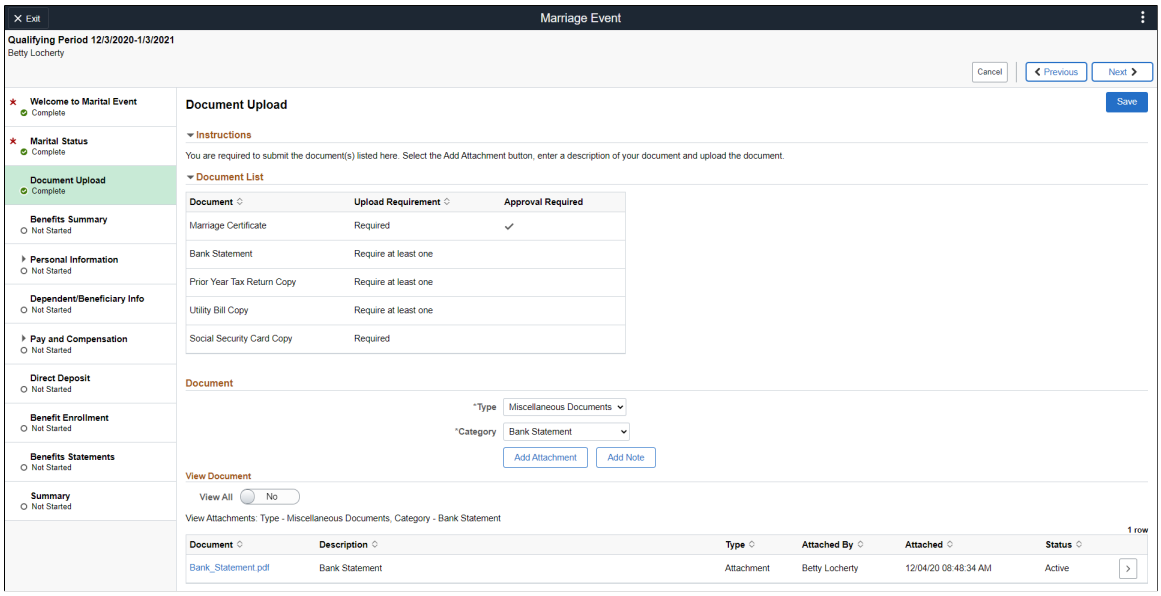
Use the Document Upload page (BEN_ATTACH_FL) to upload attachments required to support the life event you are creating. You can attach multiple documents at the same time based on different available classifications.

Navigation

Employee Self Service >Benefit Details > Life Events > Document Upload

Image: Document Upload Page

This example illustrates the Document Upload page.



Qualifying Period Qualifying Period indicates the enrollment period begin date and enrollment period end date. Event Date is the enrollment period begin date. Enrollment period end date is calculated by adding the number of qualifying days to the event date.

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By default, the number of qualifying days is 31. This value is defined using the ‘Maximum Days to Notify’ field on the Life Event Rules Page.

Document List

This section lists the type of documents required to support the selected life event. Administrators can customize the document types to be listed here.

Document Indicates the documentation type.

Upload Requirement Indicate the requirement for document upload under this category.

- If the status is ‘Required’, it is mandatory to upload a document under this category for the selected life event.
- If the status is ‘Optional’, it is optional to upload a document under this category for the selected life event.
- If the status is ‘Require at least one’, it is mandatory to upload at least one document under this category for the selected life event.

Approval Required Indicates if this document requires approval. The document uploaded for this type, will be send to the approver(s) based on the configured approval framework.

Note: The system marks the Upload Document step as complete only when all the required documents are uploaded and all the documents that require approval are approved.

Document

Type You can select the category to which your document belongs. Options are displayed based on the configuration done at the definition level.

Category You can select the sub category to which the documents belong. For example, here, when we select ‘Miscellaneous Document’ as the Type, the field ‘ Category’ is displayed. You can select one of the options to specify the type of the document.

Note: Options are displayed based on the configuration done at the definition level.

Add Attachment Use this button to open the File Attachment page. You can attach the document here.

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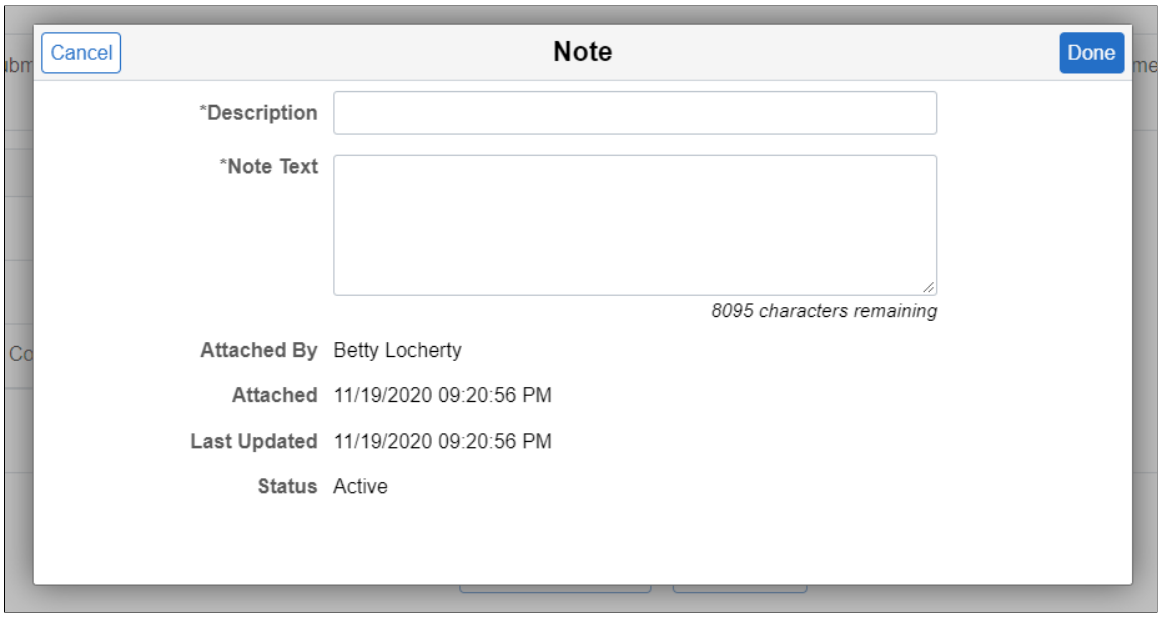
Image: File Attachment Modal

This example illustrates the File Attachment modal.

Add Note Use this button to open the Note modal window and add additional information regarding the attached file.

Image: Note Modal

This example illustrates the Note modal.



View Document

View All Indicates whether you need to see all the attached documents or only the documents that belong to a specific type.

- If you select ‘Yes’, all the documents attached for the life event will be displayed.
- If you select No, only the documents that belong to the attachment type selected in ‘Type’ field will be displayed.

Based on the value in the ‘View All’ field, the documents are listed with details like description, Type, Attached By, Attached date, and Status of the approval.

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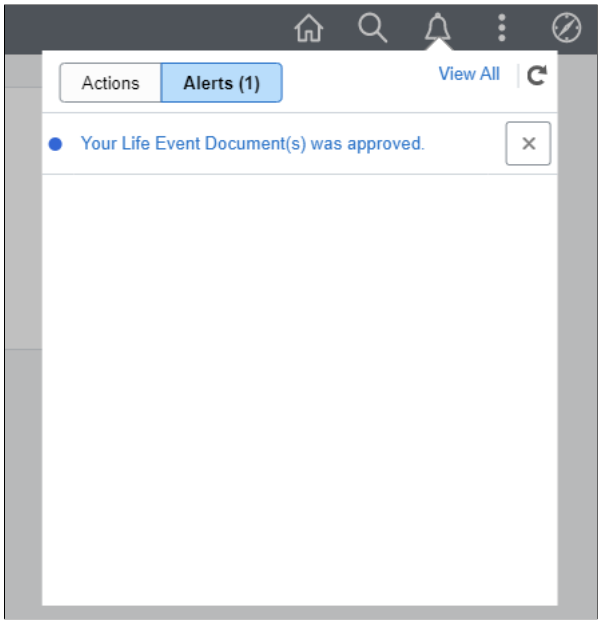
Note: If at least one of the attached document is in ‘Pending’ for approval status, the ‘Document Upload’ step shows ‘Visited’ status. The system automatically marks the step as Complete, when the document is approved.

To view more details on each attached document, click the corresponding row.

Alert

Image: Alert Message

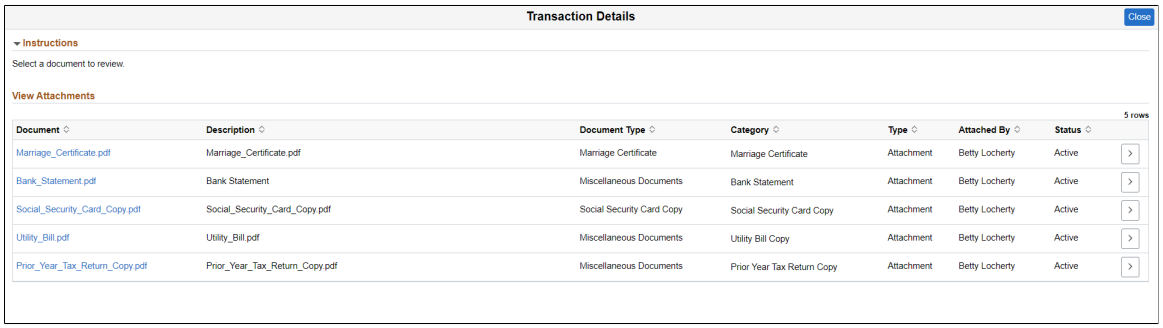
This example illustrates the Alert message when the Life Event Document is approved



Click the link to open the Transaction Details page directly from the notification link.

Image: Transaction Details Page

This example illustrates the Transaction Details page.



Benefits Attachment Page

As an employee, you can use the Benefits Attachment page to review the uploaded documents and status.

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Navigation

Open the Benefits Attachment tile from Benefit Details Dashboard or Benefits Details Navigation collection.

Image: Benefit Details Dashboard with Benefits Attachment Tile

This example illustrates the Benefit Details Dashboard with Benefit Attachment Tile

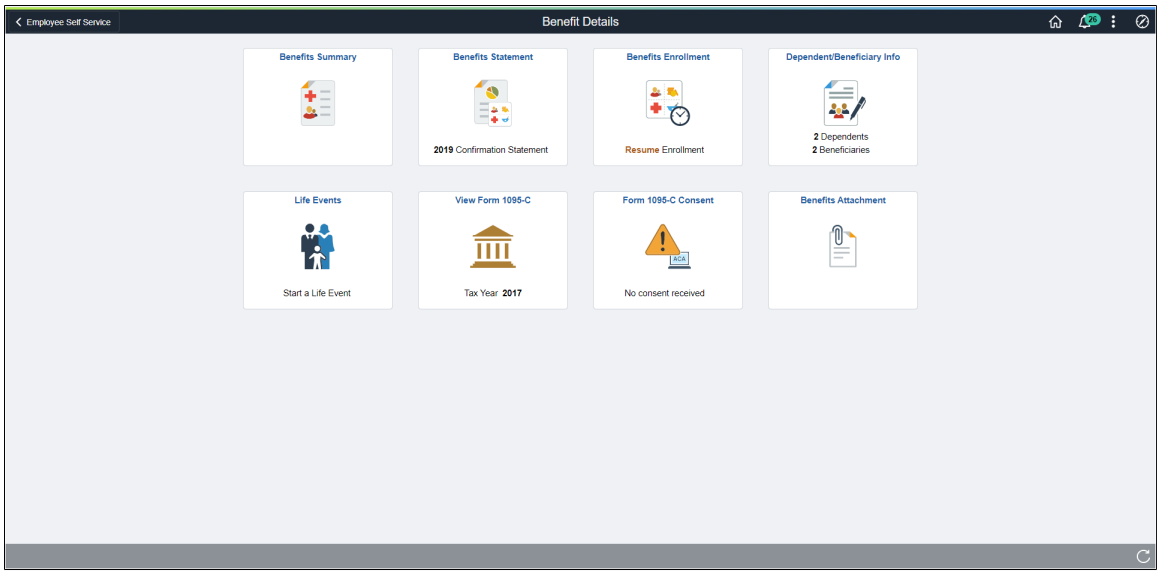
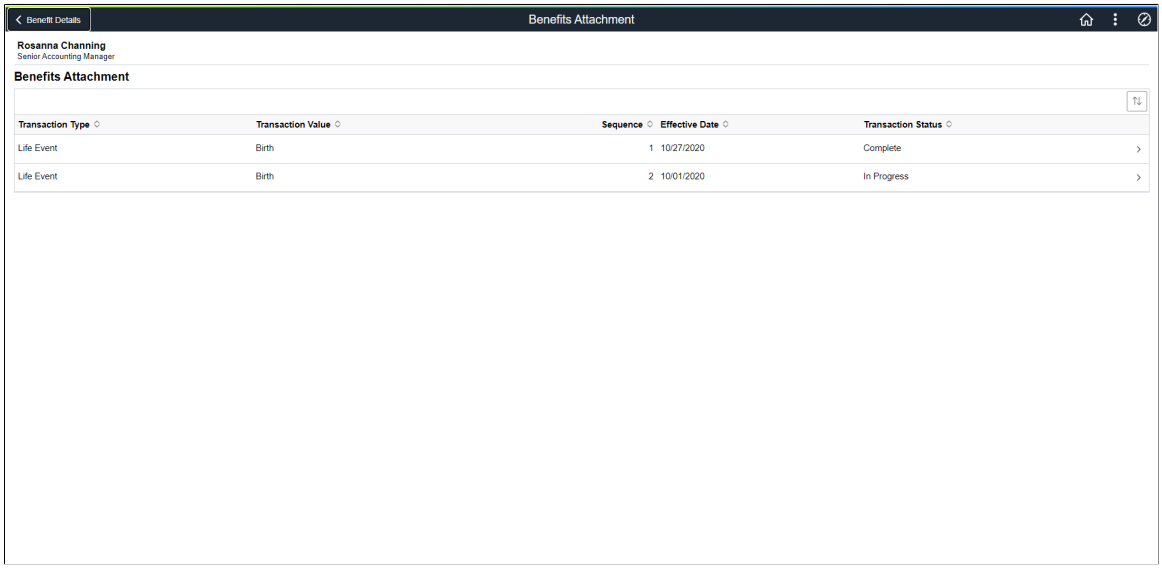


Image: Benefits Attachment Page

This example illustrates the Benefits Attachment page.



Approving Life Event Documents

These topics describe how to approve or reject life event documents uploaded by employees.

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Understanding Document Approval

Employees upload required life event documents when processing their life events. During life event setup, if Approve Document(s) is marked as required on the Life Event Rules table, then the Benefits Administrator will be notified when an employee uploads a document for this event. The document has to be approved before the employee proceeds to enroll benefits. The Approve Document Upload page enables the Benefits Administrator to approve life event documents. The page lists all life event documents that require approval. The Benefits Administrator can review and then approve or deny the documents.

Page Used to Approve Life Event Documents

Page Name	*Definition Name*	*Usage*
Approve Document Upload Page	W3EB_APPR_SUMMARY	Approve or reject life event documents uploaded by employees.

Approve Document Upload Page

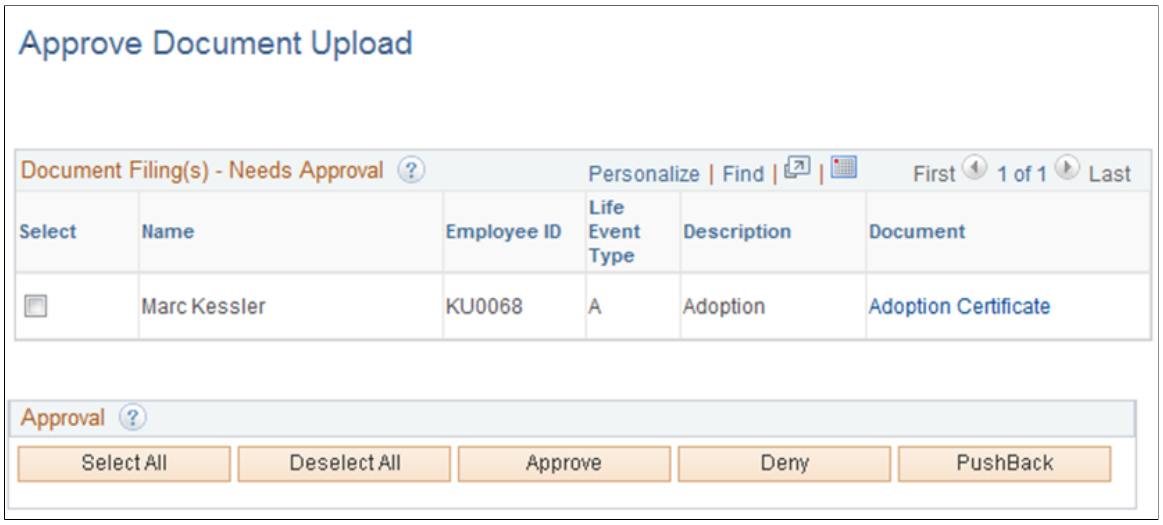
Use the Approve Document Upload page (W3EB_APPR_SUMMARY) to approve required life event documents uploaded by employees.

Navigation

Benefits >Approve Document Upload >Approve Document Upload

Image: Approve Document Upload page

This page enables the Benefits Administrator to approve required life event documents uploaded by employees.



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Field and Control Definitions

Document Filing(s) - Needs Approval

Select Select the documents to be processed from the list.

Name This field displays the name of the employee.

Employee ID This field displays the employee ID.

Life Event Type This field indicates the life event type.

Description This field contains the description for the life event.

Document Click the link to review the life event document.

Approval

Select All Select all documents pending approval.

Deselect All Deselect all documents pending approval.

Approve Approve selected documents.

On approval, an e-mail notification will be sent to the employee. An entry for the employee will be inserted in the BAS_ ACTIVITY table. This allows the employee to start the benefits enrollment process within the life event.

Deny Deny selected documents.

On denial, an e-mail notification will be sent to the employee. The employee will have to upload a new document for approval.

Push Back If more than one approver need to approve a document, click this button to push it back to the previous approver to review again.

Approving Life Event Documents Using Fluid Approvals

This topic describes how to approve Life Event documents like, certificates of marriage, adoption, divorce etc using Fluid Approvals.

See also "Using PeopleSoft Fluid User Interface Self-Service Approval Transactions" (PeopleSoft HCM 9.2: Application Fundamentals)

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Pages Used to Approve Life Event Documents Using Fluid Approvals

Page Name	Definition Name	Usage
Pending Approvals — Benefits Document Filing Page	EOAWMA_TXNHDTL_FL	Approve a life event document uploaded through fluid life event page.

Pending Approvals — Benefits Document Filing Page

Use Pending Approvals — Benefits Document Filing page (EOAWMA_TXNHDTL_FL) to approve a life event document uploaded through fluid life events page.

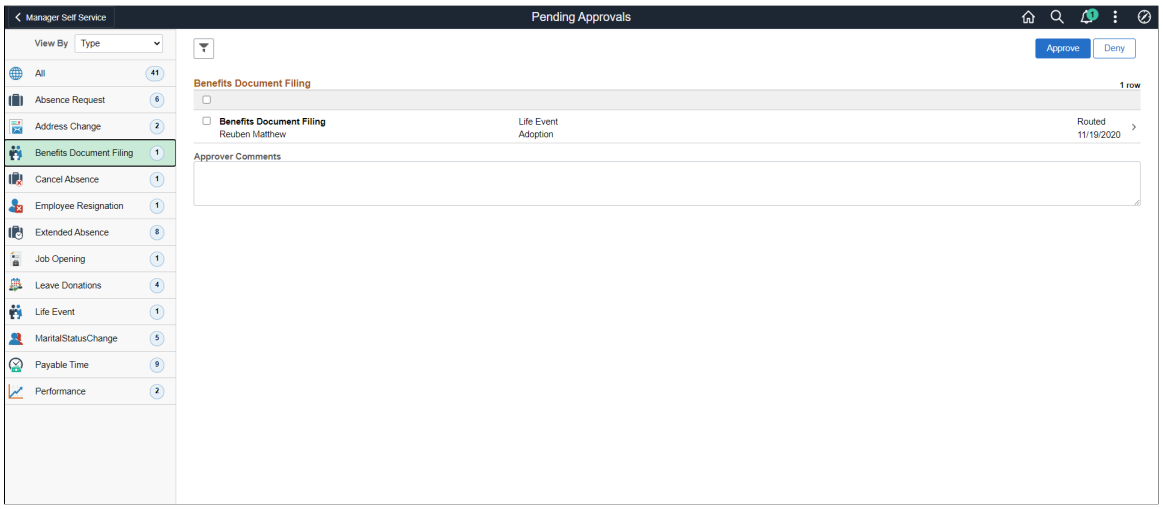
Navigation

On the Workforce Administrator home page, click the Approvals tile to access the Pending Approvals page. From the left panel, click Benefits Document Filing.

Note: Approver(s) get notification as alerts and can directly click the link to open the Benefits Document Filing Page to approve or deny the document upload.

Image: Pending Approvals-Benefits Document Filing Page

This example illustrates the Pending Approvals- Benefits Document Filing page.



The approval options on this page are common to all fluid approval transactions, as described in the documentation for the"Using PeopleSoft Fluid User Interface Self-Service Approval Transactions" (PeopleSoft HCM 9.2: Application Fundamentals).

Note: You can also take action (for e.g. approve or deny) on multiple approval requests at the same time by selecting the check box before each item then tapping the appropriate action button on the page. Select or deselect all check boxes at once by tapping the top check box in the gray header.

To view details for each request, tap a row and access the Benefits Document Filing Page.

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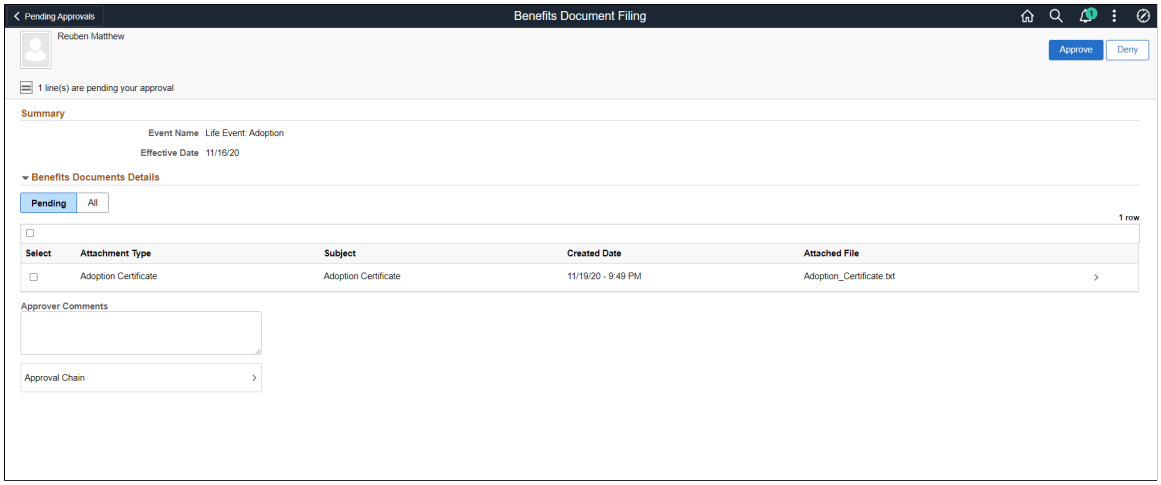
Image: Benefits Document Filing Page

This example illustrates the Benefits Document Filing Page.



Here, you can view the attachment type, subject, created date and name of the attached file. Click a row to open the Attachment modal window, where more details of the document is displayed. You can also access the document uploaded from this Attachment modal window.

Approve and **Deny** buttons	Use these buttons to take action on the requested approval.
Approver Comments	Enter any comments related to the approval action you take.
Approver Chain	Click this item to open the Approval Chain page, where you can review information about all the approver(s) for the transaction.

Delegating Life Events Document Approval

These topics describe how eBenefits uses delegation to enable a Benefits Administrator to authorize another person to approve Life Events documents on his/her behalf.

Understanding Document Approval Delegation

A Benefits Administrator can delegate the authority to approve Life Events documents uploaded by employees to another user if required. The Life Events document approval workflow integrates with the HCM Delegation Framework, thus enabling the Benefits Administrator to delegate authority of Life Events document approval. The Benefits Administrator can create a delegation request to allow a proxy to approve Life Events documents on his/her behalf. The Benefits Administrator can set a date range for the proxy to complete the delegation request. The proxy can accept or reject the delegation request, and can approve, deny, or push back the Life Events document on behalf of the delegator. The delegator can revoke or withdraw the delegated authority when required.

Email notifications will be sent to the delegator when new delegation requests are made. The proxy will in turn be notified of any pending approval requests through email.

The following terms are important to understand the delegation feature:

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- *Delegation:* The act of giving the authority to approve Life Events documents to another user.
- *Delegator:* A person who delegates authority to another user.
- *Proxy:* A person who is granted the authority to act on behalf of the delegator.
- *Delegated Authority:* The rights and privileges that are given from the delegator to the proxy.
- *Delegation Request:* A request from the delegator to the proxy to take on delegated authority.
- *Delegation Period:* The time range in which the delegated authority is in effect.
- *Delegation Administrator:* The system administrator who is responsible for configuring, managing, and maintaining delegated authorities.
- *Revoke:* When a delegator withdraws delegated authority.

Note: To prevent situations of cascading or circular delegation chains, once the delegation framework passes delegated authority over an absence transaction to a proxy, the proxy cannot delegate authority over that transaction to another user. The delegation framework only passes authority over transactions from the initial delegator to the initial proxy.

Reviewing Delivered Document Approval Delegation Setup

The delegation framework for Life Events document approval is delivered with the system. To review this framework:

1. Review the delegation transaction for workflow on the Workflow Transactions page.
2. Review the delegation permission list and role through PeopleTools Security components.
3. Review the delegation transaction on the Configure Delegation Transaction page.

Reviewing the Delegation Workflow Transaction

The PeopleSoft system delivers a pre-configured transaction for the Life Events document approval delegation framework. This table lists the delivered delegation transaction:

Transaction Name	*Transaction Type*	*Description*
W3EB_APPR_SUMMARY	Approve	Delegate approval of Life Events documents.

Use the Approval Workflow Engine (AWE) and Delegation Transactions grid to register self-service transactions that use the AWE framework and delegation framework. The data that you enter into this grid links the transaction name and accompanying tables for HCM self-service transactions to the approval process IDs that you create for these transactions on the Register Transactions page.

Reviewing the Permission List and Role for Delegation

PeopleSoft eBenefits delivers the permission list and role that are required for the Delegation framework as system data. This table describes the delivered permission list and role for the delegation framework:

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Role Name	*Attached Permission List*	*Description*
Delegate Manage Appr Document	HCCPDL2068	Enables a user to access the components to approve employee Life Events documents on behalf of another user when the authority is delegated.

Reviewing the Delegation Transaction

This table lists the delegation transaction delivered for Life Events document approval:

Transaction Name	*Transaction Type*	*Role*
Manage Approve Document	Approve	Delegate Manage Appr Document

Steps to Set Up a Delegation Request

A delegator follows these steps to delegate Life Event document approval requests using self-service:

1. Navigate to the Manage Delegation page.
2. Click the Create Delegation Request hyperlink.
3. Enter the From Date and To Date for the delegation request, and then click the Next button.
4. Select the transaction(s) to delegate authority. For Life Event document approval delegation, select the Approve Life Event Documents transaction. Click the Next button.
5. Review the proxy list and select a proxy to whom the authority for document approval will be delegated.
6. Select the Notify Delegator check box to receive a courtesy email notification on delegation and then click Submit.
7. View the confirmation message and click OK.

Delegating Document Approval Requests

Life Events document approval delegation enables the Benefits administrator to:

- Create a delegation request to allow a proxy to approve the document on his/her behalf.
- Review the list of transactions delegated and the proxy assigned for each transaction.
- Revoke or withdraw the delegated authority when required.

The following illustrations display the steps to delegate authority for employee Life Event document approval:

Managing Delegations

Use the Manage Delegation page to create the delegation request.

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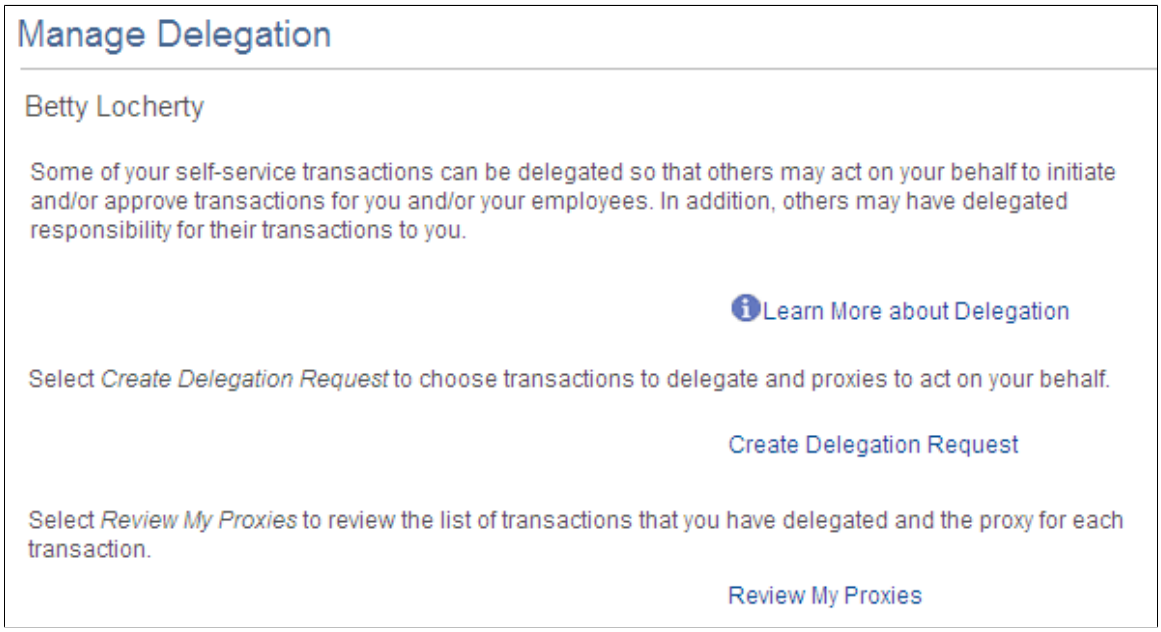
Image: Manage Delegation page

This example illustrates the fields and controls on the Manage Delegation page.

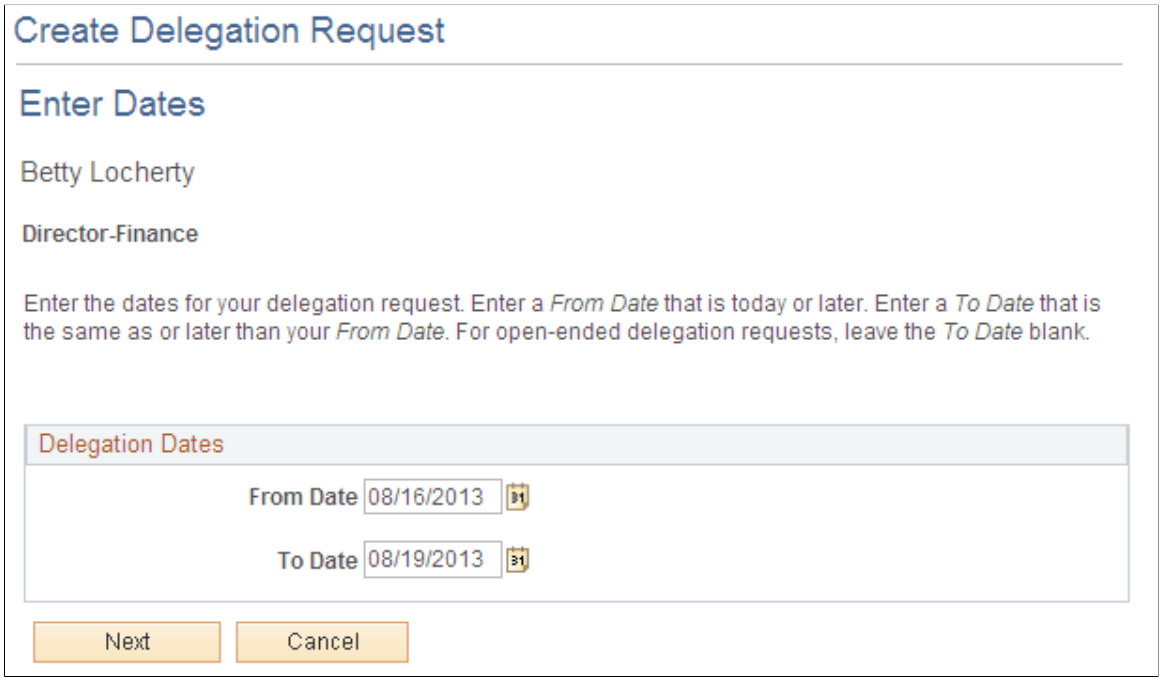


Entering Dates for the Delegation Request

Use the Enter Dates page to select the date range for delegation.

Image: Create Delegation Request — Enter Dates page

This example illustrates the fields and controls on the Create Delegation Request — Enter Dates page.



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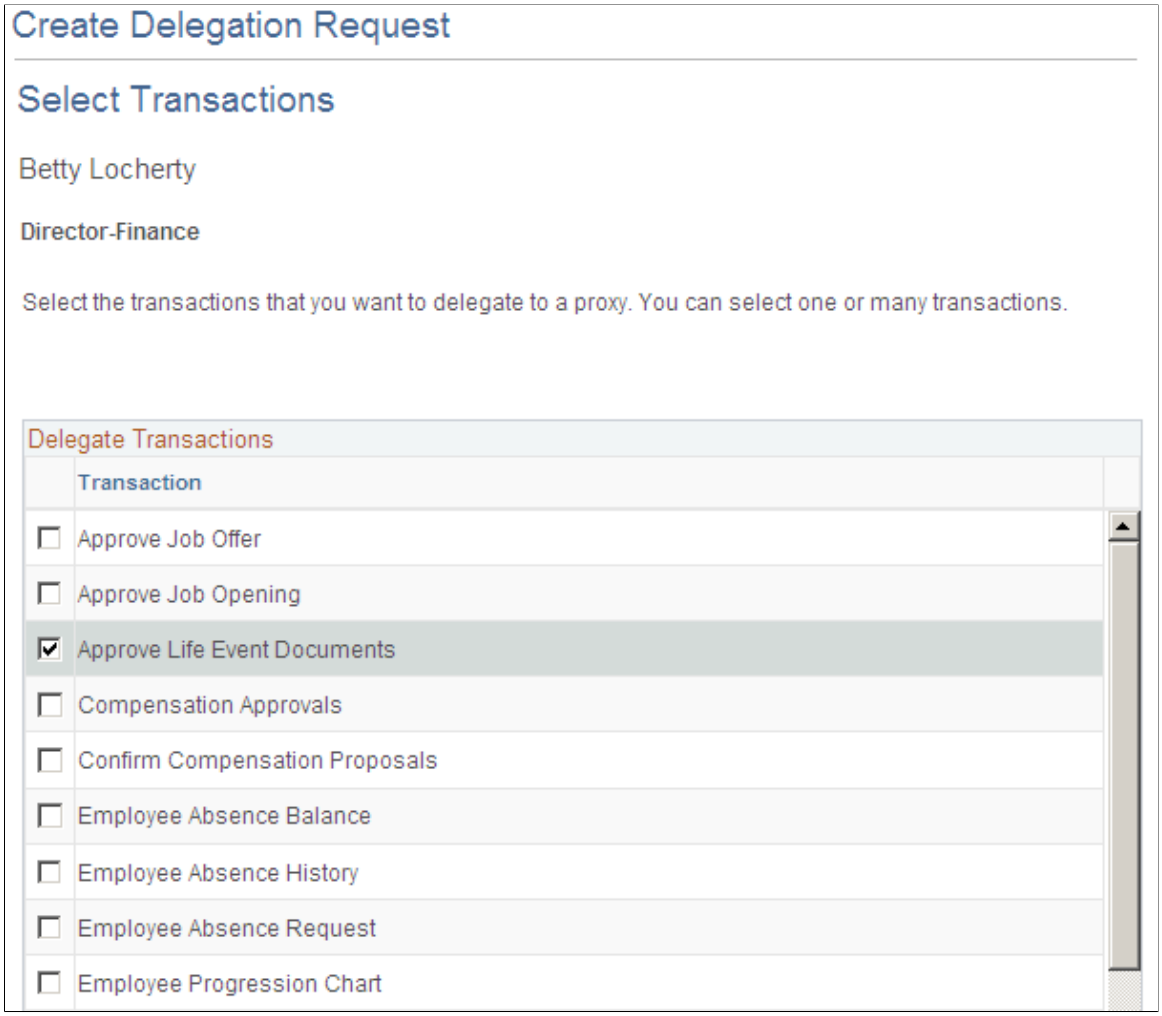
Selecting Transactions for the Delegation Request

Use the Select Transactions page to select the transaction to be delegated authority. Select the Approve Life Event Documents transaction for Life Events document approval delegation.

Image: Create Delegation Request — Select Transactions page

This example illustrates the fields and controls on the Create Delegation Request — Select Transactions page.



Selecting Proxy by Hierarchy

Use the Select Proxy by Hierarchy page to select the proxy to whom the authority of document approval should be delegated.

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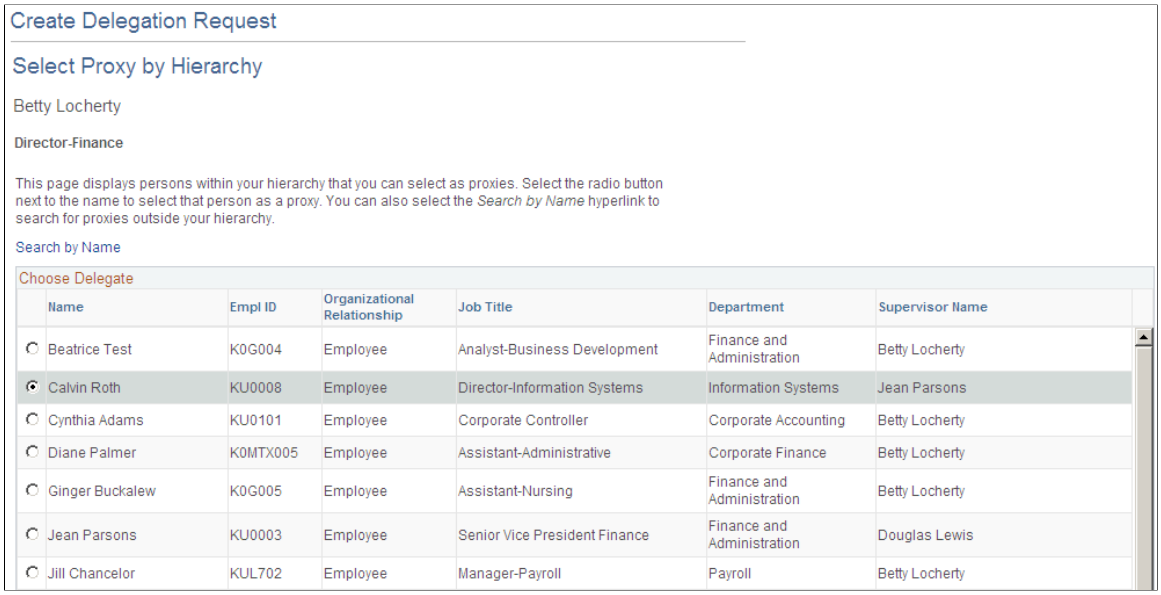
Image: Create Delegation Request - Select Proxy by Hierarchy page

This example illustrates the fields and controls on the Create Delegation Request — Select Proxy by Hierarchy page.



Viewing Delegation Detail

Use the Delegation Detail page to review the transactions selected for delegation and submit or cancel the delegation request depending on whether changes are needed. Select the Notify Delegator check box to receive a courtesy email notification on delegation. On submitting the request, the system automatically sends an email notification to the proxy to review and either accept or reject the delegation.

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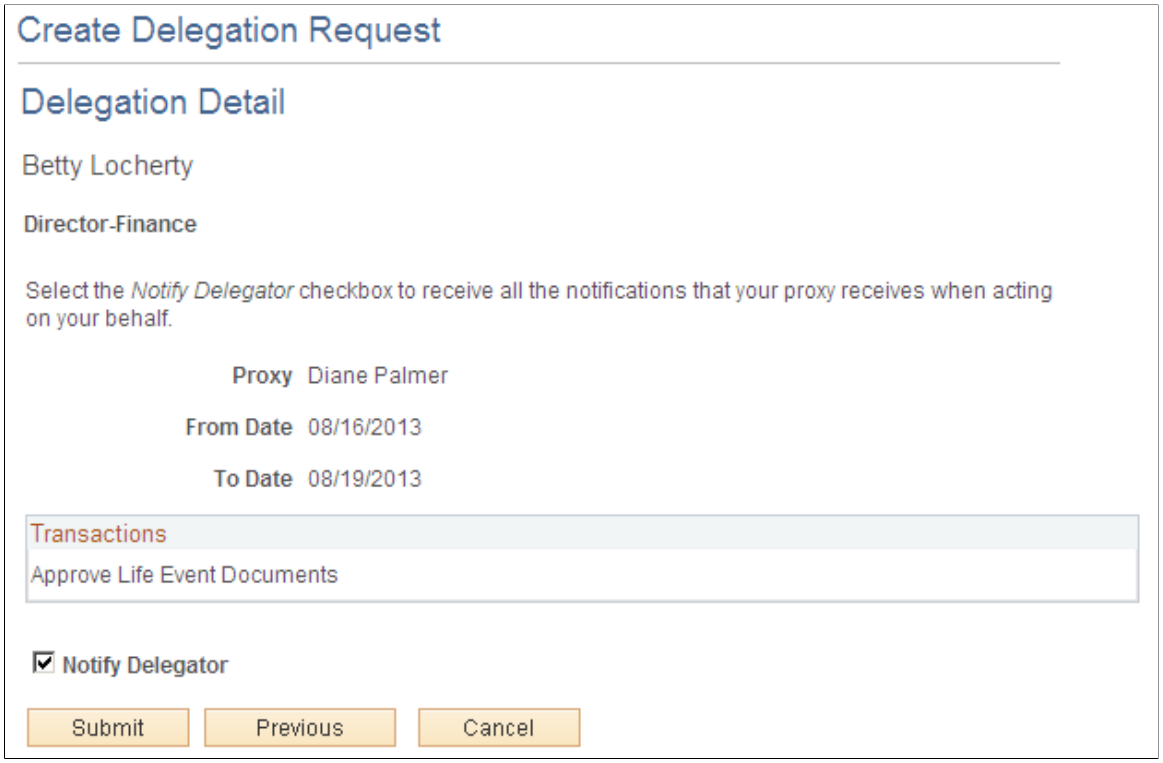
Image: Create Delegation Request - Delegation Detail page

This example illustrates the fields and controls on the Create Delegation Request - Delegation Detail page.

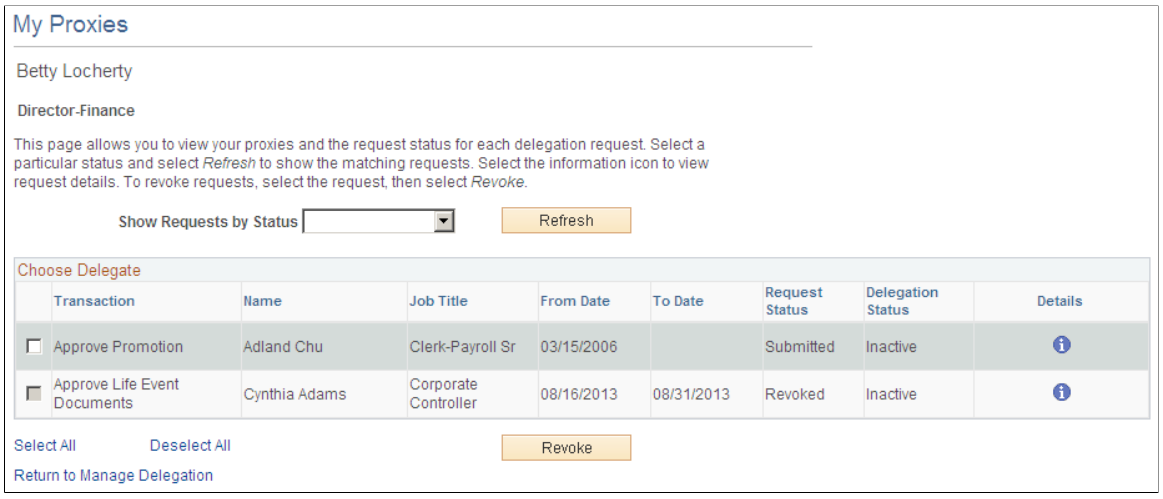


Viewing Proxies

Use the My Proxies page to view all the proxies and request status for the delegation request. Additionally, use the My Proxies page to revoke any of the delegated transactions at any point in time during the delegation period.

Image: My Proxies page

This example illustrates the fields and controls on the My Proxies page.



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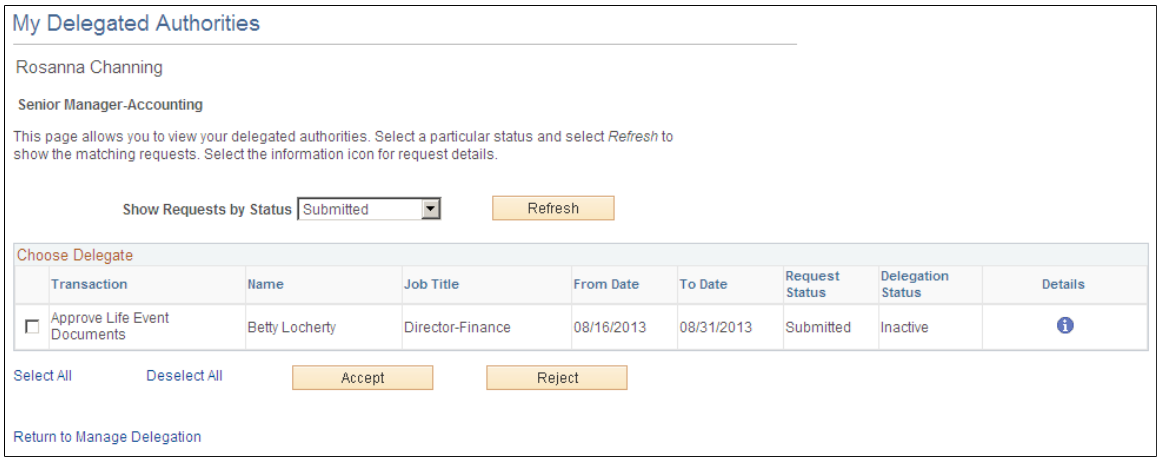
Viewing Delegation Authorities

After the proxy receives the email notification for the delegation request, he/she can access the My Delegated Authorities page to accept or reject the request.

Use the My Delegated Authorities page to manage delegated authorities.

Image: My Delegated Authorities page

This example illustrates the fields and controls on the My Delegated Authorities page.

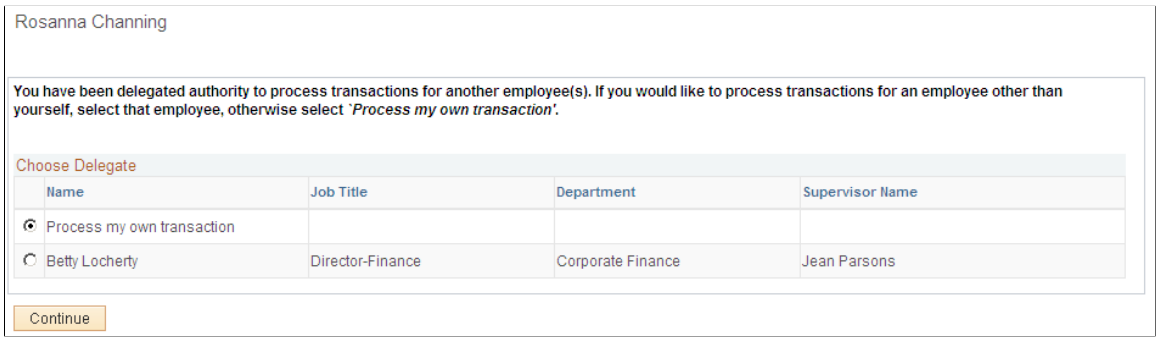


Selecting the Role for Document Approval

When approving employee Life Event documents, use the Select Role page to determine whether to process your own employee document approval transactions or the delegated approval transactions.

Image: Select Role page

This example illustrates the fields and controls on the Select Role page.



Click Continue to navigate to the Approve Document Upload page to approve Life Event documents. For more information, see section “Approving Life Event Documents”.

Managing Delegation Authorities

To maintain delegations and update any invalid rows, the HCM Delegation Administrator needs to run the Manage Delegated Authorities process on a daily basis.

Use the Maintain Delegation Authority page to run the Manage Delegated Authorities process.

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Image: Maintain Delegation Authority page

This example illustrates the fields and controls on the Maintain Delegation Authority page.

Run the Manage Delegated Authorities process to:

- Update the request status and delegation status.
- Revoke all delegation requests that have expired as of the current date.
- Search for and update inactive proxies.
- Insert or delete delegation permissions within the proxy's role.

Managing Benefits Instances

These topics describe how to manage Benefits Instances, such as Life Events and Open Enrollment activity guide instances.

Understanding Benefits Instances Maintenance

When an employee starts processing a life event using self-service or an Open Enrollment activity, an instance of the event is stored in the system so that the employee can continue the event later. When the event is completed, the instance is deleted. If an employee started a life event or an Open Enrollment activity unintentionally, and had not deleted or canceled the event, the Benefits Administrator can delete the event using the Manage Benefits Instances page.

Note: The Manage Benefits Instances page is only for the use of the Benefits Administrator for maintenance purposes. Before deleting any life event or an Open Enrollment activity using this page, ensure that the event is not required and is not in use.

Page Used to Manage Benefits Instances

Page Name	*Definition Name*	*Usage*
Manage Benefits Instances Page	W3EB_LE_INSTANCE	Delete benefits instances (for example, Life Events and Open Enrollment activity guide instances) that are no longer required.

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Manage Benefits Instances Page

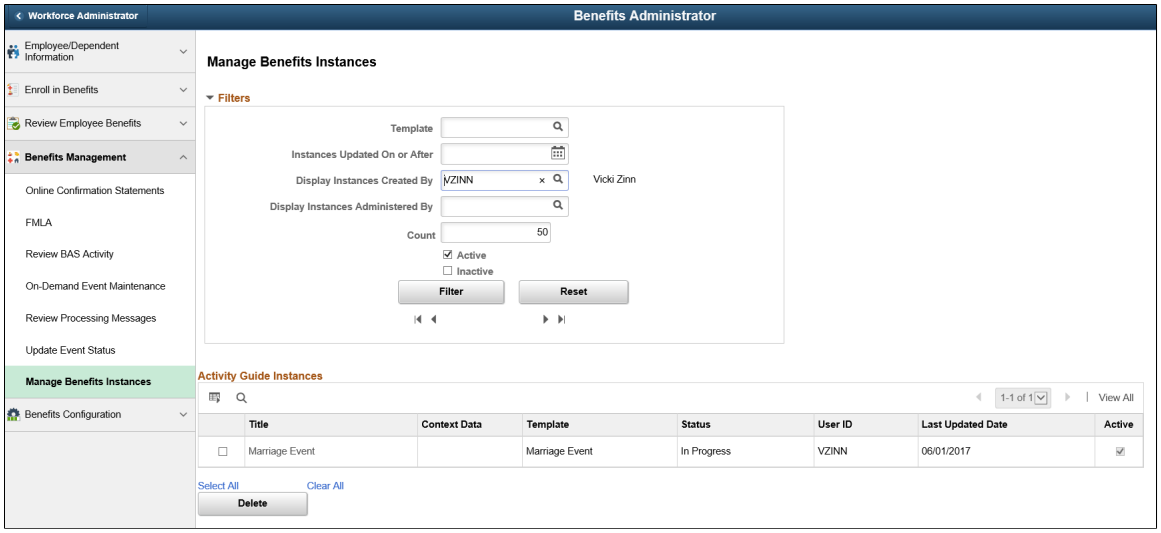
Use the Manage Benefits Instances page (W3EB_LE_INSTANCE) to delete benefits instances (for example, Life Events and Open Enrollment activity guide instances) that are no longer required.

Navigation

Benefits >Manage Benefits Instances >Manage Benefits Instances

Image: Manage Benefits Instances page

This page enables the Benefits Administrator to manage Benefits Instances in progress.



Filters

Template Select the template on which the benefits instances to be filtered are based on.

Display Instances with Items On or Older Than Enter a date to filter benefits instances with event dates on or before the specified date.

Display Instances Created By Select to filter benefits instances created by a specific employee.

Display Instances Administered By Select to filter benefits instances administered by a specific Benefits Administrator.

Active Select to include active benefits instances in the filter.

Inactive Select to include inactive benefits instances in the filter.

Filter Click to filter benefits instances based on the specified criteria.

Reset Reset the fields to create a new filter.

Activity Guide Instances

Title Title of the benefits instance.

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Template	Template on which the benefits instance is based.
Status	Status of the benefits instance.
User ID	User ID of the employee who created the benefits instance.
Last Updated Date	Date on which the benefits instance was last updated.

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Chapter 19

Using the PeopleSoft Fluid User Interface to Manage Benefits Administration

Using the PeopleSoft Fluid User Interface to Manage Benefits Administration as an Administrator

This topic discusses how administrators use the PeopleSoft Fluid User Interface to configure, manage and view benefits-related transactions.

For general information about fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals).

PeopleSoft Fluid User Interface Experience in HCM

Pages Used to Manage Benefits Administration as an Administrator Using the PeopleSoft Fluid User Interface

Page Name	*Definition Name*	*Usage*
Benefits Administrator Tile	HC_BENEFITSADMIN_FL (cref for the tile)	Access a collection of frequently used benefits-related administrative components.
Update Dependent/Beneficiary Pages "Dependent Information - Name Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce) "Dependent Information - Address Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce) "Dependent Information - Personal Profile Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	DEPEND_BENEF1 DEPEND_BENEF_ADDR DEPEND_BENEF2	Enter or update information about a dependent or beneficiary. Enter or update information about a dependent or beneficiary's address. Enter or update information about a dependent or beneficiary.
"Update ABBRs Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)	BN_ANNL_BENEF_BASE	Enter and maintain multiple Annual Benefit Base Rates (ABBRs) for an employee.
"Maintain Certifications Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)	BN_CERTIF_PARTC	Updating employee benefit certifications.

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Page Name	*Definition Name*	*Usage*
"Health Benefits Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)	HEALTH_BENEFITS1	Enroll employees and dependents in health plan types, like medical, dental and vision.
"Life and AD/D Benefits Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)	LIFE_ADD_BENEF1	Enroll participants in life and AD/D plans and assign beneficiaries to those plans.
Benefits Summary Pages Benefits Summary Page Deduction Summary Page	BEN_SUMM_GRID_FL BEN_SUMM_DEDN_FL	View benefit enrollment/deduction summaries for employees.
"Savings Plans Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)	SAVINGS_PLANS1	Enroll employees in savings benefit plans, assign beneficiaries, and identify investment elections.
"Approve Document Upload Page" (PeopleSoft HCM 9.2: eBenefits)	W3EB_APPR_SUMMARY	Approve or deny life event documents uploaded by employees.
Review Employee Statements Page	BAS_STMT_LIST_FL	Review fluid benefits statements of employees.
Online Confirmation Statements Page	RUNCTL_BAS_STMT	Run the process to generate confirmation statements for both online viewing and printing.
FMLA Page	RUNCTL_FGFMLA	Generate FMLA reports.
Review BAS Activity Page	BAS_ACTIVITY	Add events into the BAS Activity table. You manually insert events to be processed according to event rules that map to the BAS action that you enter when you run the Benefits Administration process. You can also delete unwanted, but automatically triggered, events.
On-Demand Event Maintenance Page	BAS_ON_DEM_EM	Process a single participant through all stages of the Benefits Administration process.
"Review Processing Messages Page" (PeopleSoft HCM 9.2: Pension Administration)	PA_MESSAGE_LOG	View warnings or errors generated during the calculation (or during periodic processing).
Update Event Status Page	BAS_PARTIC_STS	Reprocess individual participant events.
Manage Benefits Instances Page	W3EB_LE_INSTANCE	Delete benefits Instances (for example, Life Events and Open Enrollment activity guide instances) that are no longer needed.
"Assign to Benefit Program Page" (PeopleSoft HCM 9.2: Payroll Interface)	BEN_PROG_PARTICPTN	View the benefit programs in which an employee is enrolled.

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Page Name	*Definition Name*	*Usage*
"Benefit Rates Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)	BN_RATE_TABLE	Enter benefit rate information.
Open Enrollment Definition Page	BAS_OE_DEFINITION	Set up the parameters of the open enrollment.
Benefit Program Table - Benefit Program Page	BEN_PROG_DEFN1	Define benefit program information.
"Benefit Plan Table Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)	BENEFIT_PLAN_TABLE	Enter benefit plan information.
Event Rules Page	RUNCTL_BAS703B	Print event rule definitions.
Eligibility Rules Page	RUNCTL_BAS703A	Print the eligibility rule definitions.
"Life Event Rules Page" (PeopleSoft HCM 9.2: eBenefits)	W3EB_LE_RULES	Set up rules that control how data and information is processed for life events such as changes in marital status, birth, or adoption.
"Understanding 401 Limit" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)	LIMIT_TBL1	Identify the rules that apply to the 401, 402, 403, 415, and 457 limits, using the: 1. Limit Table Page for 401(a) Limits 2. Limit Table Page for 402(g) Limits 3. Limit Table Page for 403(b) Limits 4. Limit Table Page for 415 Limits 5. Limit Table Page to Set Up 415(c) Limits for 403(b) Plans 6. Limit Table Page for 457 Limits 7. Limit Table Page for User Defined Limits
Schedule Table Page	BAS_SCHEDULE	Control your processing schedule.
Benefits Statement Options Page	BAS_STMT_OPTIONS	Set up a report templates for benefits statements.
Administrative Contacts Page	BENEF_ADM_CONTACTS	Add or update the Benefits Administrator contact details.
Enrollment Contacts Page	BNE_CONTACT_GRP	Assign a contact person to each of the benefits plan enrollment pages that displays the Contact Information group box.

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Benefits Administrator Tile

Administrators use the Benefits Administrator tile (HC_BENEFITSADMIN_FL) to access a collection of frequently used benefits-related administrative components.

Navigation

The Benefits Administrator tile is delivered as part of the Workforce Administrator home page, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

Image: (Tablet) Benefits Administrator tile

This example illustrates the fields and controls on the (Tablet) Benefits Administrator tile.

Image: (Smartphone) Benefits Administrator tile

This example illustrates the fields and controls on the (Smartphone) Benefits Administrator tile.

Click the Benefits Administrator tile to access the Benefits Administrator application start page.

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Image: (Tablet) Benefits Administrator application start page

This example illustrates the fields and controls on the (Tablet) Benefits Administrator application start page.

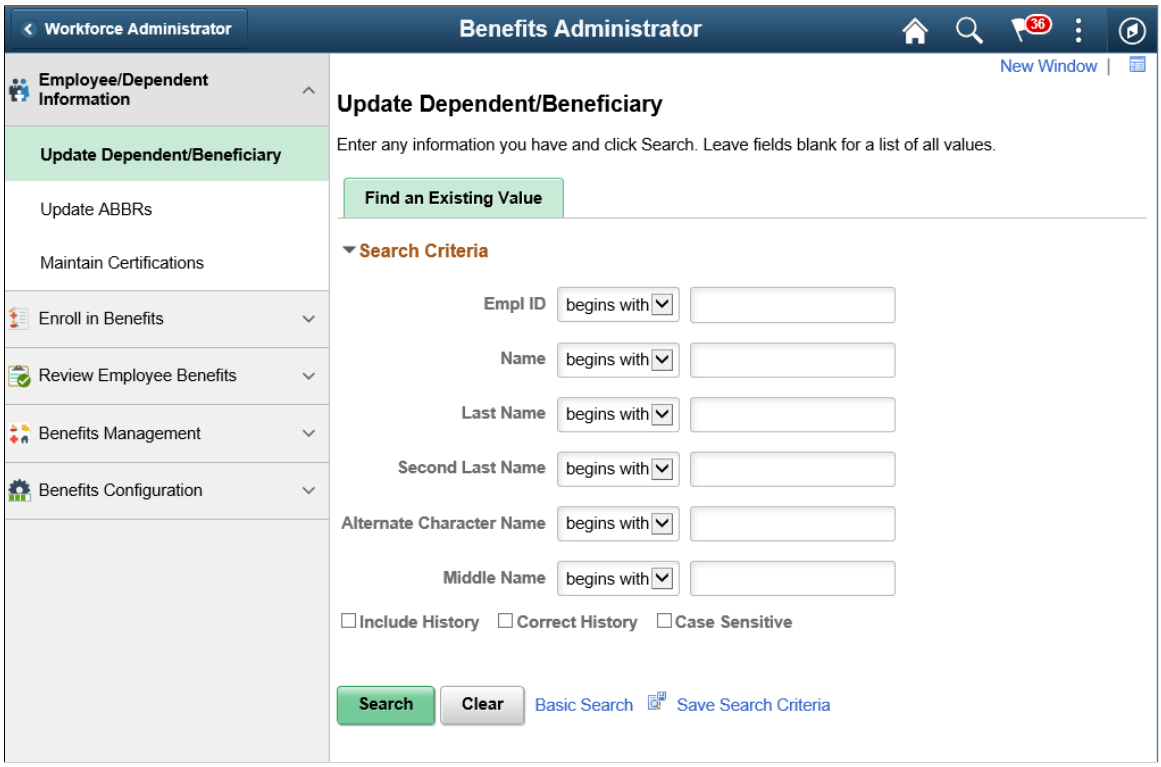

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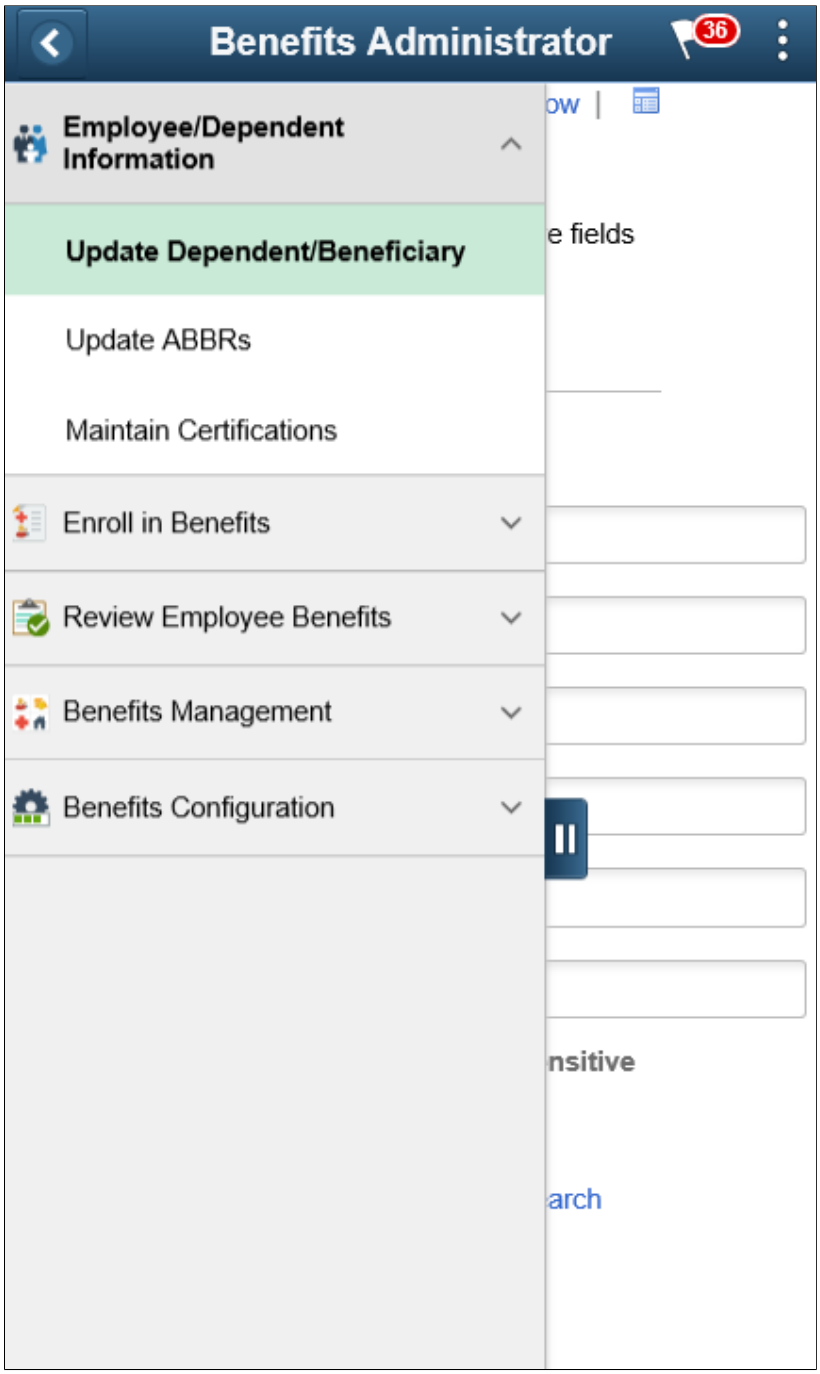
Image: (Smartphone) Benefits Administrator application start page

This example illustrates the fields and controls on the (Smartphone) Benefits Administrator application start page.



This application start page is a navigation collection that enables administrators to access frequently used Benefits Administration components from one location. The left panel of this page lists the components collected under five categories:

- Employee/Dependent Information
- Enroll in Benefits

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- Review Employee Benefits
- Benefits Management
- Benefits Configuration

The right panel displays the component selected in the left panel.

Manage Benefits Instances Page

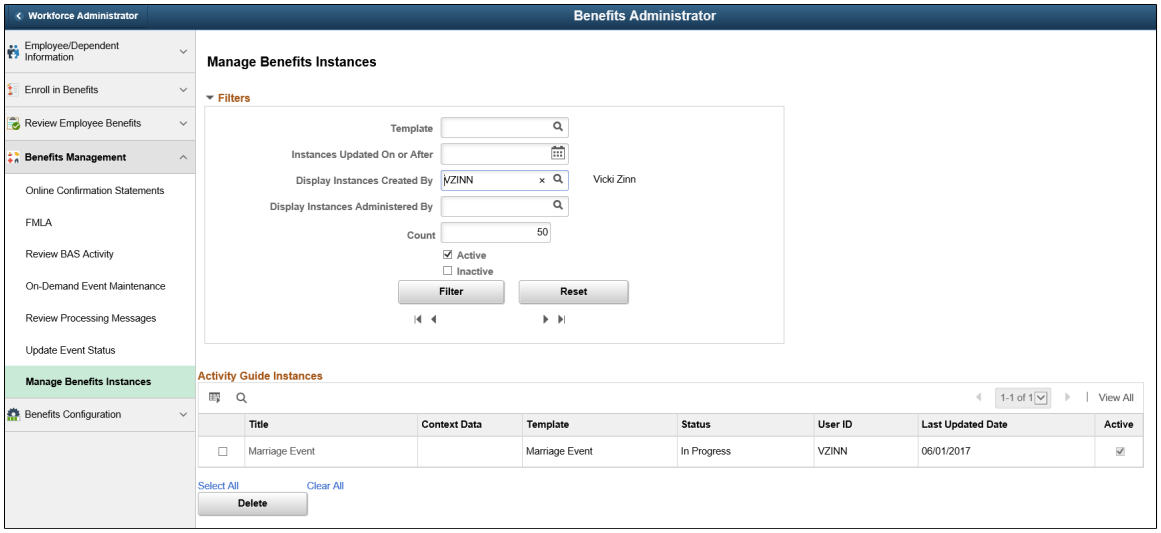
Use the Manage Benefits Instances page (W3EB_LE_INSTANCE) to delete benefits instances (for example, Life Events and Open Enrollment activity guide instances) which are no longer needed.

Navigation

- In the Workforce Administrator fluid homepage, select the Benefits Administrator tile. From the Benefits Administrator navigation collection, select Benefits Management and then select Manage Benefits Instances.
- Benefits >Manage Benefits Instances >Manage Benefits Instances

Image: Manage Benefits Instances page

This page enables the Benefits Administrator to delete benefits instances, which are no longer needed.



Filters

Template Select the template on which the benefits instances to be filtered are based on.

Display Instances with Items On or Older Than Enter a date to filter benefits instances with event dates on or before the specified date.

Display Instances Created By Select to filter benefits instances created by a specific employee.

Display Instances Administered By Select to filter benefits instances administered by a specific Benefits Administrator.

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Active	Select to include active benefits instances in the filter.
Inactive	Select to include inactive benefits instances in the filter.
Filter	Click to filter benefits instances based on the specified criteria.
Reset	Reset the fields to create a new filter.

Activity Guide Instances

Title	Title of the benefits instance.
Template	Template on which the benefits instance is based.
Status	Status of the benefits instance.
User ID	User ID of the employee who created the benefits instance.
Last Updated Date	Date on which the benefits instance was last updated.

Administrative Contacts Page

Use the Administrative Contacts page (BENEF_ADM_CONTACTS) to add or update the Benefits Administrator contact details.

Navigation

In the Workforce Administrator fluid homepage, select the Benefits Administrator tile. From the Benefits Configuration navigation collection, select Administrative Contacts.

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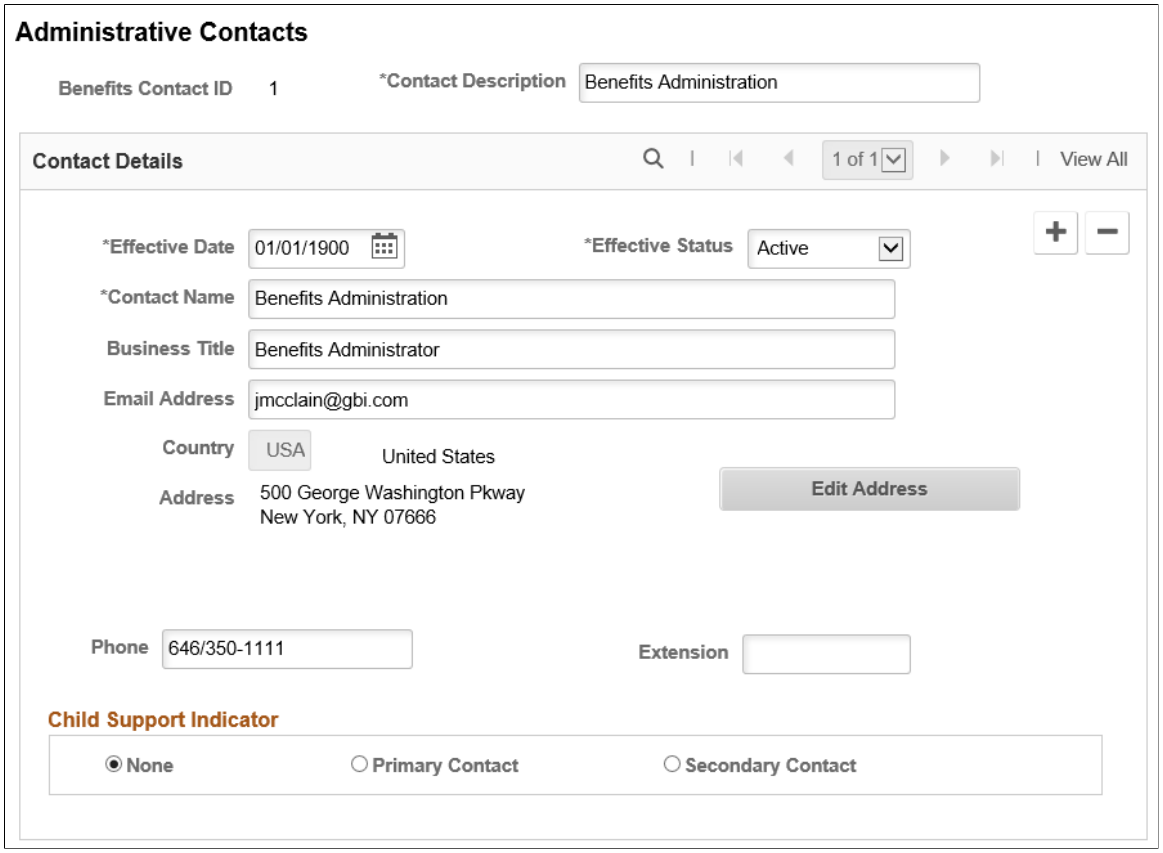
Image: Administrative Contacts Page

This example illustrates the fields and controls on the Administrative Contacts page.



Enrollment Contacts Page

Use the Enrollment Contacts page (BNE_CONTACT_GRP) to add or update the contact information in each of the Benefit Plan pages.

Navigation

In the Workforce Administrator fluid homepage, select the Benefits Administrator tile. From the Benefits Configuration navigation collection, select Enrollment Contact Assignment.

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Image: Enrollment Contacts page for the ALLEVENT group

This example illustrates the fields and controls on the Enrollment Contacts page for the ALLEVENT group.

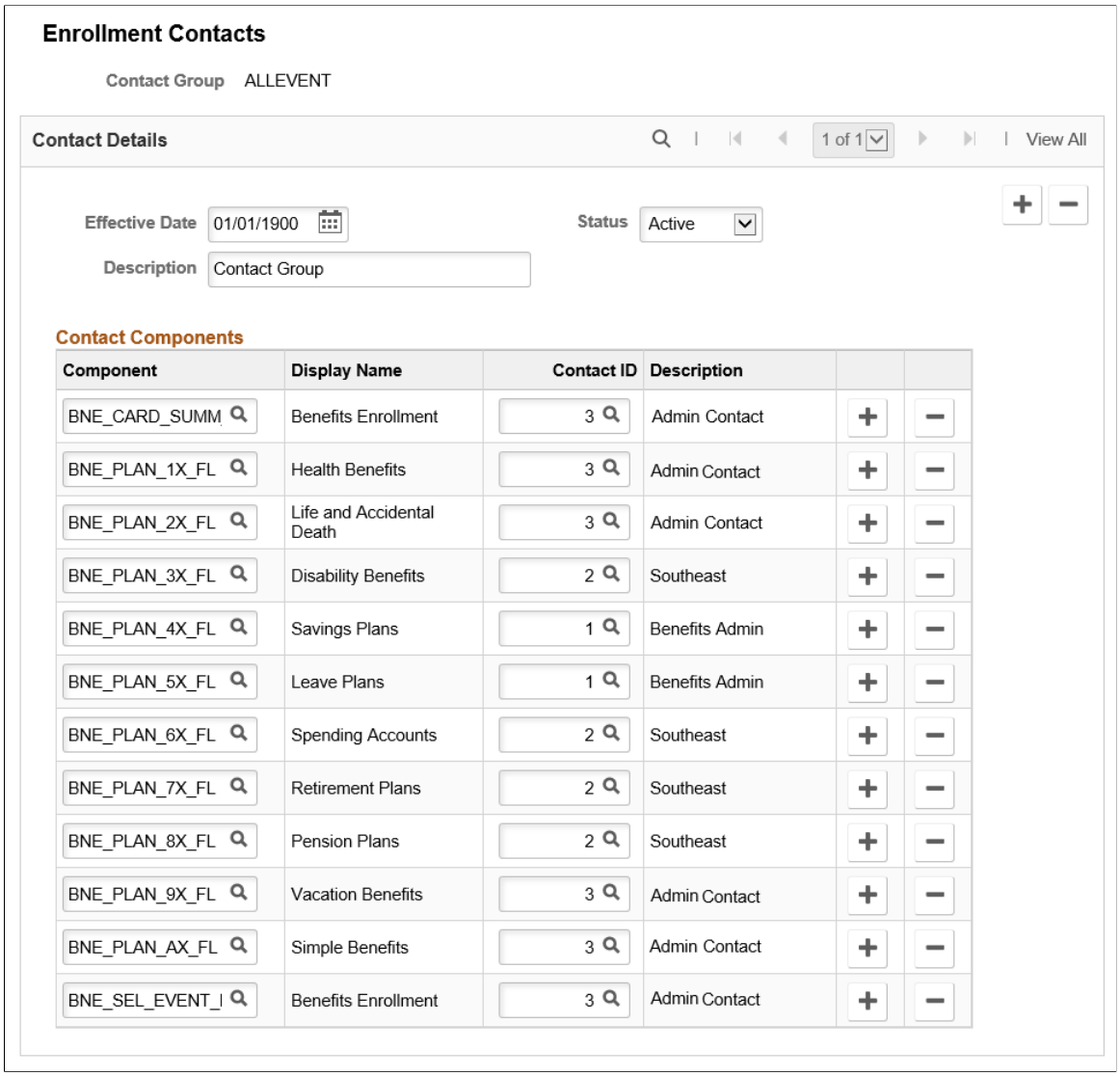

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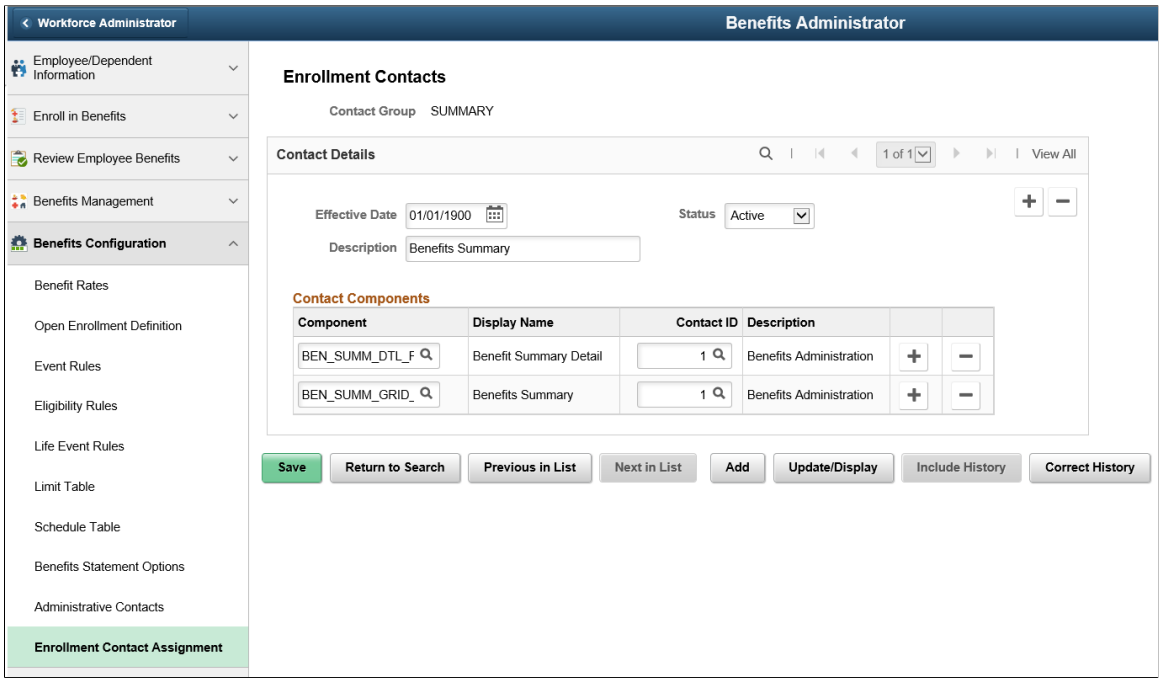
Image: Enrollment Contacts page for the SUMMARY group

This example illustrates the fields and controls on the Enrollment Contacts page for the SUMMARY group.



Related Links

"Delegating Life Events Document Approval Using Fluid Delegations" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Using the Fluid Benefits WorkCenter

The Fluid Benefits WorkCenter can be configured for specific roles like the Benefits Administrators, Benefits Specialist, ACA Administrator, etc.

This topic discusses how to use the Fluid Benefits WorkCenter to manage employees' benefits information in real-time and access key PeopleSoft application components without having to navigate from menu to menu.

The Fluid WorkCenter framework provides:

- ability to add or delete navigations
- ability to manage alerts and approvals
- personalize the setup
- a central location for reports and queries

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You can use the PeopleSoft-delivered Benefits WorkCenter and configure it to suit your business needs or even create WorkCenters best suited for your organizations. For more information, refer "Setting Up and Personalizing PeopleSoft Fluid WorkCenters" (PeopleSoft HCM 9.2: Application Fundamentals).

The following video provides an overview of Benefits WorkCenter:

PeopleSoft Benefits/Time and Labor Fluid WorkCenters

Related Links

"Understanding PeopleSoft Fluid WorkCenters" (PeopleSoft HCM 9.2: Application Fundamentals)

Pages Used in the Fluid Benefits WorkCenter

Page Name	*Definition Name*	*Usage*
Benefits WorkCenter Tile	HC_BEN_WC_APP_FL (cref for the tile)	Access the frequently used administrative work items related to the employee's benefits.
Benefits WorkCenter Page My Work Folder Audit Exceptions: • No SSN Employees–Health Benefits Page • No SSN Dependents–Health Benefits Page • Employee Under Age 16 Page • Dual Health Plan–Employee/ Dependent Page • Employees with Over-Age Dependents Page Enrollment Exceptions: Preparation and Election Error Page ACA Exceptions: Eligibility Status TBD Page	HWC_RSLT_FL	Access the pages showing the audit, enrollment and ACA exceptions.

Benefits WorkCenter Tile

Use the Benefits WorkCenter Tile (HC_BEN_WC_APP_FL – cref for tile) to access and manage the employees' benefits information.

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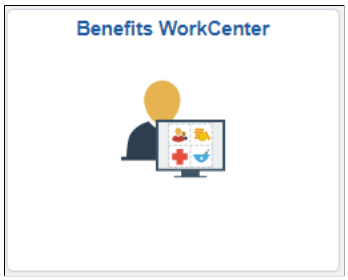
Navigation

The Benefits WorkCenter tile is delivered as part of the Workforce Administrator home page. The location may change based on home page personalization.

Image: Benefits WorkCenter Tile

This example illustrates the Benefits WorkCenter Tile.



Benefits WorkCenter Page

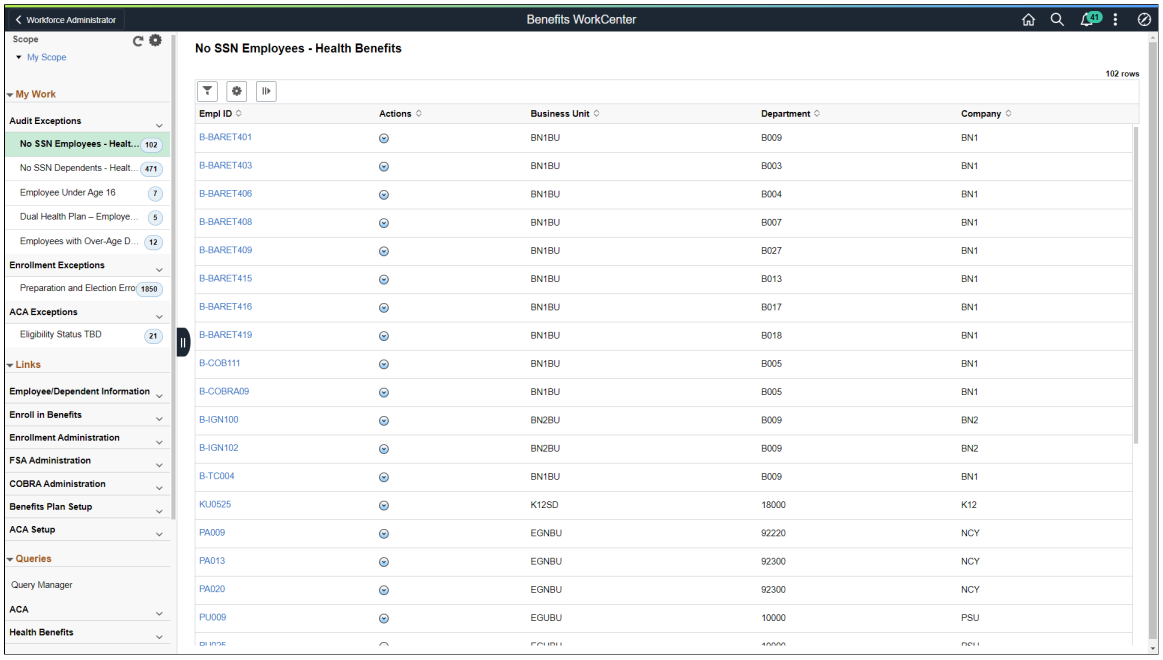
Use the Benefits WorkCenter page (HWC_RSLT_FL) to access the frequently used administrative work items related to the employee's benefits.

Navigation

Click the Benefits WorkCenter tile on the Workforce Administrator home page.

Image: Benefits WorkCenter Page

This example illustrates the fields and controls on the Benefits WorkCenter Page. You can find definitions for the fields and controls later on this page.



PeopleSoft delivers a Fluid WorkCenter for Benefits. The WorkCenter is pre-configured with work items, links, queries and reports, providing administrators access to real-time information and analytical sources

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based on their role-based security, and the ability to perform benefits process tasks from one central area. Users can personalize display options and add links to their own WorkCenter for maximum efficiency. For more information, see "Setting Up and Personalizing PeopleSoft Fluid WorkCenters" (PeopleSoft HCM 9.2: Application Fundamentals).

The WorkCenter page is divided into two areas: the navigation panel on the left and the transaction panel on the right.

Left Panel

The navigational panel on the left contains group boxes with links to specific transactions, menu components and other content. These group boxes are:

- My Work: This group box contains three collapsible sections, *Audit Exceptions*, *Enrollment Exceptions* and *ACA Exceptions*. For more information, see Understanding the My Work Group Box.
- Links: For more information, see Understanding the Links Group Box.
- Queries: For more information, see Understanding the Queries Group Box.
- Reports/Processes: For more information, see Understanding the Reports/Processes Group Box.

Scope

Scope determines the data to be displayed in the WorkCenter.

Note: If you have configured any additional scope, it will also be listed under the My Scope option. For more information on how to configure a new scope, see "Configure Scope Page" (PeopleSoft HCM 9.2: Application Fundamentals).

Click to refresh the content area to display either the first page that appears when you first access the WorkCenter, or the starting page if it is specified in your personalization.

Click to access these personalization options:

- *Personalize*: Select this option to personalize the WorkCenter layout.

  For more information, see "Personalize Page (Fluid)" (PeopleSoft HCM 9.2: Application Fundamentals).

- *Maintain Scope Detail*: Select this option to modify the current scope.
- *Configure Scope*: Select this option to create a new scope.

  For more information, see "Configure Scope Page" (PeopleSoft HCM 9.2: Application Fundamentals).

Right Panel

The transaction panel on the right is where the selected transaction result or component (work item) is displayed.

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By default, the No SSN Employees–Health Benefits page appears when you first access the WorkCenter. You can change this default setting of the WorkCenter on the "Personalize Page (Fluid)" (PeopleSoft HCM 9.2: Application Fundamentals).

You can also filter and personalize the output based on your requirements. Use the "Refine Filter Criteria Page" (PeopleSoft HCM 9.2: Application Fundamentals) to select one or more criteria to narrow the search result. The Filter icon appears green when filters have been applied to your search. Use the "Personalized Output Page" (PeopleSoft HCM 9.2: Application Fundamentals) to modify the position of columns and to select the columns to be displayed as default for each work item. For more information, see "Setting Up and Personalizing PeopleSoft Fluid WorkCenters" (PeopleSoft HCM 9.2: Application Fundamentals).

You can download grid data to .xls file.

Understanding the My Work Group Box

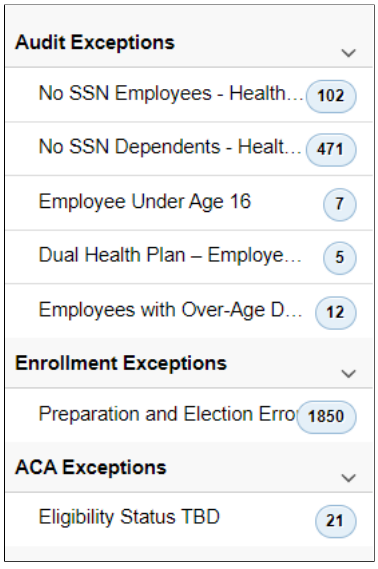
The My Work group box provides Benefits work item links for exceptions in these group sections:

- Audit Exceptions
- Enrollment Exceptions
- ACA Exceptions

PeopleSoft provides these sample exceptions which you can use, modify or clone to suit your organization's business needs.

Image: My Work Group Box

This example illustrates the fields and controls on the My Work Group Box.



Note: Work item links are grayed out if no data is available for display.

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Audit Exceptions

The PeopleSoft-delivered Audit Exceptions link provides reports of exceptions similar to what is provided in BEN733.SQR. These include:

- No SSN Employees–Health Benefits
- No SSN Dependents–Health Benefits
- Employees Under Age 16
- Dual Health Plan–Employee/Dependent
- Employees with Over-Age Dependents

Enrollment Exceptions

The PeopleSoft-delivered Enrollment Exceptions link provides a report (Preparation and Election Error) to fetch all processing messages similar to what is in the Benefits Administration Processing messages.

ACA Exceptions

The PeopleSoft-delivered ACA Exceptions link provides an audit report (Eligibility Status TBD) that fetches any ACA Employee who does not have an ACA Eligibility Status defined.

No SSN Employees–Health Benefits Page

Use the No SSN Employees–Health Benefits page to get a report of health benefits of the U.S. employees with missing National IDs.

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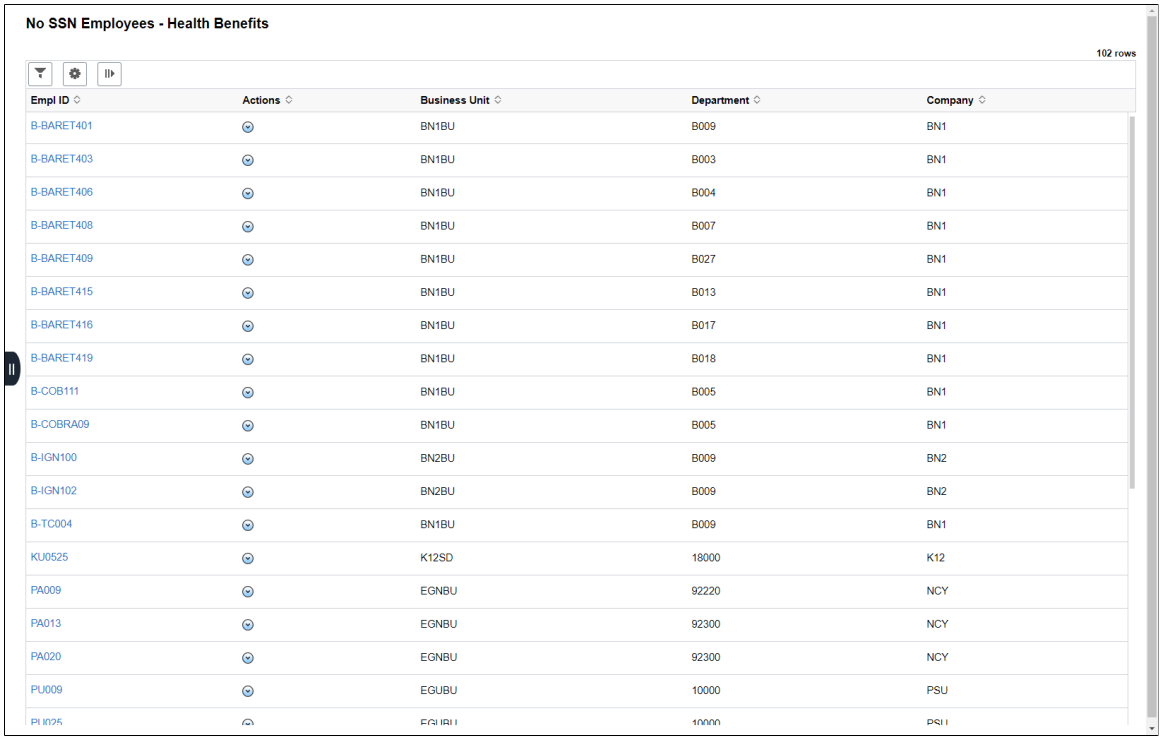
Image: No SSN Employees–Health Benefits Page

This example illustrates the fields and controls on the No SSN Employees–Health Benefits Page.



No SSN Employees - Health Benefits

102 rows

Empl ID	Actions	Business Unit	Department	Company
B-BARET401		BN1BU	B009	BN1
B-BARET403		BN1BU	B003	BN1
B-BARET406		BN1BU	B004	BN1
B-BARET408		BN1BU	B007	BN1
B-BARET409		BN1BU	B027	BN1
B-BARET415		BN1BU	B013	BN1
B-BARET416		BN1BU	B017	BN1
B-BARET419		BN1BU	B018	BN1
B-COB111		BN1BU	B005	BN1
B-COBRA09		BN1BU	B005	BN1
B-IGN100		BN2BU	B009	BN2
B-IGN102		BN2BU	B009	BN2
B-TC004		BN1BU	B009	BN1
KU0525		K12SD	18000	K12
PA009		EGNBU	92220	NCY
PA013		EGNBU	92300	NCY
PA020		EGNBU	92300	NCY
PU009		EGUBU	10000	PSU
PU025		EGUBU	10000	PSU

Empl ID Select the Empl ID link to access the Modify a Person page, to change the Social Security Number (SSN).

Actions Select Actions to access the related Actions menu, to modify personal information and benefits summary.

No SSN Dependents–Health Benefits Page

Use the No SSN Dependents–Health Benefits page to get a report of the U.S. health benefits dependents with missing National IDs.

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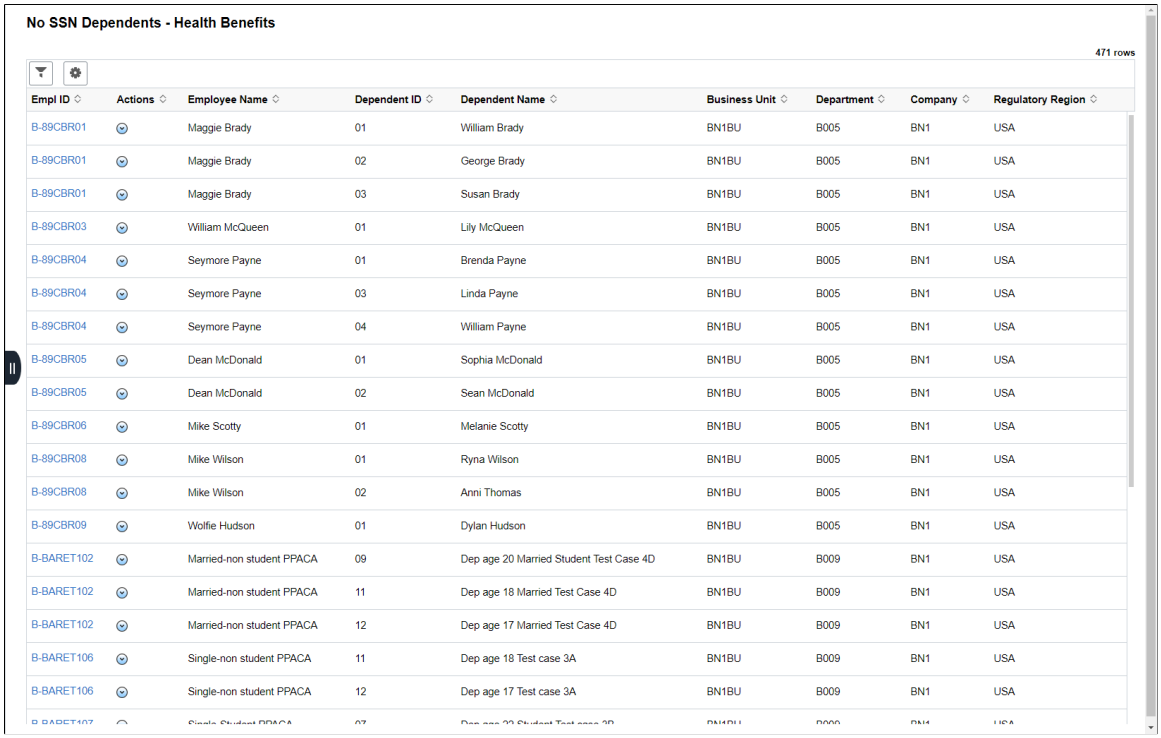
Image: No SSN Dependents–Health Benefits Page

This example illustrates the fields and controls on the No SSN Dependents–Health Benefits Page.



No SSN Dependents - Health Benefits

471 rows

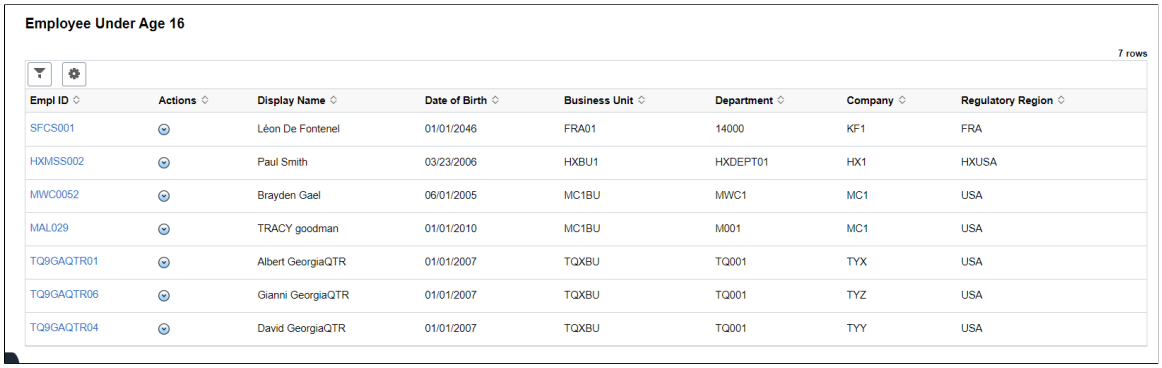
Empl ID	Actions	Employee Name	Dependent ID	Dependent Name	Business Unit	Department	Company	Regulatory Region
B-89CBR01		Maggie Brady	01	William Brady	BN1BU	B005	BN1	USA
B-89CBR01		Maggie Brady	02	George Brady	BN1BU	B005	BN1	USA
B-89CBR01		Maggie Brady	03	Susan Brady	BN1BU	B005	BN1	USA
B-89CBR03		William McQueen	01	Lily McQueen	BN1BU	B005	BN1	USA
B-89CBR04		Seymore Payne	01	Brenda Payne	BN1BU	B005	BN1	USA
B-89CBR04		Seymore Payne	03	Linda Payne	BN1BU	B005	BN1	USA
B-89CBR04		Seymore Payne	04	William Payne	BN1BU	B005	BN1	USA
B-89CBR05		Dean McDonald	01	Sophia McDonald	BN1BU	B005	BN1	USA
B-89CBR05		Dean McDonald	02	Sean McDonald	BN1BU	B005	BN1	USA
B-89CBR06		Mike Scotty	01	Melanie Scotty	BN1BU	B005	BN1	USA
B-89CBR08		Mike Wilson	01	Ryna Wilson	BN1BU	B005	BN1	USA
B-89CBR08		Mike Wilson	02	Anni Thomas	BN1BU	B005	BN1	USA
B-89CBR09		Wolfie Hudson	01	Dylan Hudson	BN1BU	B005	BN1	USA
B-BARET102		Married-non student PPACA	09	Dep age 20 Married Student Test Case 4D	BN1BU	B009	BN1	USA
B-BARET102		Married-non student PPACA	11	Dep age 18 Married Test Case 4D	BN1BU	B009	BN1	USA
B-BARET102		Married-non student PPACA	12	Dep age 17 Married Test Case 4D	BN1BU	B009	BN1	USA
B-BARET106		Single-non student PPACA	11	Dep age 18 Test case 3A	BN1BU	B009	BN1	USA
B-BARET106		Single-non student PPACA	12	Dep age 17 Test case 3A	BN1BU	B009	BN1	USA

Employee Under Age 16 Page

Use the Employee Under Age 16 page to get a report of employees, like interns, under the age of 16, or to pull up incorrect records where date of births were entered wrong.

Image: Employee Under Age 16 Page

This example illustrates the fields and controls on the Employee Under Age 16 Page.



Employee Under Age 16

7 rows

Empl ID	Actions	Display Name	Date of Birth	Business Unit	Department	Company	Regulatory Region
SFCS001		Léon De Fontenel	01/01/2046	FRA01	14000	KF1	FRA
HXMSS002		Paul Smith	03/23/2006	HXBU1	HXDEPT01	HX1	HXUSA
MWC0052		Brayden Gael	06/01/2005	MC1BU	MWC1	MC1	USA
MAL029		TRACY goodman	01/01/2010	MC1BU	M001	MC1	USA
TQ9GAQTR01		Albert GeorgiaQTR	01/01/2007	TQXBU	TQ001	TYX	USA
TQ9GAQTR06		Gianni GeorgiaQTR	01/01/2007	TQXBU	TQ001	TYZ	USA
TQ9GAQTR04		David GeorgiaQTR	01/01/2007	TQXBU	TQ001	TYY	USA

Dual Health Plan–Employee/Dependent Page

Use the Dual Health Plan–Employee/Dependent page to fetch a report to find out if the employee and spouse or dependent work in the same company and if both are enrolled in health plans.

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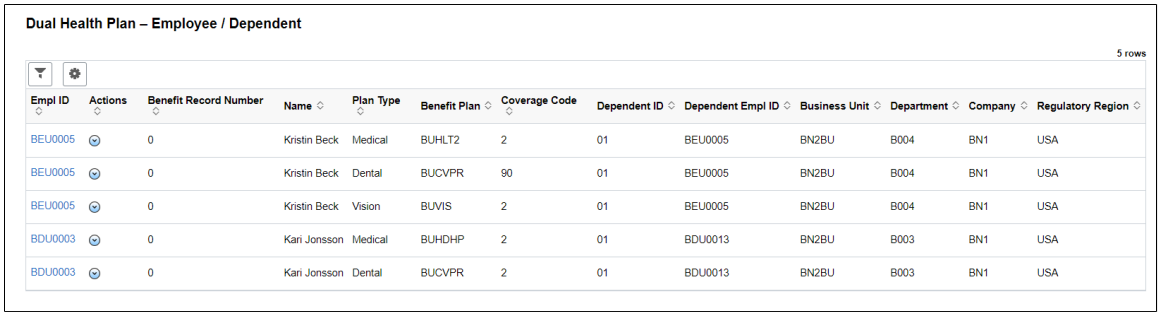
Image: Dual Health Plan–Employee/Dependent Page

This example illustrates the fields and controls on the Dual Health Plan–Employee/Dependent Page.



Dual Health Plan – Employee / Dependent

5 rows

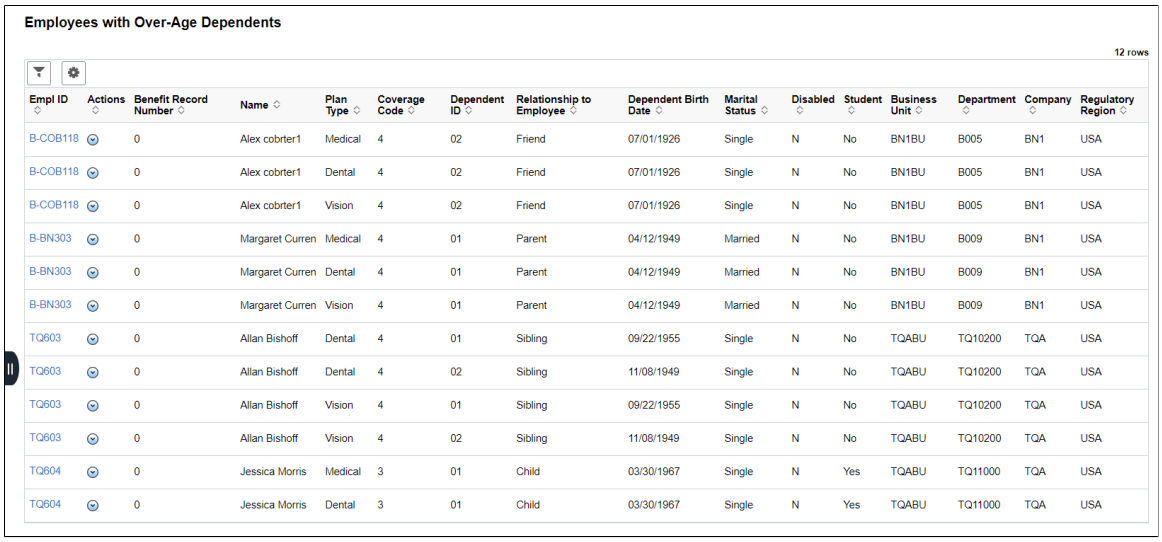
Empl ID	Actions	Benefit Record Number	Name	Plan Type	Benefit Plan	Coverage Code	Dependent ID	Dependent Empl ID	Business Unit	Department	Company	Regulatory Region
BEU0005		0	Kristin Beck	Medical	BUHLT2	2	01	BEU0005	BN2BU	B004	BN1	USA
BEU0005		0	Kristin Beck	Dental	BUCVPR	90	01	BEU0005	BN2BU	B004	BN1	USA
BEU0005		0	Kristin Beck	Vision	BUVIS	2	01	BEU0005	BN2BU	B004	BN1	USA
BDU0003		0	Kari Jonsson	Medical	BUHDHP	2	01	BDU0013	BN2BU	B003	BN1	USA
BDU0003		0	Kari Jonsson	Dental	BUCVPR	2	01	BDU0013	BN2BU	B003	BN1	USA

Employees with Over-Age Dependents Page

Use the Employees with Over-Age Dependents page to get a list of dependents of employees who are over the age as based on the "Dependent Rules Table Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits).

Image: Employees with Over-Age Dependents Page

This example illustrates the fields and controls on the Employees with Over-Age Dependents Page.



Employees with Over-Age Dependents

12 rows

Empl ID	Actions	Benefit Record Number	Name	Plan Type	Coverage Code	Dependent ID	Relationship to Employee	Dependent Birth Date	Marital Status	Disabled	Student	Business Unit	Department	Company	Regulatory Region
B-COB118		0	Alex cobrter1	Medical	4	02	Friend	07/01/1926	Single	N	No	BN1BU	B005	BN1	USA
B-COB118		0	Alex cobrter1	Dental	4	02	Friend	07/01/1926	Single	N	No	BN1BU	B005	BN1	USA
B-COB118		0	Alex cobrter1	Vision	4	02	Friend	07/01/1926	Single	N	No	BN1BU	B005	BN1	USA
B-BN303		0	Margaret Curren	Medical	4	01	Parent	04/12/1949	Married	N	No	BN1BU	B009	BN1	USA
B-BN303		0	Margaret Curren	Dental	4	01	Parent	04/12/1949	Married	N	No	BN1BU	B009	BN1	USA
B-BN303		0	Margaret Curren	Vision	4	01	Parent	04/12/1949	Married	N	No	BN1BU	B009	BN1	USA
TQ603		0	Allan Bishoff	Dental	4	01	Sibling	09/22/1955	Single	N	No	TQABU	TQ10200	TQA	USA
TQ603		0	Allan Bishoff	Dental	4	02	Sibling	11/08/1949	Single	N	No	TQABU	TQ10200	TQA	USA
TQ603		0	Allan Bishoff	Vision	4	01	Sibling	09/22/1955	Single	N	No	TQABU	TQ10200	TQA	USA
TQ603		0	Allan Bishoff	Vision	4	02	Sibling	11/08/1949	Single	N	No	TQABU	TQ10200	TQA	USA
TQ604		0	Jessica Morris	Medical	3	01	Child	03/30/1967	Single	N	Yes	TQABU	TQ11000	TQA	USA
TQ604		0	Jessica Morris	Dental	3	01	Child	03/30/1967	Single	N	Yes	TQABU	TQ11000	TQA	USA

Preparation and Election Error Page

Use the Preparation and Election page to get reports on errors appearing during preparation and election of benefit plans.

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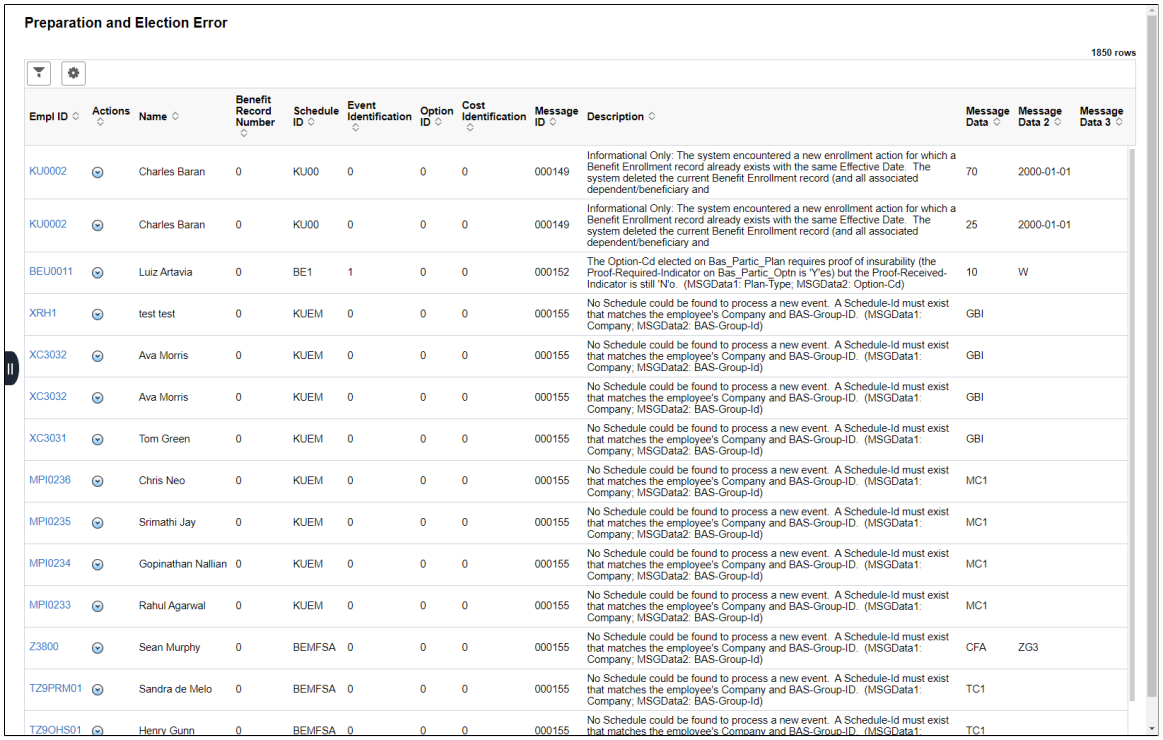
Image: Preparation and Election Error Page

This example illustrates the fields and controls on the Preparation and Election Error Page.



Preparation and Election Error

1850 rows

Empl ID	Actions	Name	Benefit Record Number	Schedule ID	Event Identification	Option ID	Cost Identification	Message ID	Description	Message Data	Message Data 2	Message Data 3
KU0002		Charles Baran	0	KU00	0	0	0	000149	Informational Only: The system encountered a new enrollment action for which a Benefit Enrollment record already exists with the same Effective Date. The system deleted the current Benefit Enrollment record (and all associated dependent/beneficiary and	70	2000-01-01	
KU0002		Charles Baran	0	KU00	0	0	0	000149	Informational Only: The system encountered a new enrollment action for which a Benefit Enrollment record already exists with the same Effective Date. The system deleted the current Benefit Enrollment record (and all associated dependent/beneficiary and	25	2000-01-01	
BEU0011		Luiz Artavia	0	BE1	1	0	0	000152	The Option-Cd elected on Bas_Partic_Plan requires proof of insurability (the Proof-Required-Indicator on Bas_Partic_Optn is 'Y'es) but the Proof-Received-Indicator is still 'N'o. (MSGData1: Plan-Type; MSGData2: Option-Cd)	10	W	
XRH1		test test	0	KUEM	0	0	0	000155	No Schedule could be found to process a new event. A Schedule-Id must exist that matches the employee's Company and BAS-Group-ID. (MSGData1: Company; MSGData2: BAS-Group-Id)	GBI		
XC3032		Ava Morris	0	KUEM	0	0	0	000155	No Schedule could be found to process a new event. A Schedule-Id must exist that matches the employee's Company and BAS-Group-ID. (MSGData1: Company; MSGData2: BAS-Group-Id)	GBI		
XC3032		Ava Morris	0	KUEM	0	0	0	000155	No Schedule could be found to process a new event. A Schedule-Id must exist that matches the employee's Company and BAS-Group-ID. (MSGData1: Company; MSGData2: BAS-Group-Id)	GBI		
XC3031		Tom Green	0	KUEM	0	0	0	000155	No Schedule could be found to process a new event. A Schedule-Id must exist that matches the employee's Company and BAS-Group-ID. (MSGData1: Company; MSGData2: BAS-Group-Id)	GBI		
MPI0236		Chris Neo	0	KUEM	0	0	0	000155	No Schedule could be found to process a new event. A Schedule-Id must exist that matches the employee's Company and BAS-Group-ID. (MSGData1: Company; MSGData2: BAS-Group-Id)	MC1		
MPI0235		Srimathi Jay	0	KUEM	0	0	0	000155	No Schedule could be found to process a new event. A Schedule-Id must exist that matches the employee's Company and BAS-Group-ID. (MSGData1: Company; MSGData2: BAS-Group-Id)	MC1		
MPI0234		Gopinathan Nallian	0	KUEM	0	0	0	000155	No Schedule could be found to process a new event. A Schedule-Id must exist that matches the employee's Company and BAS-Group-ID. (MSGData1: Company; MSGData2: BAS-Group-Id)	MC1		
MPI0233		Rahul Agarwal	0	KUEM	0	0	0	000155	No Schedule could be found to process a new event. A Schedule-Id must exist that matches the employee's Company and BAS-Group-ID. (MSGData1: Company; MSGData2: BAS-Group-Id)	MC1		
Z3800		Sean Murphy	0	BEMFSA	0	0	0	000155	No Schedule could be found to process a new event. A Schedule-Id must exist that matches the employee's Company and BAS-Group-ID. (MSGData1: Company; MSGData2: BAS-Group-Id)	CFA	ZG3	
TZ9PRM01		Sandra de Melo	0	BEMFSA	0	0	0	000155	No Schedule could be found to process a new event. A Schedule-Id must exist that matches the employee's Company and BAS-Group-ID. (MSGData1: Company; MSGData2: BAS-Group-Id)	TC1		
TZ9OHS01		Henry Gunn	0	BEMFSA	0	0	0	000155	No Schedule could be found to process a new event. A Schedule-Id must exist that matches the employee's Company and BAS-Group-ID. (MSGData1:	TC1		

Eligibility Status TBD Page

Use the Eligibility Status TBD page to get a report on the employees with the ACA eligibility status as “To be Determined”.

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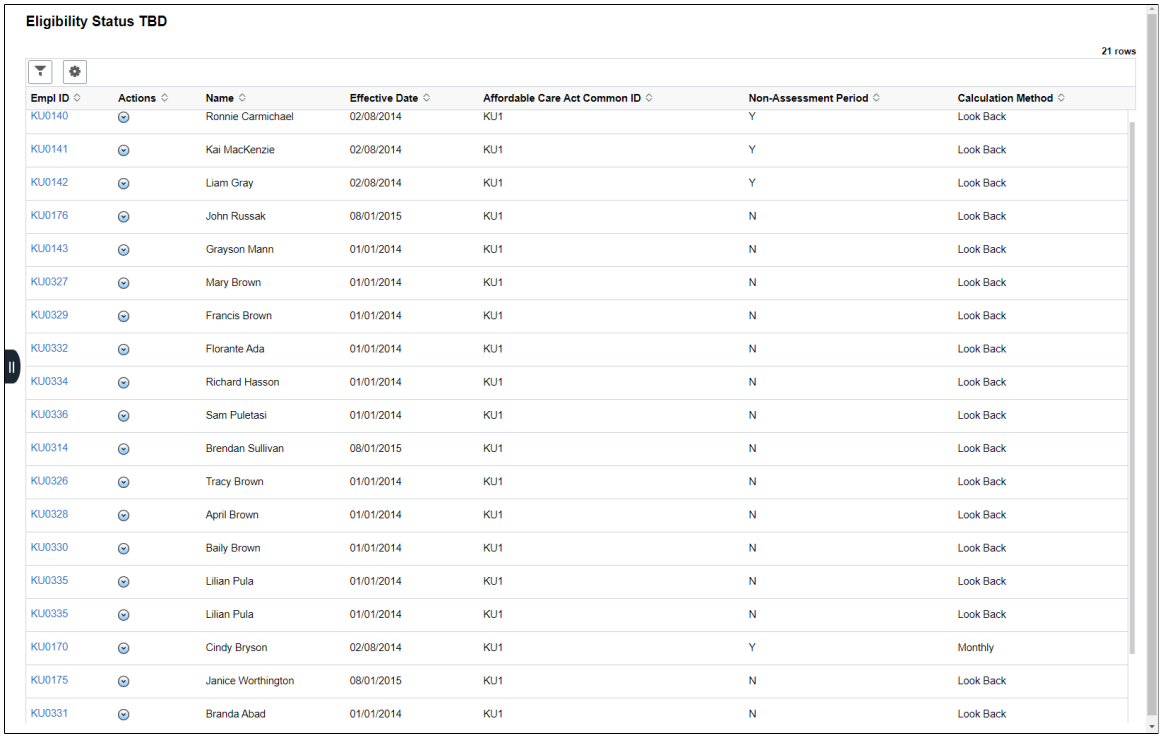
Image: Eligibility Status TBD Page

This example illustrates the fields and controls on the Eligibility Status TBD Page.

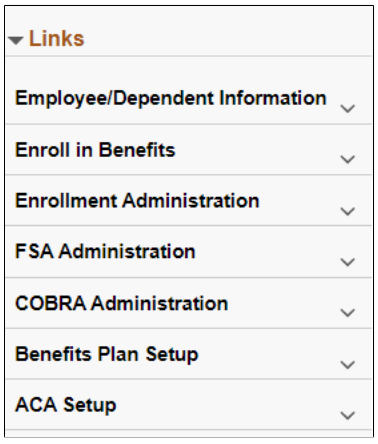


Understanding the Links Group Box

The Links group box provides access to the key components in Benefits. It contains links that users need to do their daily benefits-related work.

Image: Links Group Box

This example illustrates the Links Group Box.



System administrators can manage links and configuration options for the Links Group Box on the "Configure Pagelets - Links Page" (PeopleSoft 9.2: Enterprise Components).

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Understanding the Queries Group Box

The Queries group box contains:

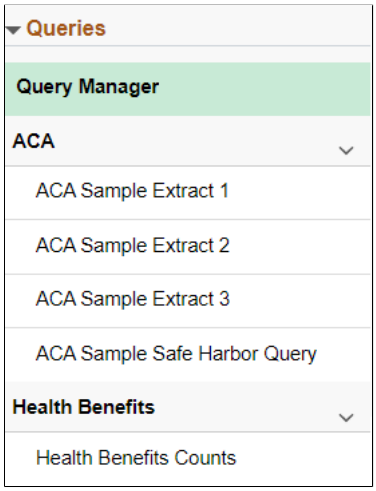
- The Query Manager link

  Users can click this link to search for existing queries or create new ones to use.

- ACA queries
- Health Benefits queries

Image: Queries Group Box

This example illustrates the Queries Group Box.



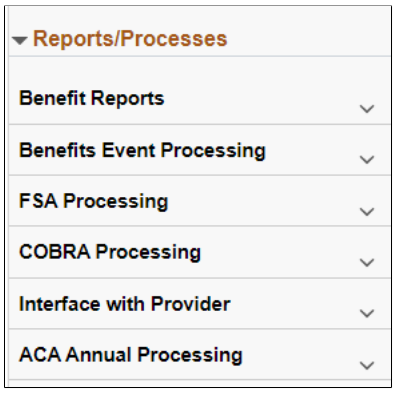
Administrators can manage links and configuration options for the Queries Group Box on the "Configure Pagelets – Queries Page" (PeopleSoft 9.2: Enterprise Components).

Understanding the Reports/Processes Group Box

The Reports/Processes group box provides access to the run control pages for existing benefits analytics, reports and processes.

Image: Reports/Processes Group Box

This example illustrates the Reports/Processes Group Box.



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Administrators can manage links and configuration options for the Reports/Processes group box on the "Configure Pagelets – Reports/Processes Page" (PeopleSoft 9.2: Enterprise Components).

Working With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface

This topic discusses how employees use the PeopleSoft Fluid User Interface to perform benefits self service activities using the Benefit Details Tile Dashboard.

PeopleSoft HCM provides two navigation options for Benefit Details while using Employee Self Service:

- Navigation Collection

  For more information on the Benefit Details Navigation Collection, refer Working with Benefit Details Navigation Collection Using the PeopleSoft Fluid User Interface.

- Tile Dashboard

  Note: Only users with the appropriate roles are allowed to access and use the Benefit Details tile dashboard.

The Benefit Details tile dashboard provides tiles which show live data for corresponding transaction pages. You can review the live information on a tile, and decide if you need to access it for further action. Like any fluid homepage, you can easily remove or add tiles from a dashboard using the personalization option.

For general information about fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals).

Pages Used to Work With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface

Page/Tile Name	*Definition Name*	*Usage*
Benefit Details Tile	HC_EBEN_SS_NAVCOLL_FL (cref for the tile) W3EB_ENR_TILE_FLU (page for dynamic data)	Access the Benefit Details Tile Dashboard.
Benefit Details Tile Dashboard	HC_EBEN_SS_DTLS_FL_GBL	Access the interactive tiles for benefits self service transactions.
Benefits Summary Tile	HC_BEN_SUMM_GRID_DB_FL	Access the Benefits Summary page.
Benefits Summary Page	BEN_SUMM_GRID_FL	View summary information about benefits.
Life Events Tile	HC_W3EB_SEL_EVNT_DB_FL	Access the Life Events page.

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Page/Tile Name	*Definition Name*	*Usage*
Life Events Page	W3EB_SEL_EVNT_FLU	Initiate processing for a life event that affects benefits.
Dependent/Beneficiary Info Tile	HC_W3EB_DEPBNSMRY_DB_FL	Access the Dependent/Beneficiary Info page.
Dependent/Beneficiary Info Page	W3EB_DEPBNSMRY_FL	Update information about dependents and beneficiaries.
Benefits Enrollment Tile	HC_BNE_SEL_EVENT_DB_FL	Access the Benefits Enrollment pages.
Benefits Enrollment pages: Benefits Enrollment Event Selection Page Benefits Enrollment Page	BNE_SEL_EVENT_FL BNE_CARD_SUMM_FL BNE_LE_ENROLL1_FL	View all currently active benefits enrollment events. View enrollment summary information and the benefit plans you are eligible to elect from.
Benefits Statements Tile	HC_BAS_STATMNTS_DB_FL	Access the Benefits Statements page.
Benefits Statement Page	BAS_STATMNTS_FL	View a list of benefits enrollment preview and confirmation statements.
Affordable Care Act: View Form 1095-C Tile	HC_ACA_EE_YE_FORM_DB_FL	Access the View Form 1095-C page.
Affordable Care Act: View Form 1095-C Page	ACA_EE_YE_FORM_FL	View the Form 1095-C generated each year and submitted to the IRS.
Affordable Care Act: Form 1095-C Consent Tile	HC_ACA_SS_CONSENT_DB_FL	Access the Form 1095-C Consent page.
Affordable Care Act: Form 1095-C Consent Page	ACA_SS_CONSENT_FL	Access the consent form to grant or withdraw consent to receive the Form 1095-C for the current year in an electronic format.
Benefits Attachment TileBenefits Attachment Page	BEN_ATTACH_FL	Access the Benefits Attachment page to review the uploaded documents and its status.

Benefit Details Tile

Employees use the Benefit Details tile (HC_EBEN_SS_NAVCOLL_FL (cref for the tile), W3EB_ENR_TILE_FLU (page for dynamic data)) to access the Benefit Details Tile Dashboard.

Navigation

The Benefit Details tile is delivered as part of the "Employee Self-Service Home Page" (PeopleSoft HCM 9.2: Application Fundamentals), but the location can change if you change the delivered home pages or if employees personalize their home pages.

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Image: (Tablet) Benefit Details tile

This example illustrates the Benefit Details tile for the tablet.

The Benefit Details tile displays “Action Required” whenever there is a pending action for the employee. For example, an enrollment process is in progress or a life event is initiated and submission from the employee is pending.

Image: (Smartphone) Benefit Details tile

This example illustrates the Benefit Details tile for the smartphone.

Click the Benefit Details tile to access the Benefit Details tile dashboard.

Benefit Details Tile Dashboard

Use the Benefit Details Tile dashboard to access the interactive tiles for benefits self service transactions.

Navigation

On the delivered Employee Self Service dashboard, click the Benefit Details tile.

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Image: Benefit Details tile dashboard

This example illustrates the Benefit Details tile dashboard.

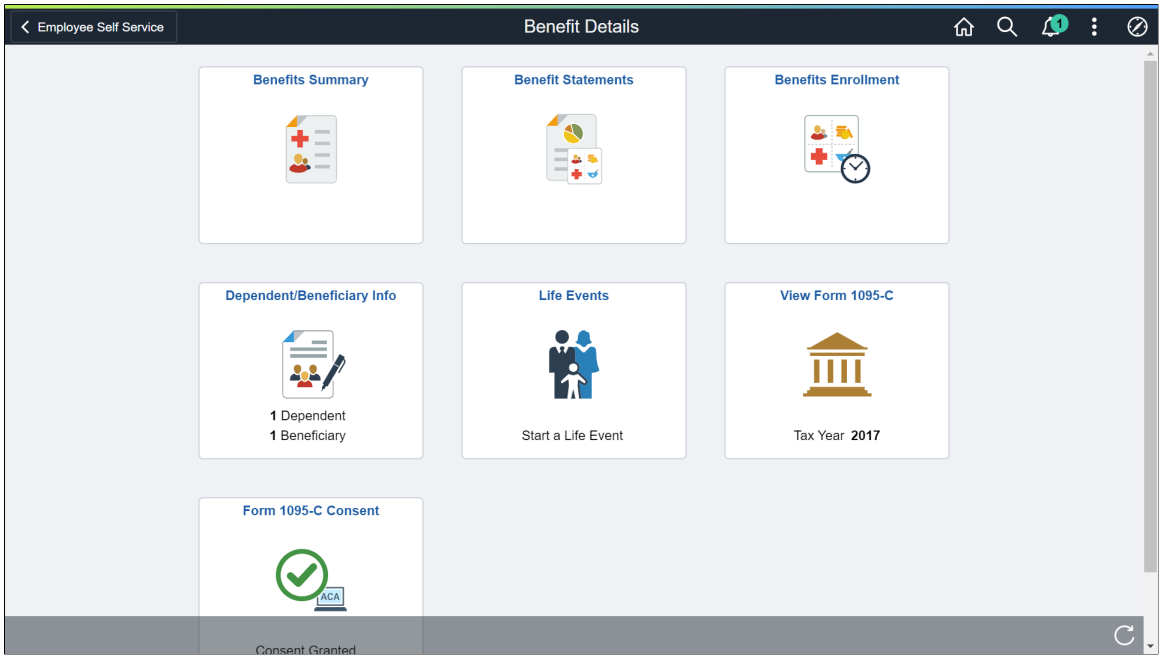

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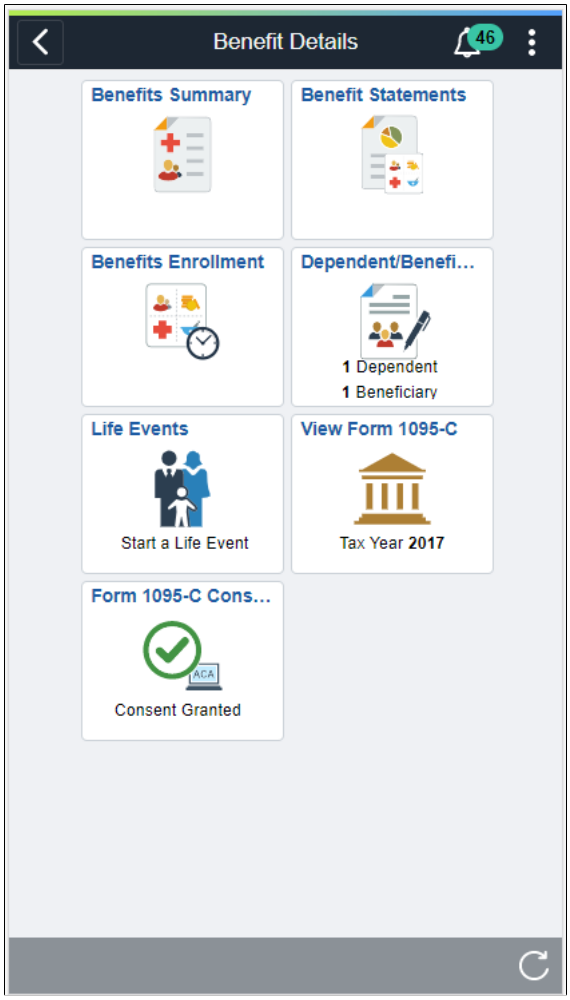
Image: Benefit Details Tile Dashboard as seen on a smartphone

This example illustrates the Benefit Details Tile Dashboard as seen on a smartphone.



Note: If you have not uptaken components for fluid features like Life Events, Benefits Summary, Benefits Enrollment, Benefits Statements and ACA Form 1095-C and Consent pages, the corresponding tiles on your Benefit Details Tile Dashboard display "You do not have access to this information." When you click this tile, a page opens to again display the same message.

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Image: Tile showing No Authorization

This example illustrates the Tile showing No Authorization.

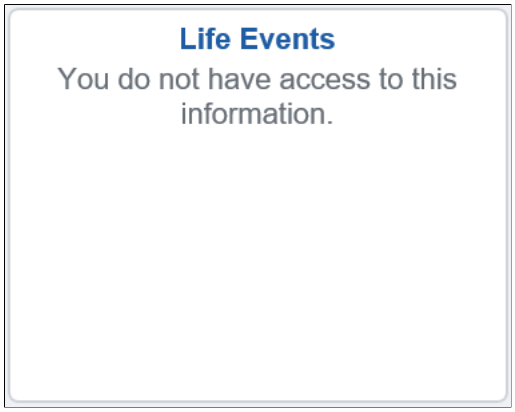

Image: No Authorization page

This example illustrates the No Authorization page.

Image Highlights, PeopleSoft HCM Update Image 34: Self-Service Navigation Updates

Benefits Summary Tile

Use the Benefits Summary tile to access the Benefits Summary page.

Navigation

On the delivered Employee Self Service home page, click the Benefit Details tile to access the Benefit Details Tile Dashboard. The Benefits Summary tile is available on the Benefit Details Tile Dashboard.

Image: Benefits Summary tile

This example illustrates the Benefits Summary tile.

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Benefits Summary Page

Use the Benefits Summary page (BEN_SUMM_GRID_FL) to view summary information about benefits.

Navigation

On the Benefit Details Tile Dashboard, click the Benefits Summary tile.

Image: Benefits Summary page

This example illustrates the Benefits Summary page, in card view.

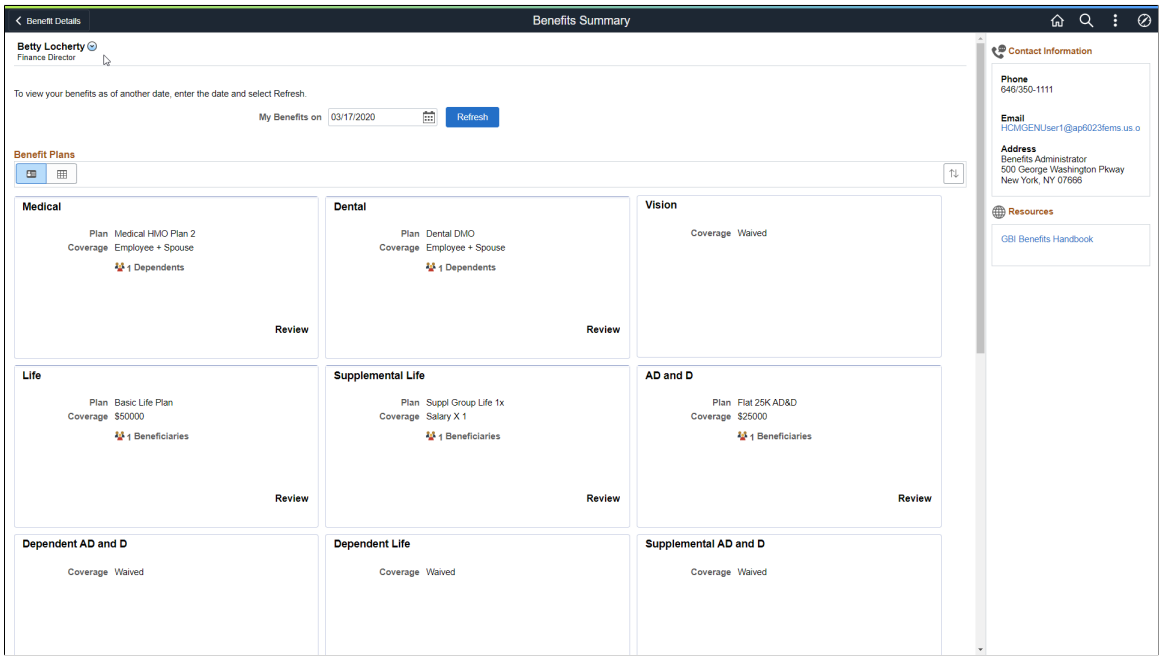

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Image: Benefits Summary page

This example illustrates the Benefits Summary page, in grid view.

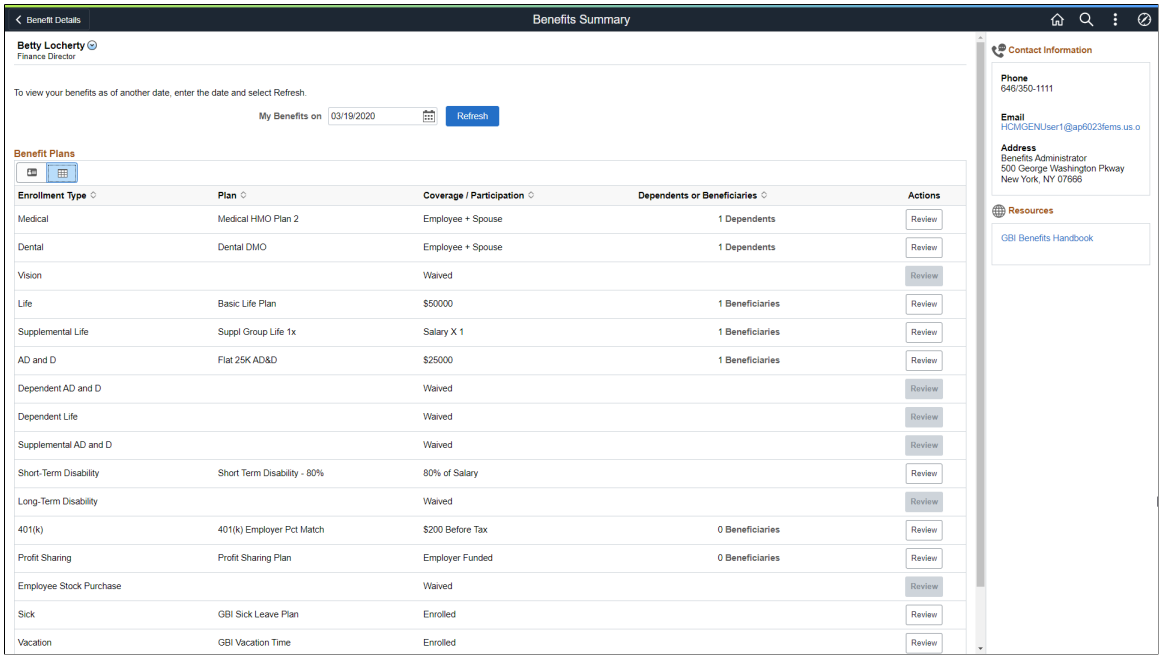

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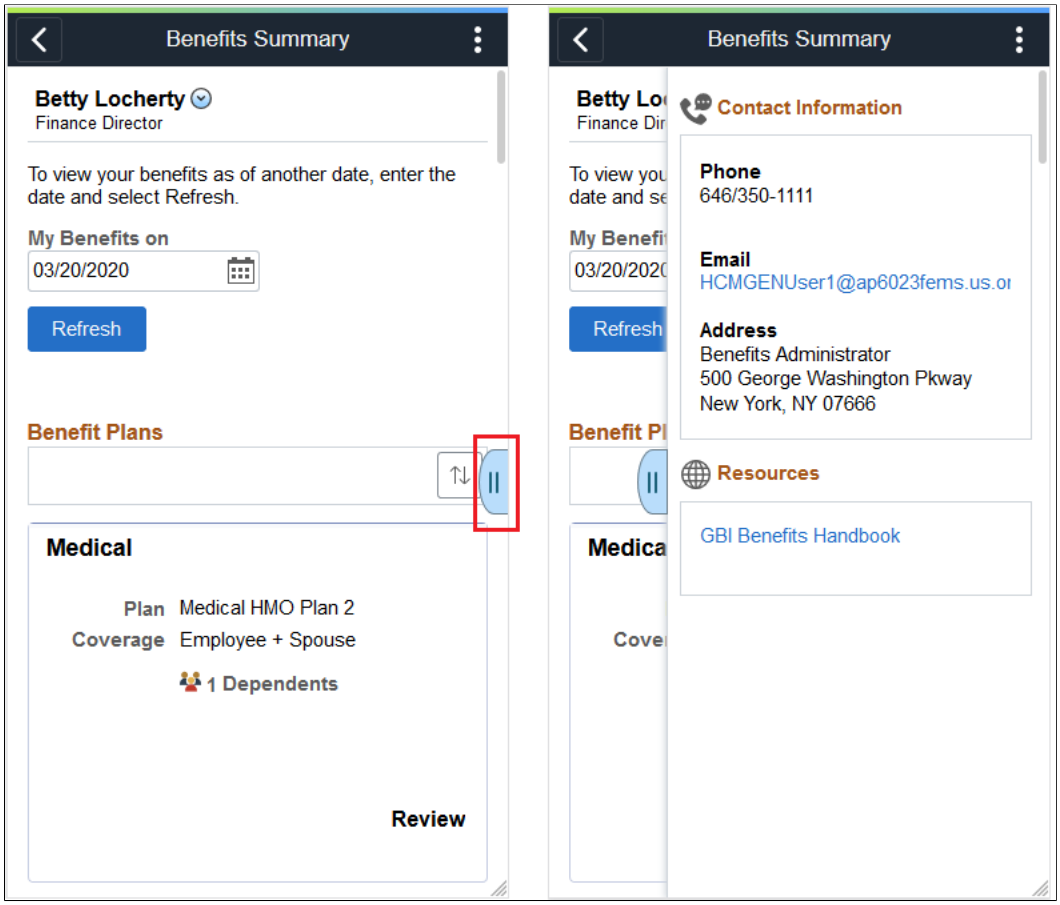
Image: (Smartphone) Benefits Summary page

This example illustrates the Benefits Summary page for the smartphone. The first image, shows the right panel collapsed, the second image has the right panel expanded.



My Benefits on

By default, the page displays benefits as of the current date. To view benefits as of a different date, choose a new date and click the Refresh button.

Benefits Plans

You can choose to see your benefit plans in either the card or grid view.

In the card view, each benefit plan card shows the plan type, employee's coverage or participation information, and the number of dependents/beneficiaries. You can click the card to access corresponding benefit plan page to review the plan details.

The grid view shows the enrollment types, a brief description of the benefits, the employee's coverage or participation, number of dependents/beneficiaries and a Review button.

For more information on how to review your benefit plans using the Benefits Summary page, refer Reviewing Benefit Plans Using the PeopleSoft Fluid User Interface.

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Life Events Tile

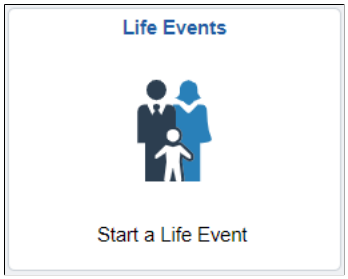
Use the Life Events tile to access the Life Events page.

Navigation

On the delivered Employee Self Service home page, click the Benefit Details tile. Life Events tile is available on the Benefit Details Tile Dashboard.

Image: Life Events tile

This example illustrates the Life Events tile.



When a life event is in progress the tile gives indication to “Resume <event name>”.

Life Events Page

Use the Life Events page (W3EB_SEL_EVNT_FLU) to initiate processing for a life event that affects your benefits.

For the video feature overview on Fluid Life Events, see

PeopleSoft Fluid Life Events .

Navigation

On the delivered Employee Self Service home page, click the Benefit Details tile and then on the Benefit Details Tile Dashboard, click the Life Events tile.

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Image: (Tablet) Life Events page

This example illustrates the Life Events page for the tablet.

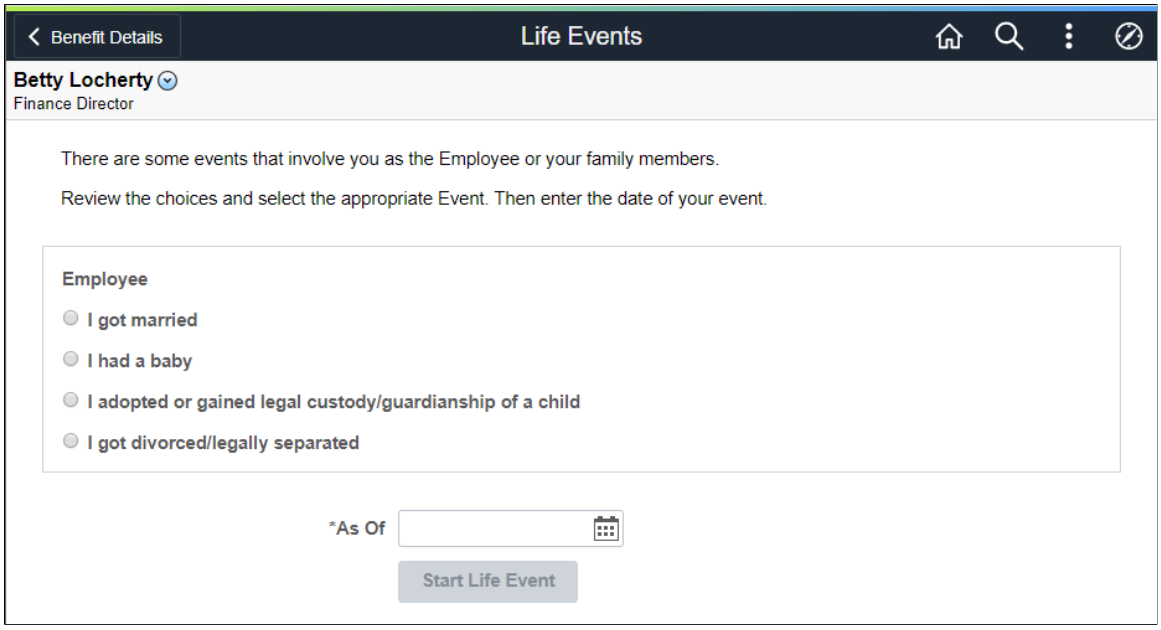
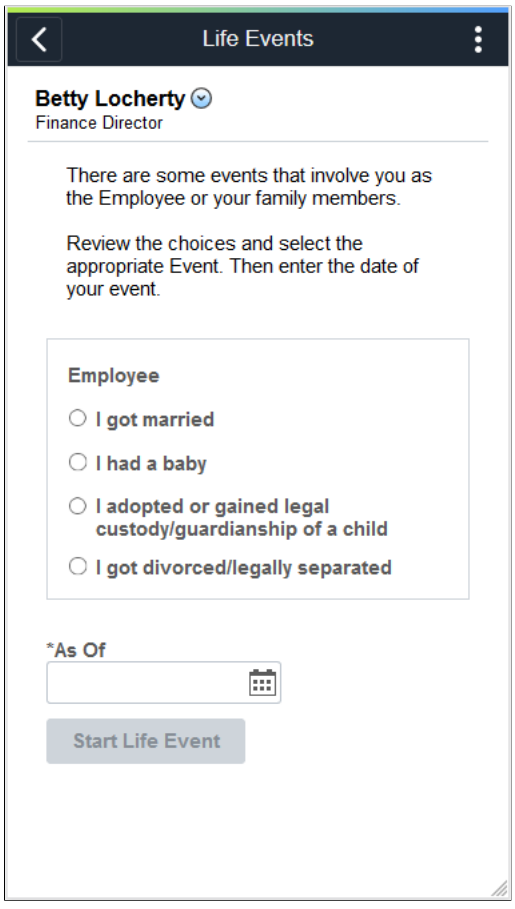


Image: (Smartphone) Life Events page

This example illustrates the Life Events page for the smartphone.



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This page lists the same life event options that an employee sees on the classic life events pages.

When you select the type of life event, the page displays a message with information about the time period within which the life event information must be submitted (for example, within 31 days of the event).

Next you enter the event date and click the Complete Life Event button. The system then displays the classic life event pages where you complete the transaction.

For information about the pages used for the four delivered life events, see the following topics:

- "Processing the Marriage Event" (PeopleSoft HCM 9.2: eBenefits)
- "Processing the Child Birth Event" (PeopleSoft HCM 9.2: eBenefits)
- "Processing the Adoption Event" (PeopleSoft HCM 9.2: eBenefits)
- "Processing the Divorce Event" (PeopleSoft HCM 9.2: eBenefits)

Related Links

"Delegating Life Events Document Approval Using Fluid Delegations" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Dependent/Beneficiary Info Tile

Use the Dependent/Beneficiary Info tile to access the Dependent/Beneficiary Info page.

Navigation

On the delivered Employee Self Service home page, click the Benefit Details tile to access the Benefit Details Tile Dashboard. The Dependent/Beneficiary Info tile is available on the Benefit Details Tile Dashboard.

Image: Dependent/Beneficiary Info Tile

This example illustrates the Dependent/Beneficiary Info Tile.

Dependent/Beneficiary Info Page

Use the Dependent/Beneficiary Info page (W3EB_DEPBNSMRY_FL) to update information about dependents and beneficiaries.

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Note: Whenever an employee makes changes to the Dependent/Beneficiary Info page in Employee Self Service, the changes are automatically reflected in the administrator (Update Dependent/Beneficiary) pages.
If the administrator has set up the Dependent Workflow, he/she can select to receive an email notification when an employee modifies the Dependent/Beneficiary Info page.

Navigation

On the delivered Employee Self Service home page, click the Benefit Details tile, and then click the Dependent/Beneficiary Info tile.

Image: Dependent and Beneficiary Information page

This example illustrates the Dependent and Beneficiary Information page.

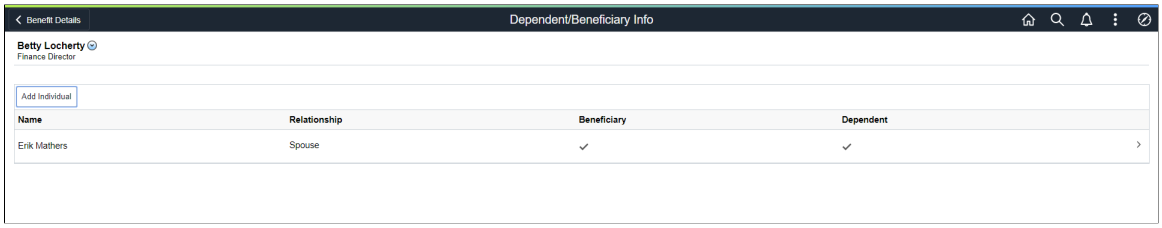

Image: (Smartphone) Dependent/Beneficiary Info page

This example illustrates the Dependent/Beneficiary Info page for the smartphone.

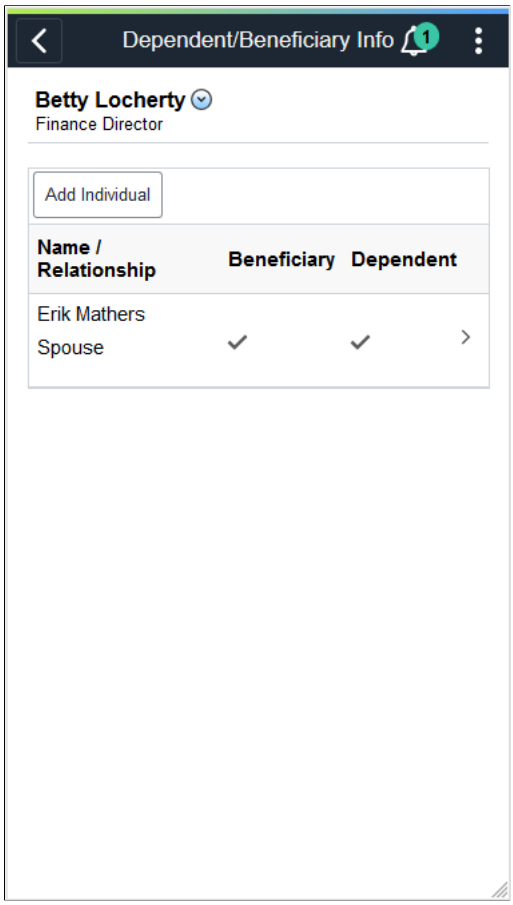

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Image: (Tablet) Individual Dependent/Beneficiary Information page (Part 1 of 2)

The following example illustrates the Individual Dependent/Beneficiary Information page for the tablet.

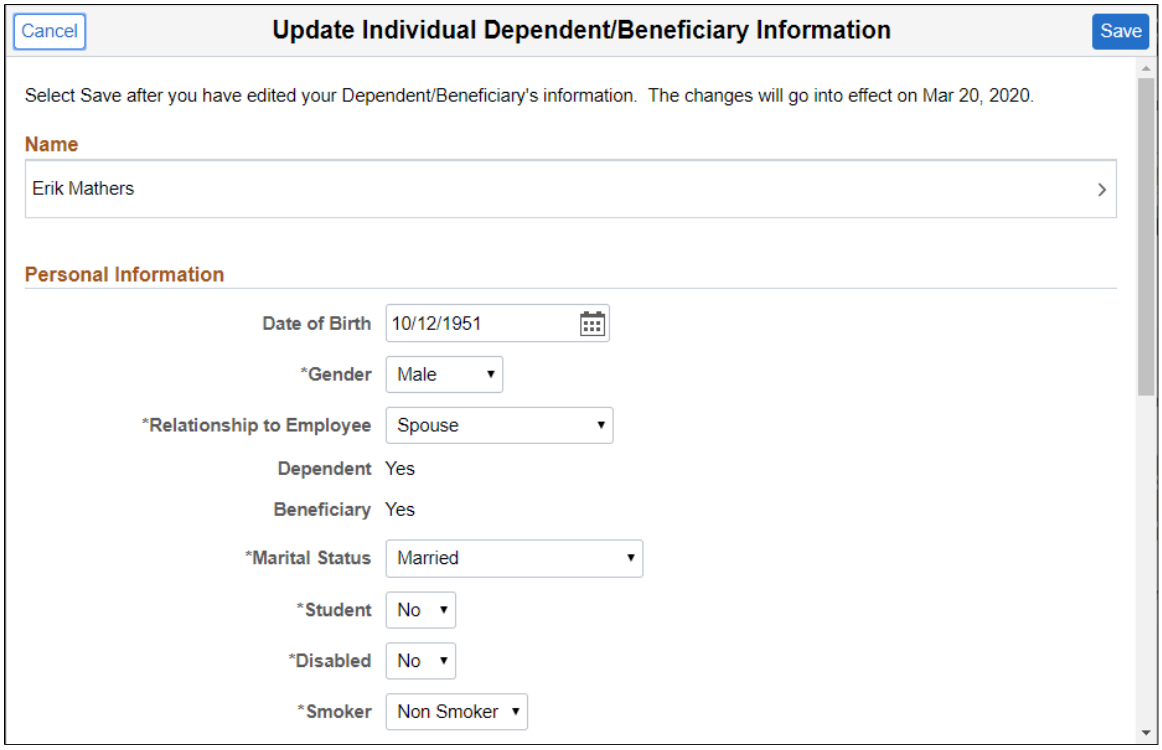

Image: (Tablet) Individual Dependent/Beneficiary Information page (Part 2 of 2)

The following example illustrates the Individual Dependent/Beneficiary Information page for the tablet.

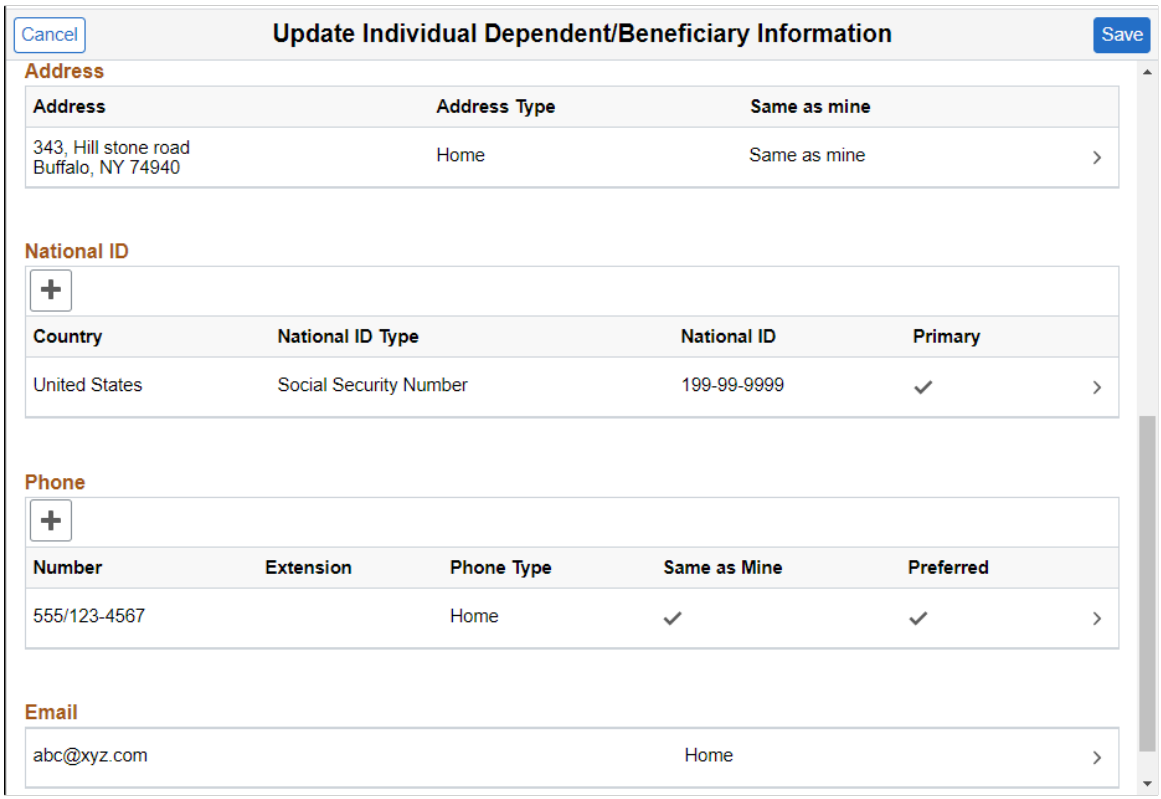

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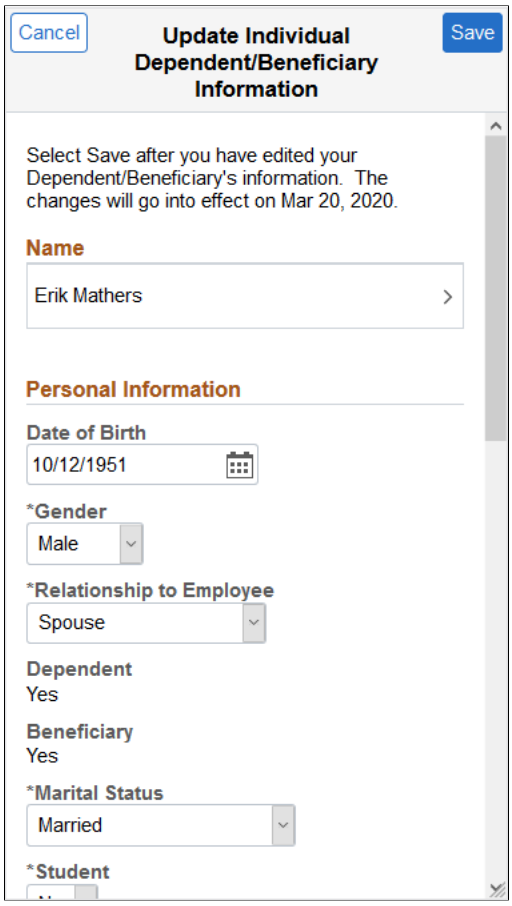
Image: (Smartphone) Individual Dependent/Beneficiary Information page

The following example illustrates the Individual Dependent/Beneficiary Information page for the smartphone.



Name Modal Window

Select the Name field to modify the name of a dependent/beneficiary.

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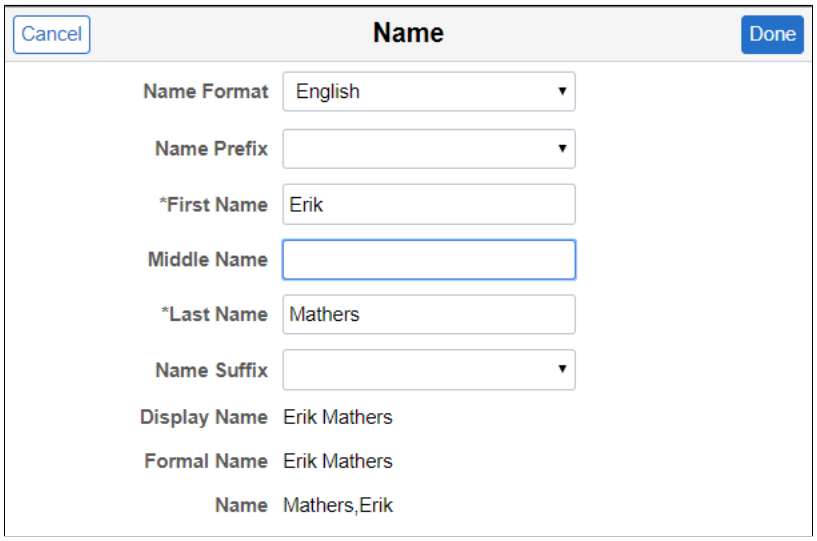
Image: (Tablet) Name modal window

This example illustrates the Name modal window for the tablet.



Address Modal Window

The address of a newly added dependent or beneficiary defaults to the ‘Same as mine’ slider equals ‘Yes’, and the home address as given in the employee’s Personal Information is displayed in the grid.

If the employee's Personal Information has no home address, then no address is displayed on the grid. You can select the Add Address row to open the Address modal window and add an address.

In the Address modal window, with the ‘Same as mine’ slider equals ‘Yes’, you can select an existing address type of the employee.

You can choose ‘No’ on the ‘Same as mine’ slider to add a different address.

If the employee's Personal Information has a home address, you can select the Address row to open the Address modal window to modify the address.

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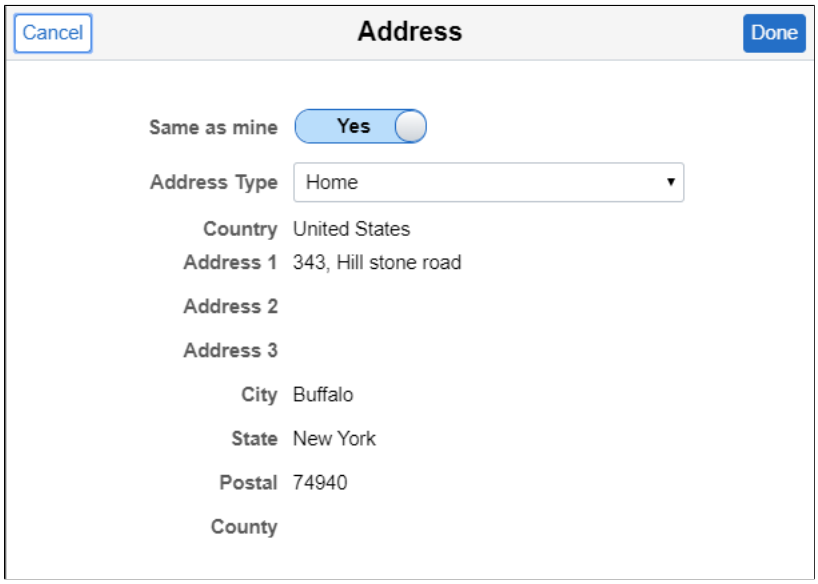
Image: (Tablet) Address modal window

This example illustrates the Address modal window for the tablet.



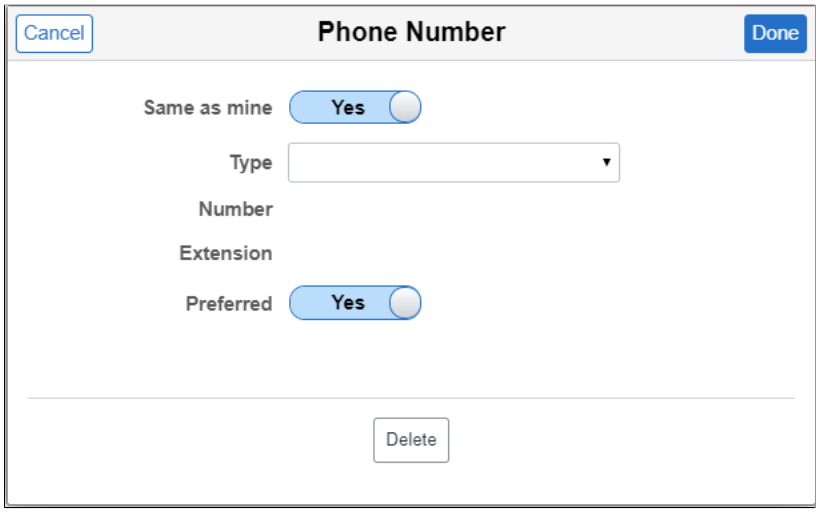
National ID Modal Window

Select the Add National ID button to add the national ID. Dependents and beneficiaries with citizenship in more than one country can have more than one national ID. Add an additional row when required.

Note: The national ID feature is supported only for the countries United States and Canada.
You cannot delete a national ID through Employee Self Service. Only an Administrator user has the rights to delete an existing national ID.

Image: (Tablet) National ID modal window

This example illustrates the National ID modal window for the tablet.



Country Select the country for which the national ID is entered.

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Note: The national ID feature currently supports only the countries United States and Canada.

Primary

When more than one national ID is added, use this option to indicate which national ID should be considered as the primary ID.

By default, the first national ID entered is considered the primary ID.

Phone Number Modal Window

Select the Add Phone button to add a phone number.

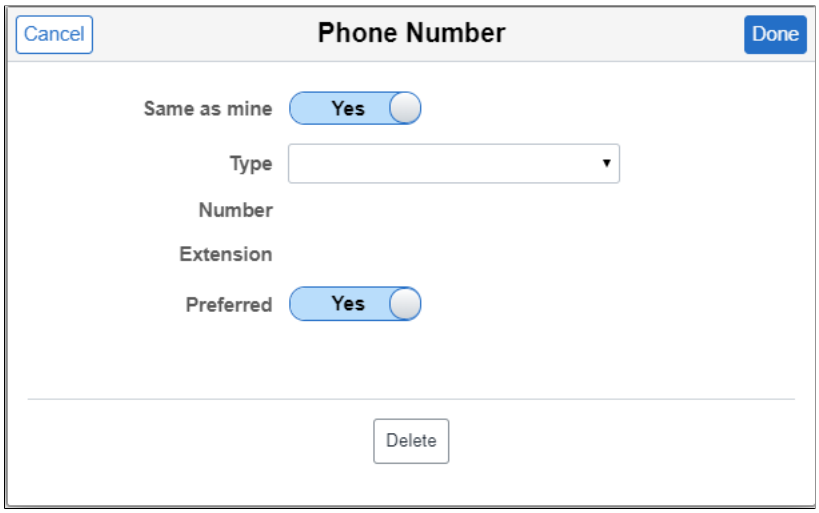
In the Phone Number modal window, the ‘Same as mine’ slider defaults to ‘No’. You can choose ‘Yes’ on the slider to add an already existing phone number in the employee’s Personal Information.

You can choose ‘No’ on the slider to add a new phone number for the dependent or beneficiary.

By default, the first phone number you add for the dependent/beneficiary is automatically set as their preferred number.

Image: (Tablet) Phone Number modal window

This example illustrates the Phone Number modal window for the tablet.



Same as mine

Choose Yes on the ‘Same as mine’ slider to select one of your already existing phone numbers for the dependent/beneficiary. To add a different phone number, choose No on the ‘Same as mine’ slider.

Type

For a ‘Same as mine’ equals ‘Yes’ phone number, you can choose any available phone type the employee has on his/her Personal Information.

If you choose No on the ‘Same as mine’ slider, you can add any available type from the drop-down list.

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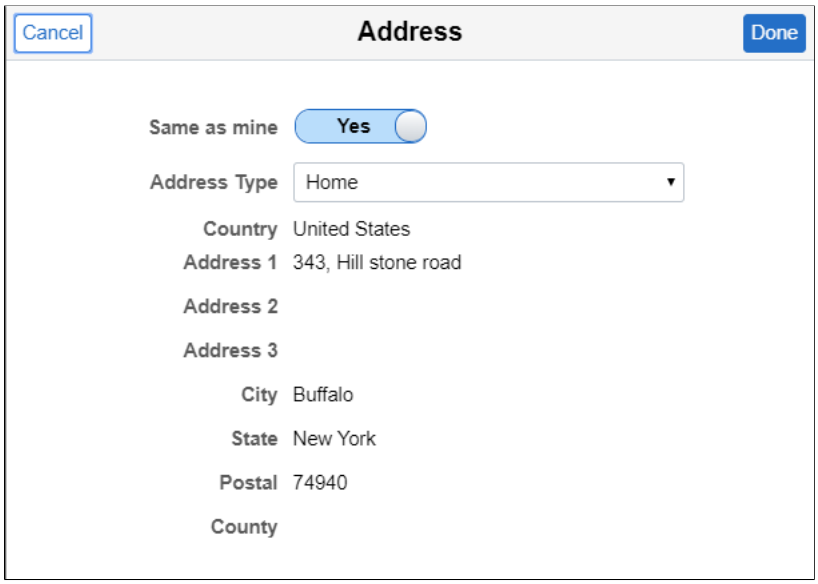
Preferred	By default, the first phone number you add is selected as a preferred number. You can select 'Yes' on the 'Preferred' slider to set a different phone number as your preferred number. **Note:** Only one phone number can be chosen as the preferred number.
Delete	Use the Delete button to delete a phone number.

Email Address Modal Window

Select the Add Email button to add an email ID.

Image: (Tablet) Email Address modal window

This example illustrates the Email Address modal window for the tablet.



Benefits Enrollment Tile

Use the Benefits Enrollment tile to access the Benefits Enrollment pages.

Navigation

On the delivered Employee Self Service home page, click the Benefit Details tile. Benefits Enrollment tile is available on the Benefit Details Tile Dashboard.

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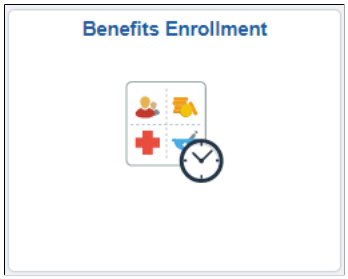
Image: Benefits Enrollment Tile

This example illustrates the Benefits Enrollment tile.



Benefits Statements Tile

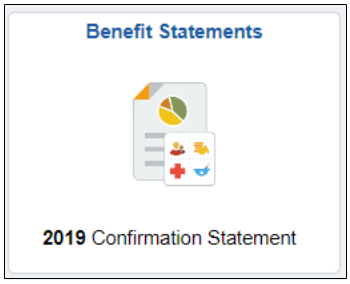
Use the Benefits Statements tile to access the Benefits Statement Page .

Navigation

On the delivered Employee Self Service home page, click the Benefit Details tile to access the Benefit Details Tile dashboard. The Benefits Statements tile is available on the Benefit Details Tile dashboard.

Image: Benefits Statements tile

This example illustrates the Benefits Statements tile.



The Benefits Statements tile displays live data regarding the latest statement available.

View Form 1095-C Tile

Use the View Form 1095-C tile to access the View Form 1095-C page.

Navigation

On the delivered Employee Self Service home page, click the Benefit Details tile to access the Benefit Details Tile Dashboard. The View Form 1095-C tile is available on the Benefit Details Tile Dashboard.

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Image: View Form 1095-C tile

This example illustrates the View Form 1095-C tile.

The View Form 1095-C tile displays the tax year of the latest Form 1095-C generated for the employee.

View Form 1095-C Page

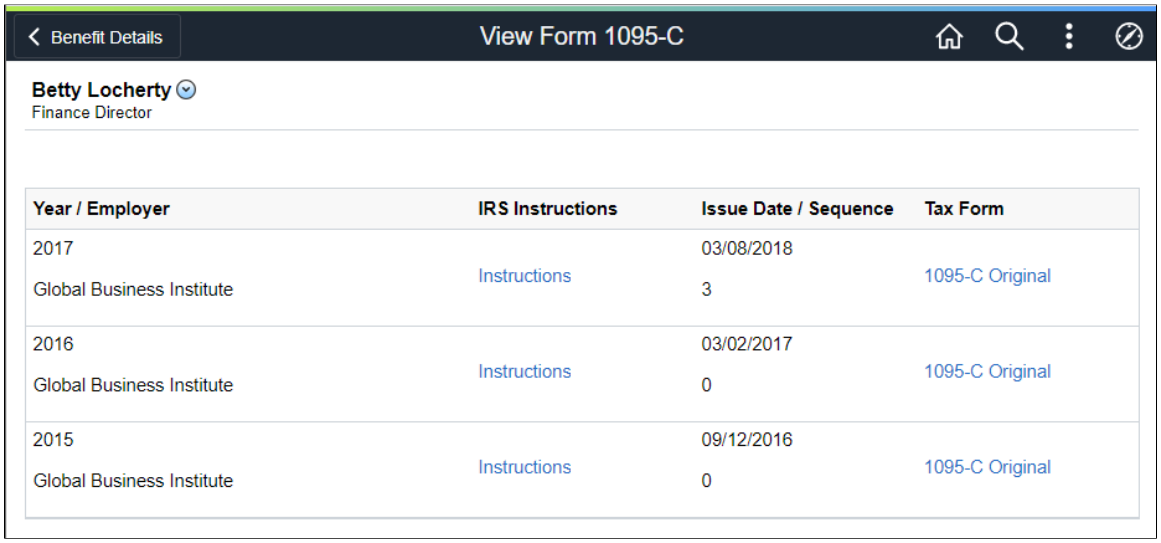
Use the View Form 1095-C page (HC_ACA_EE_YE_FORM_FL) to view the Form 1095-C generated each year and submitted to the IRS.

Navigation

Click the Benefits tile on a PeopleSoft Fluid User Interface Employee Self Service homepage, click the Affordable Care Act tab on the Benefits Details page, and then click the View Form 1095-C Consent tab.

Image: (Tablet) View Form 1095-C page

This example illustrates the View Form 1095-C page for the tablet.



IRS Instructions	Click this link to open the filing instructions of the Form 1095-C for the corresponding year.
Issue Date/Sequence	Displays the date on which the corresponding form was available in Self Service and the sequence of the form.
Tax Form	Click this link to open the PDF of Form 1095-C. There are three kinds of tax forms which could be available for the employee: Original, Reissue and Correction.

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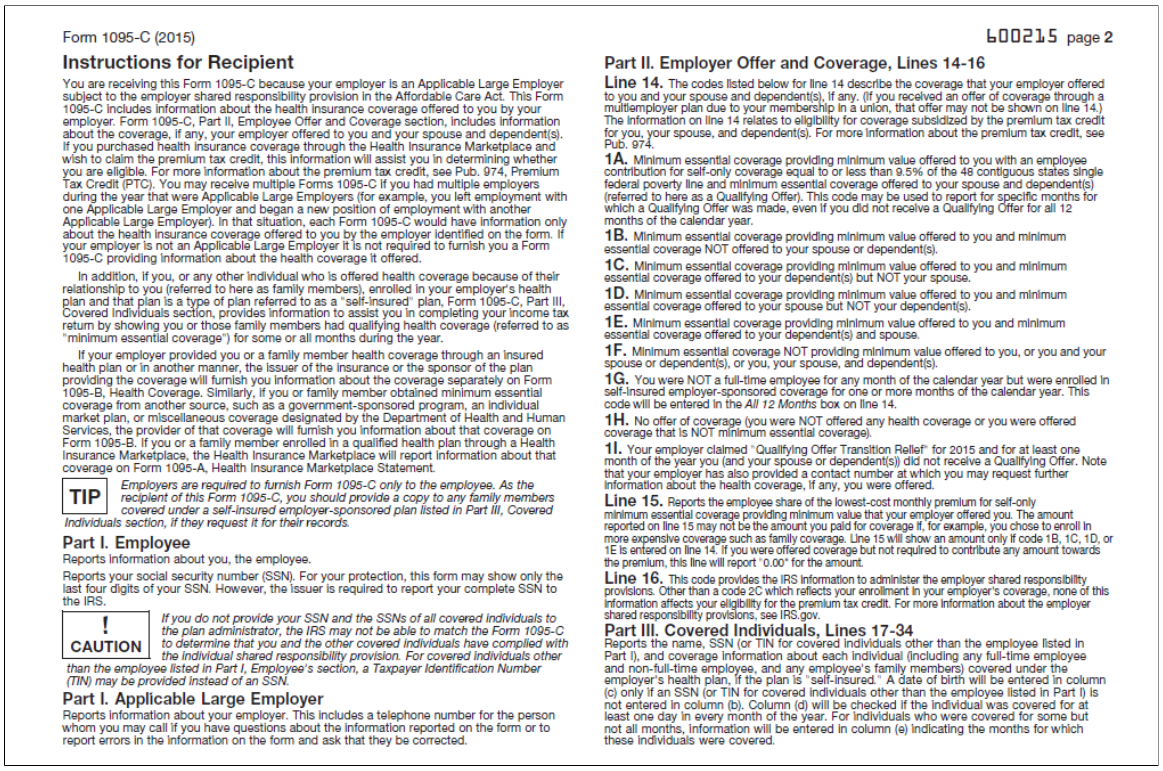
Image: Form 1095-C_IRS Instructions

This example illustrates the IRS Instructions page which opens when you click the Instructions link on the View Form 1095-C page.



Form 1095-C (2015) 600215 page 2

Instructions for Recipient

You are receiving this Form 1095-C because your employer is an Applicable Large Employer subject to the employer shared responsibility provision in the Affordable Care Act. This Form 1095-C includes information about the health insurance coverage offered to you by your employer. Form 1095-C, Part II, Employee Offer and Coverage section, includes information about the coverage, if any, your employer offered to you and your spouse and dependent(s). If you purchased health insurance coverage through the Health Insurance Marketplace and wish to claim the premium tax credit, this information will assist you in determining whether you are eligible. For more information about the premium tax credit, see Pub. 974, Premium Tax Credit (PTC). You may receive multiple Forms 1095-C if you had multiple employers during the year that were Applicable Large Employers (for example, you left employment with one Applicable Large Employer and began a new position of employment with another Applicable Large Employer). In that situation, each Form 1095-C would have information only about the health insurance coverage offered to you by the employer identified on the form. If your employer is not an Applicable Large Employer it is not required to furnish you a Form 1095-C providing information about the health coverage it offered.

In addition, if you, or any other individual who is offered health coverage because of their relationship to you (referred to here as family members), enrolled in your employer's health plan and that plan is a type of plan referred to as a "self-insured" plan, Form 1095-C, Part III, Covered Individuals section, provides information to assist you in completing your income tax return by showing you or those family members had qualifying health coverage (referred to as "minimum essential coverage") for some or all months during the year.

If your employer provided you or a family member health coverage through an insured health plan or in another manner, the issuer of the insurance or the sponsor of the plan providing the coverage will furnish you information about the coverage separately on Form 1095-B, Health Coverage. Similarly, if you or family member obtained minimum essential coverage from another source, such as a government-sponsored program, an individual market plan, or miscellaneous coverage designated by the Department of Health and Human Services, the provider of that coverage will furnish you information about that coverage on Form 1095-B. If you or a family member enrolled in a qualified health plan through a Health Insurance Marketplace, the Health Insurance Marketplace will report information about that coverage on Form 1095-A, Health Insurance Marketplace Statement.

TIP *Employers are required to furnish Form 1095-C only to the employee. As the recipient of this Form 1095-C, you should provide a copy to any family members covered under a self-insured employer-sponsored plan listed in Part III, Covered Individuals section, if they request it for their records.*

Part I. Employee

Reports information about you, the employee.

Reports your social security number (SSN). For your protection, this form may show only the last four digits of your SSN. However, the issuer is required to report your complete SSN to the IRS.

! CAUTION *If you do not provide your SSN and the SSNs of all covered individuals to the plan administrator, the IRS may not be able to match the Form 1095-C to determine that you and the other covered individuals have complied with the individual shared responsibility provision. For covered individuals other than the employee listed in Part I, Employee's section, a Taxpayer Identification Number (TIN) may be provided instead of an SSN.*

Part I. Applicable Large Employer

Reports information about your employer. This includes a telephone number for the person whom you may call if you have questions about the information reported on the form or to report errors in the information on the form and ask that they be corrected.

Part II. Employer Offer and Coverage, Lines 14-16

Line 14. The codes listed below for line 14 describe the coverage that your employer offered to you and your spouse and dependent(s), if any. (If you received an offer of coverage through a multiemployer plan due to your membership in a union, that offer may not be shown on line 14.) The information on line 14 relates to eligibility for coverage subsidized by the premium tax credit for you, your spouse, and dependent(s). For more information about the premium tax credit, see Pub. 974.

1A. Minimum essential coverage providing minimum value offered to you with an employee contribution for self-only coverage equal to or less than 9.5% of the 48 contiguous states single federal poverty line and minimum essential coverage offered to your spouse and dependent(s) (referred to here as a Qualifying Offer). This code may be used to report for specific months for which a Qualifying Offer was made, even if you did not receive a Qualifying Offer for all 12 months of the calendar year.

1B. Minimum essential coverage providing minimum value offered to you and minimum essential coverage NOT offered to your spouse or dependent(s).

1C. Minimum essential coverage providing minimum value offered to you and minimum essential coverage offered to your dependent(s) but NOT your spouse.

1D. Minimum essential coverage providing minimum value offered to you and minimum essential coverage offered to your spouse but NOT your dependent(s).

1E. Minimum essential coverage providing minimum value offered to you and minimum essential coverage offered to your dependent(s) and spouse.

1F. Minimum essential coverage NOT providing minimum value offered to you, or you and your spouse or dependent(s), or you, your spouse, and dependent(s).

1G. You were NOT a full-time employee for any month of the calendar year but were enrolled in self-insured employer-sponsored coverage for one or more months of the calendar year. This code will be entered in the *All 12 Months* box on line 14.

1H. No offer of coverage (you were NOT offered any health coverage or you were offered coverage that is NOT minimum essential coverage).

1I. Your employer claimed "Qualifying Offer Transition Relief" for 2015 and for at least one month of the year you (and your spouse or dependent(s)) did not receive a Qualifying Offer. Note that your employer has also provided a contact number at which you may request further information about the health coverage, if any, you were offered.

Line 15. Reports the employee share of the lowest-cost monthly premium for self-only minimum essential coverage providing minimum value that your employer offered you. The amount reported on line 15 may not be the amount you paid for coverage if, for example, you chose to enroll in more expensive coverage such as family coverage. Line 15 will show an amount only if code 1B, 1C, 1D, or 1E is entered on line 14. If you were offered coverage but not required to contribute any amount towards the premium, this line will report "0.00" for the amount.

Line 16. This code provides the IRS information to administer the employer shared responsibility provisions. Other than a code 2C which reflects your enrollment in your employer's coverage, none of this information affects your eligibility for the premium tax credit. For more information about the employer shared responsibility provisions, see IRS.gov.

Part III. Covered Individuals, Lines 17-34

Reports the name, SSN (or TIN for covered individuals other than the employee listed in Part I), and coverage information about each individual (including any full-time employee and non-full-time employee, and any employee's family members) covered under the employer's health plan. If the plan is "self-insured." A date of birth will be entered in column (c) only if an SSN (or TIN for covered individuals other than the employee listed in Part I) is not entered in column (b). Column (d) will be checked if the individual was covered for at least one day in every month of the year. For individuals who were covered for some but not all months, information will be entered in column (e) indicating the months for which these individuals were covered.

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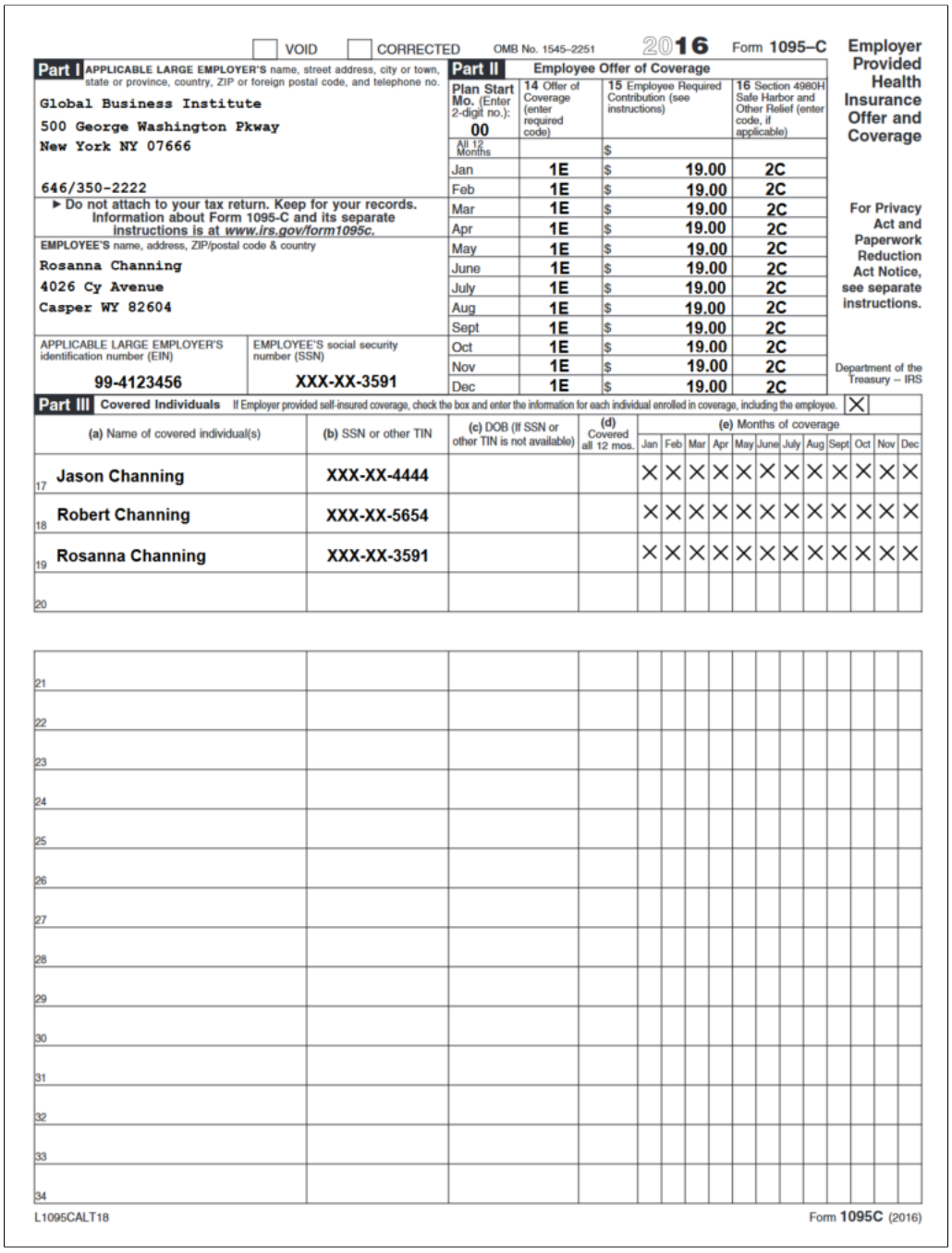
Image: (Tablet) Tax Form — Form 1095-C

This example illustrates the Tax Form – Form 1095-C which opens when you click a Tax Form link on the View Form 1095-C page.



☐ VOID ☐ CORRECTED OMB No. 1545-2251 **2016** Form **1095–C**

Employer Provided Health Insurance Offer and Coverage

Part I APPLICABLE LARGE EMPLOYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

Global Business Institute
500 George Washington Pkway
New York NY 07666

646/350-2222

▶ Do not attach to your tax return. Keep for your records. Information about Form 1095-C and its separate instructions is at *www.irs.gov/form1095c.*

EMPLOYEE'S name, address, ZIP/postal code & country

Rosanna Channing
4026 Cy Avenue
Casper WY 82604

APPLICABLE LARGE EMPLOYER'S identification number (EIN)	EMPLOYEE'S social security number (SSN)
99-4123456	XXX-XX-3591

Part II Employee Offer of Coverage

Plan Start Mo. (Enter 2-digit no.):	14 Offer of Coverage (enter required code)	15 Employee Required Contribution (see instructions)	16 Section 4980H Safe Harbor and Other Relief (enter code, if applicable)
00			
All 12 Months		$	
Jan	1E	$ 19.00	2C
Feb	1E	$ 19.00	2C
Mar	1E	$ 19.00	2C
Apr	1E	$ 19.00	2C
May	1E	$ 19.00	2C
June	1E	$ 19.00	2C
July	1E	$ 19.00	2C
Aug	1E	$ 19.00	2C
Sept	1E	$ 19.00	2C
Oct	1E	$ 19.00	2C
Nov	1E	$ 19.00	2C
Dec	1E	$ 19.00	2C

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Department of the Treasury -- IRS

Part III Covered Individuals If Employer provided self-insured coverage, check the box and enter the information for each individual enrolled in coverage, including the employee. ☒

	(a) Name of covered individual(s)	(b) SSN or other TIN	(c) DOB (If SSN or other TIN is not available)	(d) Covered all 12 mos.	(e) Months of coverage										
					Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
17	Jason Channing	XXX-XX-4444			X	X	X	X	X	X	X	X	X	X	X	X
18	Robert Channing	XXX-XX-5654			X	X	X	X	X	X	X	X	X	X	X	X
19	Rosanna Channing	XXX-XX-3591			X	X	X	X	X	X	X	X	X	X	X	X
20																
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L1095CALT18 Form **1095C** (2016)

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Image: (Smartphone) View Form 1095-C page

This example illustrates the View Form 1095-C page for the smartphone.

Form 1095-C Consent Tile

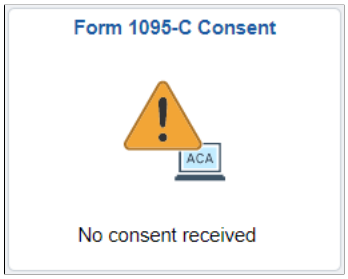
Use the Form 1095-C Consent tile to access the Form 1095-C Consent page.

Navigation

On the delivered Employee Self Service home page, click the Benefit Details tile to access the Benefit Details Tile Dashboard. The Form 1095-C Consent tile is available on the Benefit Details Tile Dashboard.

Image: Form 1095-C Consent tile

This example illustrates the Form 1095-C Consent tile.



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Form 1095-C Consent Page

Use the Form 1095-C Consent page (ACA_SS_CONSENT_FL) to access the consent form to grant or withdraw consent to receive the Form 1095-C for the current year in an electronic format.

Navigation

Click the Benefits tile on a PeopleSoft Fluid User Interface Employee Self Service homepage, click the Affordable Care Act tab on the Benefits page, and then click the Form 1095-C Consent tab.

Image: (Tablet) Form 1095-C Consent page

This example illustrates the Form 1095-C Consent page for the tablet.

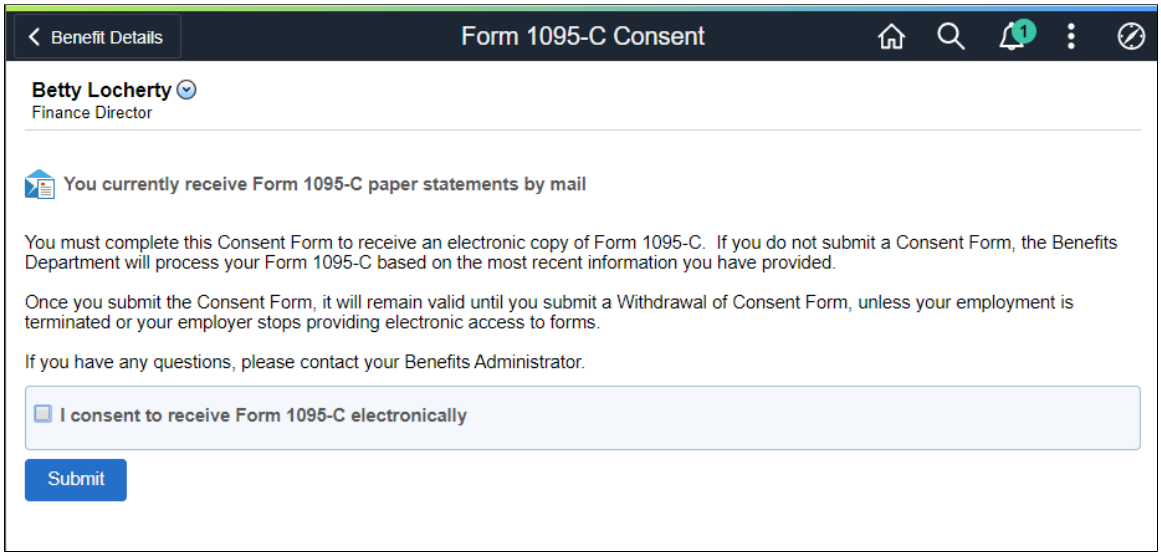

Image: (Tablet) Form 1095-C Consent - Withdraw page

This example illustrates the Form 1095-C Consent - Withdraw page for the tablet.

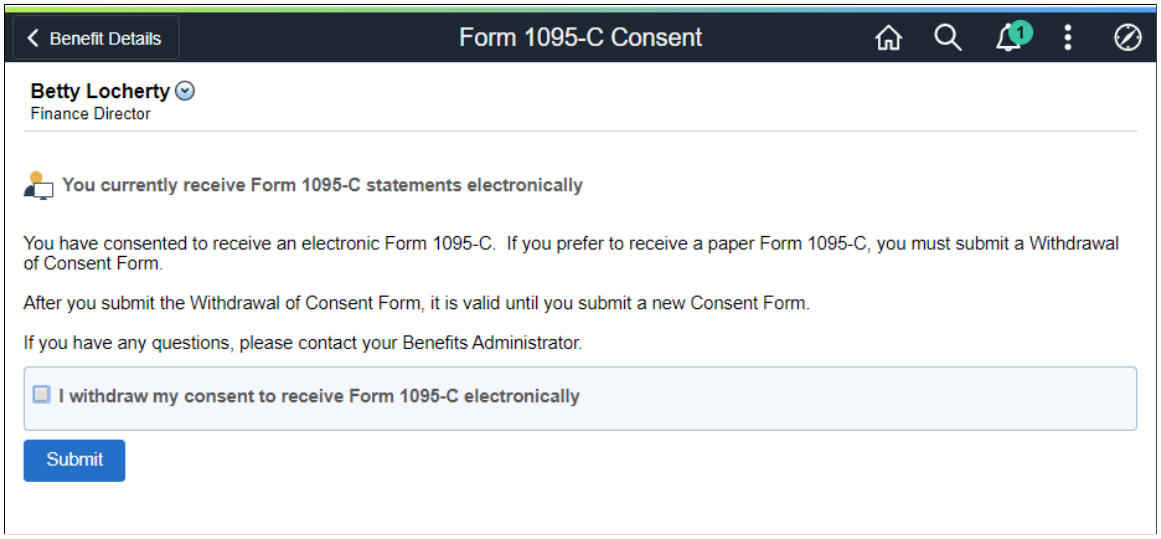

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Image: (Smartphone) Form 1095-C Consent page

This example illustrates the Form 1095-C Consent page for the Smartphone.

Working with Benefit Details Navigation Collection Using the PeopleSoft Fluid User Interface

This topic discusses how employees use the PeopleSoft Fluid User Interface to perform benefits self service activities using the Benefit Details Navigation Collection.

PeopleSoft HCM provides two navigation options for Benefit Details while using Employee Self Service:

- Navigation Collection
- Tile Dashboard

  For more information on the Benefit Details Tile Dashboard refer Working With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface

  Note: Only users with the appropriate roles are allowed access to use the Benefit Details Tile Dashboard.

The Benefits fluid pages appear in a framework that includes the following:

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- An overall page title of “Benefit Details”.
- The common employee self service header.

  The header includes the employee’s name, job title, and a related actions icon. The related actions icon provides access to additional self service transactions.

  See "Common Header for Employee Self-Service Pages" (PeopleSoft HCM 9.2: Application Fundamentals)
- A panel on the left with tabs for accessing specific pages, called the Navigation Collection.
- A supplemental panel on the right with links to resources.

For general information about fluid pages in PeopleSoft HCM, see "Understanding PeopleSoft Fluid User Interface Home Pages" (PeopleSoft HCM 9.2: Application Fundamentals)

Pages Used to Manage Benefits Using the PeopleSoft Fluid User Interface

Page/Tile Name	*Definition Name*	*Usage*
Benefit Details Tile	HC_EBEN_SS_NAVCOLL_FL (cref for the tile) W3EB_ENR_TILE_FLU (page for dynamic data)	Access benefits self service transactions.
Benefits Summary Page	BEN_SUMM_GRID_FL	View information about current benefits.
Life Events Page	W3EB_SEL_EVNT_FLU	Initiate processing for a life event that affects benefits.
Dependent/Beneficiary Info Page	W3EB_DEPBNSMRY_FL	Update information about dependents and beneficiaries.
Benefits Enrollment pages: Benefits Enrollment Event Selection Page Benefits Enrollment Page	BNE_SEL_EVENT_FL BNE_CARD_SUMM_FL	View all currently active benefits-related enrollment events. View enrollment summary information and the benefit plans you are eligible to elect from.
Benefits Statement Page	BAS_STMT_LIST_FL	View a list of benefits enrollment preview and confirmation statements.
Affordable Care Act: View Form 1095-C Page	ACA_EE_YE_FORM_FL	View the Form 1095-C generated each year and submitted to the IRS.
Affordable Care Act: Form 1095-C Consent Page	ACA_SS_CONSENT_FL_GBL	Access the consent form to grant or withdraw consent to receive the Form 1095-C for the current year in an electronic format.

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Benefit Details Tile

Employees use the Benefit Details tile to access the navigation collection for benefits self service transactions.

Navigation

The Benefit Details tile is delivered as part of the "Employee Self-Service Home Page" (PeopleSoft HCM 9.2: Application Fundamentals), but the location can change if you change the delivered home pages or if employees personalize their home pages.

Image: (Tablet) Benefit Details tile

This example illustrates the Benefit Details tile for the tablet.

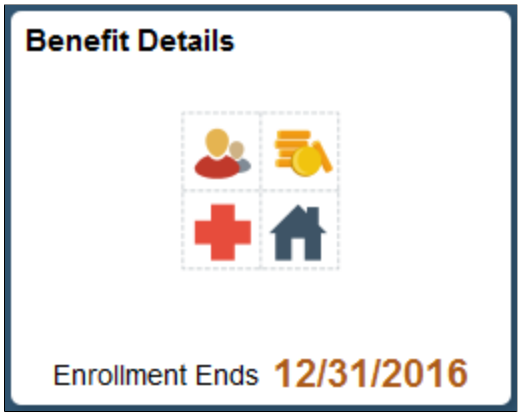

Image: (Smartphone) Benefit Details tile

This example illustrates the Benefit Details tile for the smartphone.

Click the Benefit Details tile to access the Benefit Detailspage.

During open enrollment period, live content will be displayed on the tile giving the open enrollment’s end date.

Benefits Summary Page

Use the Benefits Summary page (BEN_SUMM_GRID_FL) to view summary information about benefits.

Navigation

Click the Benefit Details tile on a PeopleSoft Fluid User Interface homepage.

The Benefit Details tile is on the delivered Employee Self Service home page.

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Image: (Tablet) Benefits Summary page

This example illustrates the Benefits Summary page, in card view, for the tablet.

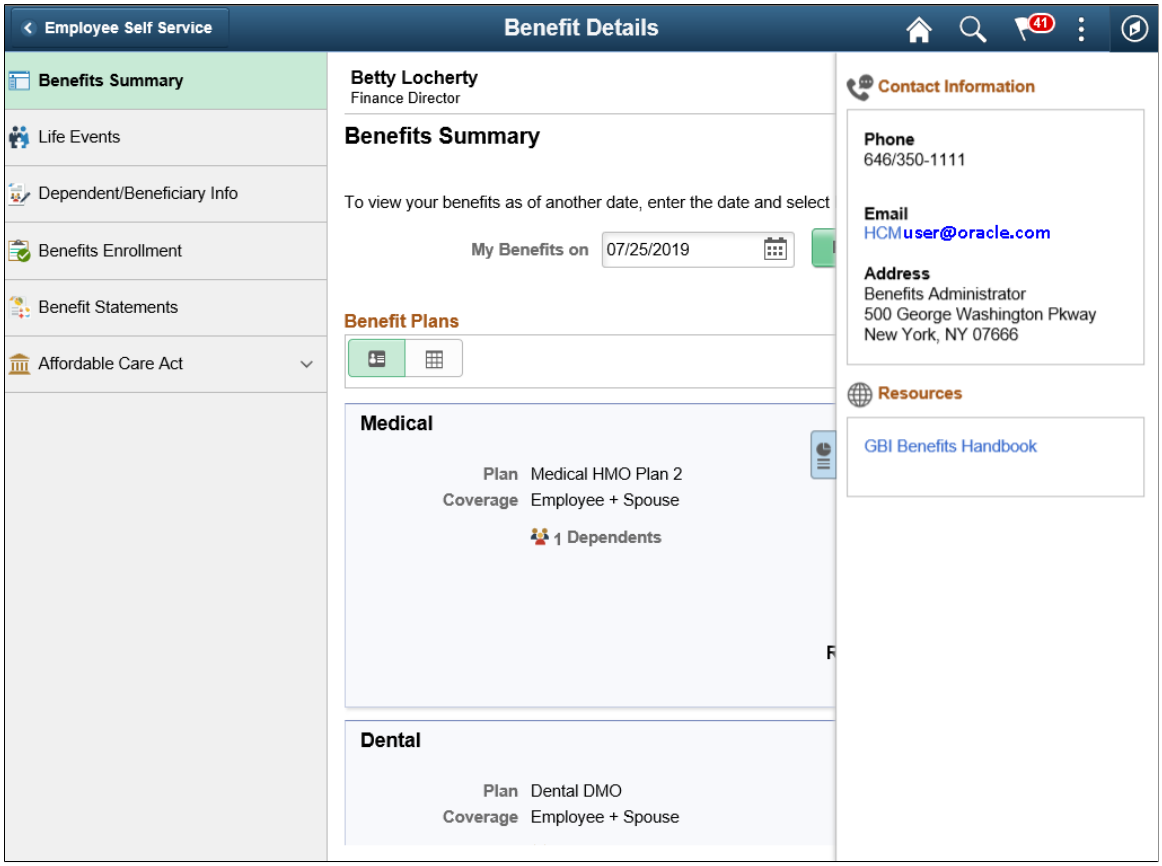

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Image: (Tablet) Benefits Summary page

This example illustrates the Benefits Summary page, in grid view, for the tablet.

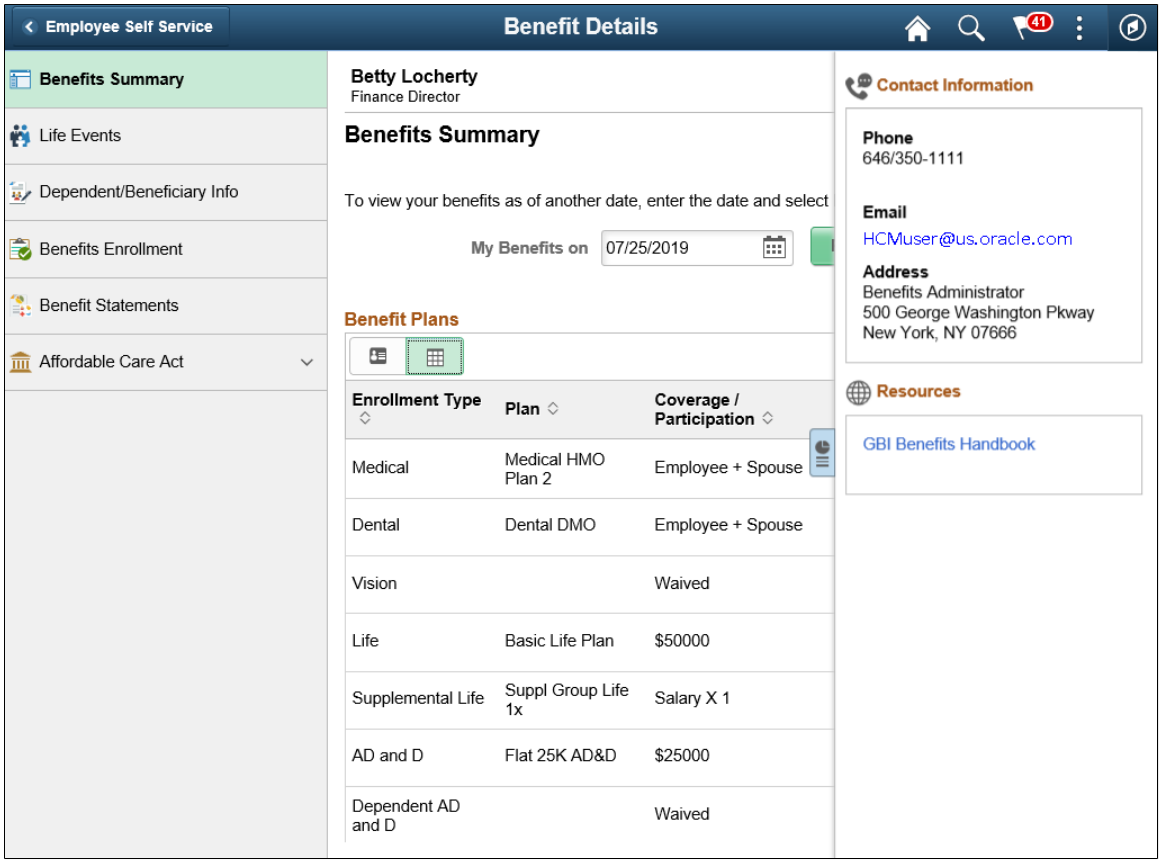
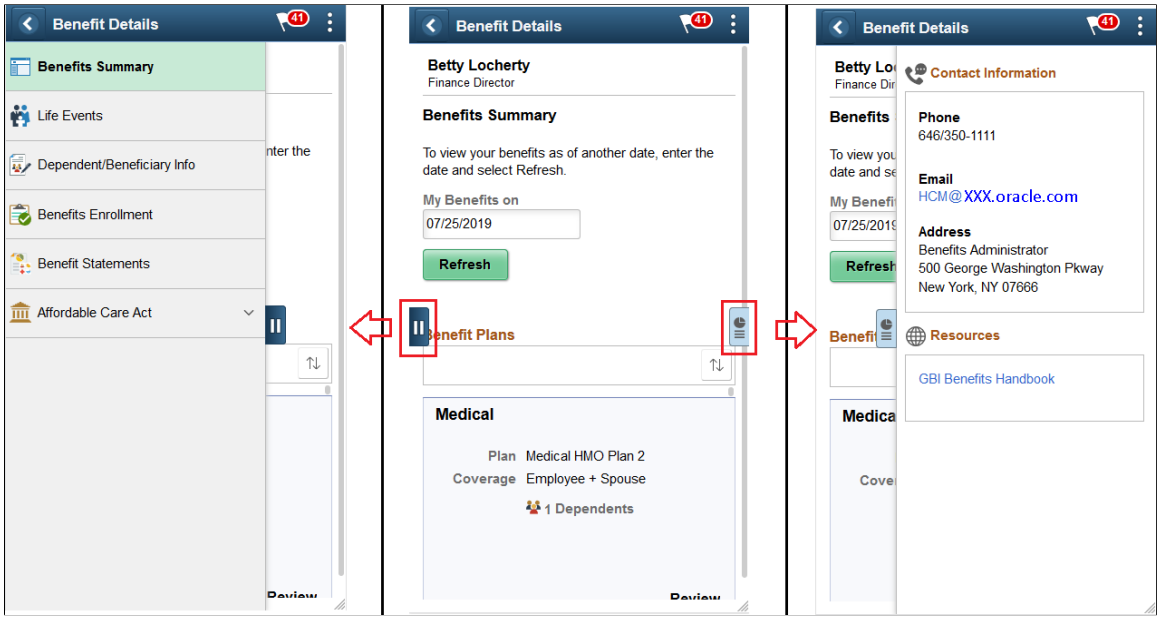


Image: (Smartphone) Benefits Summary page

This example illustrates the Benefits Summary page for the smartphone. The first image, shows the open left panel, the second image, shows both the panels collapsed, and the third image has the right panel expanded.



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My Benefits on	By default, the page displays benefits as of the current date. To view benefits as of a different date, choose a new date and click the Refresh button.
Benefits Plans	You can choose to see your benefit plans in either the card or grid view. In the card view, each benefit plan card shows the plan type, employee's coverage or participation information, and the number of dependents/beneficiaries. You can click the card to access corresponding benefit plan page to review the plan details. The grid view shows the enrollment types, a brief description of the benefit, the employee's coverage or participation, number of dependents/beneficiaries and a Review button.

For more information on how to review your benefit plans using the Benefits Summary page, refer Reviewing Benefit Plans Using the PeopleSoft Fluid User Interface.

Dependent/Beneficiary Info Page

Use the Dependent/Beneficiary Info page (W3EB_DEPBNSMRY_FL) to update information about dependents and beneficiaries.

Note: Whenever an employee makes changes to the Dependent/Beneficiary Info page in Employee Self Service, the changes are automatically reflected in the administrator (Update Dependent/Beneficiary) pages.
If the administrator has set up the Dependent Workflow, he/she can select to receive an email notification when an employee modifies the Dependent/Beneficiary Info page.

Navigation

Select the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage, select the Dependent/Beneficiary Info tab.

Image: (Tablet) Dependent and Beneficiary Information page

This example illustrates the Dependent and Beneficiary Information page for the tablet.

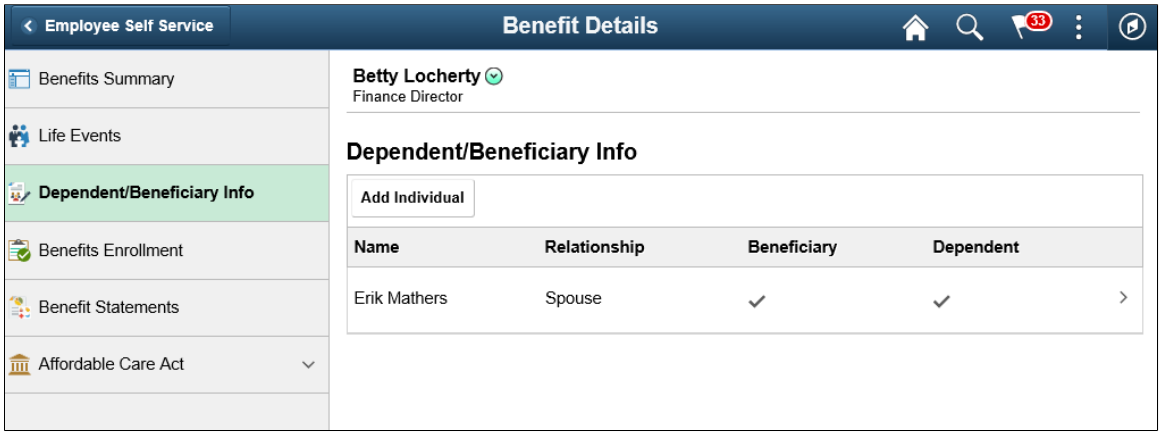

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Image: (Smartphone) Dependent/Beneficiary Info page

This example illustrates the Dependent/Beneficiary Info page for the smartphone.

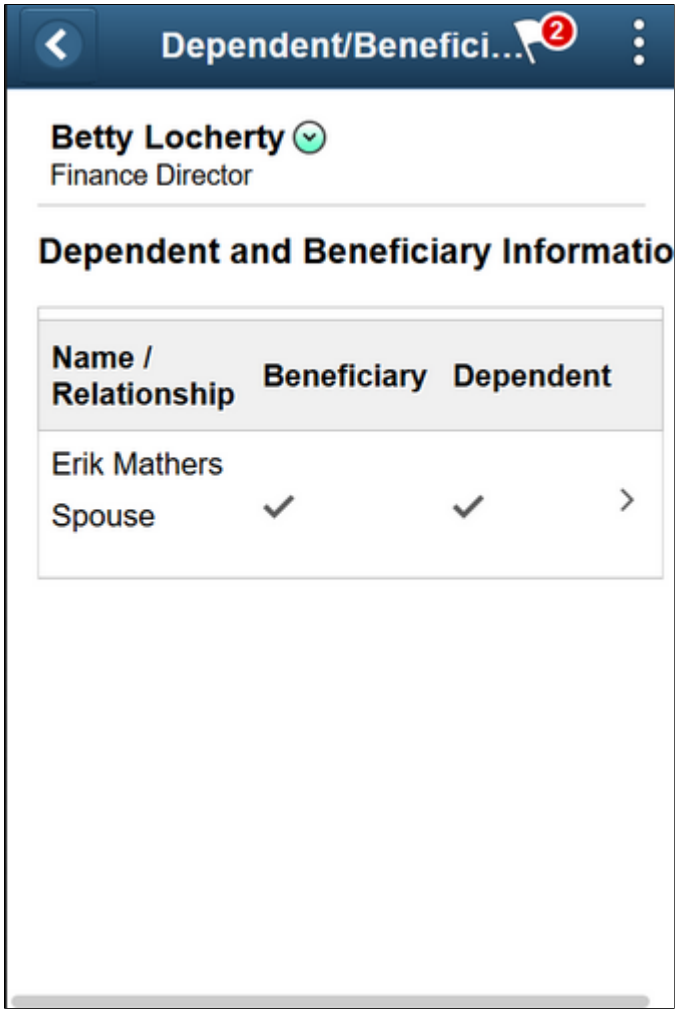

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Image: (Tablet) Individual Dependent/Beneficiary Information page (Part 1 of 2)

The following example illustrates the Individual Dependent/Beneficiary Information page for the tablet.

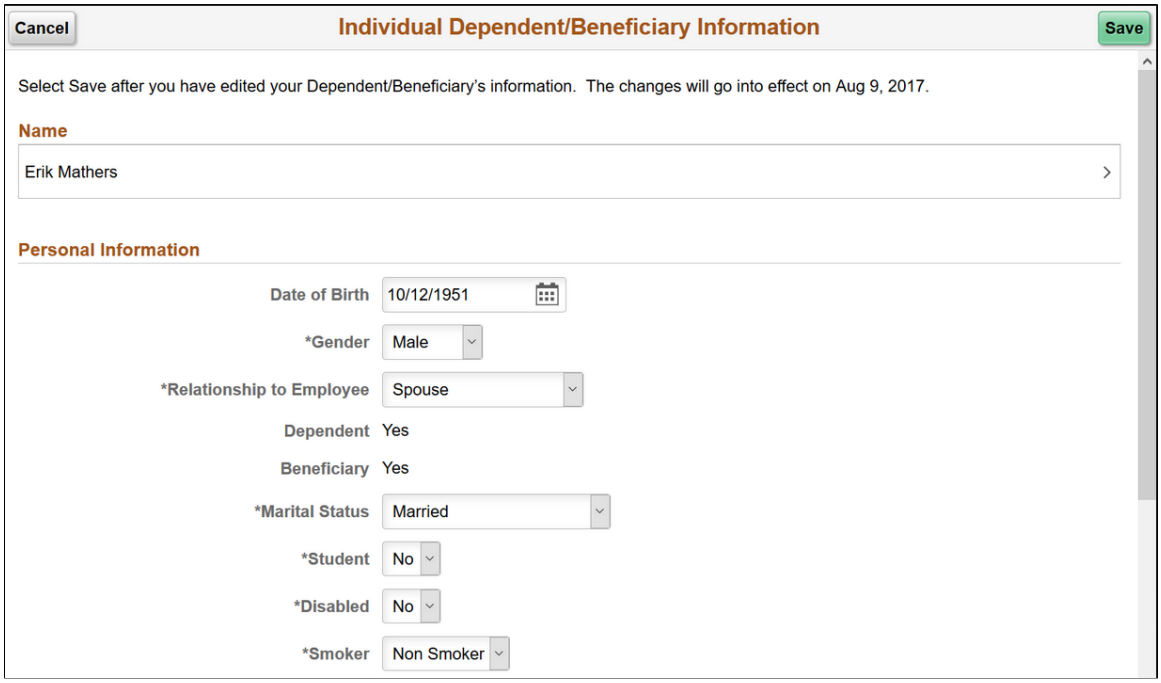

Image: (Tablet) Individual Dependent/Beneficiary Information page (Part 2 of 2)

The following example illustrates the Individual Dependent/Beneficiary Information page for the tablet.

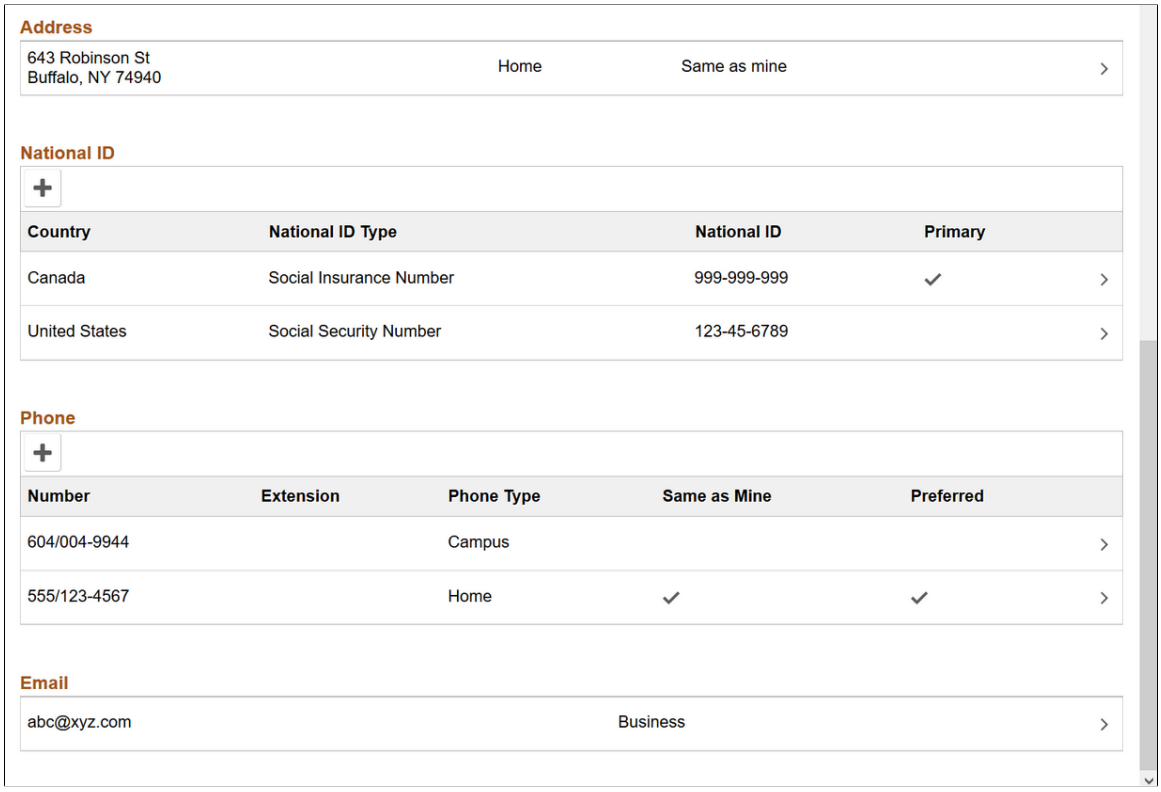

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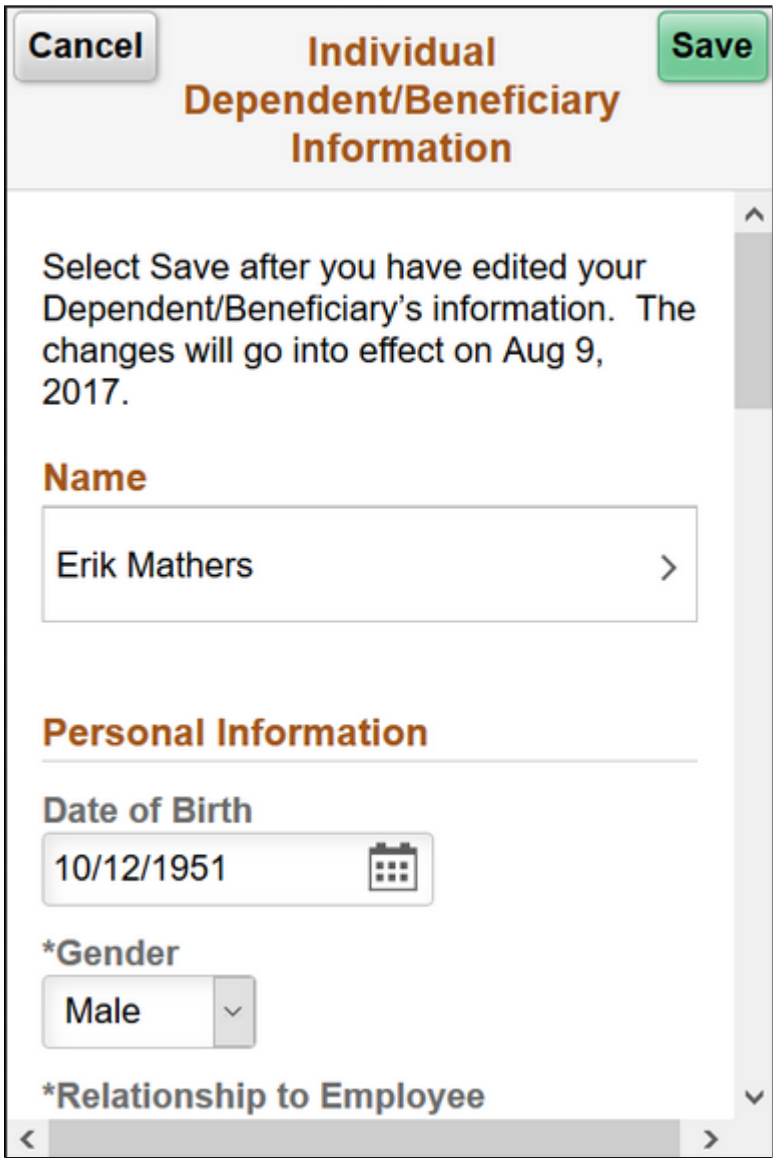
Image: (Smartphone) Individual Dependent/Beneficiary Information page

The following example illustrates the Individual Dependent/Beneficiary Information page for the smartphone.



Name Modal Window

Select the Name field to modify the name of a dependent/beneficiary.

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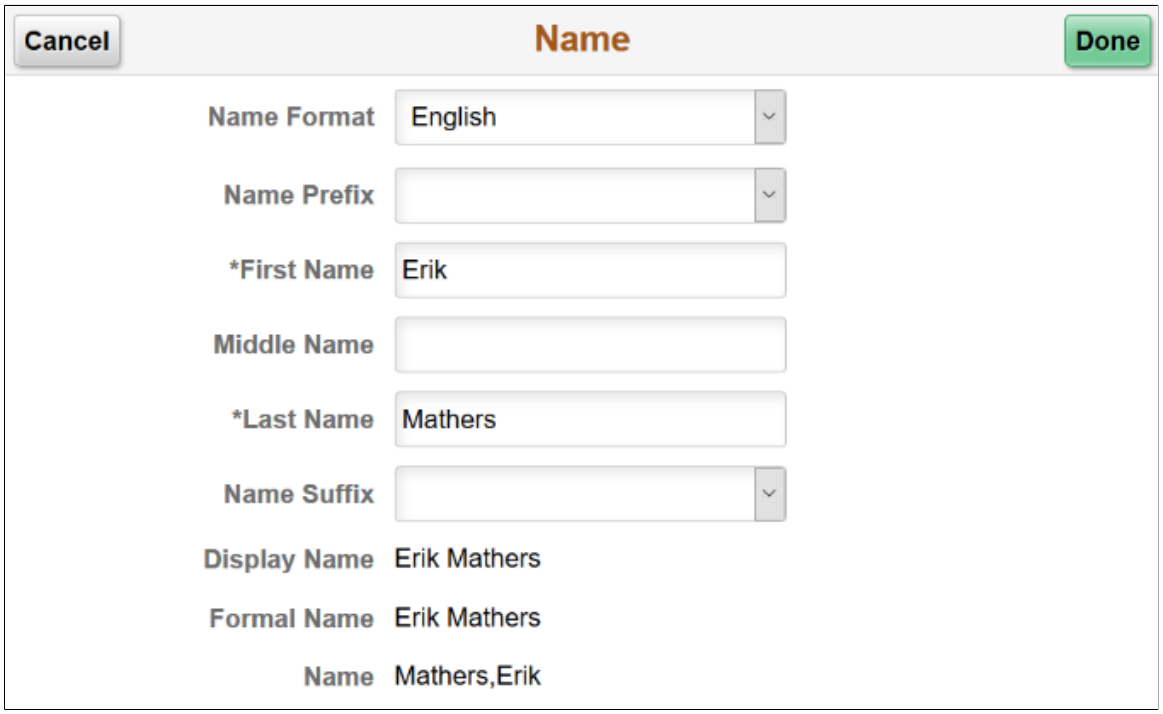
Image: (Tablet) Name modal window

This example illustrates the Name modal window for the tablet.



Address Modal Window

The address of a newly added dependent or beneficiary defaults to the ‘Same as mine’ slider equals ‘Yes’, and the home address as given in the employee’s Personal Information is displayed in the grid.

If the employee's Personal Information has no home address, then no address is displayed on the grid. You can select the Add Address row to open the Address modal window and add an address.

In the Address modal window, with the ‘Same as mine’ slider equals ‘Yes’, you can select an existing address type of the employee.

You can choose ‘No’ on the ‘Same as mine’ slider to add a different address.

If the employee's Personal Information has a home address, you can select the Address row to open the Address modal window to modify the address.

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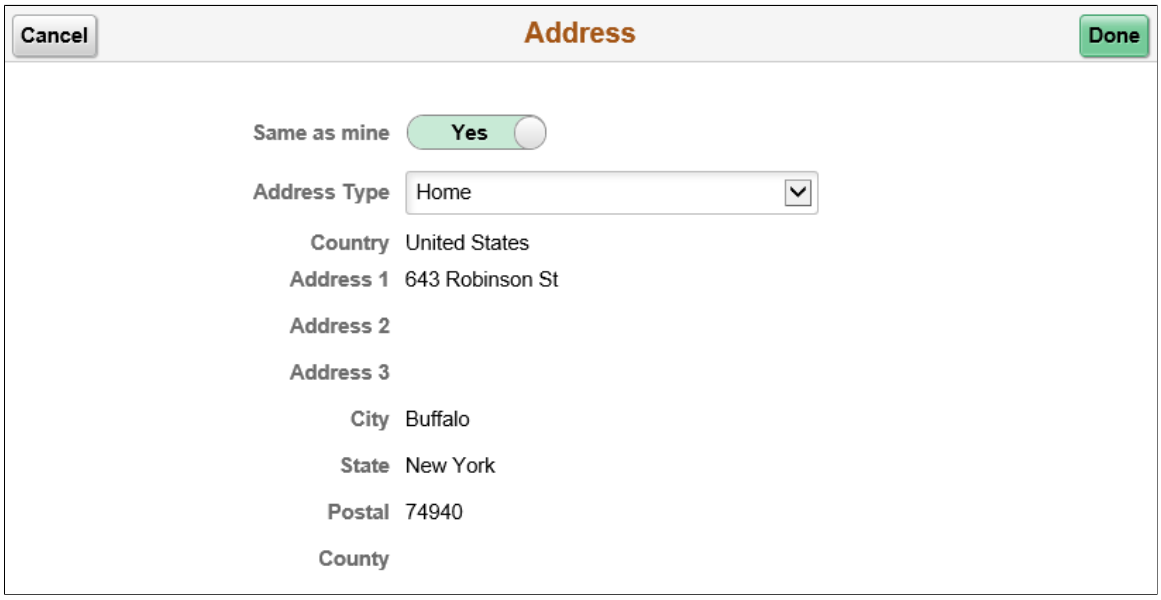
Image: (Tablet) Address modal window

This example illustrates the Address modal window for the tablet.



National ID Modal Window

Select the Add National ID button to add the national ID. Dependents and beneficiaries with citizenship in more than one country can have more than one national ID. Add an additional row when required.

Note: The national ID feature is supported only for the countries United States and Canada.
You cannot delete a national ID through Employee Self Service. Only an Admin user has the rights to delete an existing national ID.

Image: (Tablet) National ID modal window

This example illustrates the National ID modal window for the tablet.

Country Select the country for which the national ID is entered.

Note: The national ID feature currently supports only the countries United States and Canada.

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Primary

When more than one national ID is added, use this option to indicate which national ID should be considered as the primary ID.

By default, the first national ID entered is considered the primary ID.

Phone Number Modal Window

Select the Add Phone button to add a phone number.

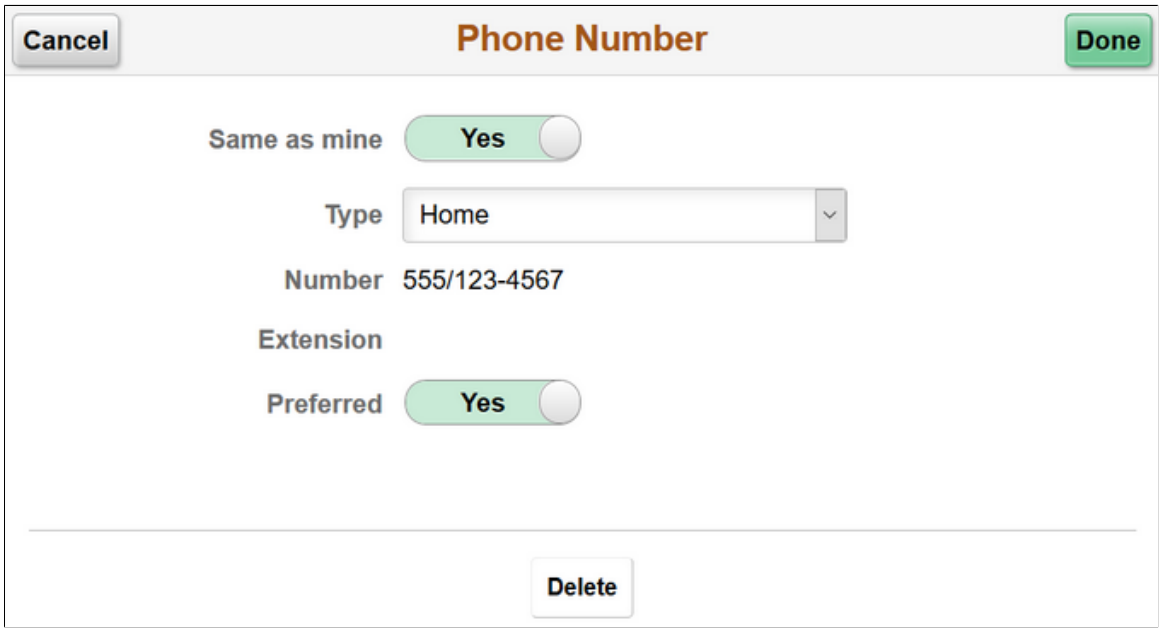
In the Phone Number modal window, the ‘Same as mine’ slider defaults to ‘No’. You can choose ‘Yes’ on the slider to add an already existing phone number in the employee’s Personal Information.

You can choose ‘No’ on the slider to add a new phone number for the dependent or beneficiary.

By default, the first phone number you add for the dependent/beneficiary is automatically set as their preferred number.

Image: (Tablet) Phone Number modal window

This example illustrates the Phone Number modal window for the tablet.



Same as mine

Choose Yes on the ‘Same as mine’ slider to select one of your already existing phone numbers for the dependent/beneficiary. To add a different phone number, choose No on the ‘Same as mine’ slider.

Type

For a ‘Same as mine’ equals ‘Yes’ phone number, you can choose any available phone type the employee has on his/her Personal Information.

If you choose No on the ‘Same as mine’ slider, you can add any available type from the drop-down list.

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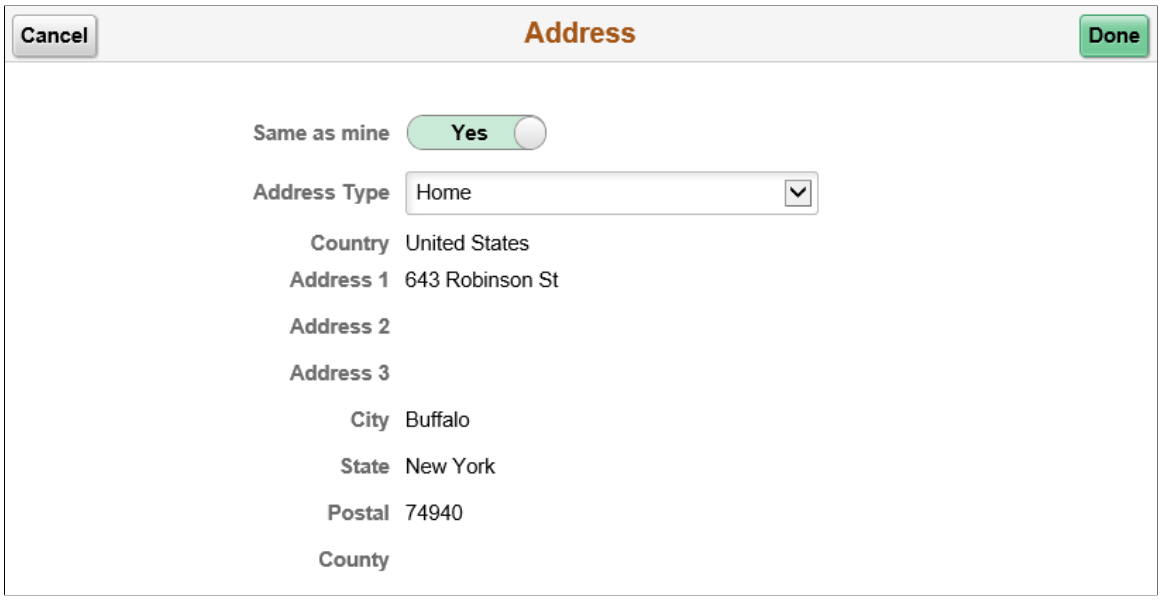
Preferred	By default, the first phone number you add is selected as a preferred number. You can select 'Yes' on the 'Preferred' slider to set a different phone number as your preferred number. **Note:** Only one phone number can be chosen as the preferred number.
Delete	Use the Delete button to delete a phone number.

Email Address Modal Window

Select the Add Email button to add an email ID.

Image: (Tablet) Email Address modal window

his example illustrates the Email Address modal window for the tablet.



Life Events Page

Use the Life Events page (W3EB_SEL_EVNT_FLU) to initiate processing for a life event that affects your benefits.

For the video feature overview on Fluid Life Events, see

PeopleSoft Fluid Life Events .

Navigation

Click the Benefits tile on a PeopleSoft Fluid User Interface home page, then click the Life Events tab on the Benefits page.

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Image: (Tablet) Life Events page

This example illustrates the Life Events page for the tablet.

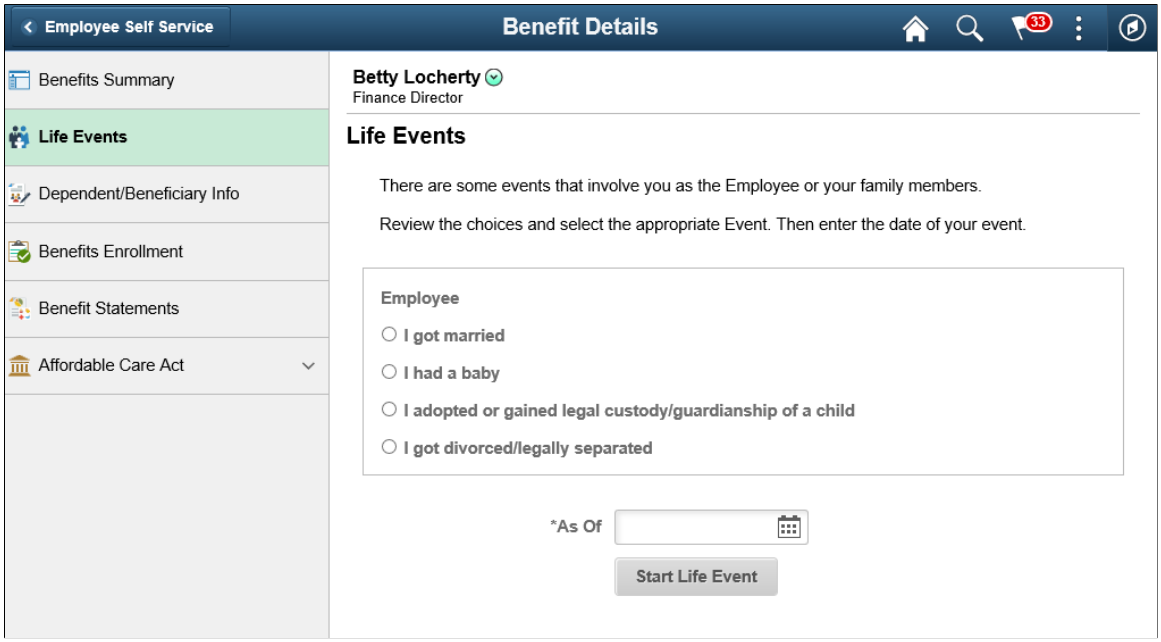

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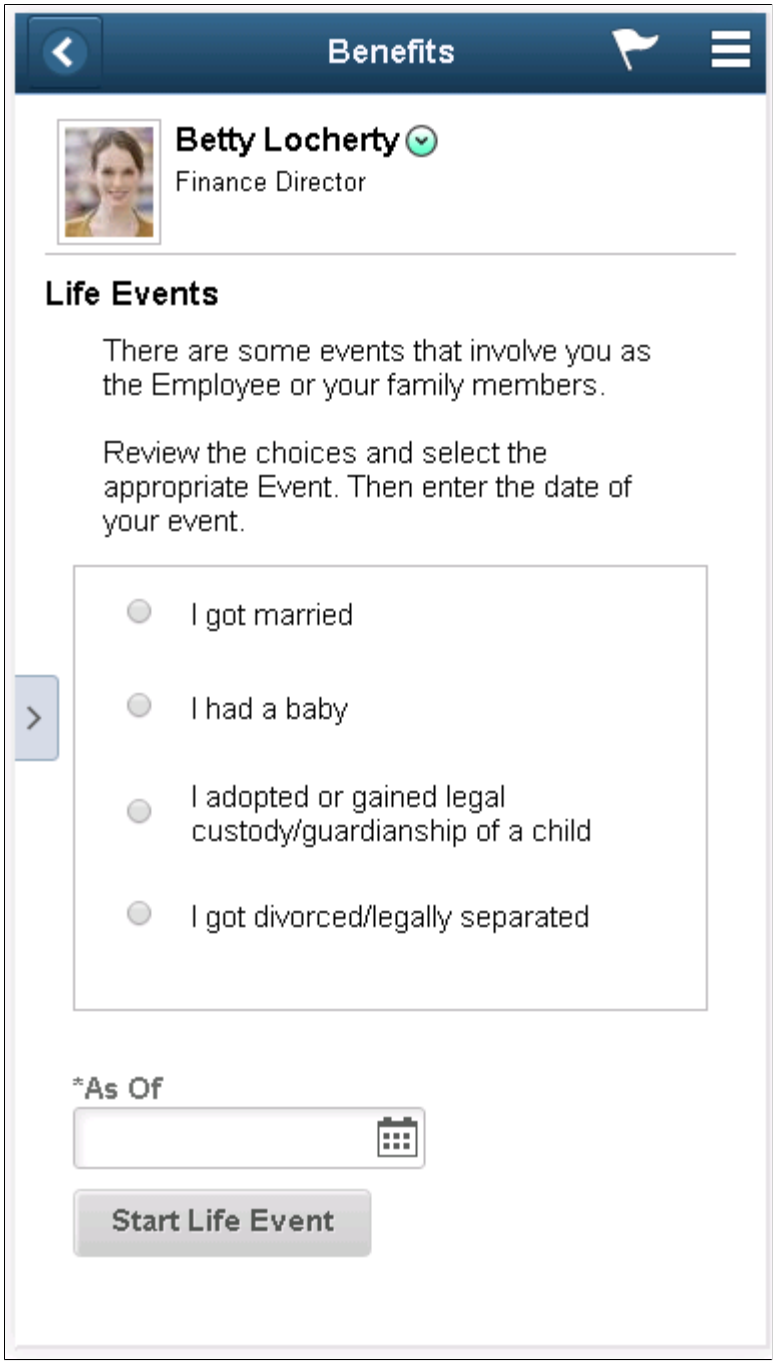
Image: (Smartphone) Life Events page

This example illustrates the Life Events page for the smartphone.



This page lists the same life event options that an employee sees on the classic life events pages.

When you select the type of life event, the page displays a message with information about the time period within which the life event information must be submitted (for example, within 31 days of the event).

Next you enter the event date and click the Complete Life Event button. The system then displays the classic life event pages where you complete the transaction.

For information about the pages used for the four delivered life events, see the following topics:

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- "Processing the Marriage Event" (PeopleSoft HCM 9.2: eBenefits)
- "Processing the Child Birth Event" (PeopleSoft HCM 9.2: eBenefits)
- "Processing the Adoption Event" (PeopleSoft HCM 9.2: eBenefits)
- "Processing the Divorce Event" (PeopleSoft HCM 9.2: eBenefits)

Related Links

"Delegating Life Events Document Approval Using Fluid Delegations" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

View Form 1095-C Page

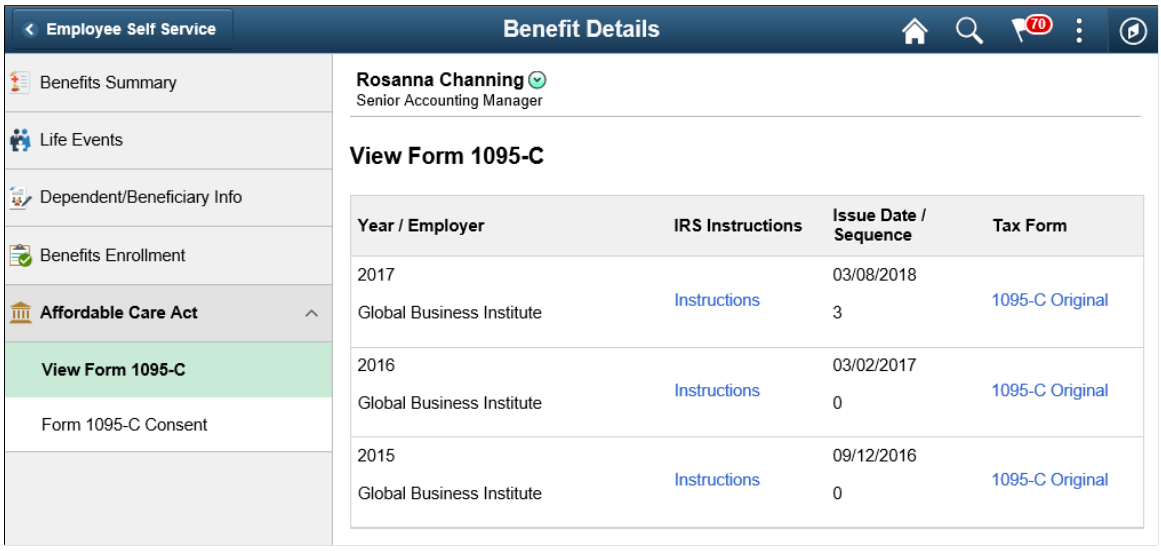
Use the View Form 1095-C page (HC_ACA_EE_YE_FORM_FL) to view the Form 1095-C generated each year and submitted to the IRS.

Navigation

Click the Benefits tile on a PeopleSoft Fluid User Interface Employee Self Service homepage, click the Affordable Care Act tab on the Benefits Details page, and then click the View Form 1095-C Consent tab.

Image: (Tablet) View Form 1095-C page

This example illustrates the View Form 1095-C page for the tablet.



IRS Instructions	Click this link to open the filing instructions of the Form 1095-C for the corresponding year.
Issue Date/Sequence	Displays the date on which the corresponding form was available in Self Service and the sequence of the form.
Tax Form	Click this link to open the PDF format of Form 1095-C. There are three kinds of tax forms which could be available for the employee: Original, Reissue and Correction.

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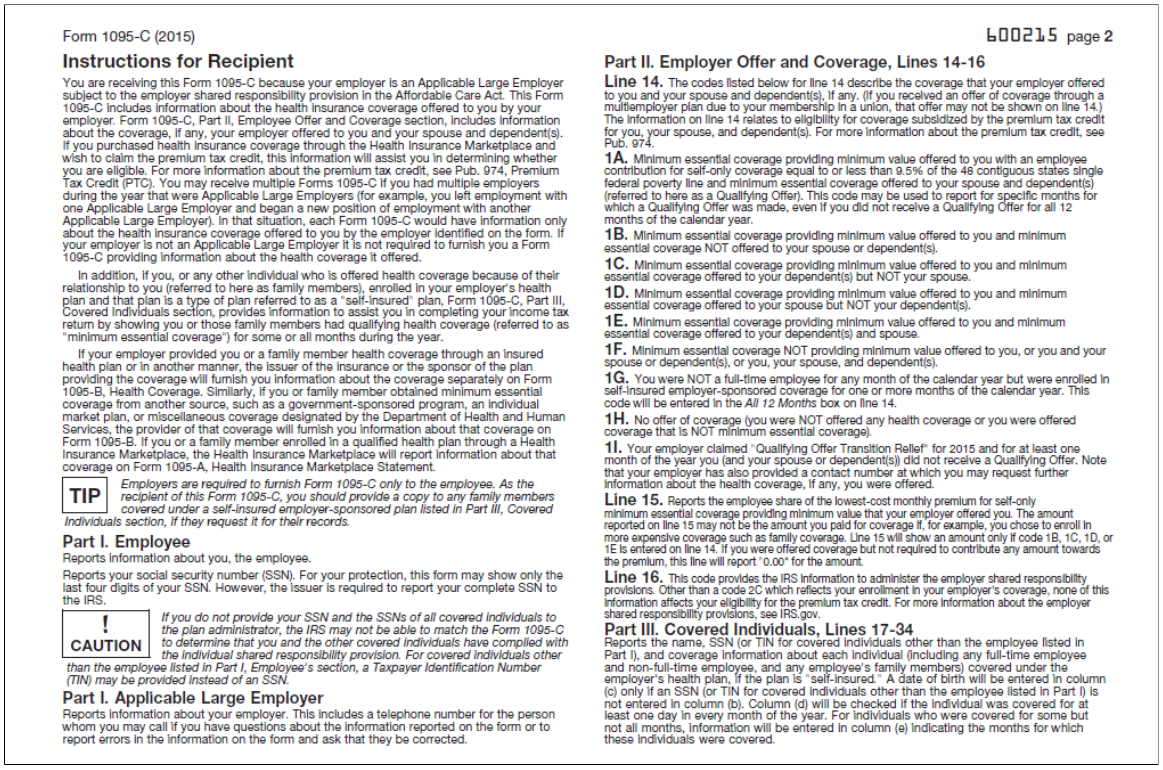
Image: Form 1095-C_IRS Instructions

This example illustrates the IRS Instructions page which opens when you click the Instructions link on the View Form 1095-C page.



Form 1095-C (2015) 600215 page 2

Instructions for Recipient

You are receiving this Form 1095-C because your employer is an Applicable Large Employer subject to the employer shared responsibility provision in the Affordable Care Act. This Form 1095-C includes information about the health insurance coverage offered to you by your employer. Form 1095-C, Part II, Employee Offer and Coverage section, includes information about the coverage, if any, your employer offered to you and your spouse and dependent(s). If you purchased health insurance coverage through the Health Insurance Marketplace and wish to claim the premium tax credit, this information will assist you in determining whether you are eligible. For more information about the premium tax credit, see Pub. 974, Premium Tax Credit (PTC). You may receive multiple Forms 1095-C if you had multiple employers during the year that were Applicable Large Employers (for example, you left employment with one Applicable Large Employer and began a new position of employment with another Applicable Large Employer). In that situation, each Form 1095-C would have information only about the health insurance coverage offered to you by the employer identified on the form. If your employer is not an Applicable Large Employer it is not required to furnish you a Form 1095-C providing information about the health coverage it offered.

In addition, if you, or any other individual who is offered health coverage because of their relationship to you (referred to here as family members), enrolled in your employer's health plan and that plan is a type of plan referred to as a "self-insured" plan, Form 1095-C, Part III, Covered Individuals section, provides information to assist you in completing your income tax return by showing you or those family members had qualifying health coverage (referred to as "minimum essential coverage") for some or all months during the year.

If your employer provided you or a family member health coverage through an insured health plan or in another manner, the issuer of the insurance or the sponsor of the plan providing the coverage will furnish you information about the coverage separately on Form 1095-B, Health Coverage. Similarly, if you or family member obtained minimum essential coverage from another source, such as a government-sponsored program, an individual market plan, or miscellaneous coverage designated by the Department of Health and Human Services, the provider of that coverage will furnish you information about that coverage on Form 1095-B. If you or a family member enrolled in a qualified health plan through a Health Insurance Marketplace, the Health Insurance Marketplace will report information about that coverage on Form 1095-A, Health Insurance Marketplace Statement.

TIP *Employers are required to furnish Form 1095-C only to the employee. As the recipient of this Form 1095-C, you should provide a copy to any family members covered under a self-insured employer-sponsored plan listed in Part III, Covered Individuals section, if they request it for their records.*

Part I. Employee

Reports information about you, the employee.

Reports your social security number (SSN). For your protection, this form may show only the last four digits of your SSN. However, the issuer is required to report your complete SSN to the IRS.

! CAUTION *If you do not provide your SSN and the SSNs of all covered individuals to the plan administrator, the IRS may not be able to match the Form 1095-C to determine that you and the other covered individuals have complied with the individual shared responsibility provision. For covered individuals other than the employee listed in Part I, Employee's section, a Taxpayer Identification Number (TIN) may be provided instead of an SSN.*

Part I. Applicable Large Employer

Reports information about your employer. This includes a telephone number for the person whom you may call if you have questions about the information reported on the form or to report errors in the information on the form and ask that they be corrected.

Part II. Employer Offer and Coverage, Lines 14-16

Line 14. The codes listed below for line 14 describe the coverage that your employer offered to you and your spouse and dependent(s), if any. (If you received an offer of coverage through a multiemployer plan due to your membership in a union, that offer may not be shown on line 14.) The information on line 14 relates to eligibility for coverage subsidized by the premium tax credit for you, your spouse, and dependent(s). For more information about the premium tax credit, see Pub. 974.

1A. Minimum essential coverage providing minimum value offered to you with an employee contribution for self-only coverage equal to or less than 9.5% of the 48 contiguous states single federal poverty line and minimum essential coverage offered to your spouse and dependent(s) (referred to here as a Qualifying Offer). This code may be used to report for specific months for which a Qualifying Offer was made, even if you did not receive a Qualifying Offer for all 12 months of the calendar year.

1B. Minimum essential coverage providing minimum value offered to you and minimum essential coverage NOT offered to your spouse or dependent(s).

1C. Minimum essential coverage providing minimum value offered to you and minimum essential coverage offered to your dependent(s) but NOT your spouse.

1D. Minimum essential coverage providing minimum value offered to you and minimum essential coverage offered to your spouse but NOT your dependent(s).

1E. Minimum essential coverage providing minimum value offered to you and minimum essential coverage offered to your dependent(s) and spouse.

1F. Minimum essential coverage NOT providing minimum value offered to you, or you and your spouse or dependent(s), or you, your spouse, and dependent(s).

1G. You were NOT a full-time employee for any month of the calendar year but were enrolled in self-insured employer-sponsored coverage for one or more months of the calendar year. This code will be entered in the *All 12 Months* box on line 14.

1H. No offer of coverage (you were NOT offered any health coverage or you were offered coverage that is NOT minimum essential coverage).

1I. Your employer claimed "Qualifying Offer Transition Relief" for 2015 and for at least one month of the year you (and your spouse or dependent(s)) did not receive a Qualifying Offer. Note that your employer has also provided a contact number at which you may request further information about the health coverage, if any, you were offered.

Line 15. Reports the employee share of the lowest-cost monthly premium for self-only minimum essential coverage providing minimum value that your employer offered you. The amount reported on line 15 may not be the amount you paid for coverage if, for example, you chose to enroll in more expensive coverage such as family coverage. Line 15 will show an amount only if code 1B, 1C, 1D, or 1E is entered on line 14. If you were offered coverage but not required to contribute any amount towards the premium, this line will report "0.00" for the amount.

Line 16. This code provides the IRS information to administer the employer shared responsibility provisions. Other than a code 2C which reflects your enrollment in your employer's coverage, none of this information affects your eligibility for the premium tax credit. For more information about the employer shared responsibility provisions, see IRS.gov.

Part III. Covered Individuals, Lines 17-34

Reports the name, SSN (or TIN for covered individuals other than the employee listed in Part I), and coverage information about each individual (including any full-time employee and non-full-time employee, and any employee's family members) covered under the employer's health plan. If the plan is "self-insured." A date of birth will be entered in column (c) only if an SSN (or TIN for covered individuals other than the employee listed in Part I) is not entered in column (b). Column (d) will be checked if the individual was covered for at least one day in every month of the year. For individuals who were covered for some but not all months, information will be entered in column (e) indicating the months for which these individuals were covered.

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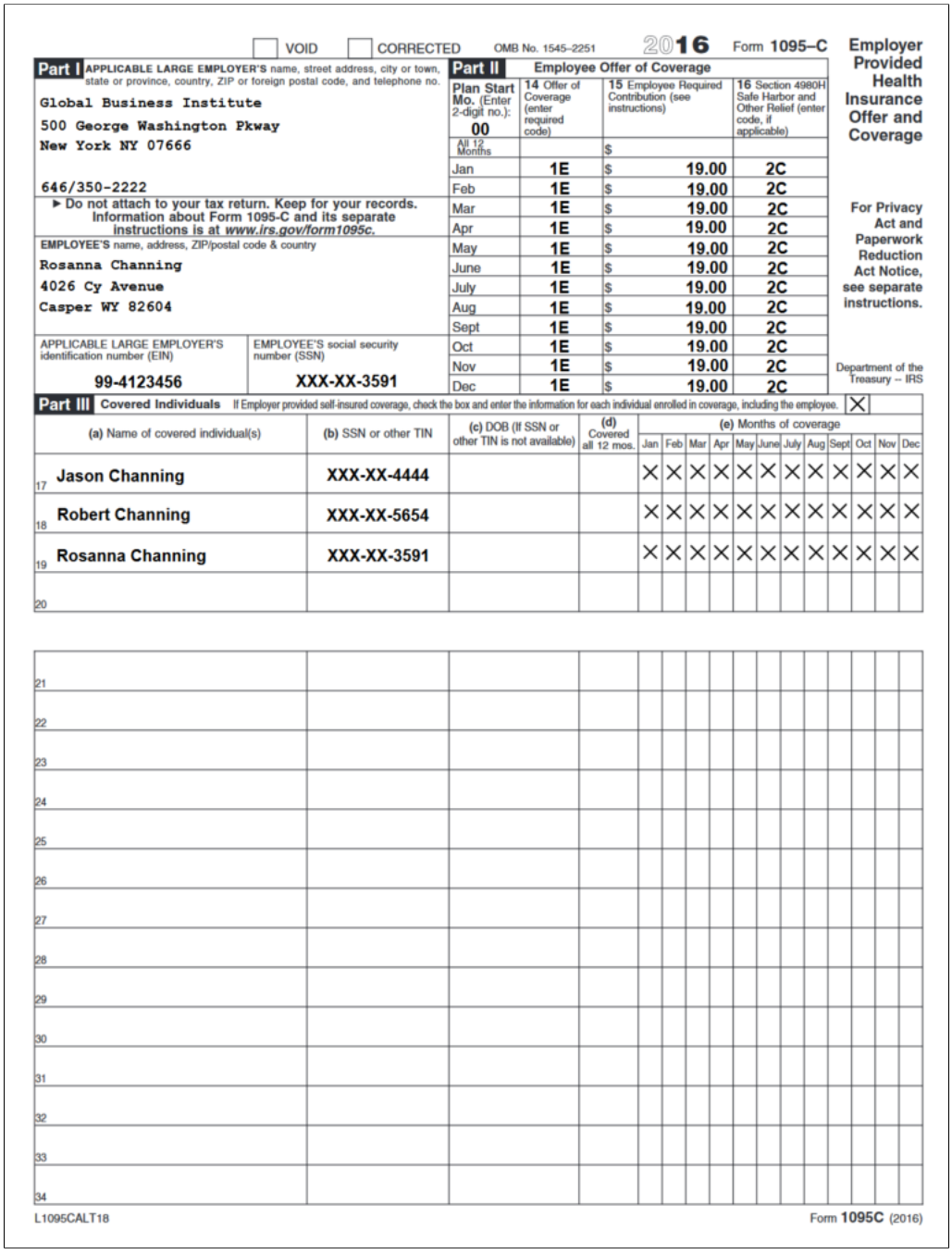
Image: (Tablet) Tax Form — Form 1095-C

This example illustrates the Tax Form – Form 1095-C which opens when you click a Tax Form link on the View Form 1095-C page.



☐ VOID ☐ CORRECTED OMB No. 1545-2251 **2016** Form **1095–C**

Employer Provided Health Insurance Offer and Coverage

Part I APPLICABLE LARGE EMPLOYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

Global Business Institute
500 George Washington Pkway
New York NY 07666

646/350-2222

▶ Do not attach to your tax return. Keep for your records. Information about Form 1095-C and its separate instructions is at *www.irs.gov/form1095c.*

EMPLOYEE'S name, address, ZIP/postal code & country

Rosanna Channing
4026 Cy Avenue
Casper WY 82604

APPLICABLE LARGE EMPLOYER'S identification number (EIN)	EMPLOYEE'S social security number (SSN)
99-4123456	XXX-XX-3591

Part II Employee Offer of Coverage

Plan Start Mo. (Enter 2-digit no.):	14 Offer of Coverage (enter required code)	15 Employee Required Contribution (see instructions)	16 Section 4980H Safe Harbor and Other Relief (enter code, if applicable)
00			
All 12 Months		$	
Jan	1E	$ 19.00	2C
Feb	1E	$ 19.00	2C
Mar	1E	$ 19.00	2C
Apr	1E	$ 19.00	2C
May	1E	$ 19.00	2C
June	1E	$ 19.00	2C
July	1E	$ 19.00	2C
Aug	1E	$ 19.00	2C
Sept	1E	$ 19.00	2C
Oct	1E	$ 19.00	2C
Nov	1E	$ 19.00	2C
Dec	1E	$ 19.00	2C

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Department of the Treasury -- IRS

Part III Covered Individuals If Employer provided self-insured coverage, check the box and enter the information for each individual enrolled in coverage, including the employee. ☒

	(a) Name of covered individual(s)	(b) SSN or other TIN	(c) DOB (If SSN or other TIN is not available)	(d) Covered all 12 mos.	(e) Months of coverage										
					Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
17	Jason Channing	XXX-XX-4444			X	X	X	X	X	X	X	X	X	X	X	X
18	Robert Channing	XXX-XX-5654			X	X	X	X	X	X	X	X	X	X	X	X
19	Rosanna Channing	XXX-XX-3591			X	X	X	X	X	X	X	X	X	X	X	X
20																
21																
22																
23																
24																
25																
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27																
28																
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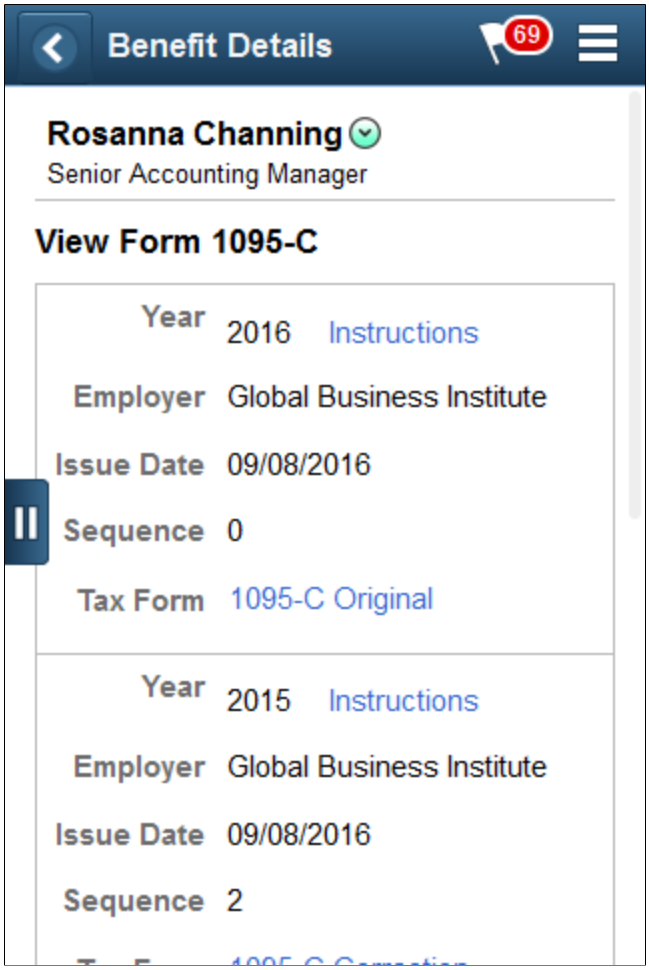
30																
31																
32																
33																
34																

L1095CALT18 Form **1095C** (2016)

Image: (Smartphone) View Form 1095-C page

This example illustrates the View Form 1095-C page for the smartphone.



Form 1095-C Consent Page

Use the Form 1095-C Consent page (ACA_SS_CONSENT_FL_GBL) to access the consent form to grant or withdraw consent to receive the Form 1095-C for the current year in an electronic format.

Navigation

Click the Benefits tile on a PeopleSoft Fluid User Interface Employee Self Service homepage, click the Affordable Care Act tab on the Benefits page, and then click the Form 1095-C Consent tab.

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Image: (Tablet) Form 1095-C Consent page

This example illustrates the Form 1095-C Consent page for the tablet.

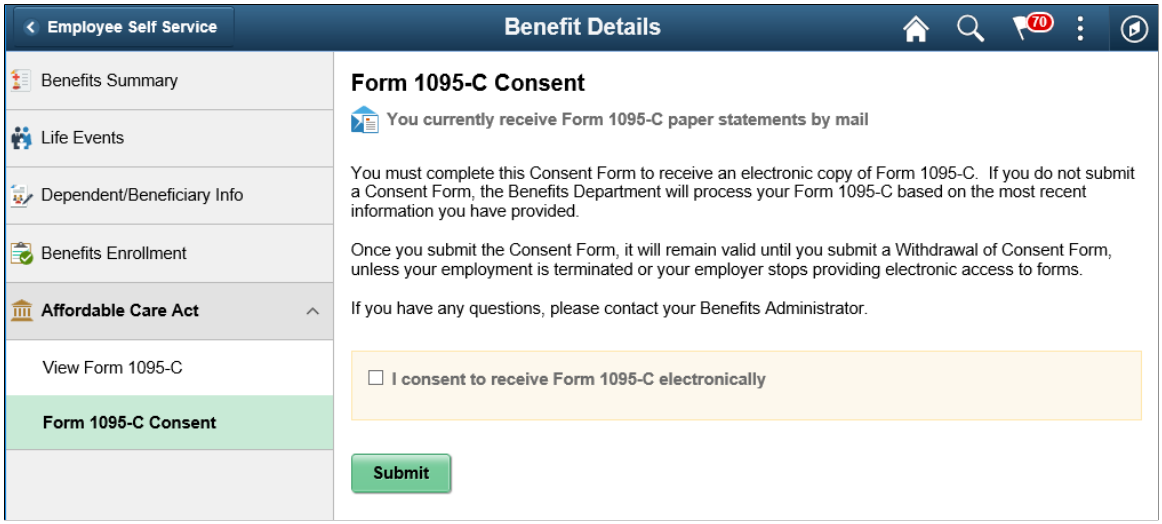

Image: (Tablet) Form 1095-C Consent - Withdraw page

This example illustrates the Form 1095-C Consent - Withdraw page for the tablet.

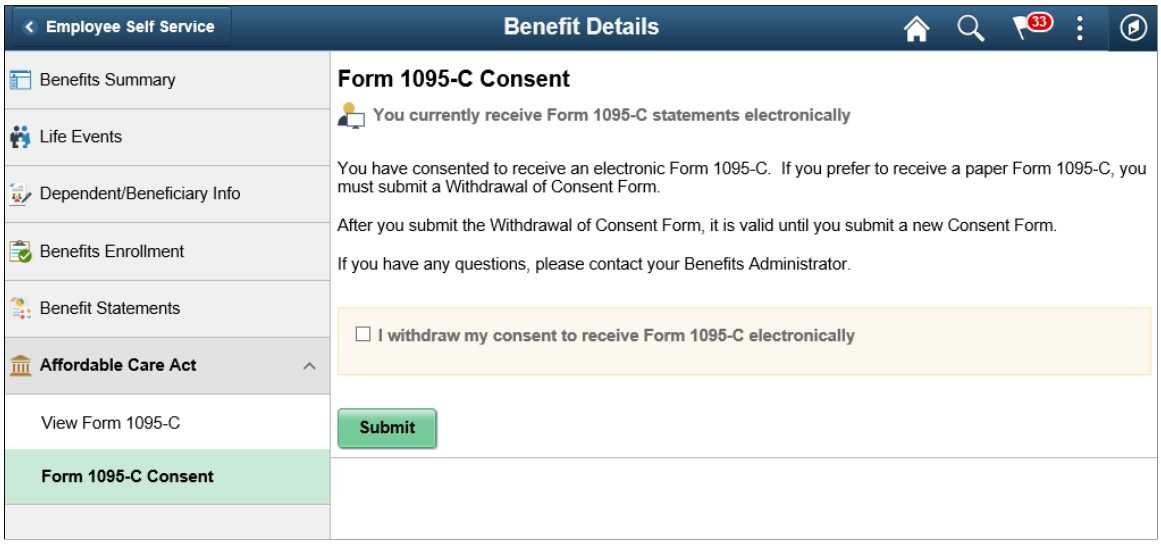

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Image: (Smartphone) Form 1095-C Consent page

This example illustrates the Form 1095-C Consent page for the Smartphone.

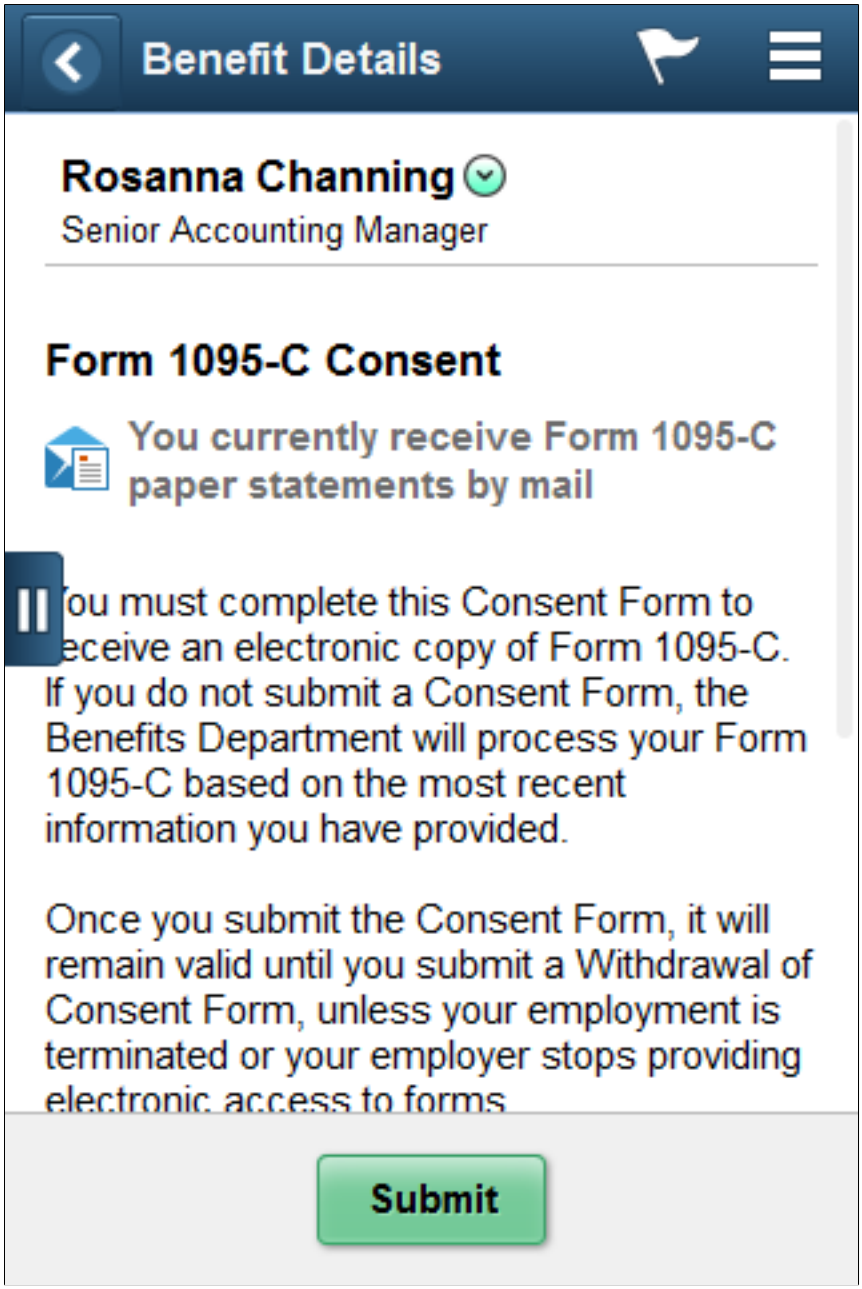

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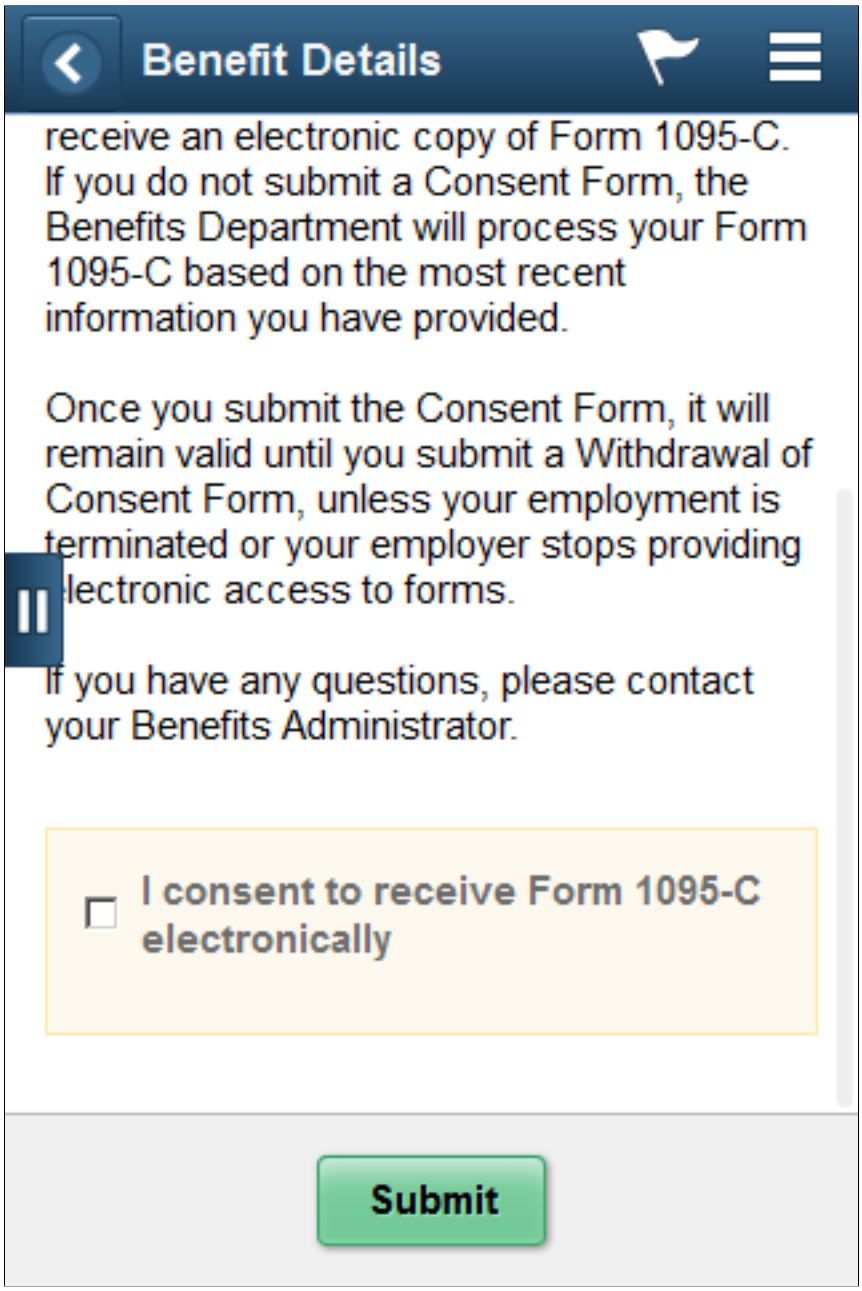
Image: (Smartphone) Form 1095-C Consent page - Displaying checkbox

This example illustrates the Form 1095-C Consent page for the Smartphone displaying the checkbox at the bottom of the page.



Using the PeopleSoft Fluid User Interface to Manage Benefits Enrollment as an Employee

This topic discusses how employees use the PeopleSoft Fluid User Interface to perform benefits-related self-service activities.

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The following video provides a demonstration of the Fluid Benefits Enrollment process:

PeopleSoft Fluid Benefits Enrollment

Pages Used to Manage Benefits as an Employee

Page Name	*Definition Name*	*Usage*
"Benefit Details Tile" (PeopleSoft HCM 9.2: eBenefits)	HC_EBEN_SS_NAVCOLL_FL (cref for the tile) W3EB_ENR_TILE_FLU (page for dynamic data)	Access benefits-related self-service transactions.
Benefits Enrollment Event Selection Page	BNE_SEL_EVENT_FL	View all currently active benefits-related enrollment events.
Benefits Enrollment Page	BNE_LE_ENROLL1_FL	View enrollment summary information and the benefit plans you are eligible to elect from.

Benefit Details Tile

Employees use the Benefit Details tile to access benefits-related self-service transactions.

Navigation

The Benefit Details tile is delivered as part of the "Employee Self-Service Home Page" (PeopleSoft HCM 9.2: Application Fundamentals), but the location can change if you change the delivered home pages or if employees personalize their home pages.

Image: (Tablet) Benefit Details tile

This example illustrates the Benefit Details tile for the tablet.

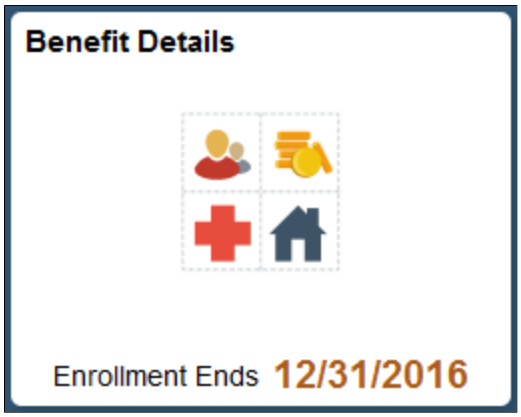

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Image: (Smartphone) Benefit Details tile

This example illustrates the Benefit Details tile for the smartphone.

Click the Benefit Details tile to access the Benefit Details page.

During open enrollment period, live content is displayed on the tile giving the open enrollment's end date.

Benefits Enrollment Event Selection Page

Use the Benefits Enrollment Event Selection page (BNE_SEL_EVENT_FL) to view all currently active benefits-related enrollment events. This could be a Hire, OnBoarding, Family Status Change or Open Enrollment event. You can select an event to go to the Benefits Details Navigation Collection page or start a corresponding activity guide.

Navigation

Select the Benefit Details tile on the PeopleSoft Fluid User Interface Employee Self Service homepage.

Image: Benefits Enrollment Event Selection Page with an Open Enrollment Event

This example illustrates the fields and controls on the Benefits Enrollment Event Selection page with an Open Enrollment event.

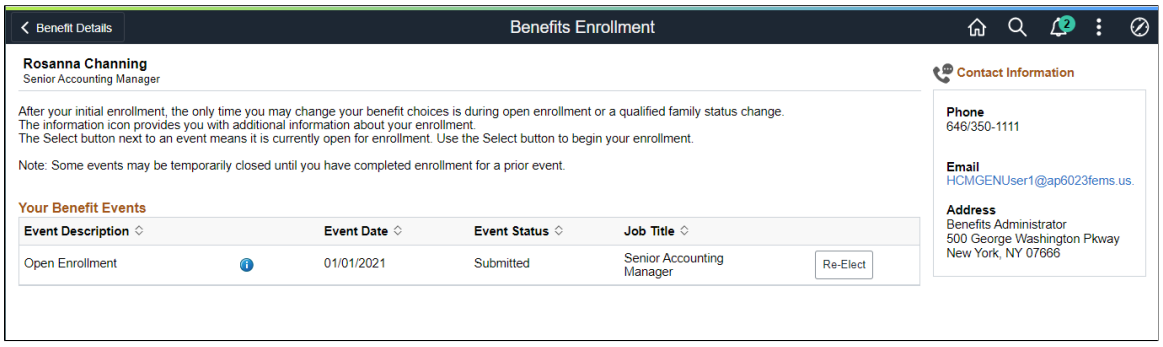

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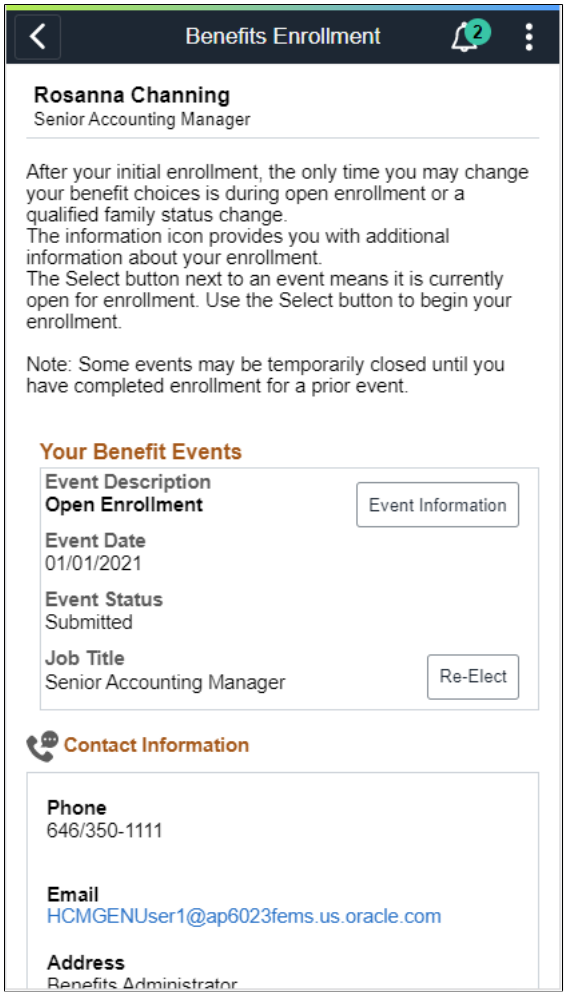
Image: Smartphone_Benefits Enrollment Event Selection Page

This example illustrates the Benefits Enrollment Event Selection Page as seen on a smartphone.



Your Benefits Events	Lists the Benefit Events open for review. This could be a Hire, OnBoarding, Family Status Change or Open Enrollment event.
Information Icon	Click the Information icon to view additional information about the corresponding Benefit event.
Start, **Resume**, or **Re-Elect** buttons	The first time you visit this page, the button displays Start to access the Benefits Enrollment page or start a corresponding Activity Guide. For a subsequent visit, it would display Resume or Re-Elect. The Resume button indicates that you visited the page, but have not submitted your enrollment. The Re-Elect button indicates that you had submitted the enrollment, but can make changes to it, as you are still within the open period for enrolling in that event.
Contact Information	The Contact Information group box displays the contact details for the Benefits Administrator.

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Benefits Enrollment Page

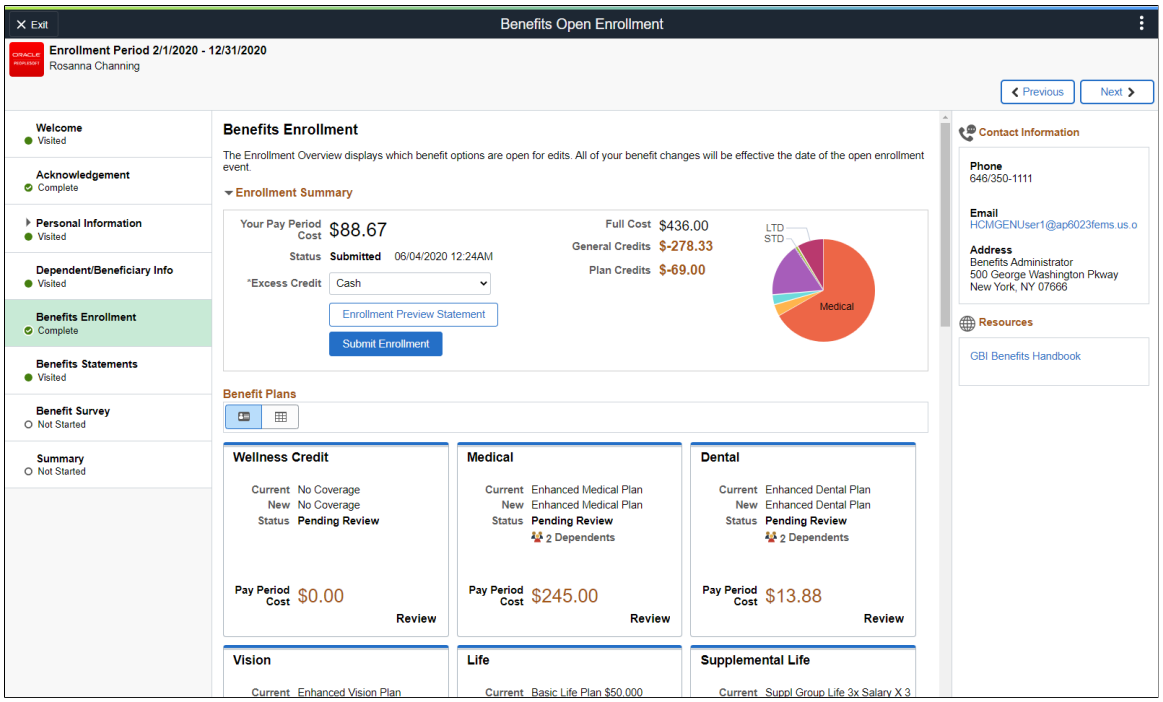
Use the Benefits Enrollment page (BNE_LE_ENROLL1_FL) to view enrollment summary information and the benefit plans you are eligible to elect from.

Navigation

Select the Benefit Details tile on the PeopleSoft Fluid User Interface Employee Self Service homepage, select the Benefits Enrollment tab. Select the Start button on Your Benefit Events to access the Benefit Details navigation collection or start a corresponding activity guide. On the Benefit Details Navigation Collection, select the Benefits Enrollment tab on the left-hand panel. On the activity guide, select the Benefits Enrollment step on the left-hand panel.

Image: Benefits Enrollment page

This example illustrates the fields and controls on the Benefits Enrollment page. You can find definitions for the fields and controls later on this page.



Enrollment Summary Section

This section displays a summary of the costs and credits of the benefit plans that the employee enrolls in. The pie chart on this page is based on the positive costs from the benefits plans compared to the total of those costs. The total costs include the full cost and all credits for the benefit plans but not the general credits.

The Status indicates the current status of your benefits enrollment, with a time stamp of when it was last updated. The available values are Visited, Pending Review, Submitted, Changed - Resubmit Required, and Error on Submit.

You can select the Enrollment Preview Statement button to generate and view a preview of the enrollment statement.

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All of your benefit changes are effective as of the date of the benefit change event. Your enrollment is not complete until you select the Submit Enrollment button.

The cost(s) displayed in Enrollment Summary section are based on the Benefits Program Table configurations.

Enrollment Summary section fields	***Benefits Program Table configurations***
Your Pay Period Cost	Cost Freq on Enrollment Form (Cost frequency on enrollment form)
General and Plan Credits	Show Credits on Enrollment Form
Total Taxes	Include Can Sales Tax on Form
Total Employer Cost	Show Employer Costs on Form

For more information see "Setting Up Page Display Information" (PeopleSoft HCM 9.2: eBenefits).

Excess Credit If you are using flexible credits, this option is used to define how the system processes excess flexible credit amounts when an employee does not designate a rollover election during benefit enrollment. The options available are Cash, FSA-Dependent Care, FSA-Health Care, FSA Retirement Counseling, Forfeit Excess Credit and Savings-401(k).

Enrollment Preview Statement Click this button to view a summary of all your Benefits plan enrollment details. The Review Enrollment page displays the benefits enrollment details as collapsible sections. Expand each section to view details. Use the Print View button on the page to download the statement in a PDF format to save as a file or to print a hard copy.

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Image: Review Enrollment page

This example illustrates the Review Enrollment page.

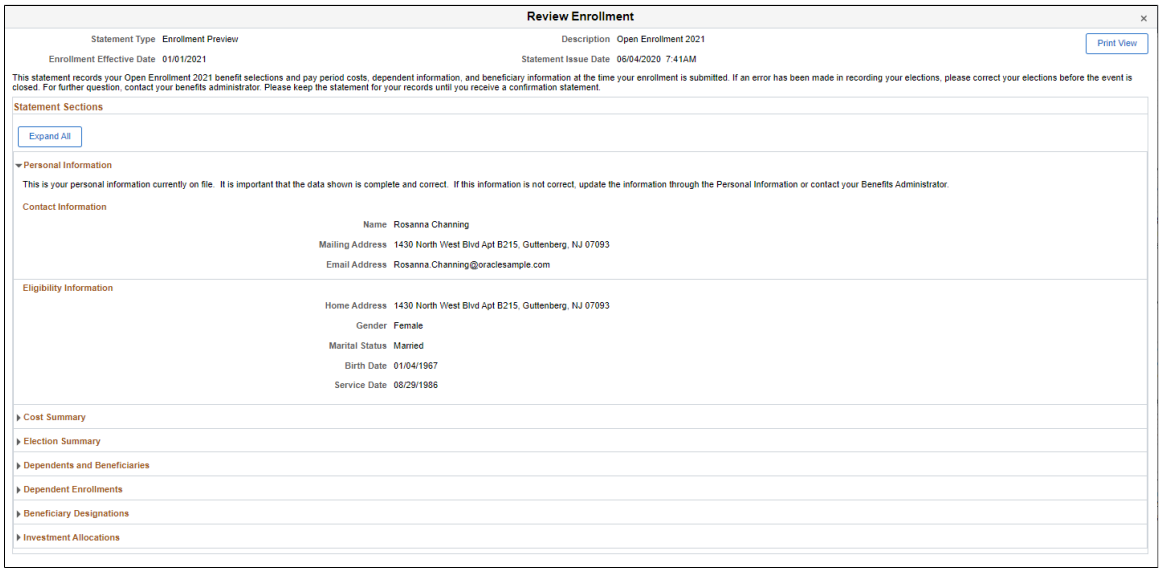

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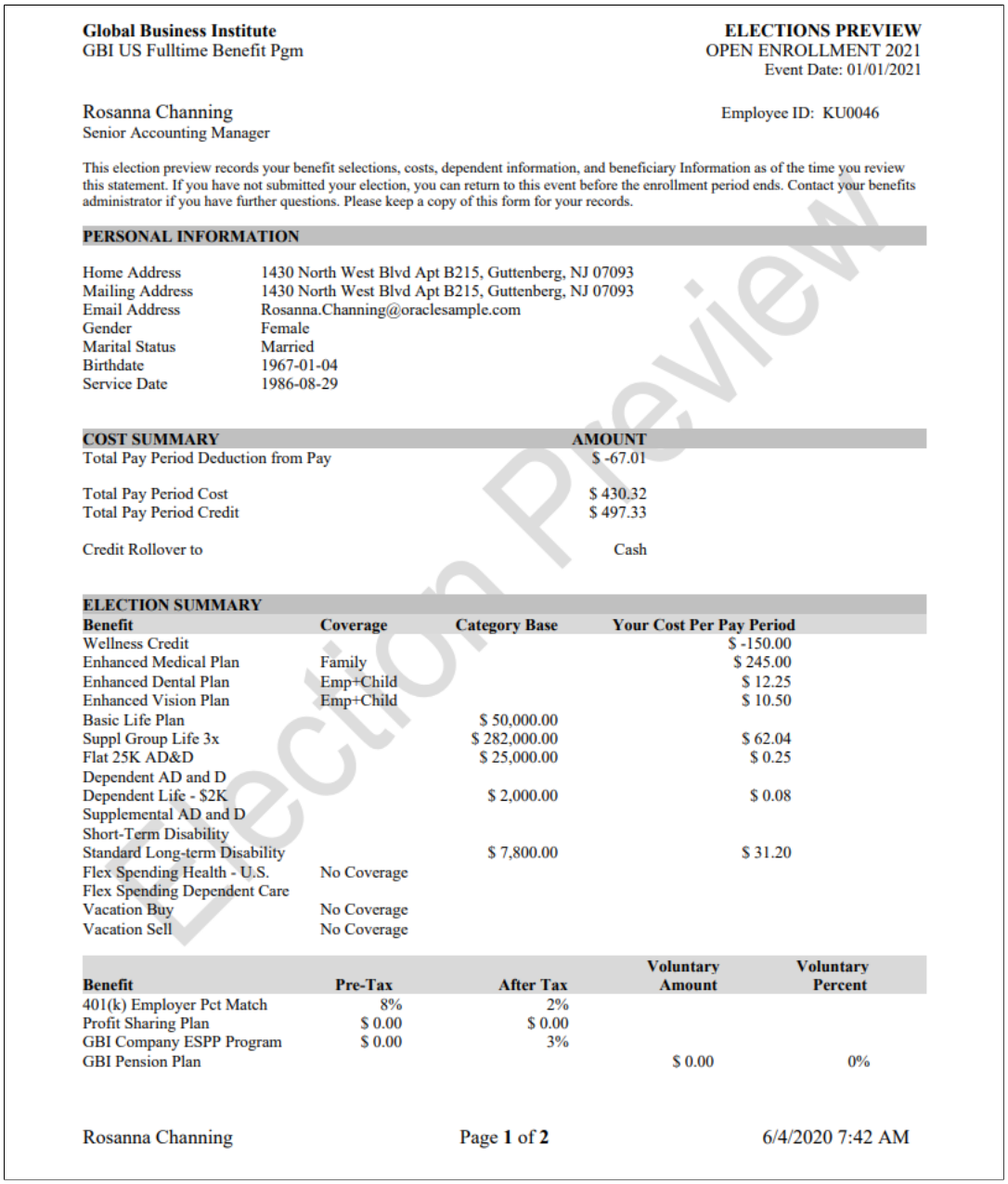
Image: Election Preview Statement in the PDF format

This example illustrates the Election Preview Statement in the PDF format.



Global Business Institute
GBI US Fulltime Benefit Pgm

ELECTIONS PREVIEW
OPEN ENROLLMENT 2021
Event Date: 01/01/2021

Rosanna Channing
Senior Accounting Manager

Employee ID: KU0046

This election preview records your benefit selections, costs, dependent information, and beneficiary Information as of the time you review this statement. If you have not submitted your election, you can return to this event before the enrollment period ends. Contact your benefits administrator if you have further questions. Please keep a copy of this form for your records.

PERSONAL INFORMATION

Home Address	1430 North West Blvd Apt B215, Guttenberg, NJ 07093
Mailing Address	1430 North West Blvd Apt B215, Guttenberg, NJ 07093
Email Address	Rosanna.Channing@oraclesample.com
Gender	Female
Marital Status	Married
Birthdate	1967-01-04
Service Date	1986-08-29

COST SUMMARY	AMOUNT
Total Pay Period Deduction from Pay	$ -67.01
Total Pay Period Cost	$ 430.32
Total Pay Period Credit	$ 497.33
Credit Rollover to	Cash

ELECTION SUMMARY

Benefit	Coverage	Category Base	Your Cost Per Pay Period
Wellness Credit			$ -150.00
Enhanced Medical Plan	Family		$ 245.00
Enhanced Dental Plan	Emp+Child		$ 12.25
Enhanced Vision Plan	Emp+Child		$ 10.50
Basic Life Plan		$ 50,000.00	
Suppl Group Life 3x		$ 282,000.00	$ 62.04
Flat 25K AD&D		$ 25,000.00	$ 0.25
Dependent AD and D			
Dependent Life - $2K		$ 2,000.00	$ 0.08
Supplemental AD and D			
Short-Term Disability			
Standard Long-term Disability		$ 7,800.00	$ 31.20
Flex Spending Health - U.S.	No Coverage		
Flex Spending Dependent Care			
Vacation Buy	No Coverage		
Vacation Sell	No Coverage		

Benefit	Pre-Tax	After Tax	Voluntary Amount	Voluntary Percent
401(k) Employer Pct Match	8%	2%		
Profit Sharing Plan	$ 0.00	$ 0.00		
GBI Company ESPP Program	$ 0.00	3%		
GBI Pension Plan			$ 0.00	0%

Rosanna Channing Page **1** of **2** 6/4/2020 7:42 AM

Election Preview

Submit Enrollment

After making changes to your enrollment plans, click this button to submit your benefit plan choices to the system.

Once you click the Submit Enrollment button, a Benefits Alerts pop-up window opens to confirm your submission. Click the View button on this pop-up window to once again review the benefits enrollment details. The View page displays the benefits enrollment details as collapsible sections. Expand each section to view details. Use the Print View button on the page to download the statement in a PDF format to save as a file or to print a hard copy.

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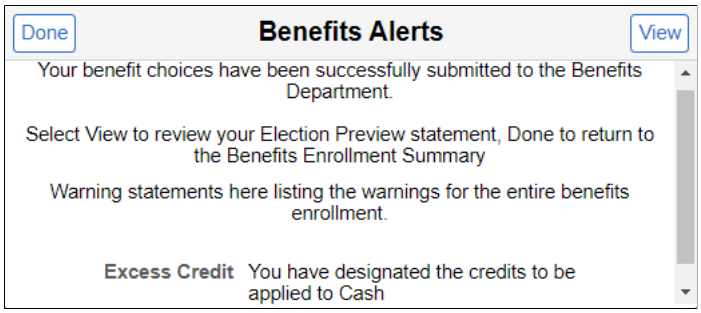
Click the Done button, to complete your enrollment process.

Image: Benefits Alerts

This example illustrates the Benefits Alerts pop-up window.



Contact Information and Resources The right panel displays the contact details of the Benefits Administrator, as well as links to additional resources.

Benefit Plans Section

You can choose to view your benefit plans either as cards or in a grid. This section displays which benefit plans are open for edits. All of your benefit changes are effective as of the date of the benefit change event.

The benefit plan cards and the sequence in which it is displayed are as specified in the Benefit Program Table. There is a visual clue/identifier, in the form of a color bar, at the top of the cards to help you quickly identify the status of the benefit plans.

The first time an employee enters the Benefits Enrollment page, the plan status displays Pending Review. After the employee clicks the card (or the Review button in the grid view) to review the plans, the next time he/she returns to the Benefits Enrollment page, the status displays Visited. All cards with statuses Pending Review and Visited have a blue bar at the top. Whenever an update is made to a plan, the status displays Changed along with a green tick icon and the cards have a green bar at the top.

Certain benefit plans require submission of proofs and after enrolling in such plans, the status in the grid and the card displays Changed – Pending Proof. Once the administrator receives the proof, the status changes to Changed – Proof Received.

Cards with a red bar signifies benefit plans with some error. If a benefit plan has a cross plan dependency and if the validation fails, an error status displays on the card. Click the card to view an error message at the top of the page.

Certain benefit plan cards are not clickable with no color bars at the top and status as Not Available. These benefit plans have no election option to choose from and are displayed in this page only because the Show if no choice check box is selected in the Benefits Program Table. If the Show if no choice is unchecked, these cards are not be displayed in the Benefits Enrollment page.

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Image: Benefit Plans in the Card view

This example illustrates the fields and controls on the Benefit Plans in the Card view. You can find definitions for the fields and controls later on this page.

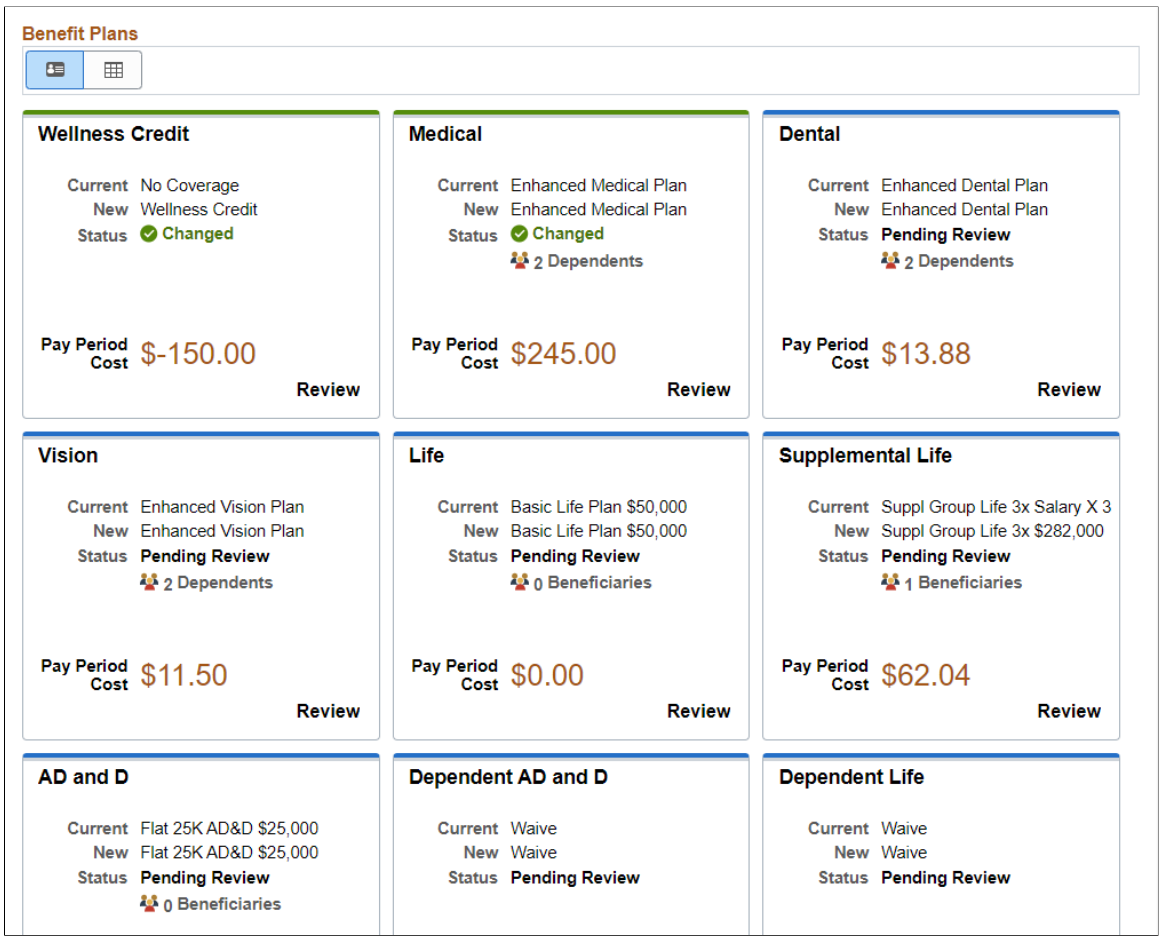

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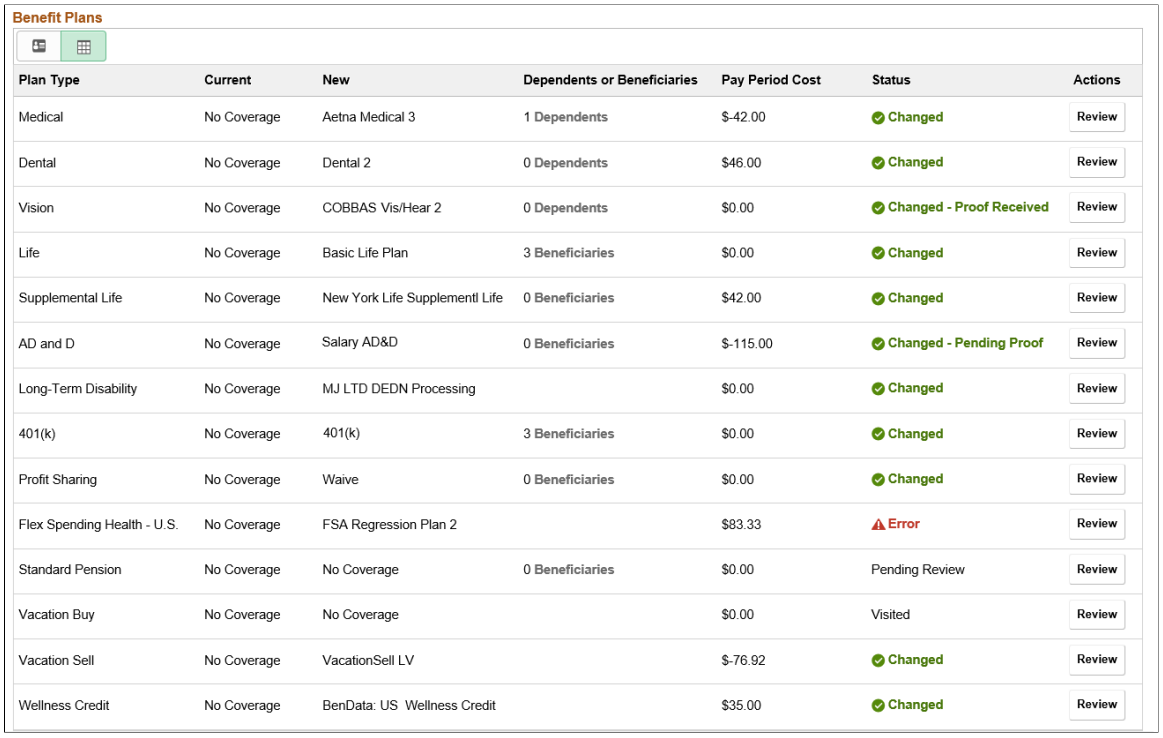
Image: Benefit Plans in the Grid view

This example illustrates the fields and controls on the Benefit Plans in the Grid view. You can find definitions for the fields and controls later on this page.



Benefit Plans

Plan Type	Current	New	Dependents or Beneficiaries	Pay Period Cost	Status	Actions
Medical	No Coverage	Aetna Medical 3	1 Dependents	$-42.00	Changed	Review
Dental	No Coverage	Dental 2	0 Dependents	$46.00	Changed	Review
Vision	No Coverage	COBBAS Vis/Hear 2	0 Dependents	$0.00	Changed - Proof Received	Review
Life	No Coverage	Basic Life Plan	3 Beneficiaries	$0.00	Changed	Review
Supplemental Life	No Coverage	New York Life Supplementl Life	0 Beneficiaries	$42.00	Changed	Review
AD and D	No Coverage	Salary AD&D	0 Beneficiaries	$-115.00	Changed - Pending Proof	Review
Long-Term Disability	No Coverage	MJ LTD DEDN Processing		$0.00	Changed	Review
401(k)	No Coverage	401(k)	3 Beneficiaries	$0.00	Changed	Review
Profit Sharing	No Coverage	Waive	0 Beneficiaries	$0.00	Changed	Review
Flex Spending Health - U.S.	No Coverage	FSA Regression Plan 2		$83.33	Error	Review
Standard Pension	No Coverage	No Coverage	0 Beneficiaries	$0.00	Pending Review	Review
Vacation Buy	No Coverage	No Coverage		$0.00	Visited	Review
Vacation Sell	No Coverage	VacationSell LV		$-76.92	Changed	Review
Wellness Credit	No Coverage	BenData: US Wellness Credit		$35.00	Changed	Review

Current Displays an already existing enrollment to the Benefit plan, if any. If no enrollment exists then the field displays No Coverage.

New Displays the default election when an employee enrolls for the first time. As the employee selects a different plan option, New reflect the new choice.

Dependents or Beneficiaries For plans that allow enrolling dependents or beneficiaries, the card displays a dependent or a beneficiary icon and the number of dependents or beneficiaries enrolled in the new enrollment.

Pay Period Cost Displays the pay period or annual cost as defined in the Cost Freq on Enrollment Form drop-down in the Benefits Program Table.

Status Displays the status of the benefit plan. The available values are Pending Review, Visited, Changed, Not Available and Error.

Review Click the cards or the Review button on the grid, to review your benefit plan elections.

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Enrolling in Benefit Plans Using the PeopleSoft Fluid User Interface

This topic discusses the fluid Benefit plan pages to enroll in or review your benefit plans.

Pages Used to Enroll in Benefit Plans Using the PeopleSoft Fluid User Interface

Page Name	*Definition Name*	*Usage*
Benefits Enrollment Page	BNE_CARD_SUMM_FL	View the enrollment summary and detailed information about various benefit plans which are open for enrollment or edits.
1x Health Plans: Medical Page Dental Page Medical/Dental Page Major Medical Page Vision Page Domestic Partner Medical Page Domestic Partner Dental Page Domestic Partner Vision Page	BNE_PLAN_1X_FL	Review or elect health (medical/dental/vision) plan-type benefits for employee and domestic partner.
2x Life Plans: Life Page Supplemental Life Page AD and D Page Life and AD and D Page Dependent AD and D Page Dependent Life Page Survivor Income Page Supplemental AD and D Page Spousal Life Page	BNE_PLAN_2X_FL	Review and elect life plan-type benefits for employee and dependents.

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Page Name	*Definition Name*	*Usage*
3x Disability Plans: Short-Term Disability Page Long-Term Disability Page	BNE_PLAN_3X_FL	Enroll in short-term or long-term disability plans.
4x Savings Plans: 401(k) Page Profit Sharing Page Thrift Page IRA Page Capital Accumulation Page U.S. Savings Bonds Page 403(b) Page Nonelective Contributions Page Employer Only Page Section 456 Page Employee Stock Purchase Page	BNE_PLAN_4X_FL	Enroll in savings plan benefits.
5x Leave Plans: Sick Page Vacation Page Personal Page Family and Medical Act Page	BNE_PLAN_5X_FL	Enroll in a leave plan.
6x FSA and HSA Plans: Flex Spending Health – U.S. Page Flex Spending Health – Canada Page Flex Spending Dependent Care Page Retirement Counselling Page Health Savings Account Page	BNE_PLAN_6X_FL	Enroll in FSA and HSA plan benefits.
7x Retirement Plan: PERS (Public Employee Retirement Systems) Page	BNE_PLAN_7X_FL	Enroll in retirement plans.

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Page Name	*Definition Name*	*Usage*
8x Pension Plans: Standard Pension Page Pension Plan 1 - U.S. Page Pension Plan 2 - U.S. Page Pension Plan 3 - U.S. Page Pension Plan 4 - U.S. Page Pension Plan 5 - U.S. Page Pension Plan 6 - U.S. Page	BNE_PLAN_8X_FL	Enroll in U.S. and Canada pension plan benefits.
9x Vacation Plans: Vacation Buy Page Vacation Sell Page	BNE_PLAN_9X_FL	Enroll in vacation plan benefits.
Ax Simple Plans: Long-Term Care Page Legal Services Page Wellness Credit Page	BNE_PLAN_375AX_FL	Enroll in simple plans.

Dependents and Beneficiaries Enrollment Sections in Benefit Plan Pages

For 1x Health Plans, the Enroll Your Dependents section displays only when the Collect Dep/Ben check box in the Event Rules Table- Event Rules Page is selected. When the Collect Dep/Ben check box in the Event Rules table is not selected, then the plans will have all coverage levels listed separately under the Enroll in Your Plan section.

For 2x, 4x and 8x plans, the Designate Your Beneficiaries section displays only when the Collect Dep/Ben check box in the Event Rules table is selected.

Medical Page

Use the Medical page (BNE_PLAN_1X_FL) to review or elect health (medical) plan-type benefits for employee and domestic partner.

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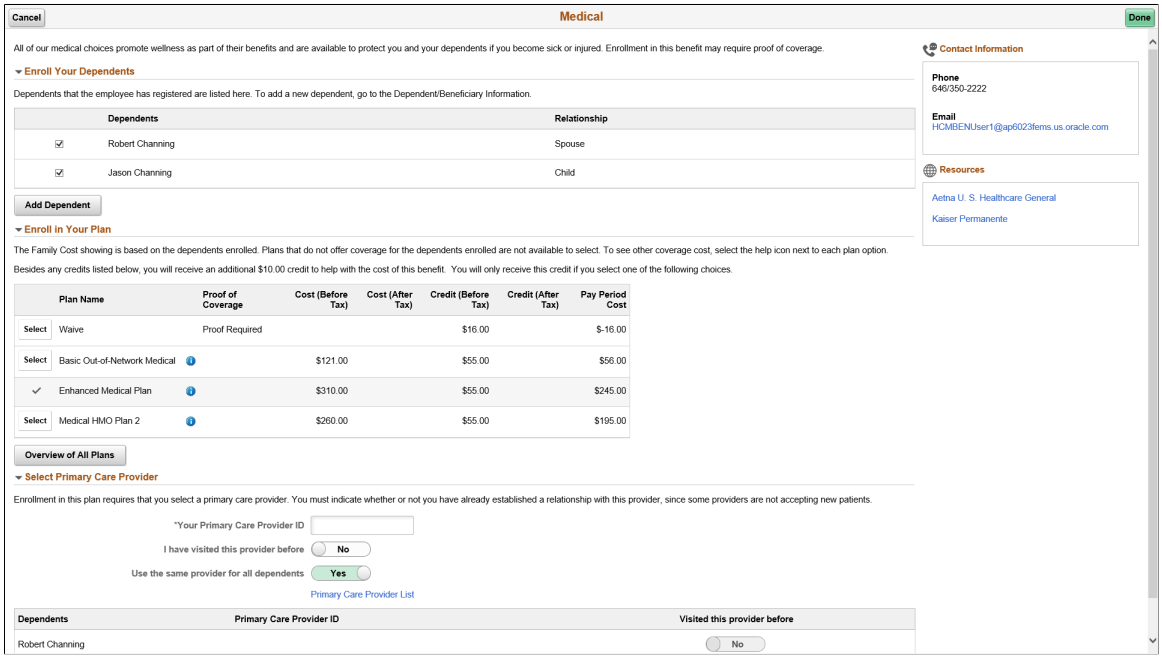
Navigation

- Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the Benefits Enrollment tab on the left panel, and then under the Benefit Plans section, click the plan type, Medical.
- You can also access the benefit enrollment plan pages using the Open Enrollment or OnBoarding tile on the Employee Self Service homepage. On the Open Enrollment or OnBoarding activity guide, click the Benefits Enrollment tab on the left panel and then under the Benefit Plans section, click the plan type, Medical.

Image: Medical Page

This example illustrates the fields and controls on the Medical Page. You can find definitions for the fields and controls later on this page.



Enroll Your Dependents — All dependents that the employee has registered are listed here.

Select the check box next to the dependent you want to enroll in this plan.

Add Dependent button — Use the Add Dependent button, to add a new dependent.

Enroll in Your Plan section — This section displays the plan names and the cost based on the dependents you have enrolled.

— For more information about the plans, click the Information icon next to the Plan Name.

Overview of All Plans — Click this to view a summary of all the benefit plans along with the cost for each coverage level.

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Image: Medical page_smartphone

This example illustrates the fields and controls on the Medical page as seen on a smartphone.

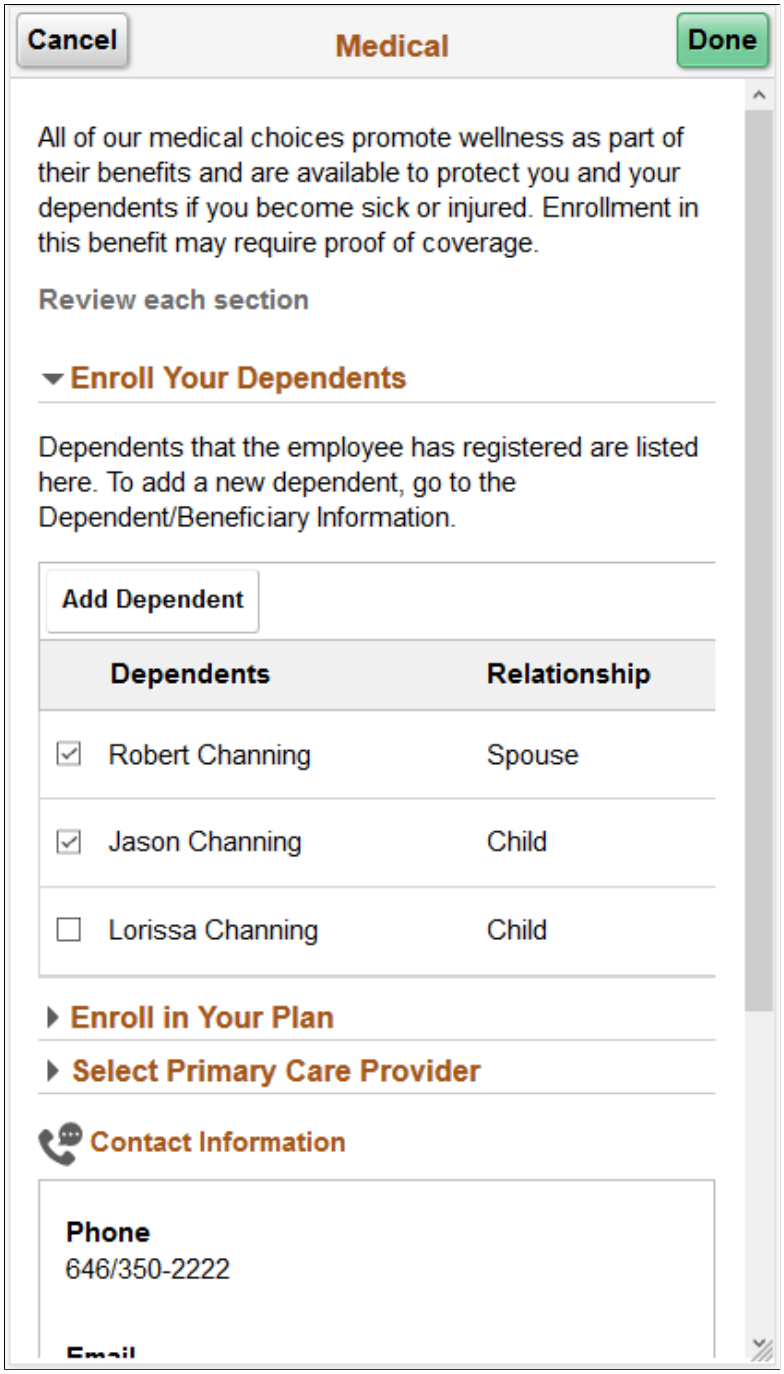

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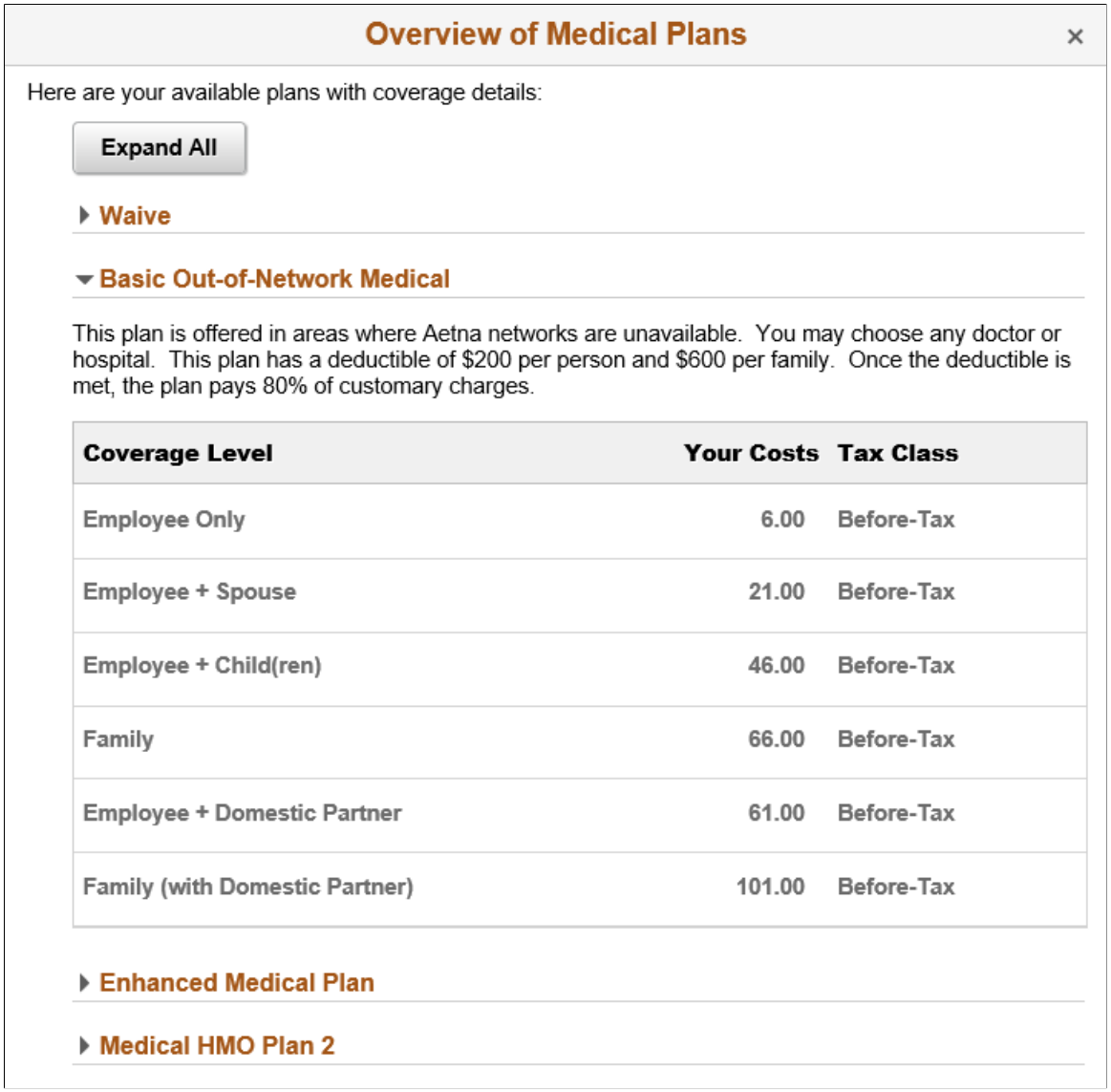
Image: Overview of Medical Plans modal window

This example illustrates the fields and controls on the Overview of Medical Plans modal window.



Select Primary Care Provider section Select Primary Care Provider section displays only when the "Health Plan Table Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits) has the Health Provider set as required. The Primary Care Provider List link in this section displays if the enrolled benefit plan has an Authorized Provider URL ID associated in the Vendor Information table – "Policy Information Page" (PeopleSoft HCM 9.2: Application Fundamentals).

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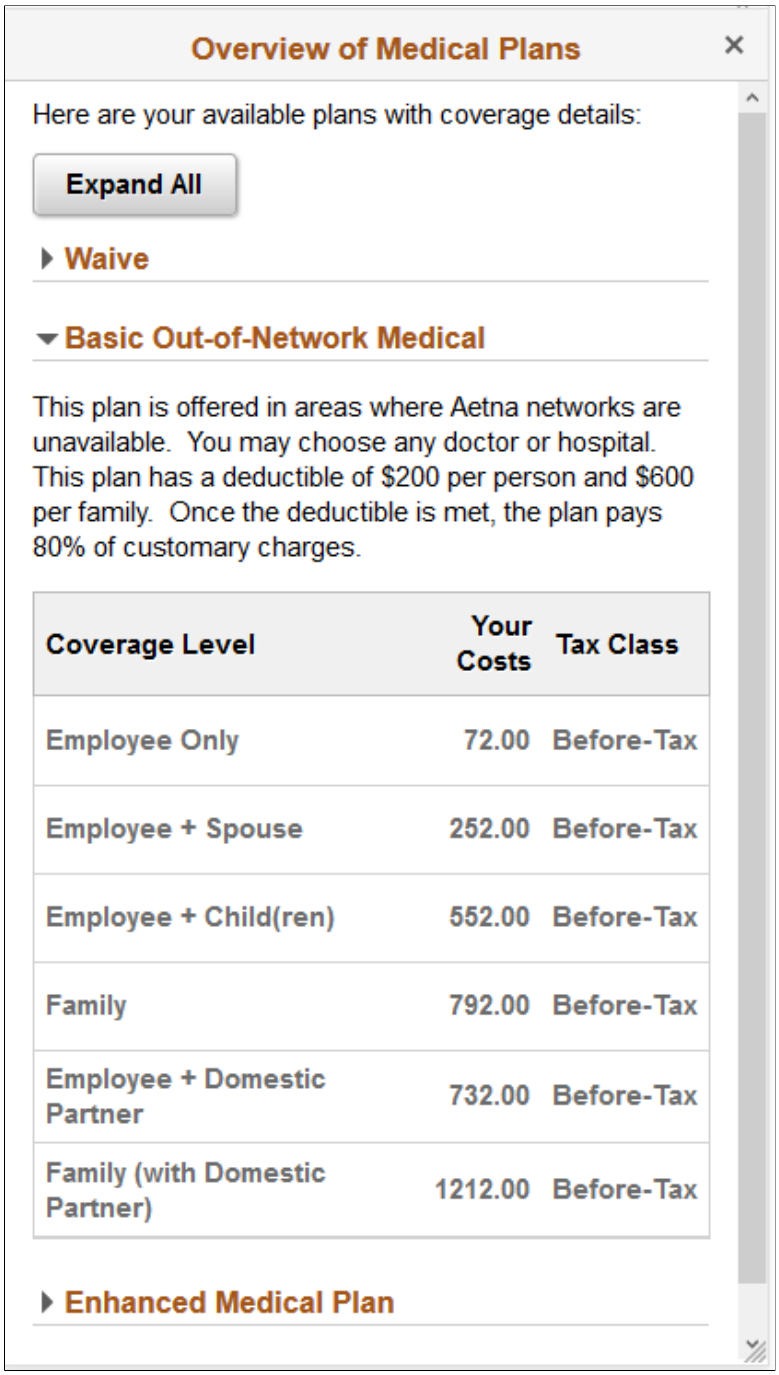
Image: Smartphone_Overview of Medical Plans modal window

This example illustrates the fields and controls on the Overview of Medical Plans modal window as seen on a smartphone.



Related Links

Defining Event Rules

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Life Page

Use the Life page (BNE_PLAN_2X_FL) to review and elect life plan-type benefits for employee and dependents.

Navigation

- Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the Benefits Enrollment tab on the left panel, and then under the Benefit Plans section, click the plan type, Life.
- You can also access the benefit enrollment plan pages using the Open Enrollment or OnBoarding tile on the Employee Self Service homepage. On the Open Enrollment or OnBoarding activity guide, click the Benefits Enrollment tab on the left panel and then under the Benefit Plans section, click the plan type, Life.

Note: The 2x Life plans are configured based on the Coverage Type and Insured Person Type as set in the "Life and AD/D Plan Table Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits). And hence the 2x Life plans display different sections depending on the plan type you select.

The sections on the 2x Life plan pages are:

- Enroll in Your Plan
- Coverage Amount
- Enroll Your Dependents
- Designate Your Beneficiaries

Image: Life Page

This example illustrates the fields and controls on the Life Page. You can find definitions for the fields and controls later on this page.

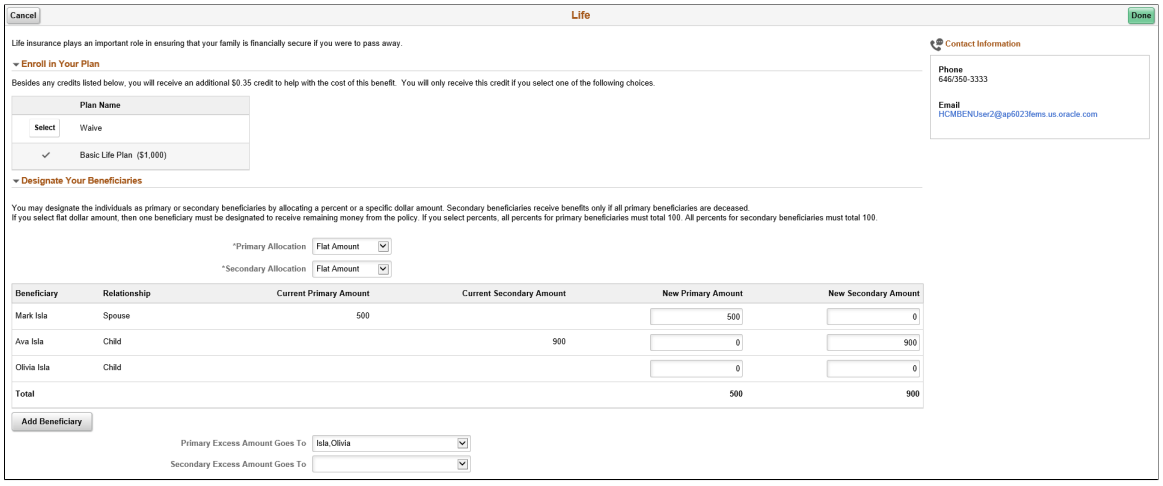

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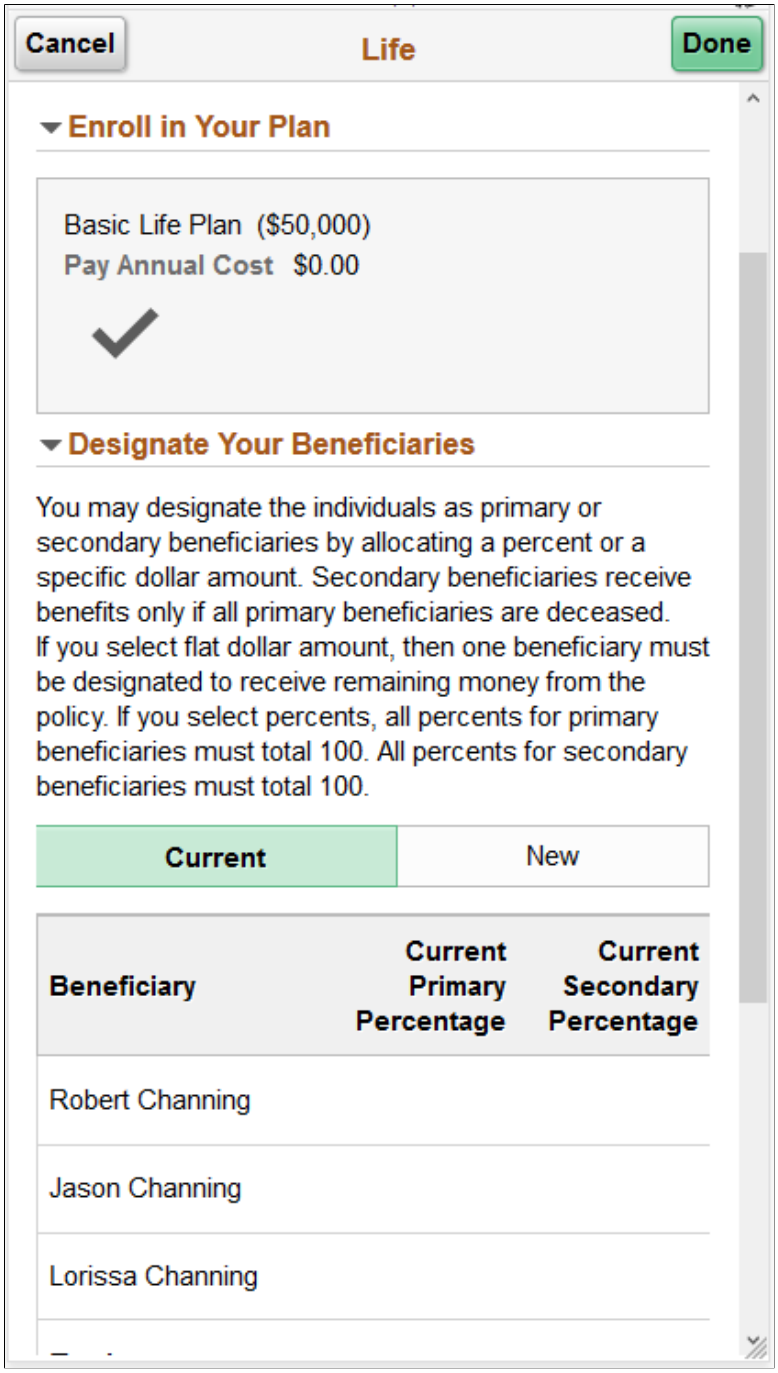
Image: Smartphone_Life page

This example illustrates the fields and controls on the Life page as seen on a smartphone.



Primary Allocation and **Secondary Allocation** drop-downs	The allocation types available are Flat Amount or Percent.
New Primary Amount or**New Primary Percentage**, **New Secondary Amount** or **New Secondary Percentage** columns	If percent is used in the allocation type, on the New Primary Allocation or New Secondary Allocation column enter values that add up to a 100 percent.

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If flat amount is used in the allocation type, on the New Primary Allocation or New Secondary Allocation column enter values that represents the dollar amount.

Primary Excess Amount Goes To and **Secondary Excess Amount Goes To**

If the primary and secondary allocation types are in percents, then these fields appear greyed out.

If flat amount is used in the Primary or Secondary allocation type, in the corresponding drop-downs, select an eligible beneficiary.

Related Links

Defining Event Rules

"Setting Up Life Insurance and Accidental Death Plans" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Supplemental Life Page

Use the Supplemental Life page (BNE_PLAN_2X_FL) to review and elect supplemental life plan-type benefits for employee and dependents.

Navigation

- Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the Benefits Enrollment tab on the left panel, and then under the Benefit Plans section, click the plan type, Supplemental Life.
- You can also access the benefit enrollment plan pages using the Open Enrollment or OnBoarding tile on the Employee Self Service homepage. On the Open Enrollment or OnBoarding activity guide, click the Benefits Enrollment tab on the left panel and then under the Benefit Plans section, click the plan type, Supplemental Life.

Image: Supplemental Life Page — part1

This example illustrates the fields and controls on the Supplemental Life Page. You can find definitions for the fields and controls later on this page.

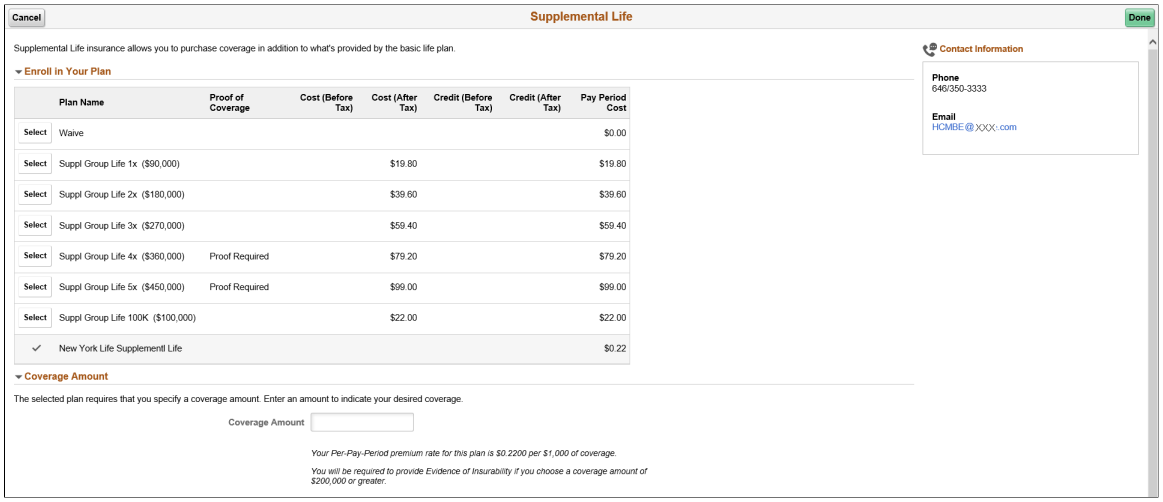
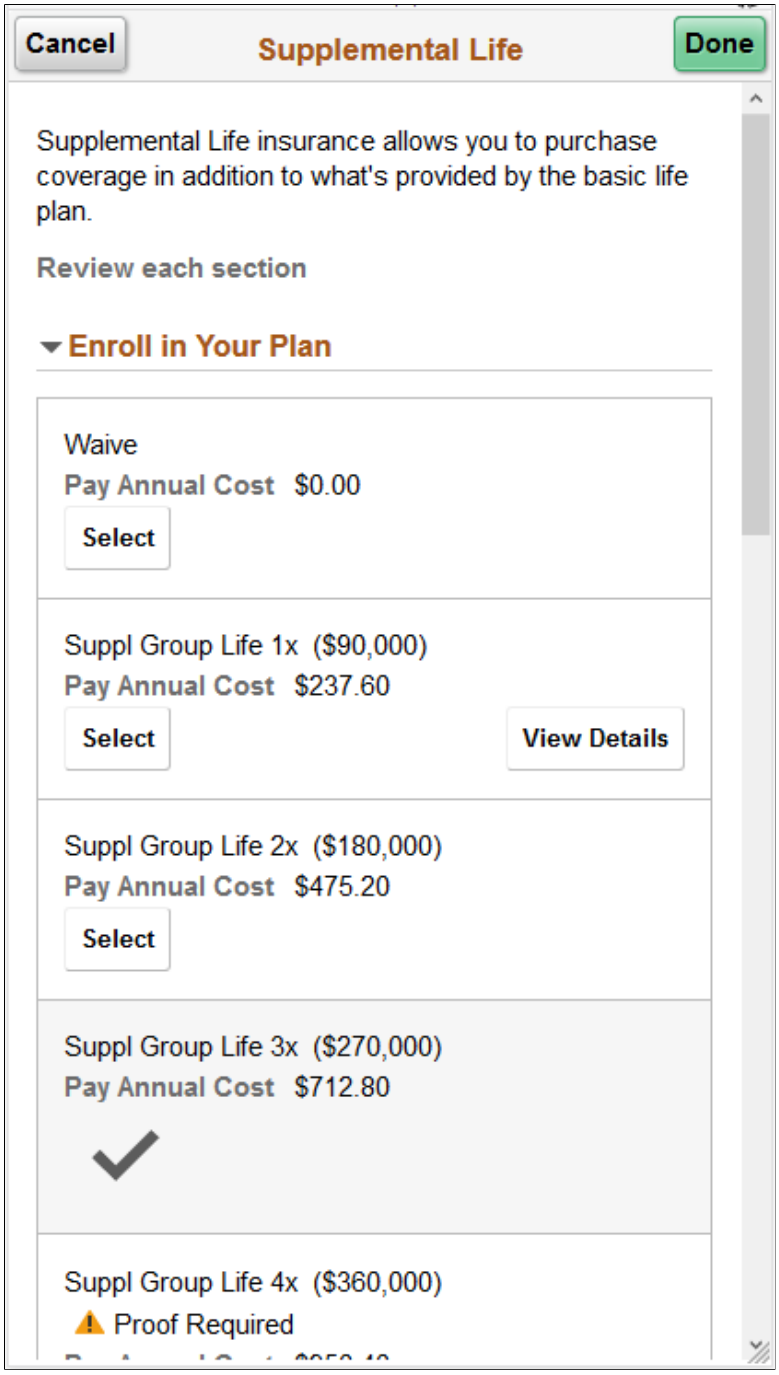


Image: Smartphone_Supplemental page part1

This example illustrates the fields and controls on the Supplemental page part1 as seen on a smartphone.



Enroll in Your Plan section — Click the Select button next to the plan you wish to enroll in.

Coverage Amount — Enter the amount, for the plans that allow you to specify a coverage amount.

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Image: Supplemental Life Page - part2

This example illustrates the fields and controls on the Supplemental Life Page - part2. You can find definitions for the fields and controls later on this page.

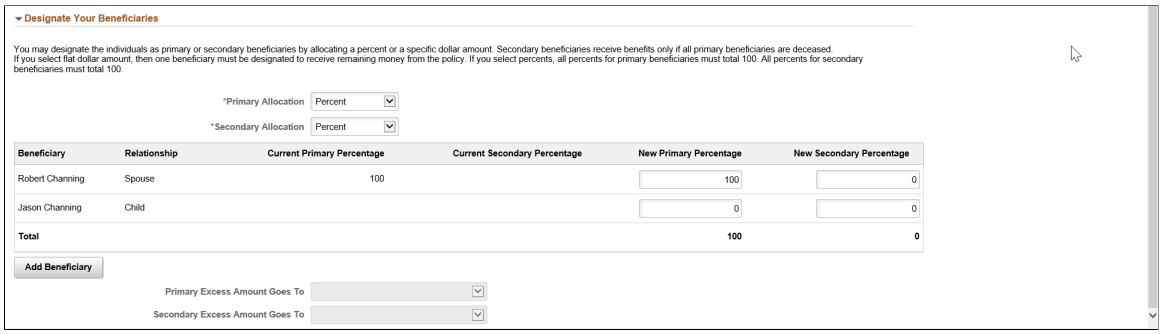
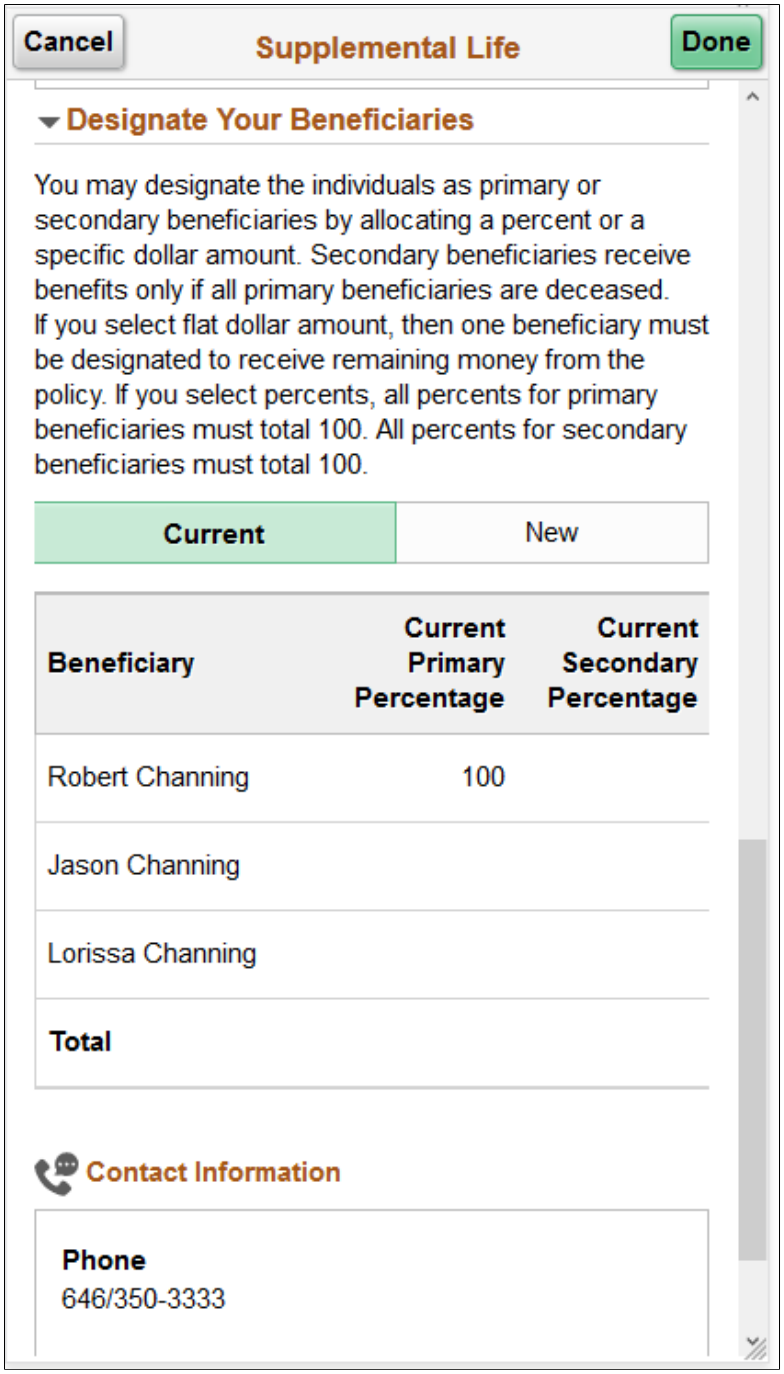


Image: Smartphone_Supplemental page part2

This example illustrates the fields and controls on the Supplemental page part2, as seen on a smartphone.



Primary Allocation and **Secondary Allocation** drop-downs	The allocation types available are Flat Amount or Percent.
New Primary Amount or**New Primary Percentage**, **New Secondary Amount** or **New Secondary Percentage** columns	If percent is used in the allocation type, on the New Primary Allocation or New Secondary Allocation column enter values that add up to a 100 percent.

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If flat amount is used in the allocation type, on the New Primary Allocation or New Secondary Allocation column enter values that represents the dollar amount.

Primary Excess Amount Goes To and **Secondary Excess Amount Goes To**

If the primary and secondary allocation types are in percents, then these fields appear greyed out.

If flat amount is used in the Primary or Secondary allocation type, in the corresponding drop-downs, select an eligible beneficiary.

Related Links

Defining Event Rules

"Setting Up Life Insurance and Accidental Death Plans" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)

Short-Term Disability Page

Use the Short-Term Disability page (BNE_PLAN_3X_FL) to enroll in short-term disability plans.

Navigation

- Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the Benefits Enrollment tab on the left panel, and then under the Benefit Plans section, click the plan type, Short-Term Disability.
- You can also access the benefit enrollment plan pages using the Open Enrollment or OnBoarding tile on the Employee Self Service homepage. On the Open Enrollment or OnBoarding activity guide, click the Benefits Enrollment tab on the left panel and then under the Benefit Plans section, click the plan type, Short-Term Disability.

Image: Short-Term Disability Page

This example illustrates the fields and controls on the Short-Term Disability Page.

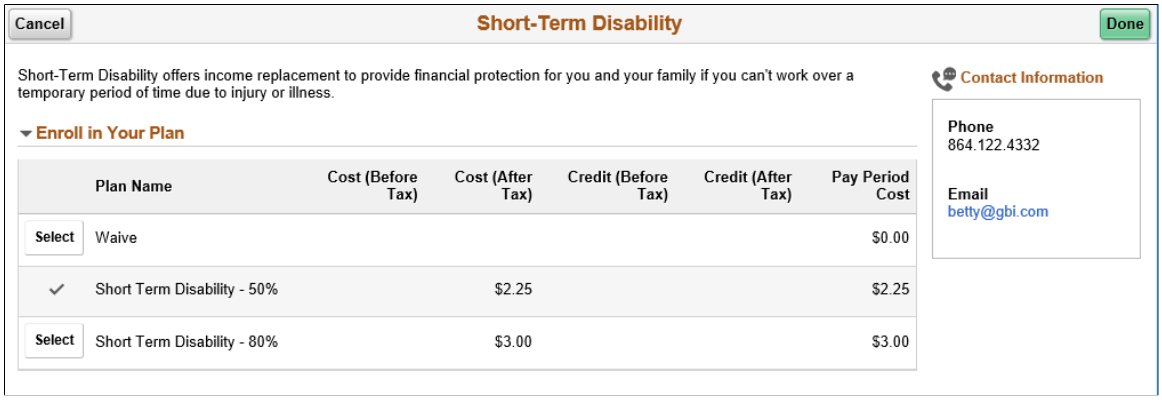

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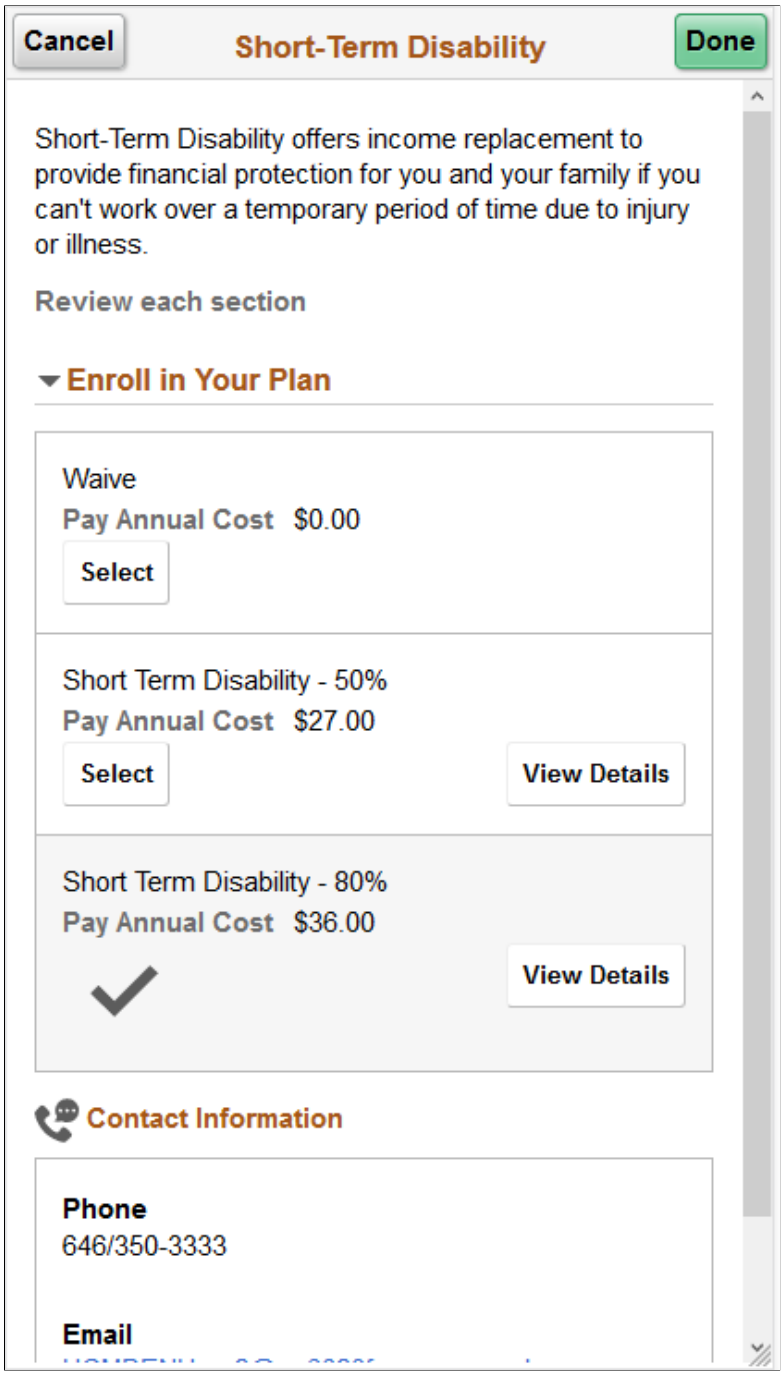
Image: Smartphone_Short-Term Disability Page

This example illustrates the fields and controls on the Short-Term Disability Page as seen on a smartphone.



401(k) Page

Use the 401(k) page (BNE_PLAN_4X_FL) to enroll in savings plan benefits.

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Navigation

- Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the Benefits Enrollment tab on the left panel, and then under the Benefit Plans section, click the plan type, 401(k).
- You can also access the benefit enrollment plan pages using the Open Enrollment or OnBoarding tile on the Employee Self Service homepage. On the Open Enrollment or OnBoarding activity guide, click the Benefits Enrollment tab on the left panel and then under the Benefit Plans section, click the plan type, 401(k).

Image: 401(k) Page – Part 1

This example illustrates the fields and controls on the 401(k) Page – Part 1. You can find definitions for the fields and controls later on this page.

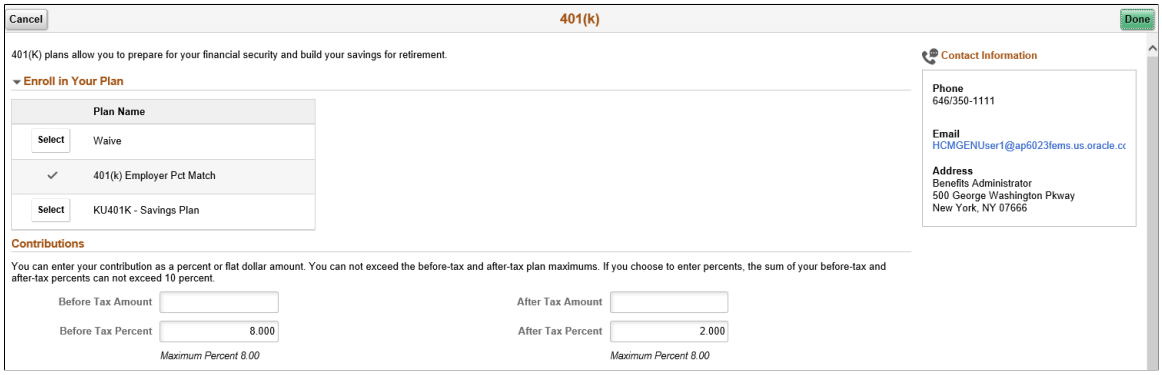

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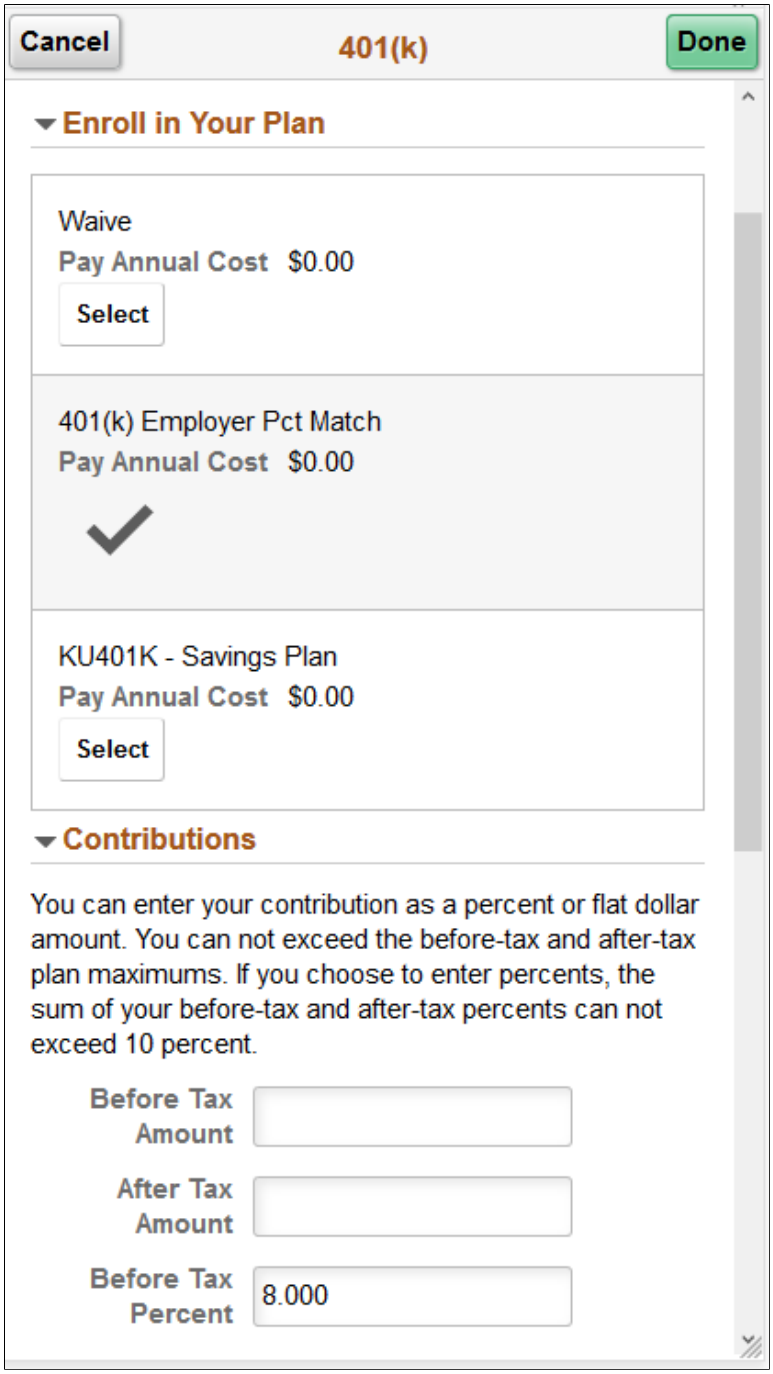
Image: Smartphone_401(k) Page – Part 1

This example illustrates the fields and controls on the 401(k) Page – Part 1, as seen on a smartphone.



Before Tax Amount and **Before Tax Percent** Enter either a flat amount or percent, but not both.

After Tax Amount and **After Tax Percent** Enter either a flat amount or percent, but not both.

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Image: 401(k) Page – Part 2

This example illustrates the fields and controls on the 401(k) Page – Part 2. You can find definitions for the fields and controls later on this page.

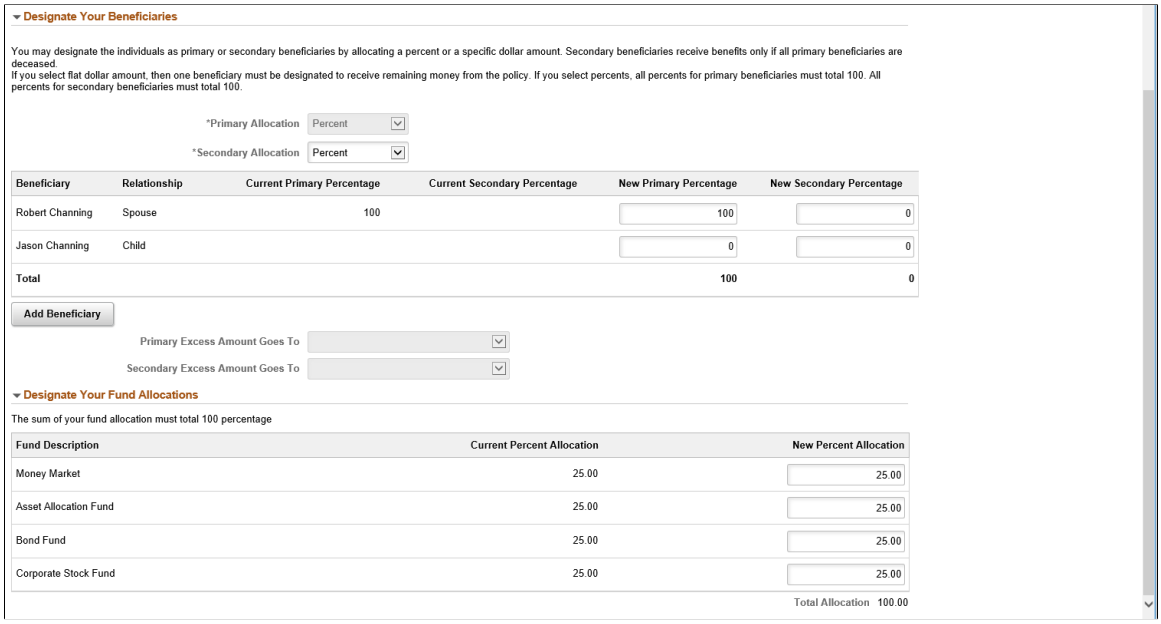

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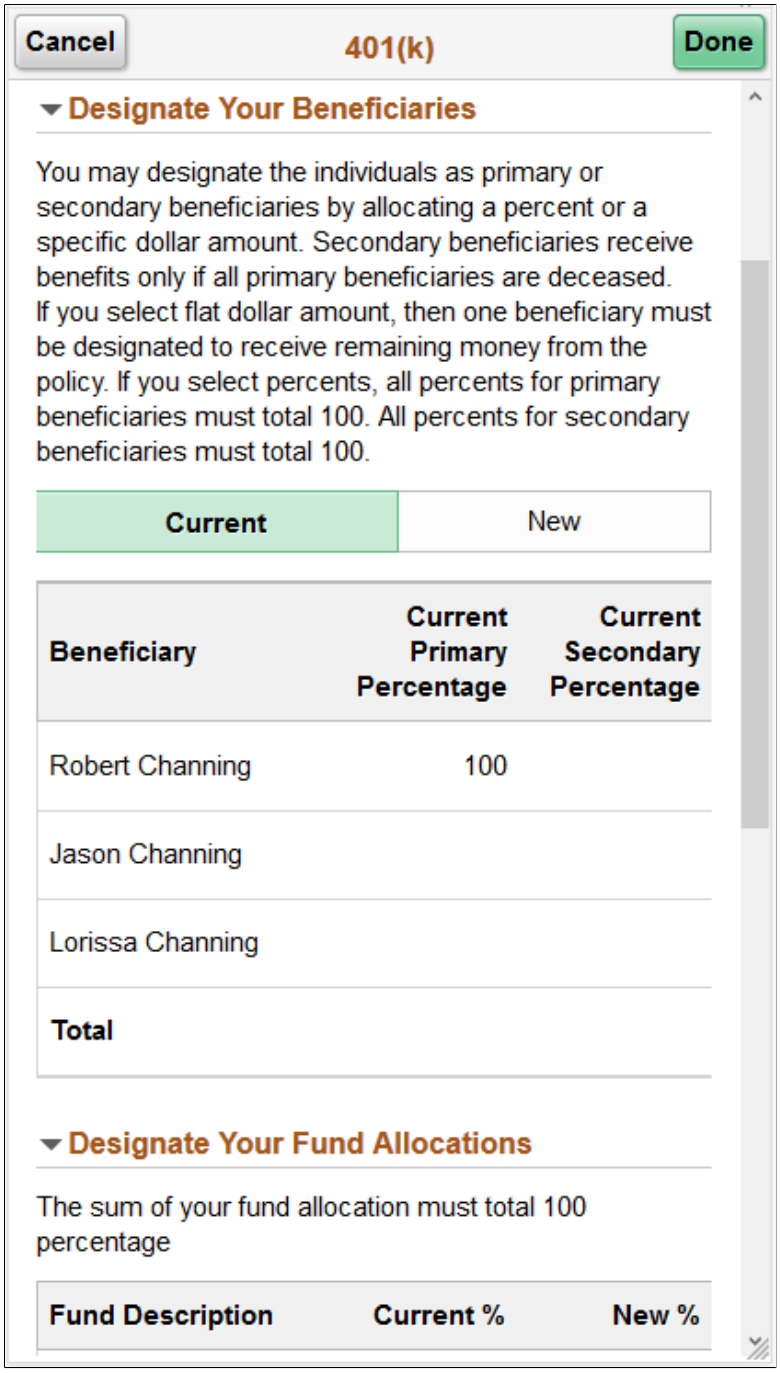
Image: Smartphone_401(k) Page – Part 2

This example illustrates the fields and controls on the 401(k) Page – Part 2 as seen on a smartphone.



Designate Your Beneficiaries: **Primary Allocation** and **Secondary Allocation** drop-downs

The allocation types available are Flat Amount or Percent.

New Primary Amount or**New Primary Percentage**, **New Secondary Amount** or **New Secondary Percentage** columns

If percent is used in the allocation type, on the New Primary Allocation or New Secondary Allocation column enter values that add up to a 100 percent.

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	If flat amount is used in the allocation type, on the New Primary Allocation or New Secondary Allocation column enter values that represents the dollar amount.
Primary Excess Amount Goes To and **Secondary Excess Amount Goes To**	If the primary and secondary allocation types are in percents, then these fields appear greyed out. If flat amount is used in the primary or secondary allocation type, then in the corresponding drop-downs, select an eligible beneficiary.
Designate Your Fund Allocations: **New Percent Allocation**	Enter a new value in percent for each fund.

Related Links

Defining Event Rules

Sick Page

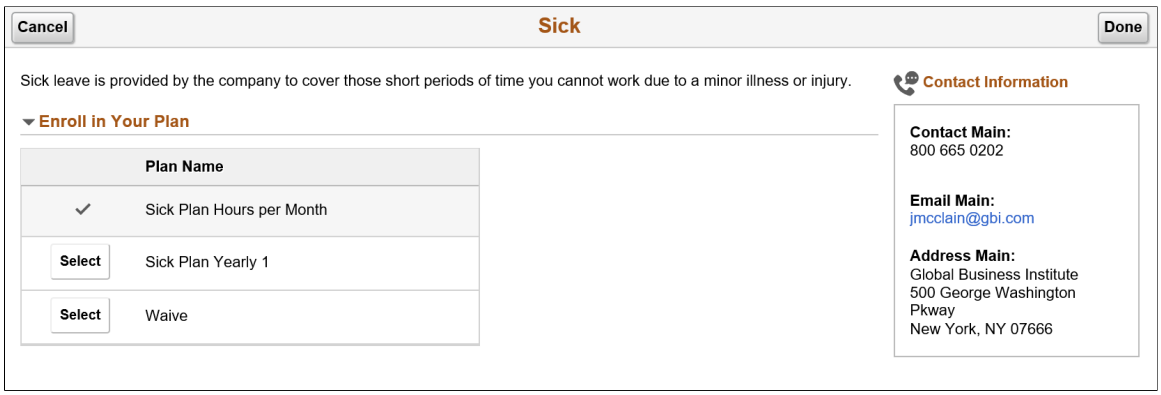
Use the Sick page (BNE_PLAN_5X_FL) to enroll in a sick leave plan.

Navigation

- Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the Benefits Enrollment tab on the left panel, and then under the Benefit Plans section, click the plan type, Sick.
- You can also access the benefit enrollment plan pages using the Open Enrollment or OnBoarding tile on the Employee Self Service homepage. On the Open Enrollment or OnBoarding activity guide, click the Benefits Enrollment tab on the left panel and then under the Benefit Plans section, click the plan type, Sick.

Image: Sick Page

This example illustrates the fields and controls on the Sick page.



Flex Spending Health – U.S. Page

Use the Flex Spending Health – U.S. page (BNE_PLAN_6X_FL) to enroll in FSA plan benefits.

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Navigation

- Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the Benefits Enrollment tab on the left panel, and then under the Benefit Plans section, click the plan type, Flex Spending Health – U.S.
- You can also access the benefit enrollment plan pages using the Open Enrollment or OnBoarding tile on the Employee Self Service homepage. On the Open Enrollment or OnBoarding activity guide, click the Benefits Enrollment tab on the left panel and then under the Benefit Plans section, click the plan type, Flex Spending Health – U.S.

Image: Flex Spending Health – U.S. Page

This example illustrates the fields and controls on the Flex Spending Health – U.S. page.

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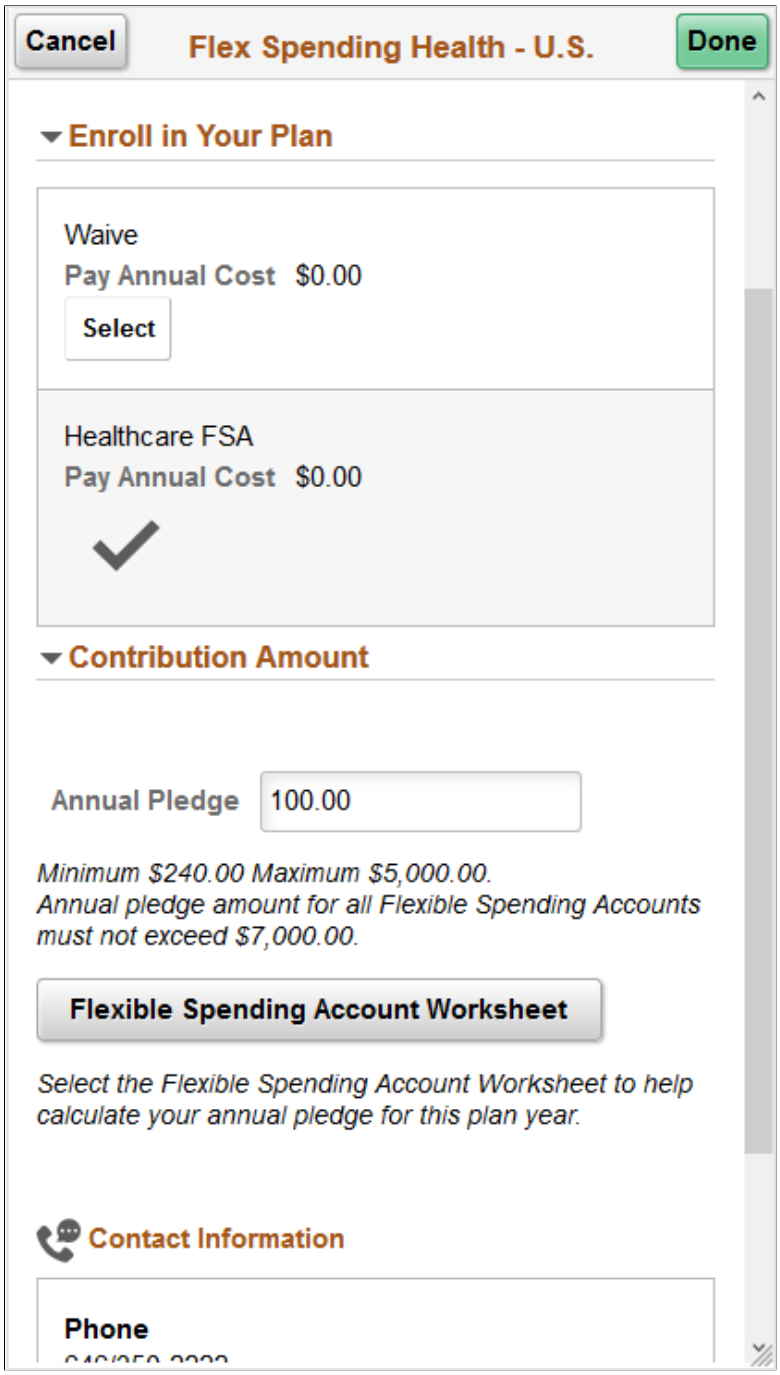
Image: Smartphone_Flex Spending Health – U.S. Page

This example illustrates the fields and controls on the Flex Spending Health – U.S. Page as seen on a smartphone.



Annual Pledge Enter your annual pledge amount.

Flexible Spending Account Worksheet Click the button, to open a Flexible Spending Account Worksheet pop up window.

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Image: Flexible Spending Account Worksheet

This example illustrates the fields and controls on the Flexible Spending Account Worksheet. You can find definitions for the fields and controls later on this page.

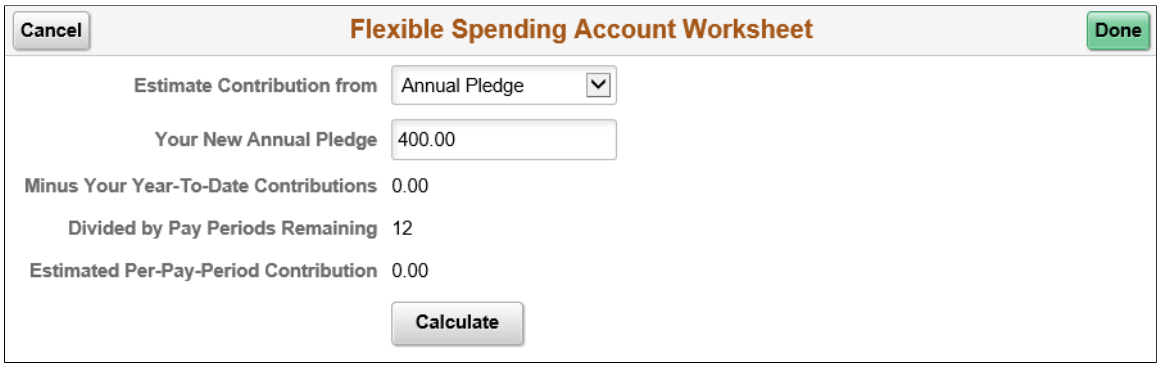

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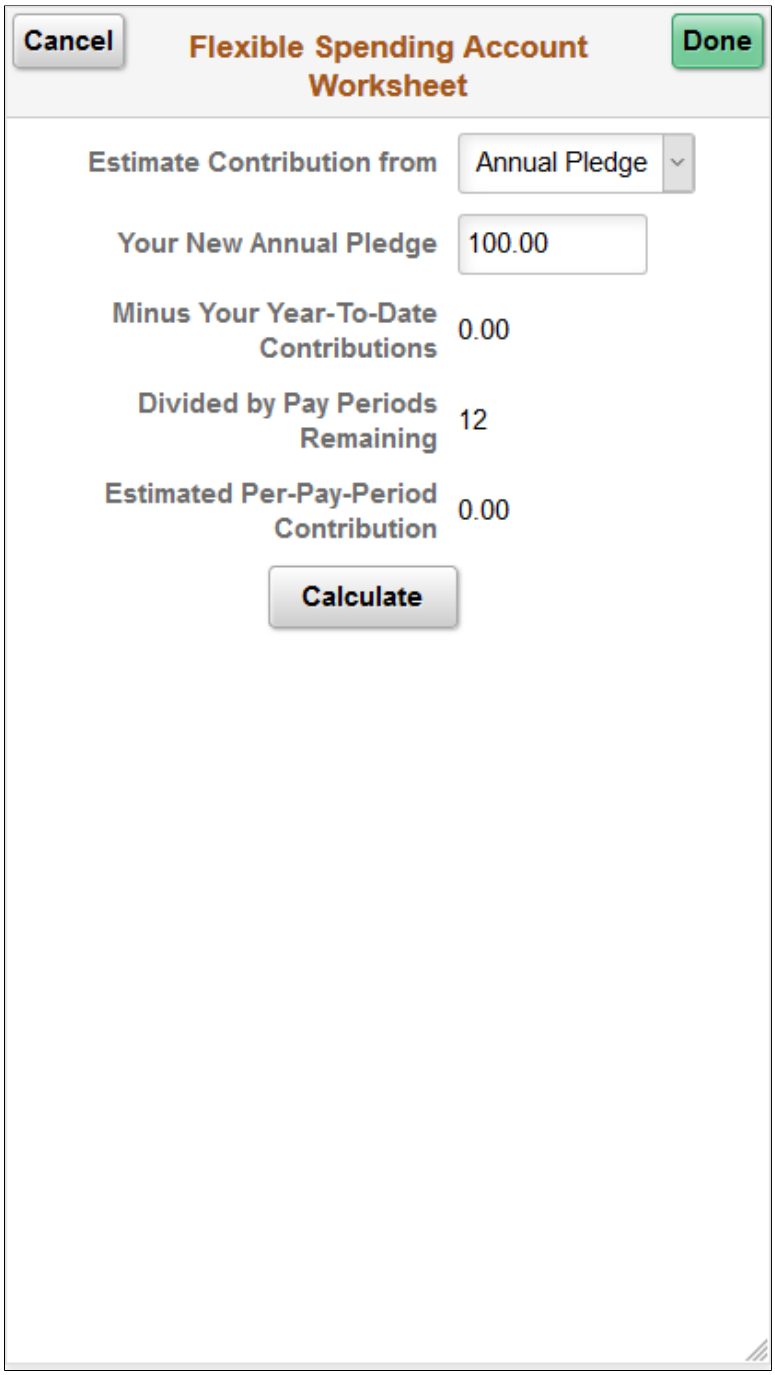
Image: Smartphone_Flexible Spending Account Worksheet

This example illustrates the fields and controls on the Flexible Spending Account Worksheet as seen on a smartphone.



Estimate Contribution from Select from the values in the drop-down: Annual Pledge or Per-Pay-Period.

Your New Annual Pledge or **Estimated Pay-Per-Period Contribution** Enter the amount for either Annual Pledge or Per-Pay-Period contribution.

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Calculate button

Click the button view the calculations.

If you entered your annual pledge amount, then after the calculation you can view your estimated per-pay-period contribution, as well as the values for Minus Your Year-To-Date Contributions and Divided by Pay Periods Remaining.

If you entered your estimated per-pay-period contribution, the calculation returns your new annual pledge amount, as well as the values for Multiplied by Pay Periods Remaining and Plus Your Year-To-Date Contributions.

PERS (Public Employee Retirement Systems) Page

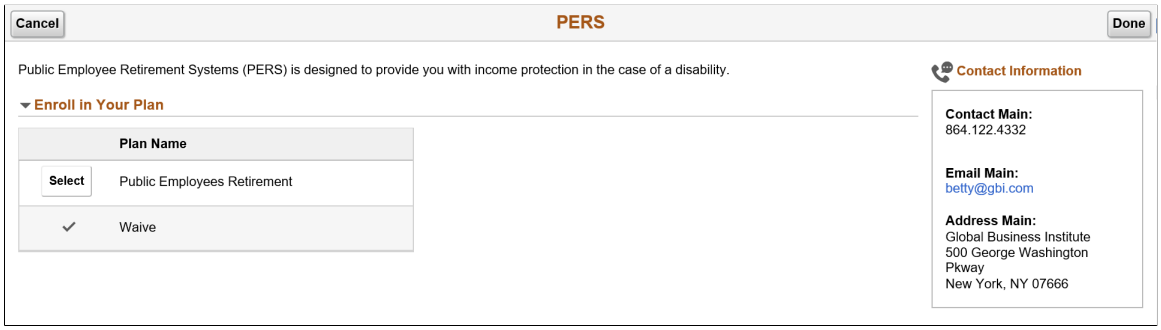
Use the PERS (Public Employee Retirement Systems) page (BNE_PLAN_8X_FL) to enroll in retirement plans.

Navigation

- Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the Benefits Enrollment tab on the left panel, and then under the Benefit Plans section, click the plan type, PERS.
- You can also access the benefit enrollment plan pages using the Open Enrollment or OnBoarding tile on the Employee Self Service homepage. On the Open Enrollment or OnBoarding activity guide, click the Benefits Enrollment tab on the left panel and then under the Benefit Plans section, click the plan type, PERS.

Image: PERS Page

This example illustrates the fields and controls on the PERS page.



Standard Pension Page

Use the Standard Pension page (BNE_PLAN_8X_FL) to enroll in pension plan benefits.

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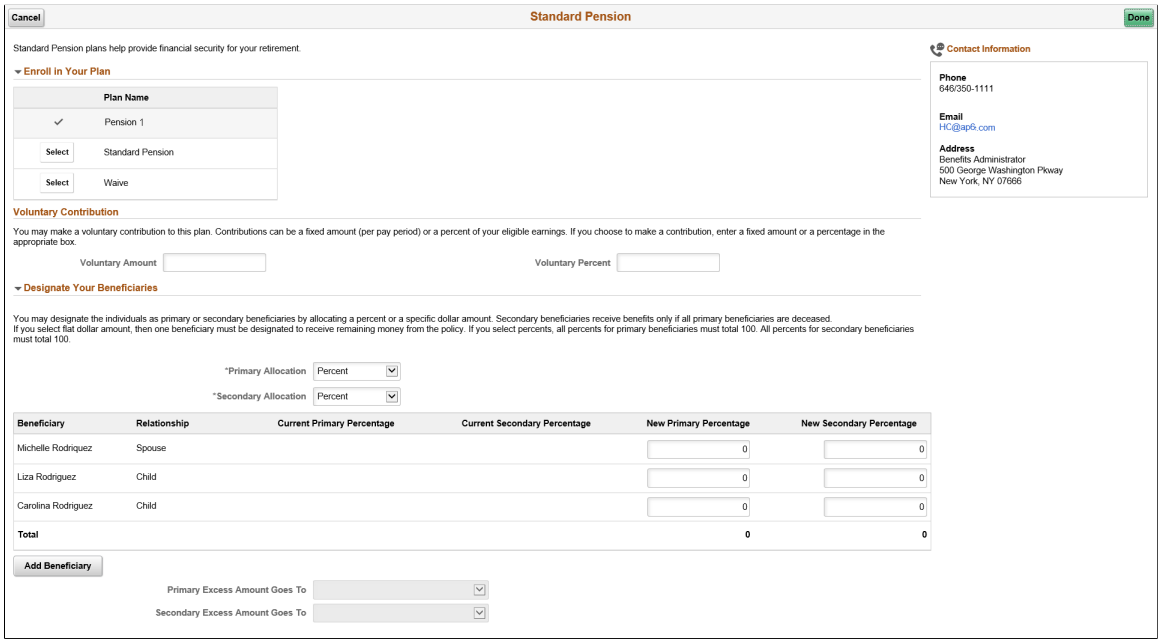
Navigation

- Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the Benefits Enrollment tab on the left panel, and then under the Benefit Plans section, click the plan type, Standard Pension.
- You can also access the benefit enrollment plan pages using the Open Enrollment or OnBoarding tile on the Employee Self Service homepage. On the Open Enrollment or OnBoarding activity guide, click the Benefits Enrollment tab on the left panel and then under the Benefit Plans section, click the plan type, Standard Pension.

Image: Standard Pension Page

This example illustrates the fields and controls on the Standard Pension page.



Voluntary Contribution: **Voluntary Amount** or **Voluntary Percent**	Enter the amount or percent for your voluntary contribution.
Designate Your Beneficiaries: **Primary Allocation** and **Secondary Allocation** drop-downs	The allocation types available are Flat Amount or Percent.
New Primary Amount or**New Primary Percentage**, **New Secondary Amount** or **New Secondary Percentage** columns	If percent is used in the allocation type, on the New Primary Allocation or New Secondary Allocation column enter values that add up to a 100 percent. If flat amount is used in the allocation type, on the New Primary Allocation or New Secondary Allocation column enter values that represents the dollar amount.
Primary Excess Amount Goes To and **Secondary Excess Amount Goes To**	If the primary and secondary allocation types are in percents, then these fields appear greyed out.

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If flat amount is used in the primary or secondary allocation type, then in the corresponding drop-downs, select an eligible beneficiary.

Related Links

Defining Event Rules

Vacation Buy Page

Use the Vacation Buy page (BNE_PLAN_9X_FL) to enroll in vacation plan benefits.

Navigation

- Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the Benefits Enrollment tab on the left panel, and then under the Benefit Plans section, click the plan type, Vacation Buy.
- You can also access the benefit enrollment plan pages using the Open Enrollment or OnBoarding tile on the Employee Self Service homepage. On the Open Enrollment or OnBoarding activity guide, click the Benefits Enrollment tab on the left panel and then under the Benefit Plans section, click the plan type, Vacation Buy.

Image: Vacation Buy Page

This example illustrates the fields and controls on the Vacation Buy page.

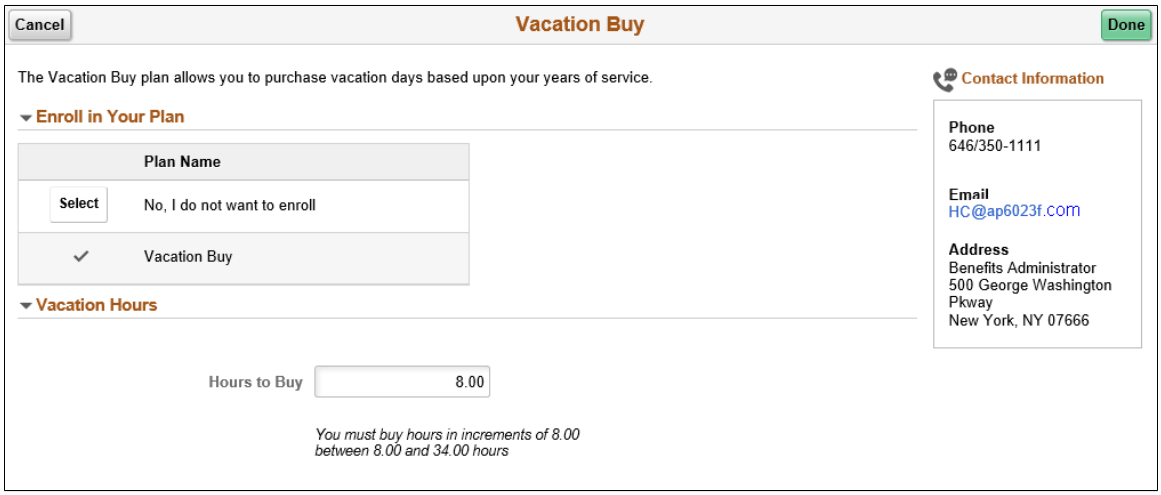

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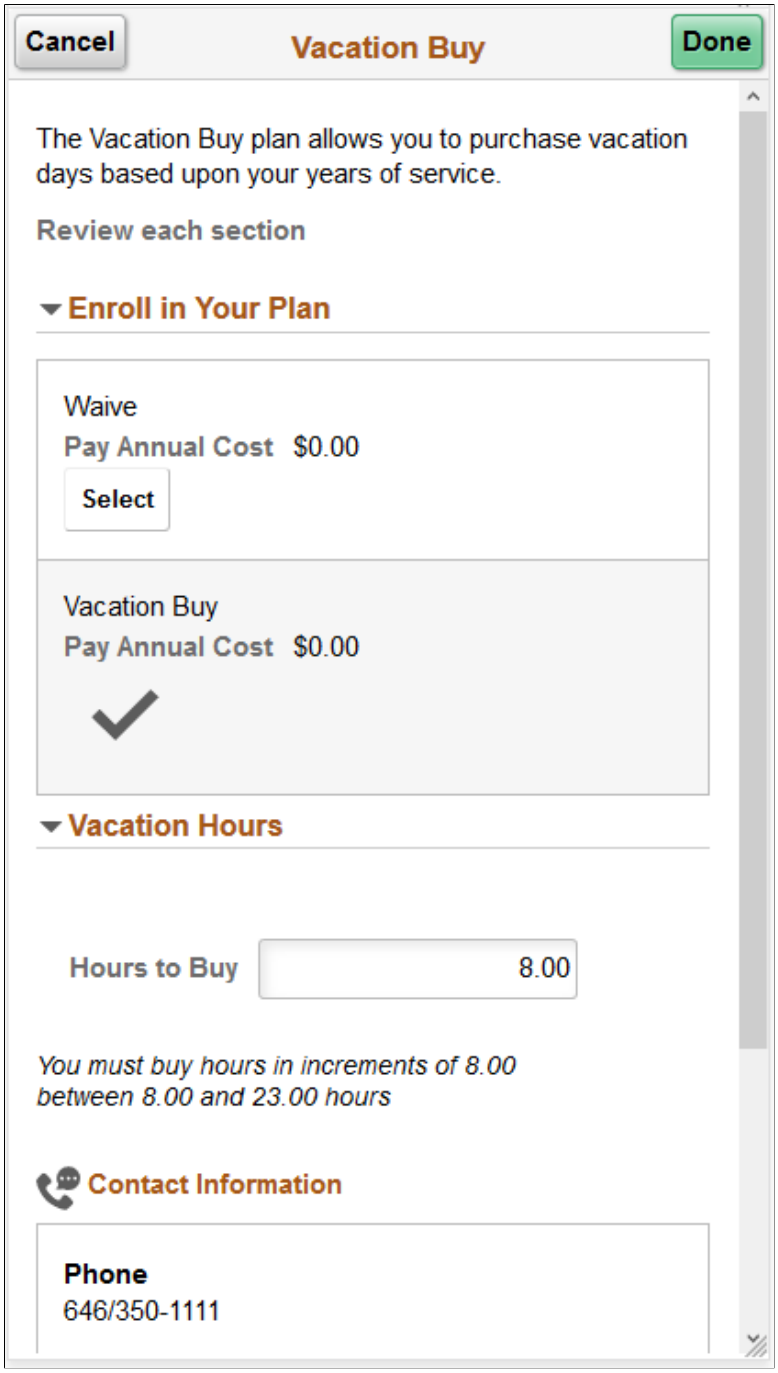
Image: Smartphone_Vacation Buy Page

This example illustrates the fields and controls on the Vacation Buy page as seen on a smartphone.



Hours to Buy Enter the number of hours to buy based on your years of service.

Long-Term Care Page

Use the Long-Term Care page (BNE_PLAN_375AX_FL) to enroll in simple plans.

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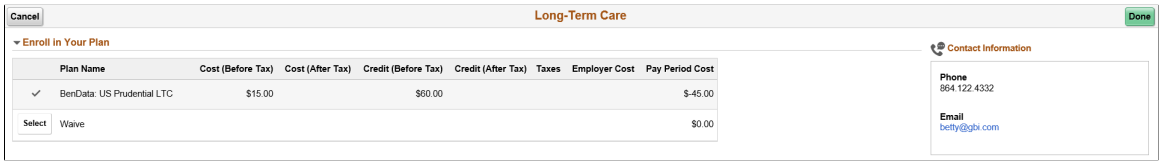
Navigation

- Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the Benefits Enrollment tab on the left panel, and then under the Benefit Plans section, click the plan type, Long-Term Care.
- You can also access the benefit enrollment plan pages using the Open Enrollment or OnBoarding tile on the Employee Self Service homepage. On the Open Enrollment or OnBoarding activity guide, click the Benefits Enrollment tab on the left panel and then under the Benefit Plans section, click the plan type, Long-Term Care.

Image: Long-Term Care Page

This example illustrates the fields and controls on the Long-Term Care page.



Reviewing Benefit Plans Using the PeopleSoft Fluid User Interface

This topic discusses the fluid Benefit plan pages to review the benefit plans for an employee.

Pages Used to Review Benefit Plans Using the PeopleSoft Fluid User Interface

Page Name	*Definition Name*	*Usage*
Benefits Summary Page	BEN_SUMM_GRID_FL	Review and modify the benefits summary and detailed information about various benefit plans in which the employee is enrolled in.
1x Health Plans: Medical Page	BEN_SUMM_DTL_FL	Review and modify health (medical/dental/vision) plan-type benefits for employee and domestic partner.
2x Life Plans: Life Page Supplemental Life Page		Review and modify life plan-type benefits for employee and dependents.
3x Disability Plans: Short-Term Disability Page		Review short-term or long-term disability plans.
4x Savings Plans: 401(k) Page		Review and modify the benefits savings plans.

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Page Name	*Definition Name*	*Usage*
5x Leave Plans: Sick Page		Review leave plans.
6x FSA and HSA Plans: Flex Spending Health – U.S. Page		Review FSA and HSA plan benefits.
7x Retirement Plan: PERS (Public Employee Retirement Systems) Page		Review retirement plans.
8x Pension Plans: Standard Pension Page		Review and modify U.S. and Canada pension plan benefits.
9x Vacation Plans: Vacation Buy Page		Review vacation plan benefits.
Ax Simple Plans: Wellness Credit Page		Review simple plans.

Note: The information you see on the Benefit Plan pages in Employee Self Service, such as the options to add beneficiaries, update designations, contributions, and funds, and view latest deductions depend on the configurations set in the "Benefit Program Table - Plan Type and Option Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits), Additional Summary Configuration section.

Medical Page

Use the Medical page (BEN_SUMM_DTL_FL) to review and modify the health (medical) plan-type benefits for employee and domestic partner.

Navigation

Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the plan type/card for Medical.

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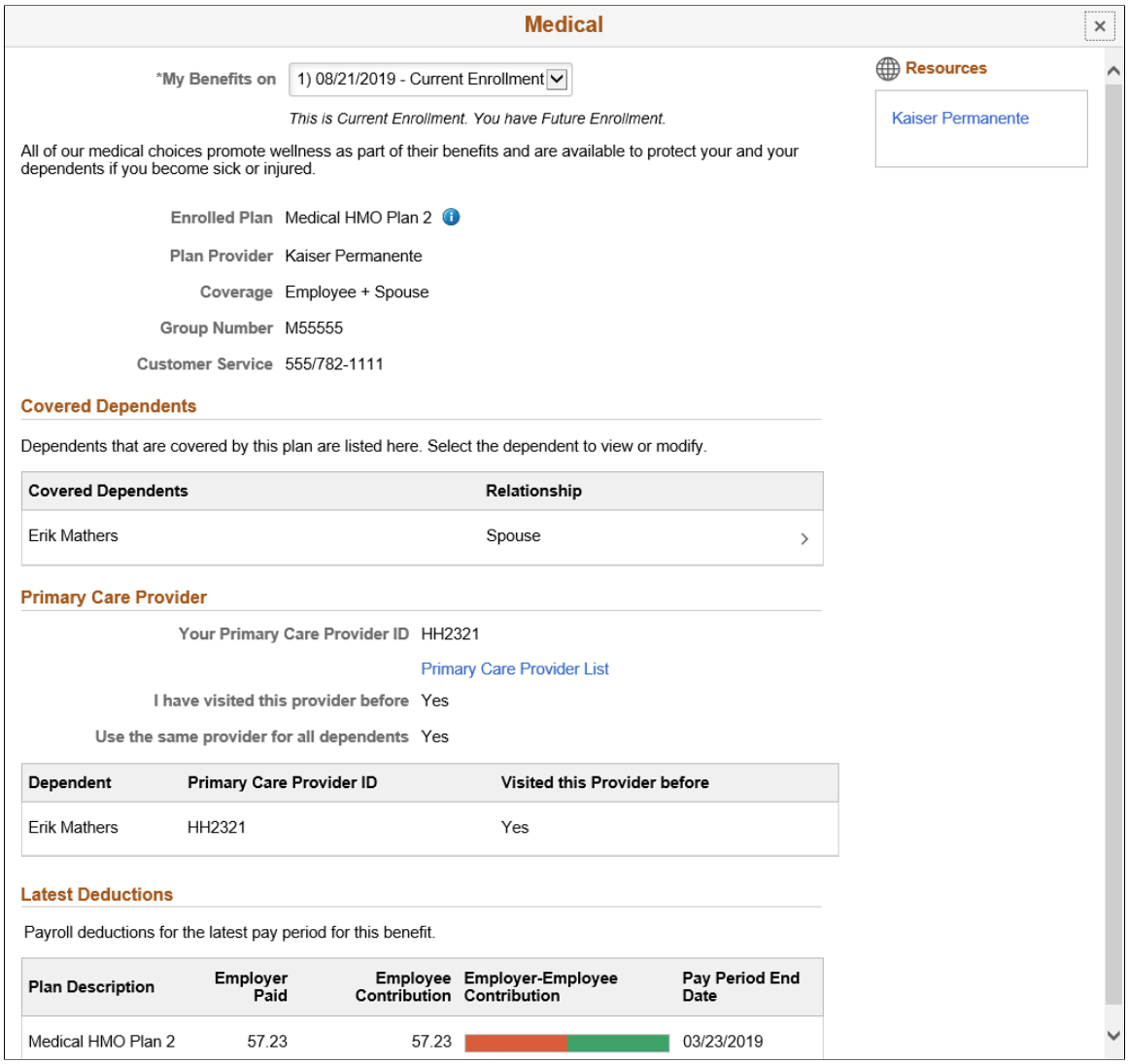
Image: Medical Page

This example illustrates the fields and controls on the Medical Page. You can find definitions for the fields and controls later on this page.



My Benefits on

Displays the ‘My Benefits on’ date you selected in the Benefits Summary Page.

If you select the current date in the Benefits Summary page, and you have future enrollments for the particular benefits plan, a drop down displays. Select the enrollment you wish to review.

Covered Dependents

All dependents that the employee has selected for coverage are listed here.

Click the row to open an Update Individual Dependent/ Beneficiary Information modal window, where you can modify the details.

Note: The employee cannot use this page to add or delete dependents.

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To add or delete dependents, use the Dependent/Beneficiary Info Page.

Primary Care Provider List link

Click the link to view a list of primary care providers.

The Primary Care Provider List is displayed if the enrolled benefit plan has a primary care provider link associated in the Provider/Vendor Table.

For more information about the enrolled plan, click the Information icon next to the Enrolled Plan name.

The help text that appears when you click the icon is set in the "Benefit Plan Table Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits), in the ‘Self Service Plan Description’ field.

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Image: Medical page_smartphone

This example illustrates the fields and controls on the Medical page as seen on a smartphone.

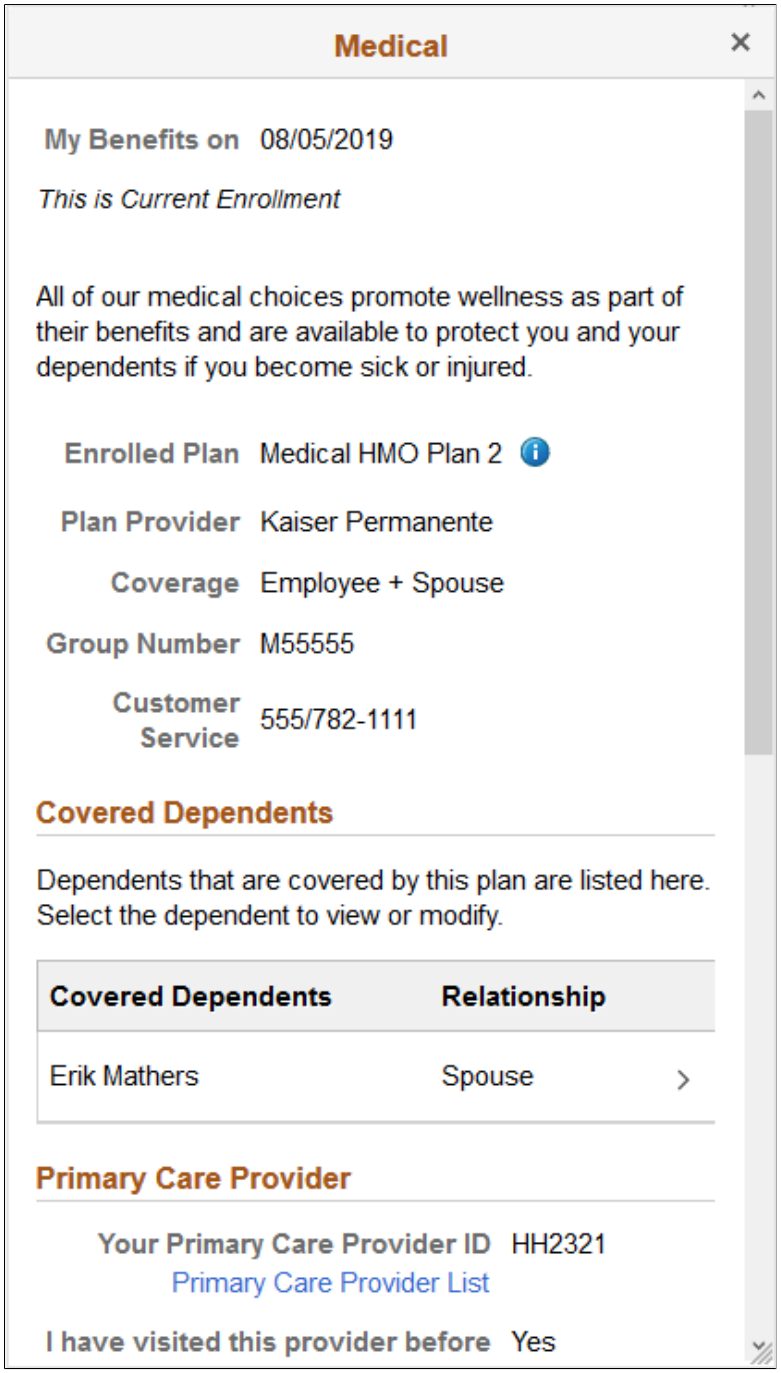

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Image: Update Individual Dependent/Beneficiary Information modal window

This example illustrates the fields and controls on the Update Individual Dependent/Beneficiary Information modal window.

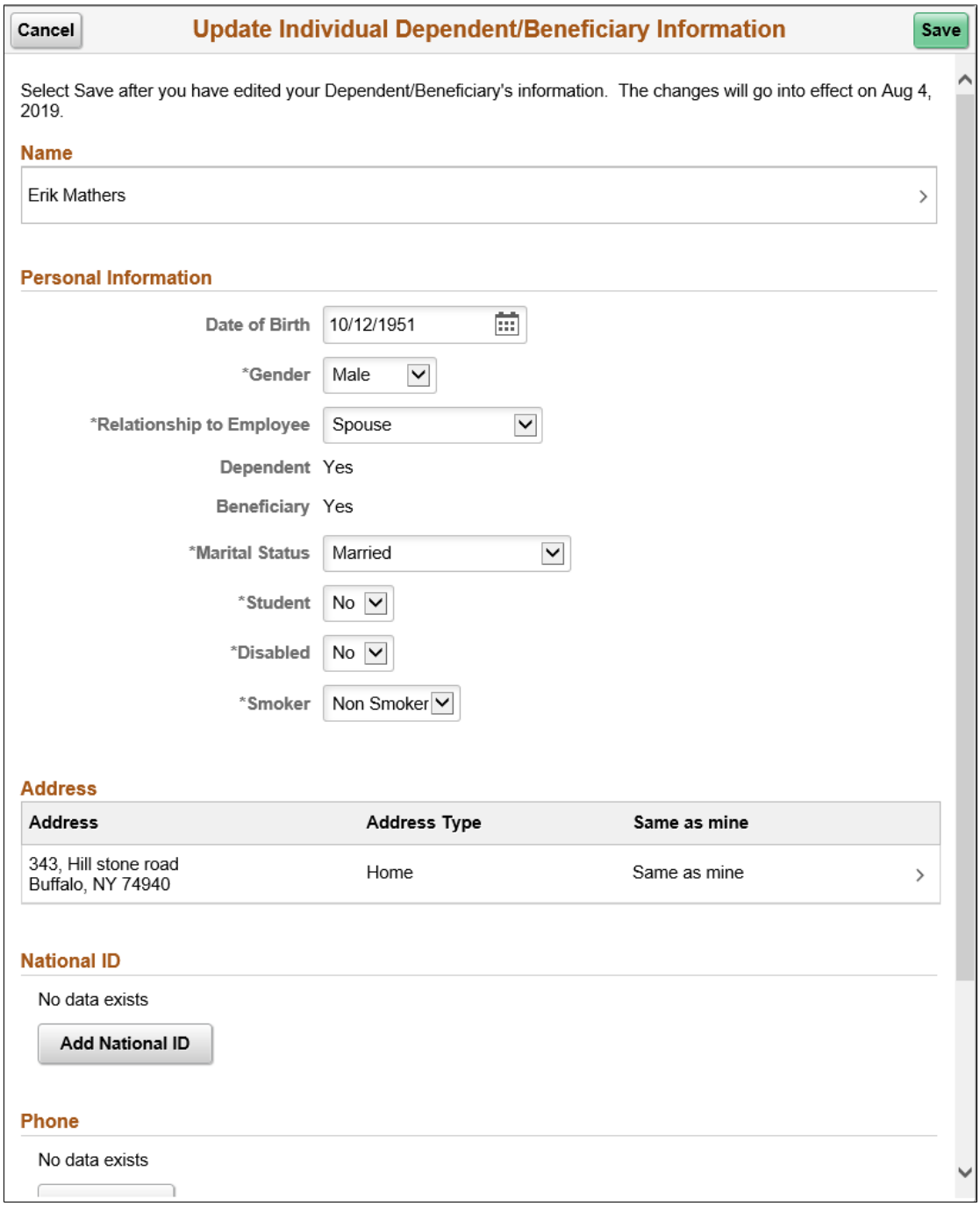

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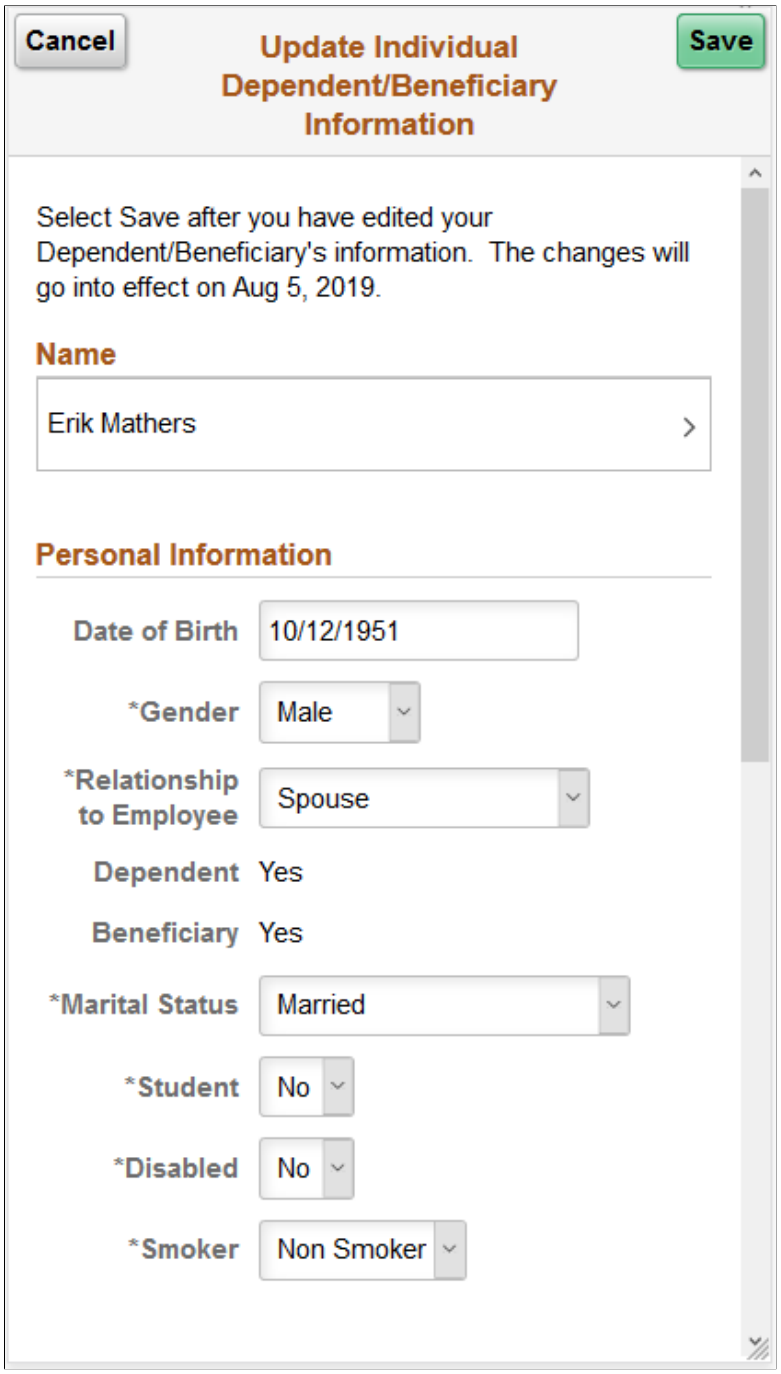
Image: Smartphone_ Update Individual Dependent/Beneficiary Information

This example illustrates the fields and controls on the Update Individual Dependent/Beneficiary Information as seen on a smartphone.



Life Page

Use the Life page (BEN_SUMM_DTL_FL) to review and modify life plan-type benefits for employee and dependents.

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Navigation

Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the plan type/card for Life.

Image: Life Page

This example illustrates the fields and controls on the Life Page. You can find definitions for the fields and controls later on this page.

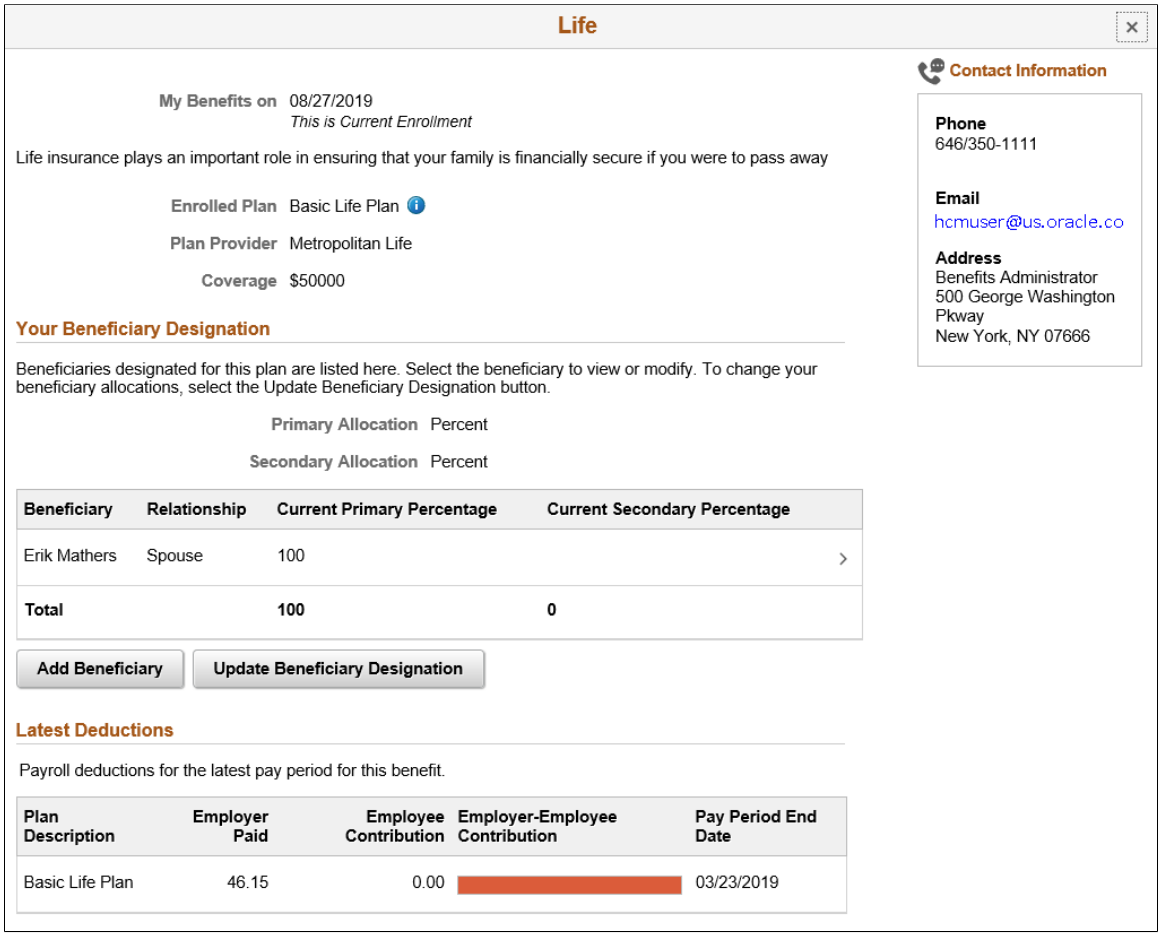

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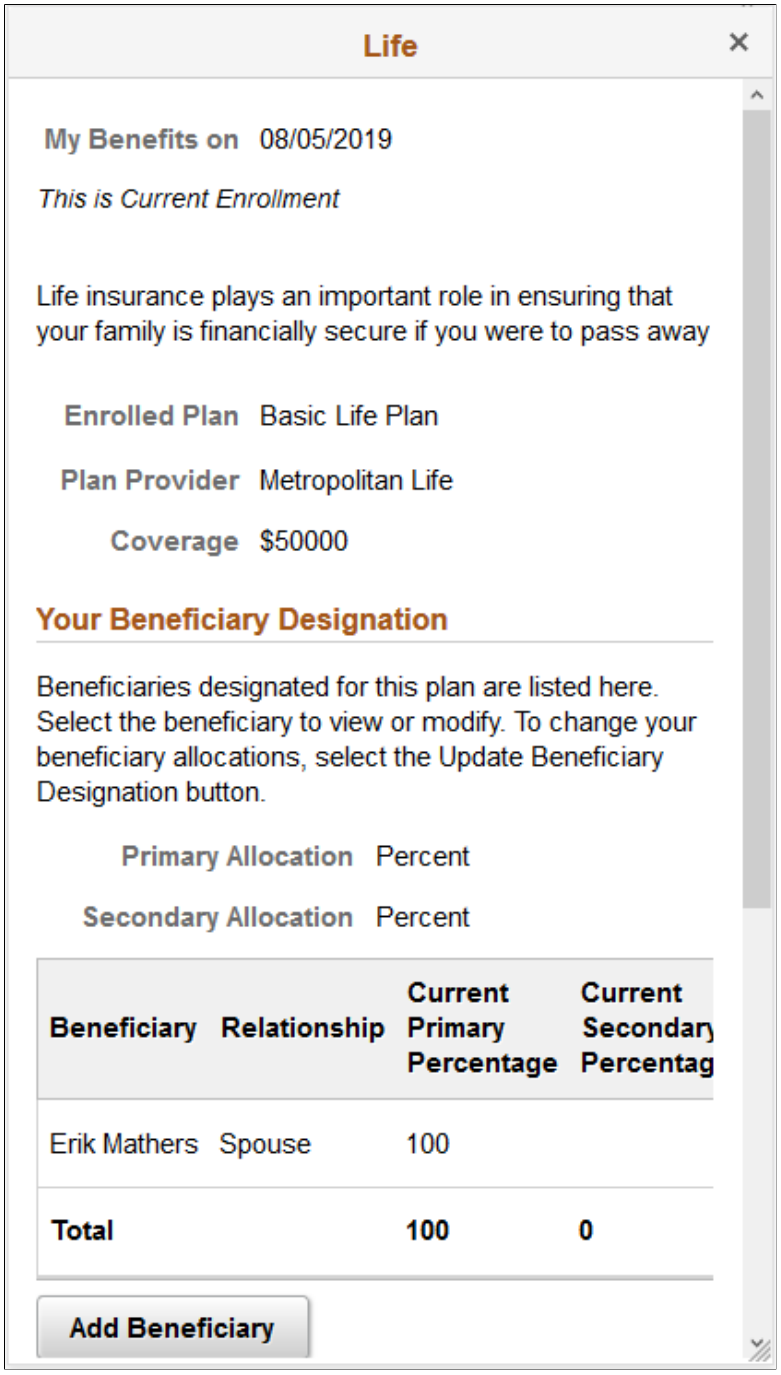
Image: Smartphone_Life page

This example illustrates the fields and controls on the Life page as seen on a smartphone.



Note: The Add Beneficiary and Update Beneficiary Designation buttons are displayed depending on the configurations set in the Additional Summary Configuration section in the "Benefit Program Table - Plan Type and Option Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits).

My Benefits on Displays the ‘My Benefits on’ date you selected in the Benefits Summary Page.

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	If you select the current date in the Benefits Summary page, and you have future enrollments for the particular benefits plan, a drop down displays. Select the enrollment you wish to review.
	For more information about the enrolled plan, click the Information icon next to the Enrolled Plan name. The help text that appears when you click the icon is set in the "Benefit Plan Table Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits), in the ‘Self Service Plan Description’ field.
Add Beneficiary button	Click the button to open an Update Individual Dependent/ Beneficiary Information window, to add or modify the details.
Update Beneficiary Designation button	Click the button to access an Update Beneficiary Designation window, to modify the allocation details.

Supplemental Life Page

Use the Supplemental Life page (BEN_SUMM_DTL_FL) to review and modify supplemental life plan-type benefits for employee and dependents.

Navigation

Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the plan type/card for Supplemental Life.

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Image: Supplemental Life Page

This example illustrates the fields and controls on the Supplemental Life Page. You can find definitions for the fields and controls later on this page.

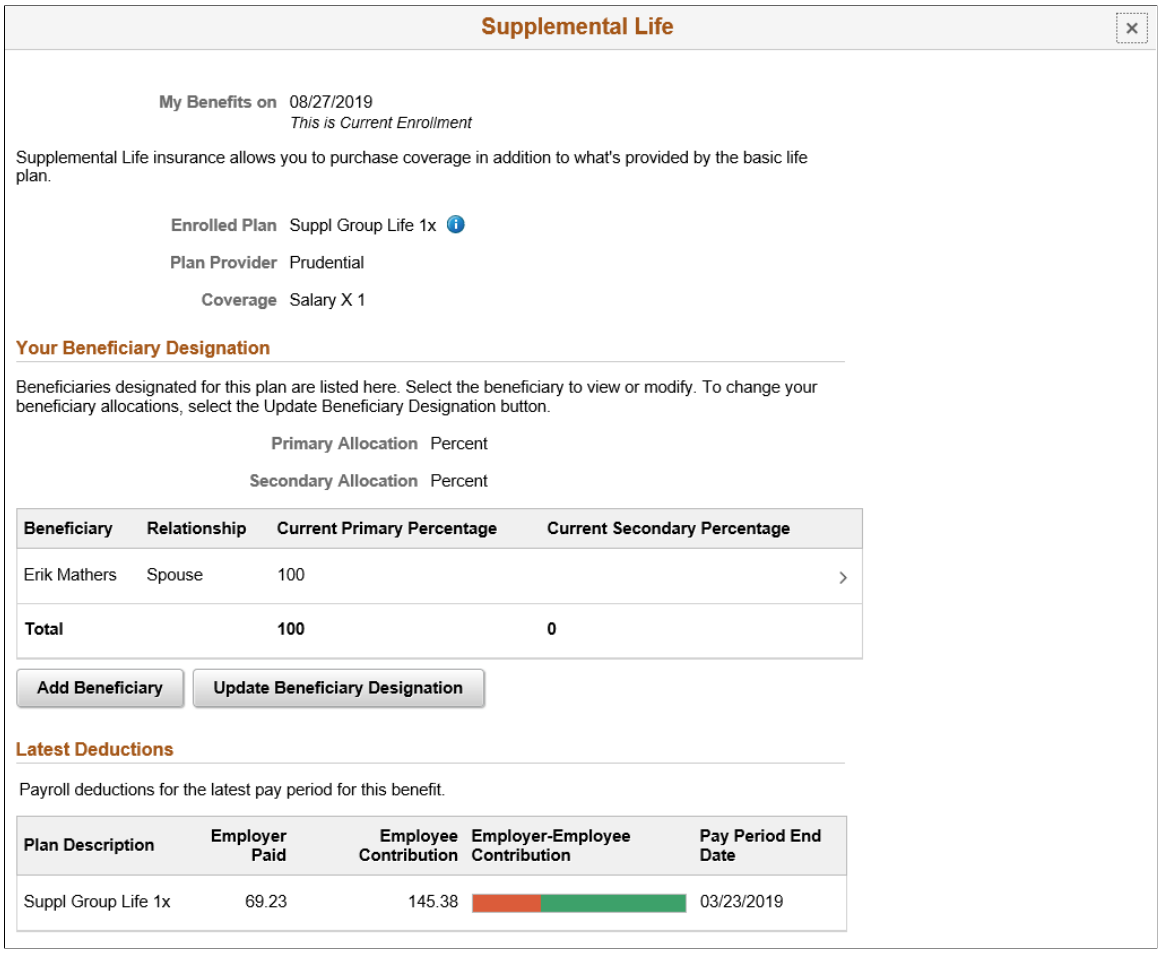

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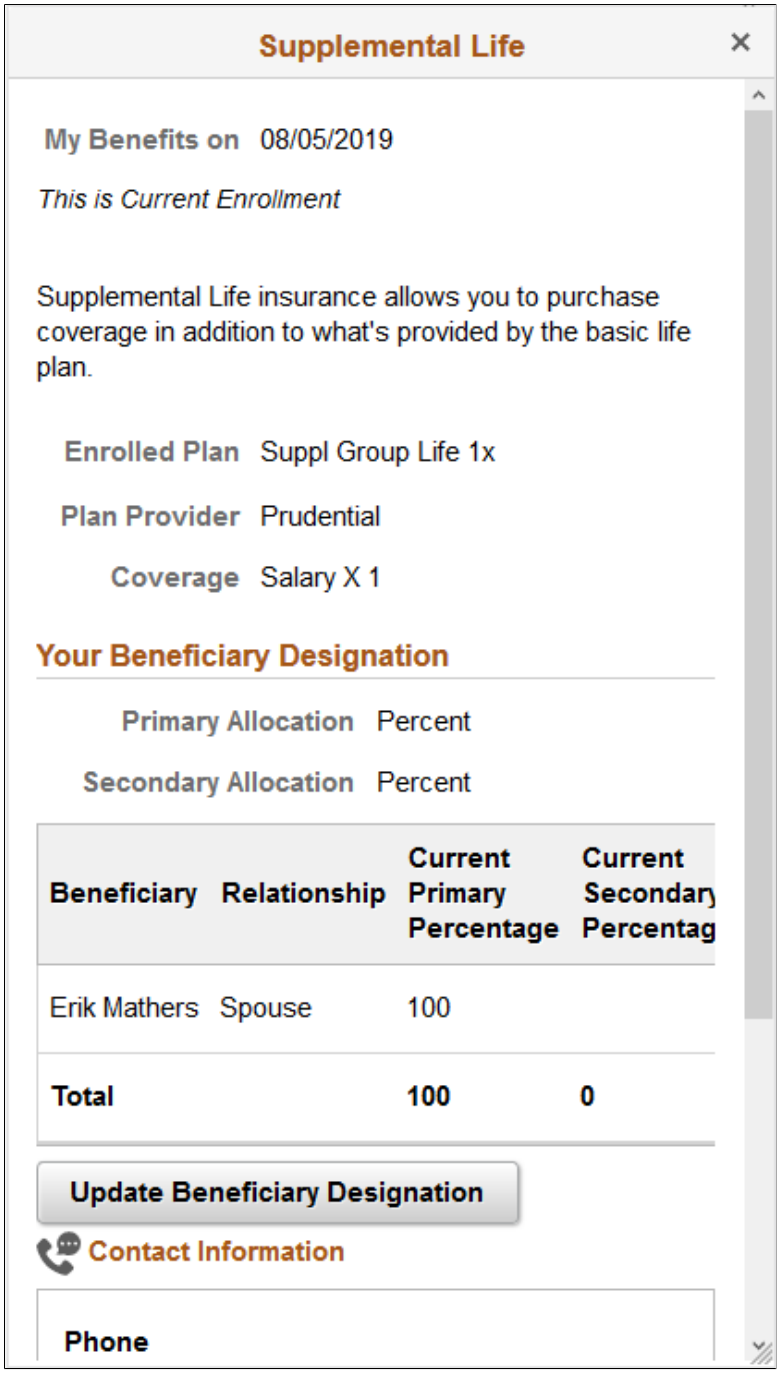
Image: Smartphone_Supplemental page part1

This example illustrates the fields and controls on the Supplemental page part1 as seen on a smartphone.



Note: The Add Beneficiary and Update Beneficiary Designation buttons are displayed depending on the configurations set in the Additional Summary Configuration section in the "Benefit Program Table - Plan Type and Option Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits).

For more information about the enrolled plan, click the Information icon next to the Enrolled Plan name.

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Add Beneficiary button	Click the button to open an Update Individual Dependent/ Beneficiary Information window, where you can add or modify the details.
Update Beneficiary Designation button	Click the button to access an Update Beneficiary Designation window, where you can modify the allocation details.

Short-Term Disability Page

Use the Short-Term Disability page (BEN_SUMM_DTL_FL) to review the short-term disability plans.

Navigation

Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the plan type/card for Short-Term Disability.

Image: Short-Term Disability Page

This example illustrates the fields and controls on the Short-Term Disability Page.

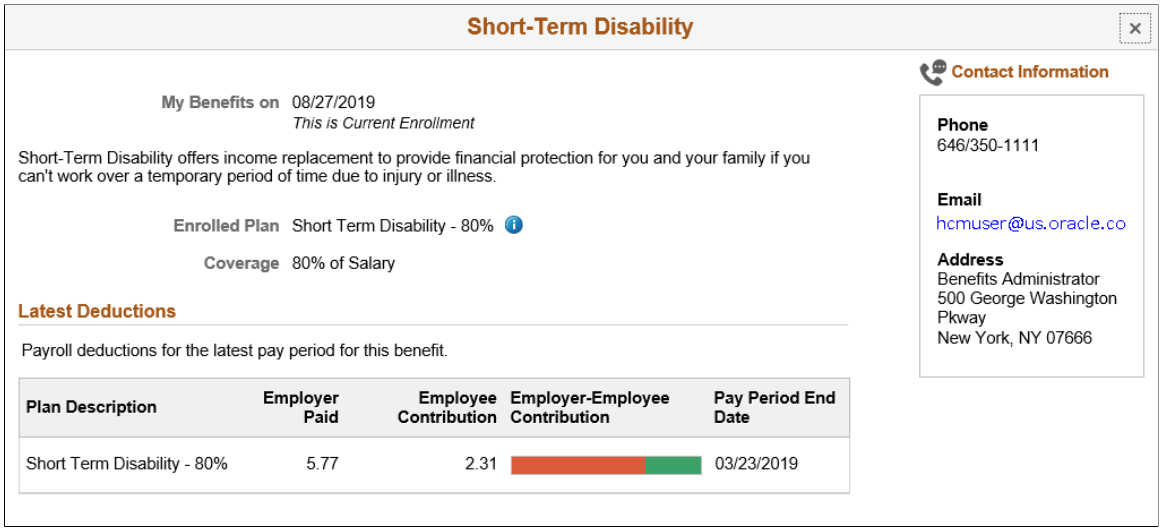

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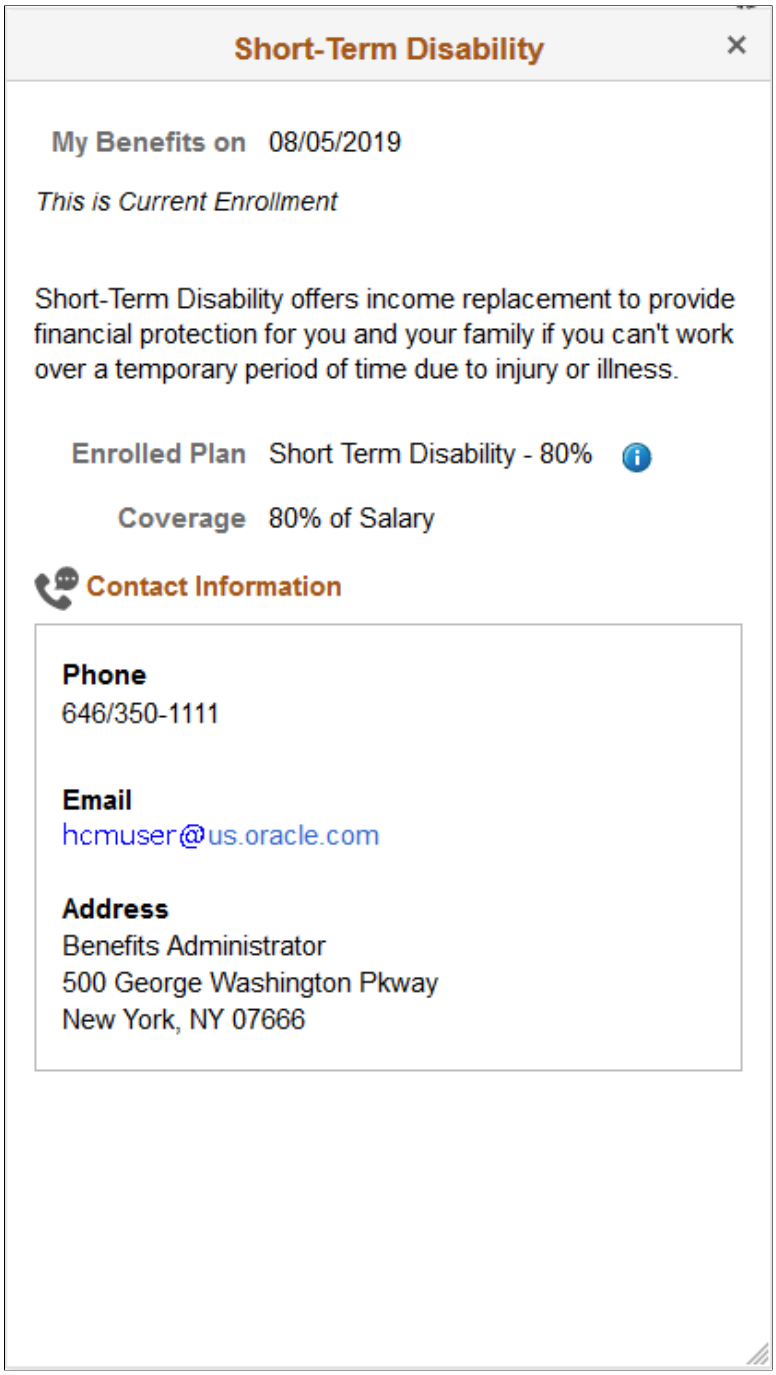
Image: Smartphone_Short-Term Disability Page

This example illustrates the fields and controls on the Short-Term Disability Page as seen on a smartphone.



401(k) Page

Use the 401(k) page (BEN_SUMM_DTL_FL) to enroll in savings plan benefits.

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Navigation

Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the plan type/card for 401(k).

Note: The Update Contributions, Add Beneficiary, Update Beneficiary Designation and Update Funds buttons are displayed depending on the configurations set in the Additional Summary Configuration section in the "Benefit Program Table - Plan Type and Option Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits).

Image: 401(k) Page – Part 1

This example illustrates the fields and controls on the 401(k) Page – Part 1. You can find definitions for the fields and controls later on this page.

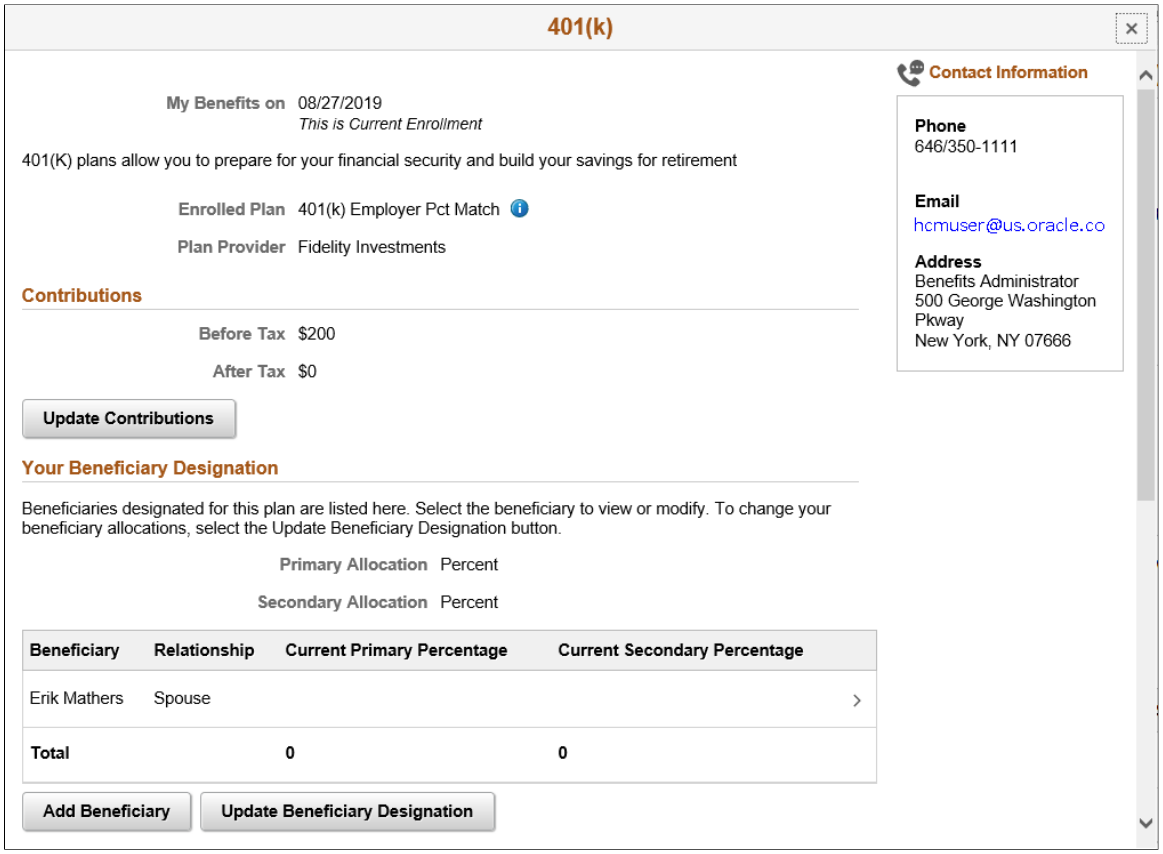

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Image: 401(k) Page – Part 1

This example illustrates the fields and controls on the 401(k) Page – Part 2. You can find definitions for the fields and controls later on this page.

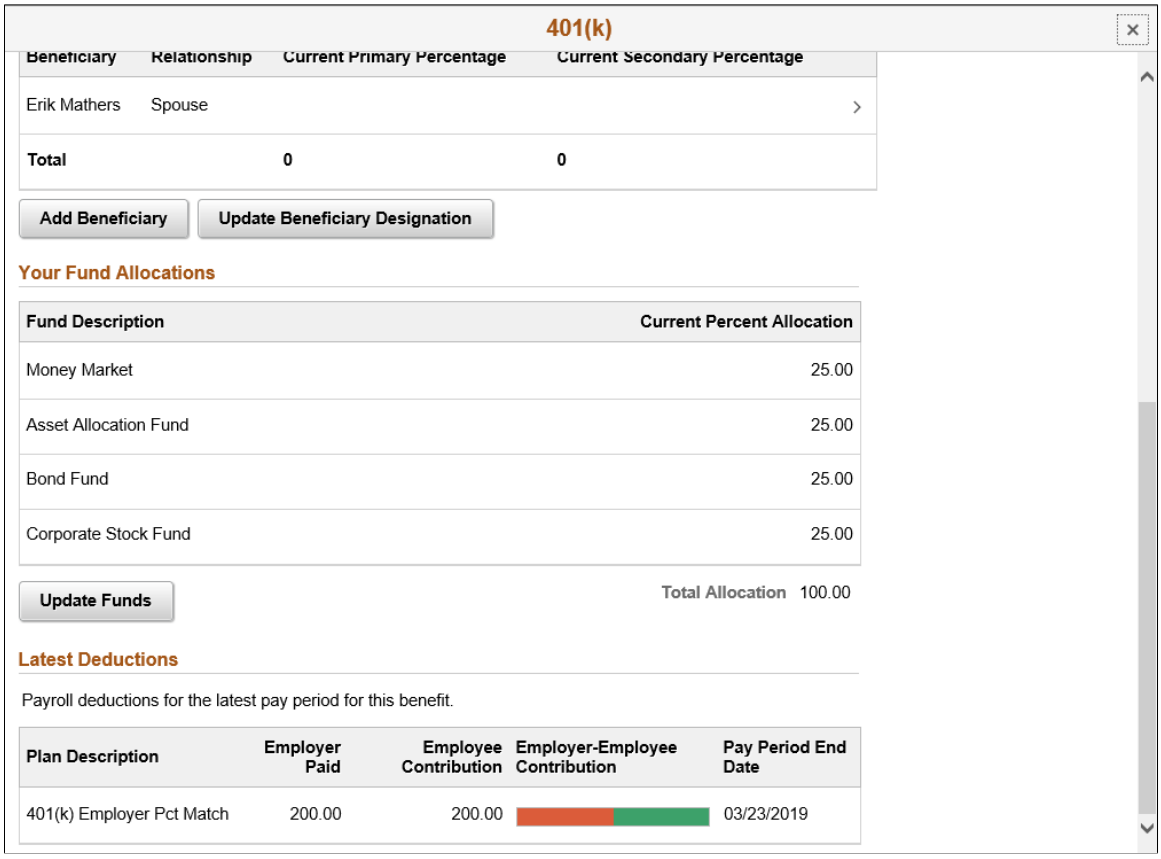

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Image: Smartphone_401(k) Page – Part 2

This example illustrates the fields and controls on the 401(k) Page – Part 1, as seen on a smartphone.

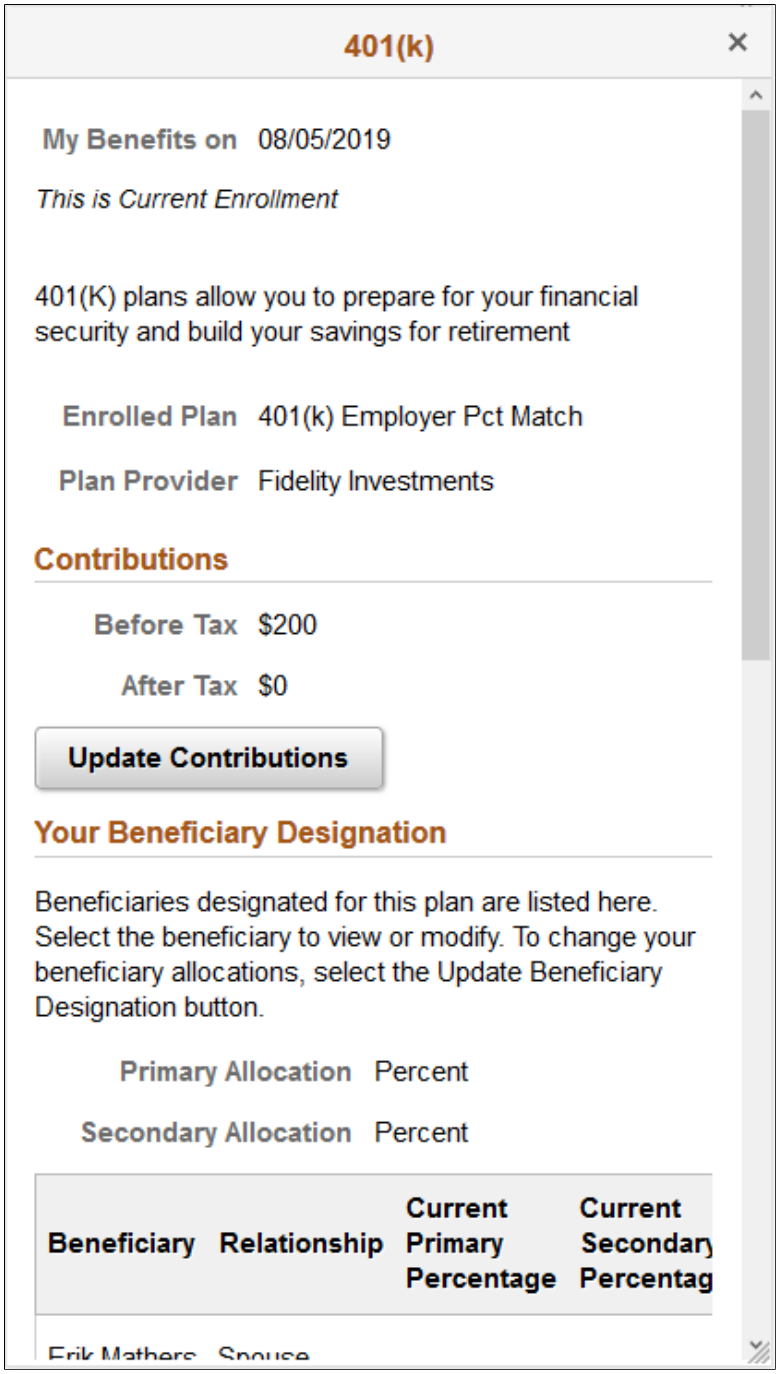

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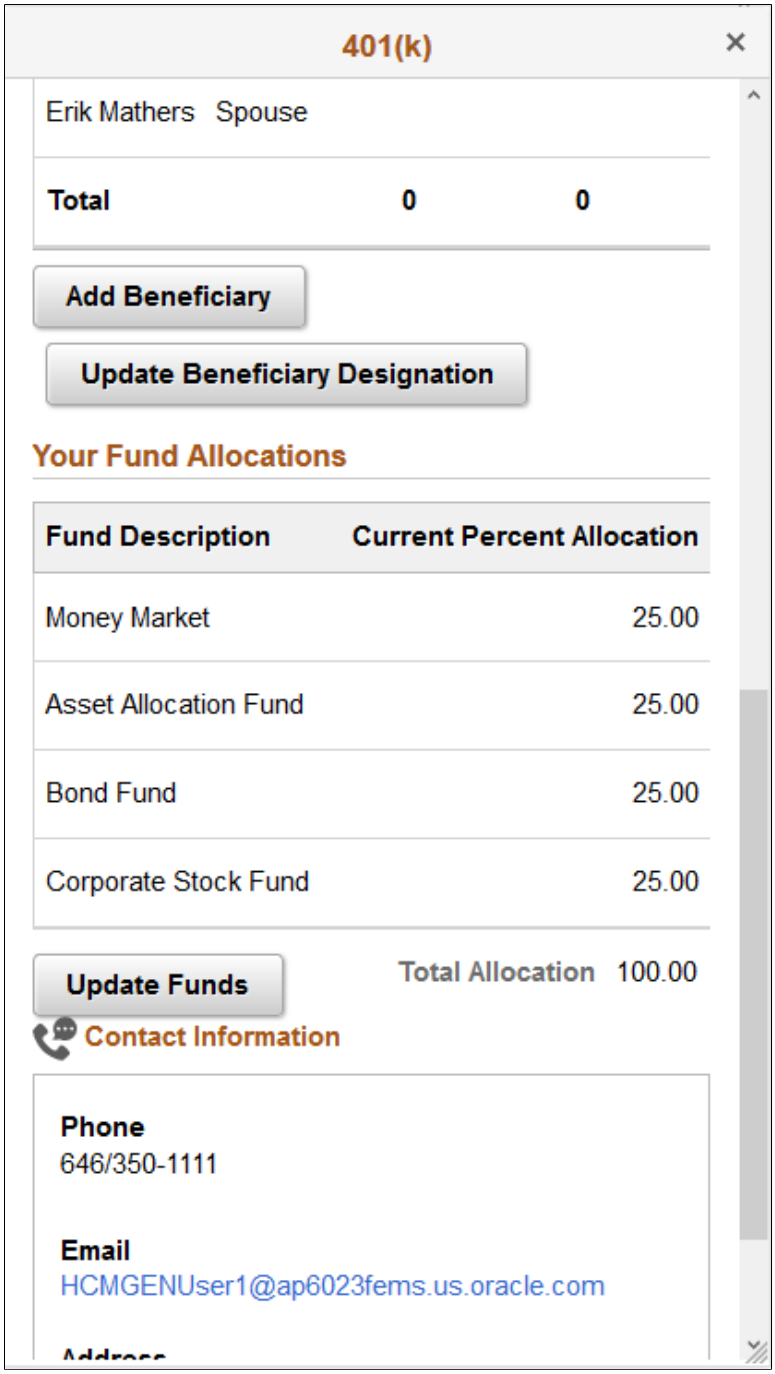
Image: Smartphone_401(k) Page – Part 2

This example illustrates the fields and controls on the 401(k) Page – Part 2, as seen on a smartphone.



Update Contributions button — Click the button to access the Contributions window to update the contribution type, and the new before and after tax amounts.

Add Beneficiary button — Click the button to open an Update Individual Dependent/ Beneficiary Information window, to add or modify the details.

Update Beneficiary Designation button — Click the button to access an Update Beneficiary Designation window, to modify the allocation details.

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Update Funds button	Click the button to access the Fund Allocations window, to modify the allocation percentages.

Sick Page

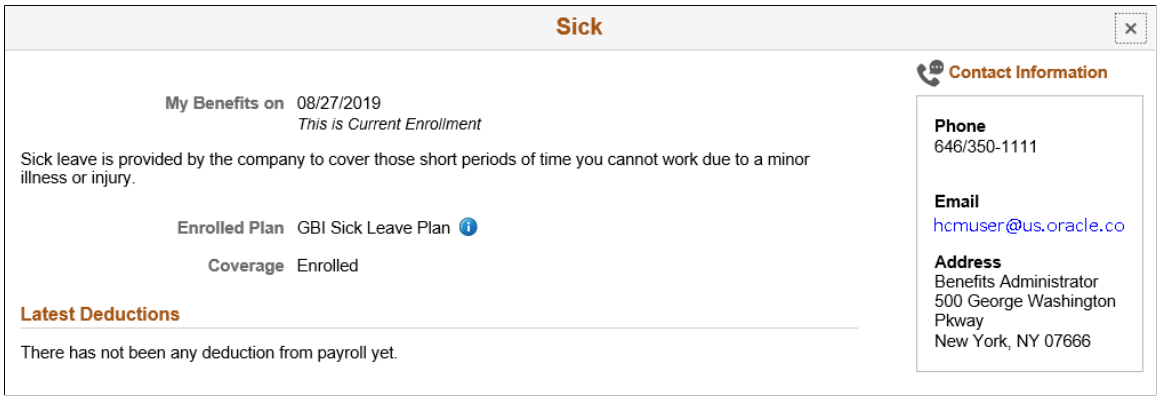
Use the Sick page (BEN_SUMM_DTL_FL) to review the sick leave plans.

Navigation

Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the plan type/card for Sick.

Image: Sick Page

This example illustrates the fields and controls on the Sick page.



Flex Spending Health – U.S. Page

Use the Flex Spending Health – U.S. page (BEN_SUMM_DTL_FL) to review the FSA plan benefits.

Navigation

Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the plan type/card for Flex Spending Health – U.S.

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Image: Flex Spending Health – U.S. Page

This example illustrates the fields and controls on the Flex Spending Health – U.S. page.

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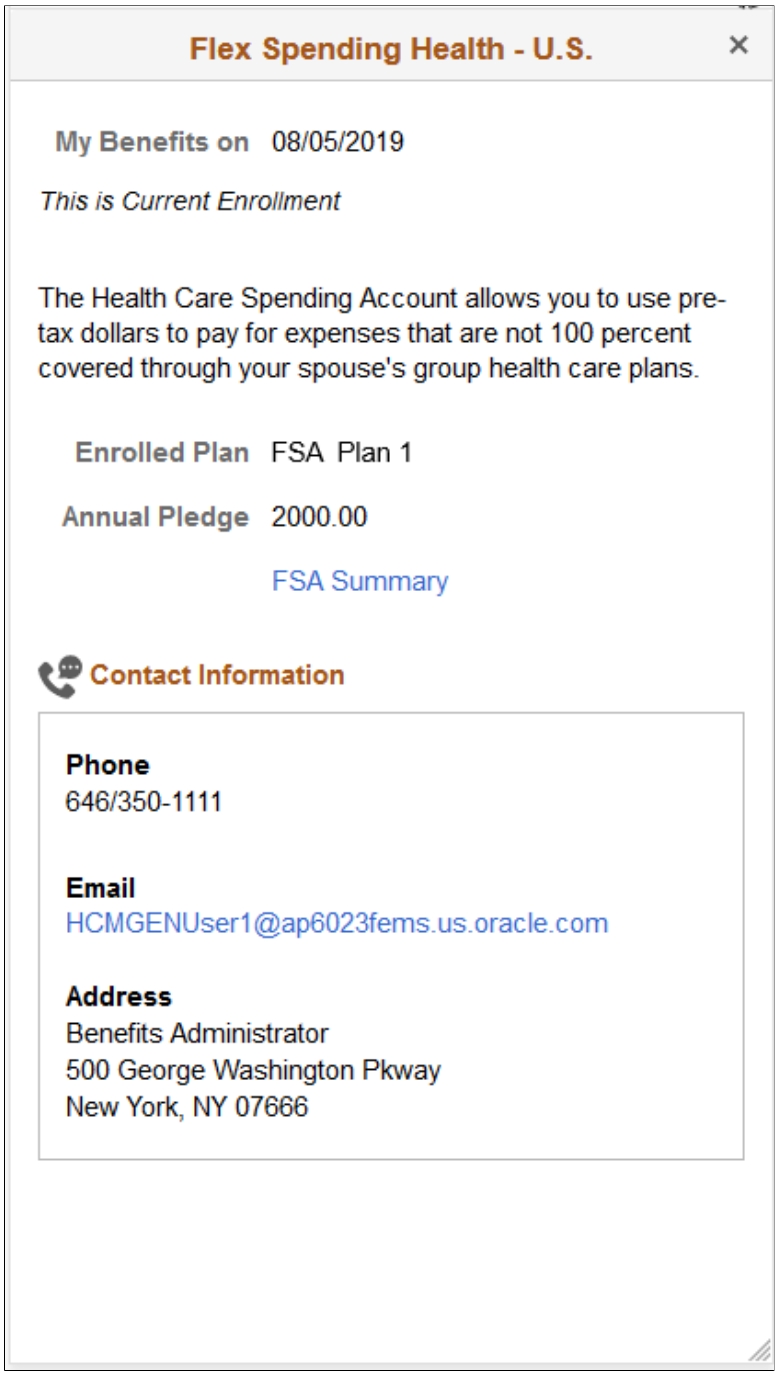
Image: Smartphone_Flex Spending Health – U.S. Page

This example illustrates the fields and controls on the Flex Spending Health – U.S. Page as seen on a smartphone.



FSA Summary Click this link to see an overview of the flexible spending account.

Note: The FSA Summary link appears only if your company uses the FSA Administration.

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Note: For more information on how to set up FSA plans, refer "Setting Up FSA Plans" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits).

Image: Flexible Spending Account Summary – Claim History

This example illustrates the fields and controls on the Flexible Spending Account Summary – Claim History tab.

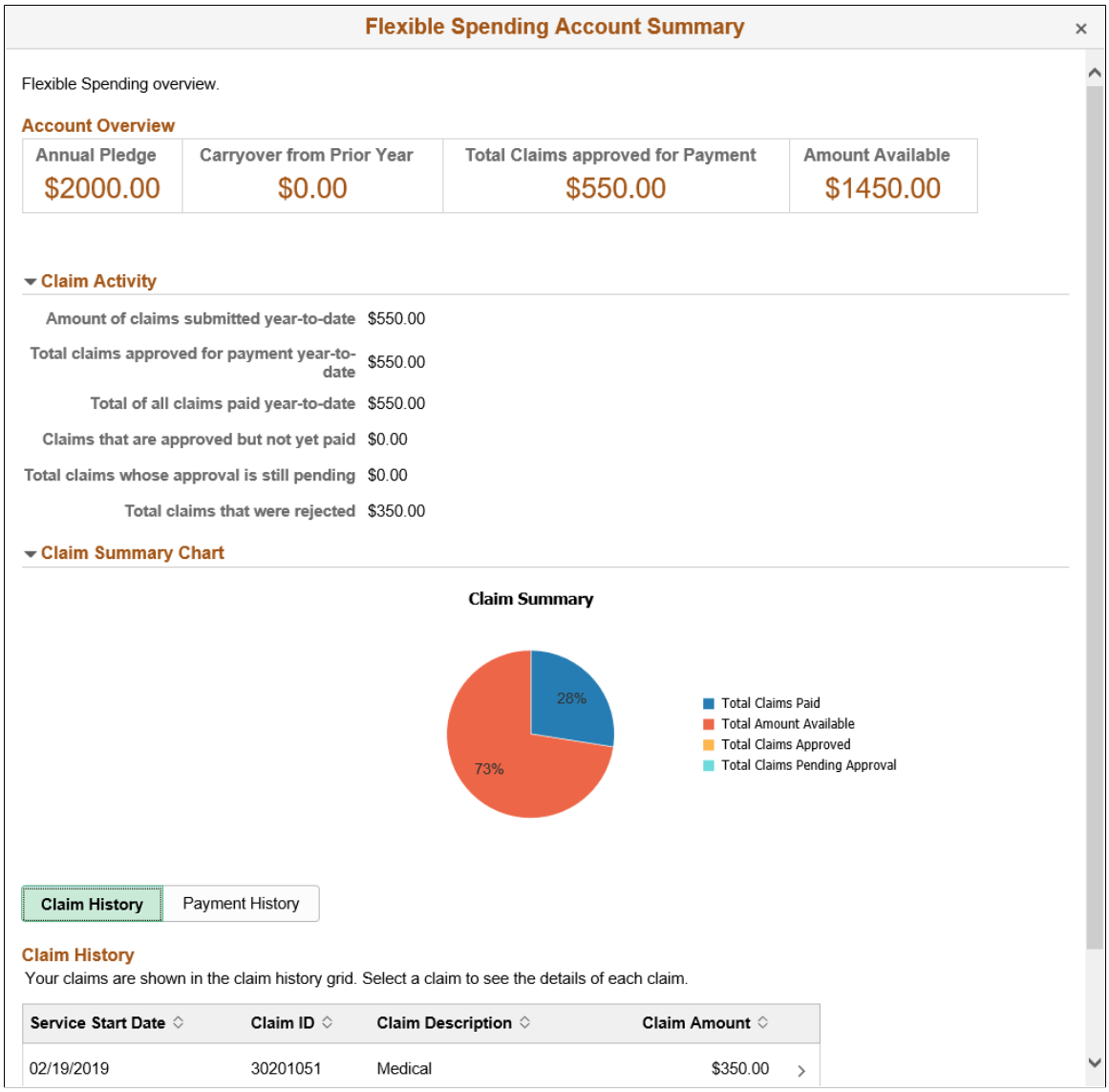

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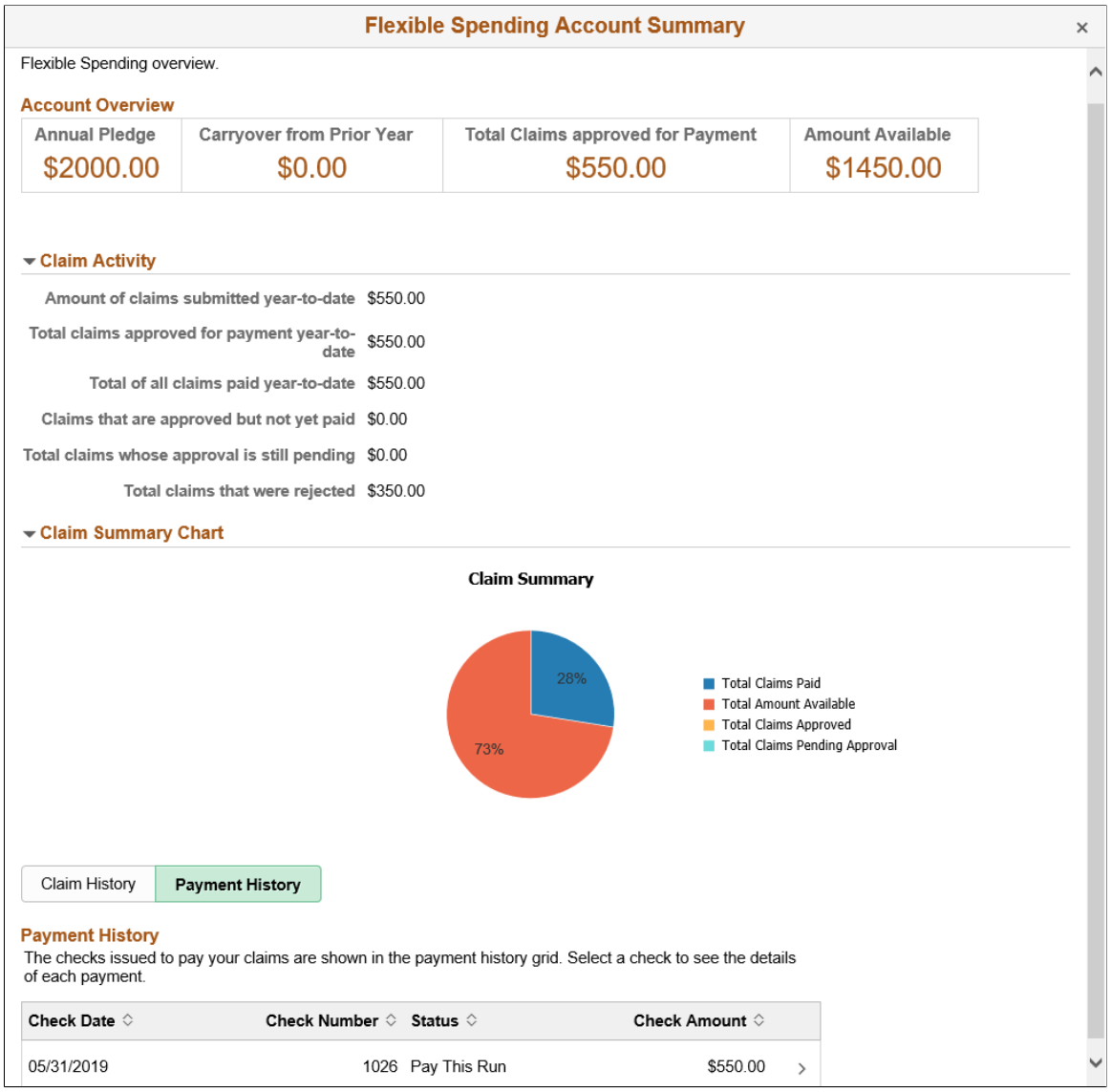
Image: Flexible Spending Account Summary – Payment History

This example illustrates the fields and controls on the Flexible Spending Account Summary – Payment History tab.



PERS (Public Employee Retirement Systems) Page

Use the PERS (Public Employee Retirement Systems) page (BEN_SUMM_DTL_FL) to review retirement plans.

Navigation

Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the plan type/card for PERS.

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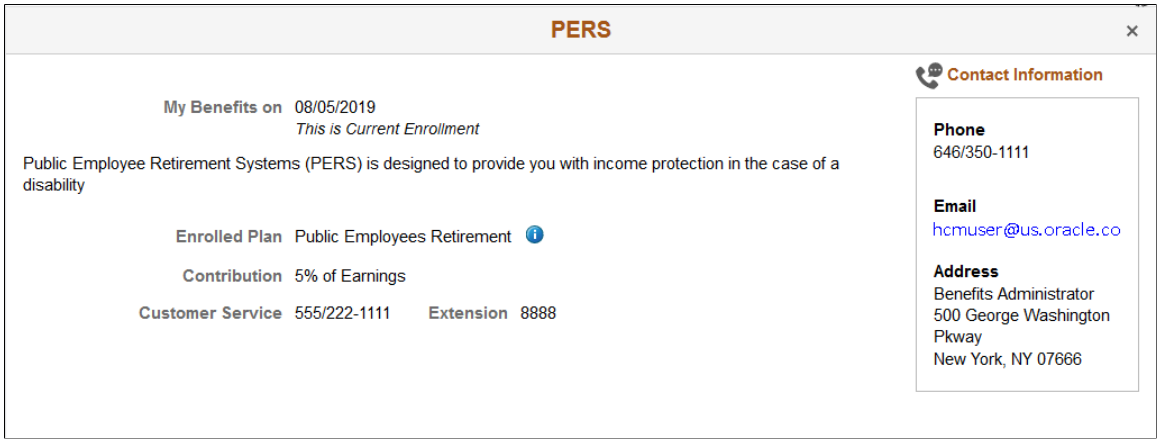
Image: PERS Page

This example illustrates the fields and controls on the PERS page.



Standard Pension Page

Use the Standard Pension page (BEN_SUMM_DTL_FL) to review pension plan benefits.

Navigation

Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the plan type/card for Standard Pension.

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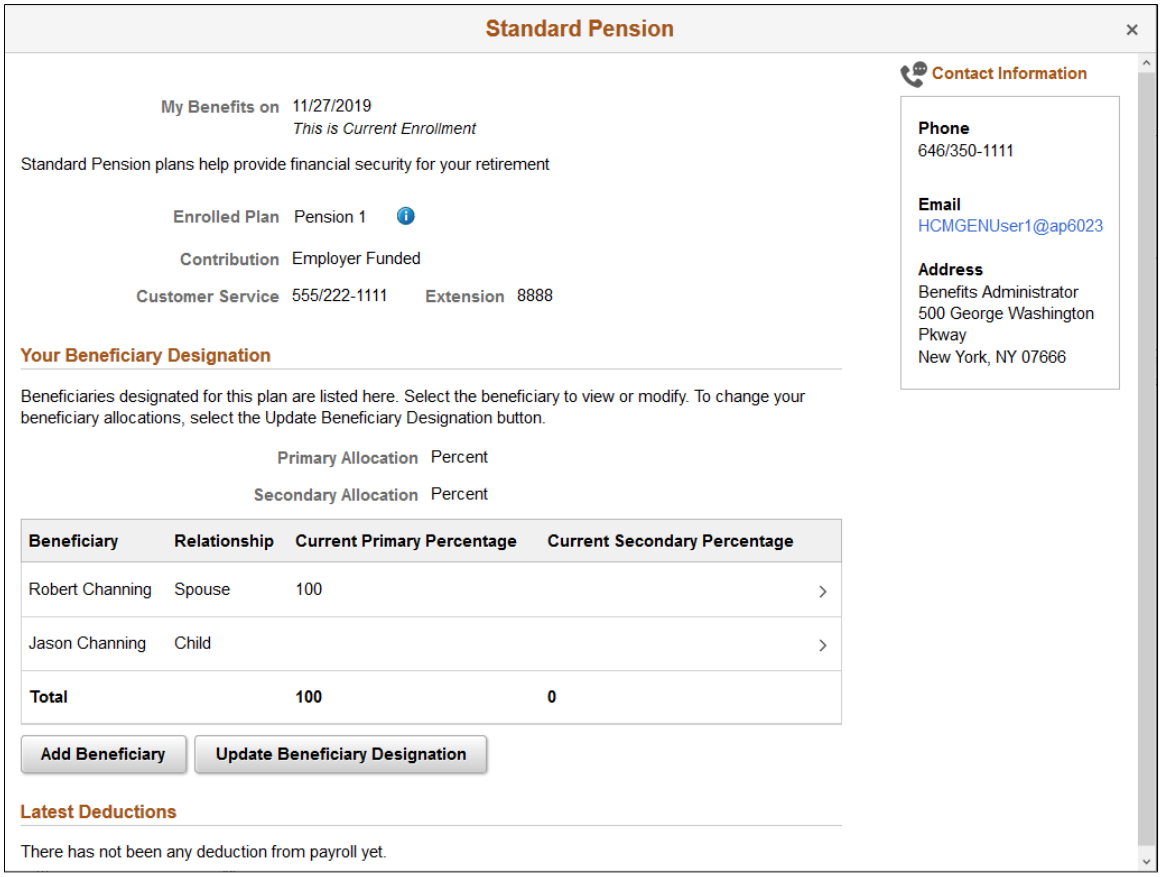
Image: Standard Pension Page

This example illustrates the fields and controls on the Standard Pension page.



The Add Beneficiaryand Update Beneficiary Designation buttons are displayed depending on the configurations set in the Additional Summary Configuration section in the "Benefit Program Table - Plan Type and Option Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Benefits).

Add Beneficiary button — Click the button to open an Update Individual Dependent/ Beneficiary Information window, where you can add or modify the details.

Update Beneficiary Designation button — Click the button to access an Update Beneficiary Designation window, to modify the allocation details.

Vacation Buy Page

Use the Vacation Buy page (BEN_SUMM_DTL_FL) to review vacation plan benefits.

Navigation

Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the plan type/card for Vacation Buy.

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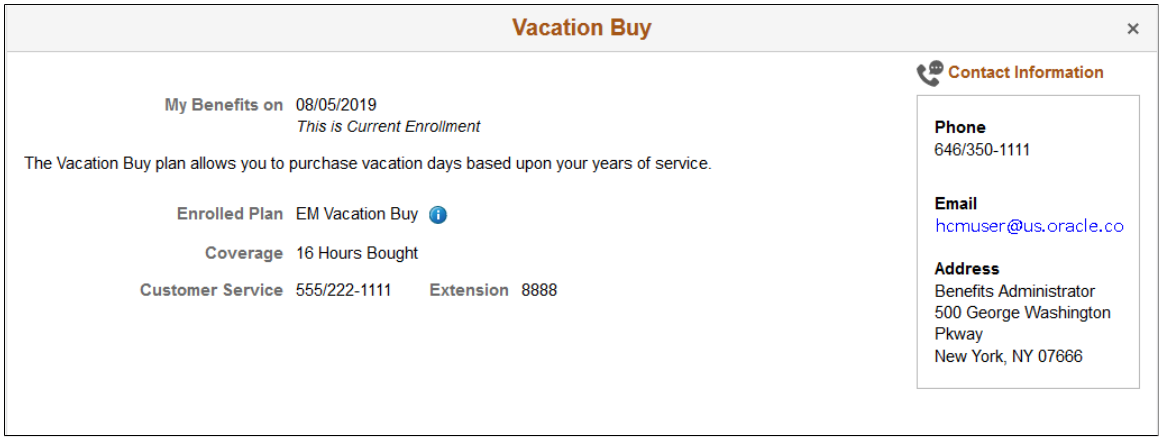
Image: Vacation Buy Page

This example illustrates the fields and controls on the Vacation Buy page.



Wellness Credit Page

Use the Wellness Credit page (BEN_SUMM_DTL_FL) to review simple plans.

Navigation

Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the plan type/card for Wellness Credit.

Image: Wellness Credit Page

This example illustrates the fields and controls on the Wellness Credit page.

Viewing Employee Benefits Summary Data as an Administrator

Benefits Administrators can use the benefits summary pages to view a summary of employee benefits data and the most recent payroll deduction, regardless of whether the organization uses PeopleSoft Benefits Administration or Base Benefits.

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This section lists the pages used by a Benefits Administrator to view employees' benefits summary data and the latest benefits deductions.

Note: The deduction summary information is available only for organizations using Payroll for North America or Payroll Interface.

Pages Used to View Benefits Summary Data as an Administrator

Page Name	*Definition Name*	*Usage*
Benefits Summary Page	BEN_SUMM_GRID_FL	View benefit enrollment summaries for employees.
Benefit Plan pages	BEN_SUMM_DTL_FL	Review information on the employee's benefit plan pages. For more information on these pages, refer the topic Reviewing Benefit Plans Using the PeopleSoft Fluid User Interface.
Deduction Summary Page	BEN_SUMM_DEDN_FL	Display the latest benefits deductions of a selected employee.

Benefits Summary Page

Use the Benefits Summary page (BEN_SUMM_GRID_FL) to view benefit enrollment summaries for employees.

Navigation

- In the Workforce Administrator fluid homepage, select the Benefits Administrator tile. From the Benefits Administrator navigation collection, select Review Employee Benefits and then select Benefits Summary.
- Benefits >Review Employee Benefits >Benefits Summary

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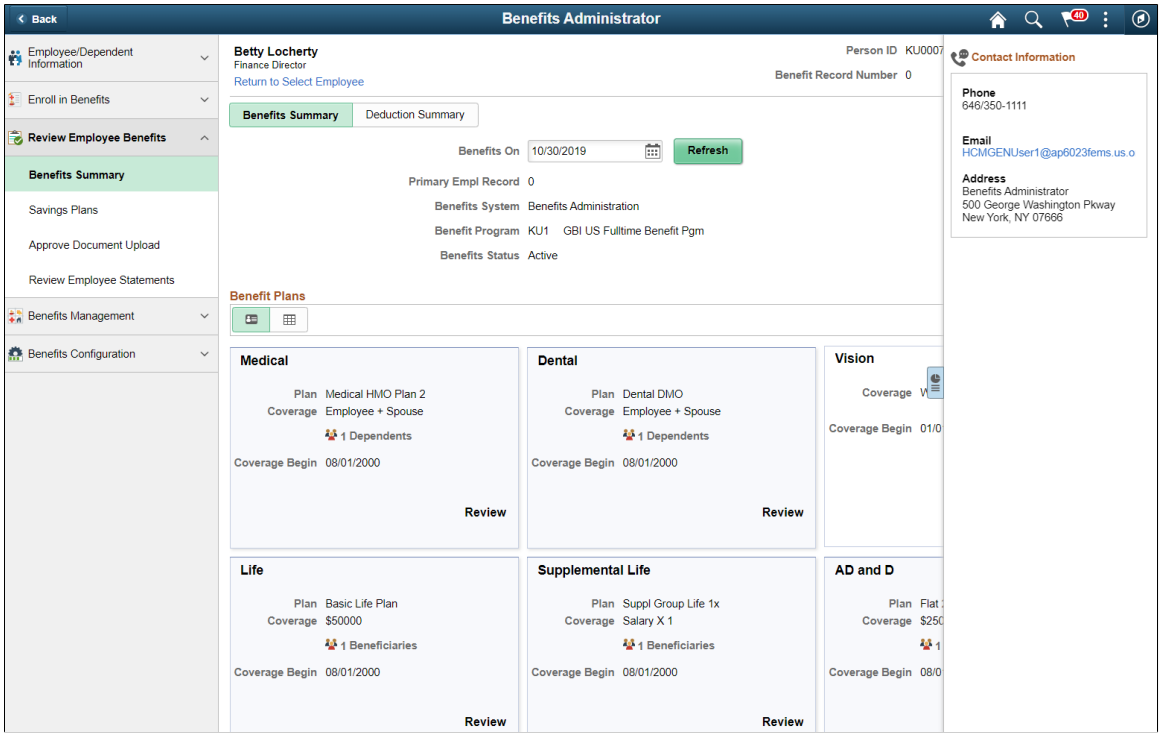
Image: Benefits Summary page

This example illustrates the fields and controls on the Benefits Summary page.



Return to Select Employee link — Click this link to return to the search page and select a different employee.

Benefits On — By default, the page displays benefits as of the current date. To view benefits as of a different date, choose a new date and click the Refresh button.

Benefits Plans — You can choose to see the selected employee's benefit plans in either the card or grid view.

In the card view, each benefit plan card shows the plan type, employee's coverage or participation information, and the number of dependents/beneficiaries. You can click the card to access the corresponding employee's benefit plan page to review the plan details.

The grid view shows the enrollment types, a brief description of the benefit, the employee's coverage or participation, number of dependents/beneficiaries, the coverage begin date, and a Review button. You can click the Review button to access the corresponding employee's benefit plan page to review the plan details.

Related Links

Reviewing Benefit Plans Using the PeopleSoft Fluid User Interface

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Deduction Summary Page

Use the Deduction Summary page (BEN_SUMM_DEDN_FL) to display the latest benefits deductions of a selected employee.

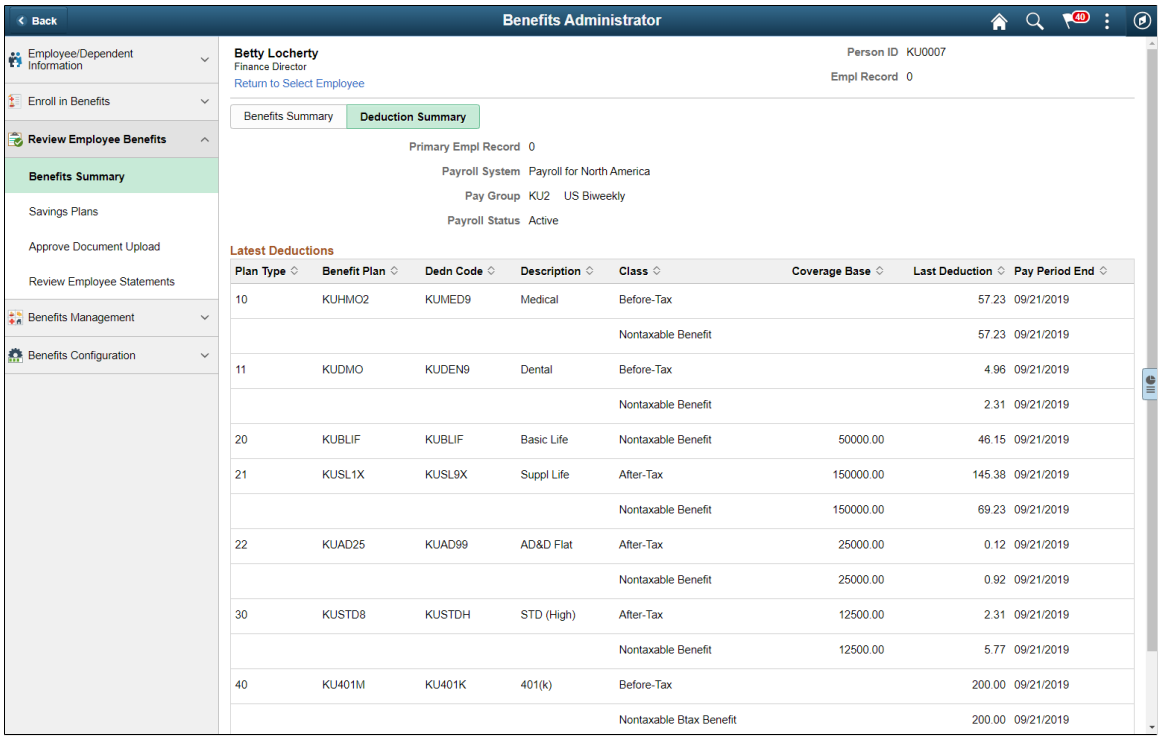
Note: The Deduction Summary page is available only for organizations using Payroll for North America or Payroll Interface.

Navigation

- In the Workforce Administrator fluid homepage, select the Benefits Administrator tile. From the Benefits Administrator navigation collection, select Review Employee Benefits and then select Benefits Summary.
- Benefits >Review Employee Benefits >Benefits Summary

Image: Deduction Summary page

This example illustrates the fields and controls on the Deduction Summary page.



Setting Up and Managing Fluid Benefits Statements as an Administrator

This topic discusses the process of setting up and managing fluid benefits statements as a benefits administrator.

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Pages Used to Set Up and Manage Fluid Benefits Statements as an Administrator

Page Name	*Definition Name*	*Usage*
Benefits Statement Options Page	BAS_STMT_OPTIONS	Set up report templates for benefits statements.
Online Confirmation Statements Page	RUNCTL_BAS_STMT	Run the process to generate confirmation statements for both online viewing and printing.
Review Employee Statements Page	BAS_STMT_LIST_FL	Review fluid benefits statements of employees.

Benefits Statement Options Page

Use the Benefits Statement Options page (BAS_STMT_OPTIONS) to set up a report template for the Benefits Statement preview.

Navigation

In the Workforce Administrator fluid homepage, select the Benefits Administrator tile. From the Benefits Configuration navigation collection, select Benefits Statement Options.

Image: Benefits Statement Options page for Enrollment Preview

This example illustrates the fields and controls on the Benefits Statement Options page for Enrollment Preview.

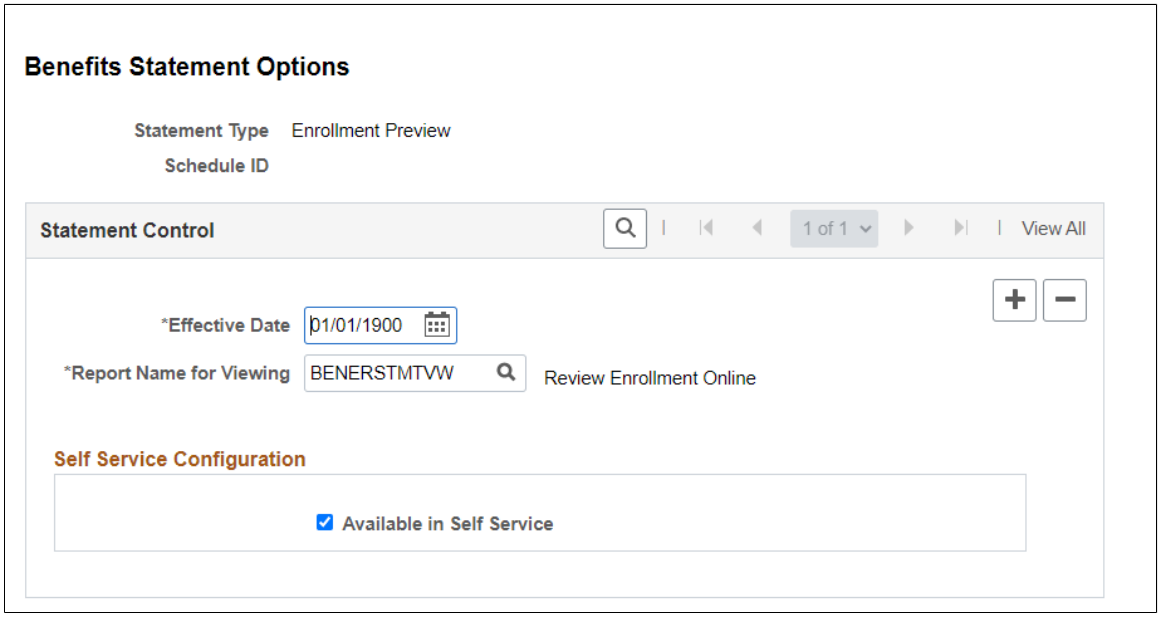


Image: Benefits Statement Options page for Submitted Enrollment

This example illustrates the fields and controls on the Benefits Statement Options page for Submitted Enrollment.

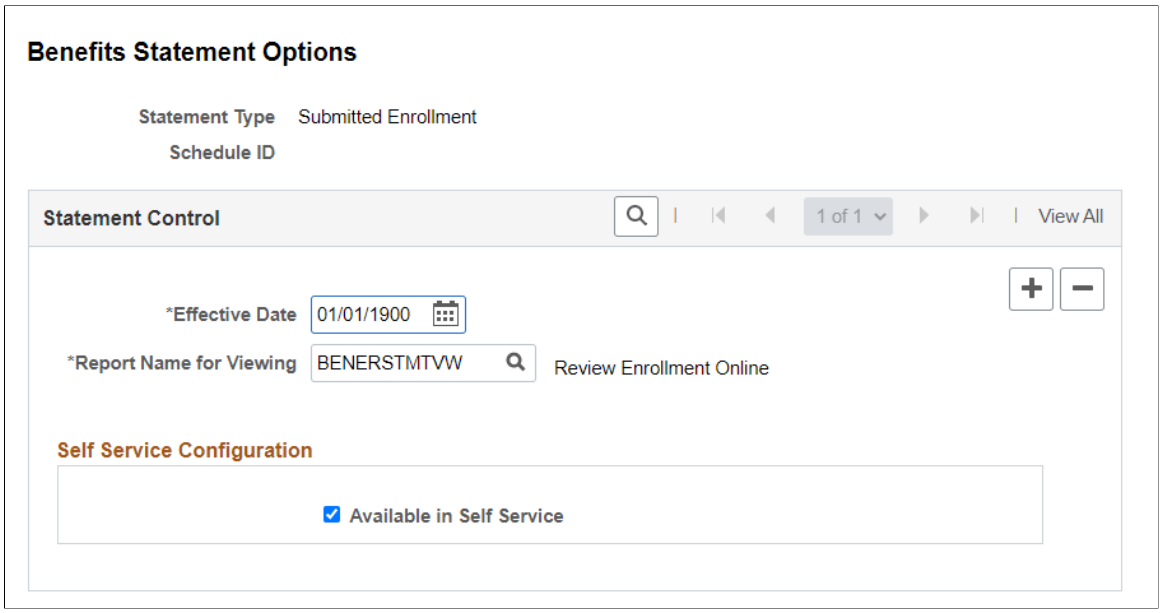
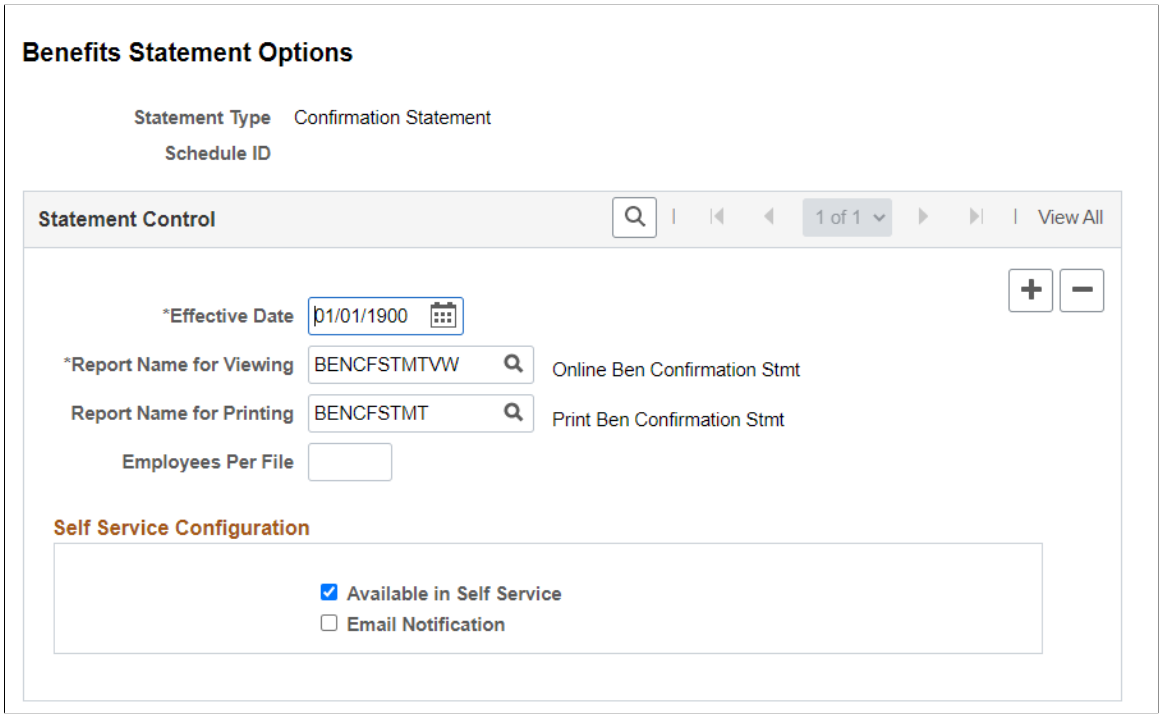


Image: Benefits Statement Options page for Confirmation Statement

This example illustrates the fields and controls on the Benefits Statement Options page for Confirmation Statement. You can find definitions for the fields and controls later on this page.



Statement Type The available Statement Types are *Enrollment Preview*, *Submitted Enrollment* and *Confirmation Statement.*

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Effective Date	Select the effective date from which the enrollment or confirmation statement controls take effect.
Schedule ID	Displays the Schedule ID if selected in the previous Search page. The statement control is based on the Schedule ID. Different report layouts can be specified for different Schedule Ids. A blank Schedule ID is the default configuration if you are using the same control for all Schedule IDs or if the statement process cannot find a matching Schedule ID.
Report ID for Viewing	Select the XML report defined in BI Publisher for online viewing.
Report ID for Printing	Select the XML report defined in BI Publisher for the 'print file' bulk printing (hard copy).
Employees Per File	Enter the number of employees to be included in each PDF file. BI Publisher allows large print files to be split into smaller PDF files. This is to avoid potential issues while printing large files. **Note:** If this field is left blank, then all the employees' records are complied into a single file.
Available in Self Service	Select the check box to allow employees to view the statements online in Self Service.
Email Notification	Select the check box to allow administrators to send email notifications to employees when the statements are ready for viewing in Self Service. Along with the email notification, an alert appears for employees on their Employee Self Service homepage.

For more information on BI Publisher settings, see *PeopleTools: BI Publisher for PeopleSoft*.

Email Notification Texts

The Maintain Text Catalog page stores the types of email texts that are sent out as notifications for employees with respect to the confirmation statements.

Navigation

Set Up HCM >Common Definitions >Text Catalog and Notepad >Maintain Text Catalog

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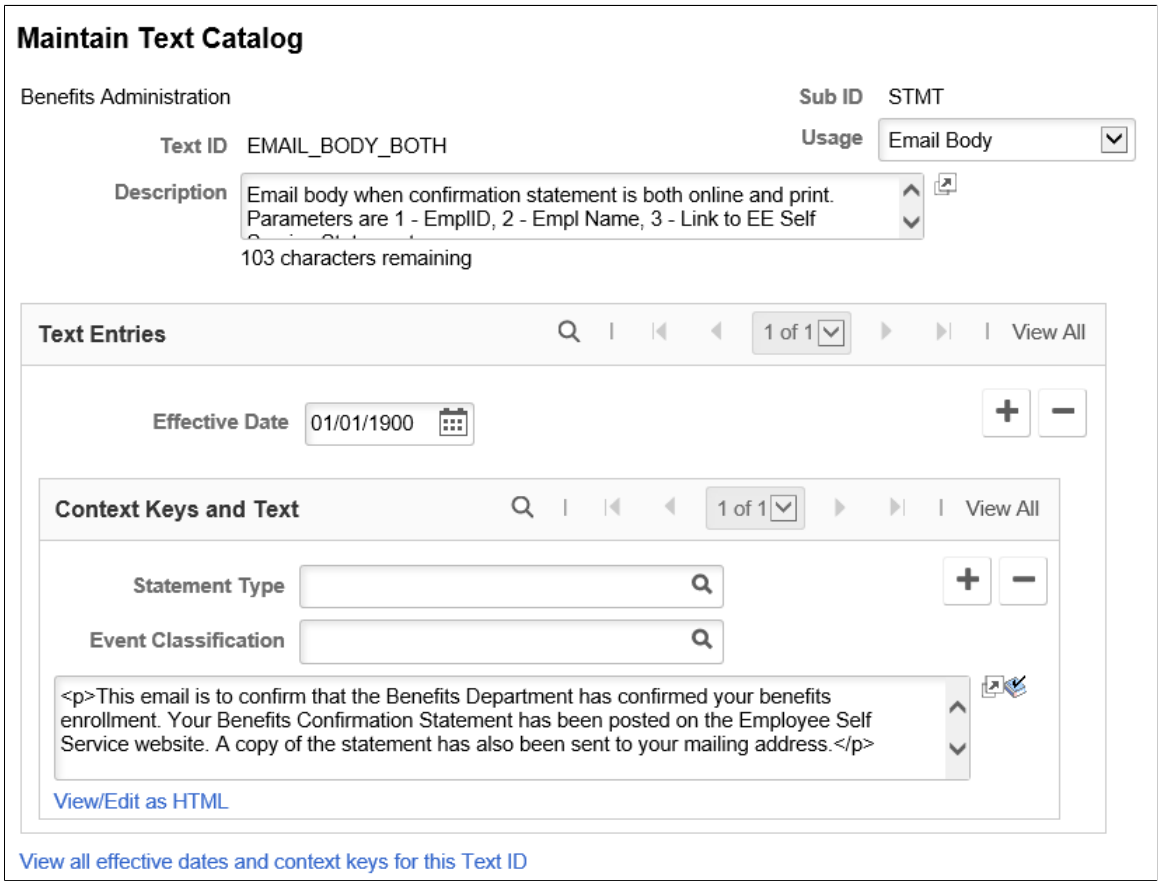
Image: Maintain Text Catalog Page

This example illustrates the fields and controls on the Maintain Text Catalog Page.



Sub ID	*Text ID*	*Usage*	*Description*
STMT	EMAIL_BODY_BOTH	Email Body	Email body when confirmation statement is both online and print.
STMT	EMAIL_BODY_ONLINE	Email Body	Email body when confirmation statement is available online only.
STMT	EMAIL_BODY_PRINT	Email Body	Email body when confirmation statement is print only.
STMT	EMAIL_LBL	Field Label	Email Address label for the Personal Information section of the confirmation statement.
STMT	EMAIL_SUBJECT	Email Subject	Subject for notification email.

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Online Confirmation Statements Page

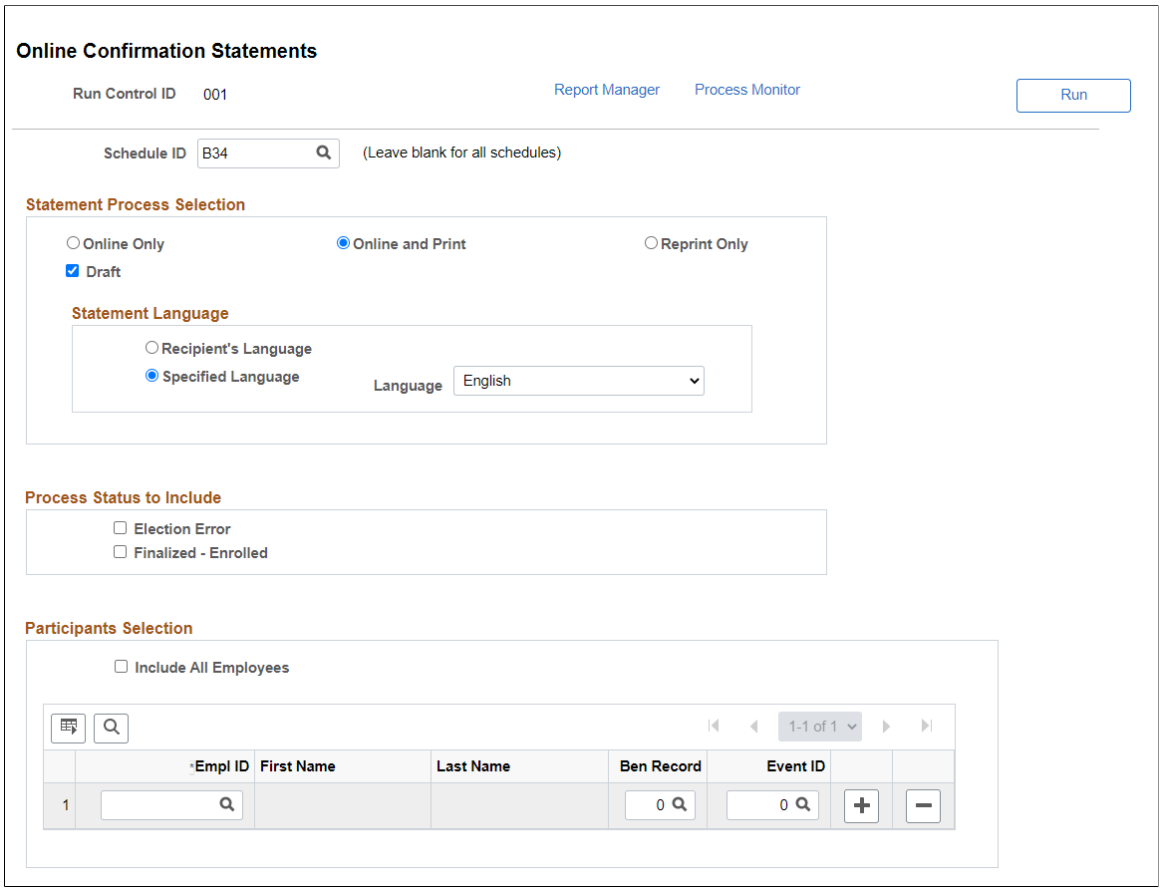
Use the Online Confirmation Statements page (RUNCTL_BAS_STMT) to run the process to generate confirmation statements for both online viewing and printing.

Navigation

In the Workforce Administrator fluid homepage, select the Benefits Administrator tile. Select the Benefits Management tab and from the navigation collection, select Online Confirmation Statements.

Image: Online Confirmation Statements page

This example illustrates the fields and controls on the Online Confirmation Statements page.



Schedule ID Enter a Schedule ID or use the Look Up icon to select one from the list of available values.

If the Schedule ID is left blank, the data for all employees are extracted.

Statement Process Selection Options are:

- *Online Only*: Select this option to generate statements for online viewing only. No hardcopy statement is generated.
- *Online and Print*: Select this option to generate statements for online viewing and a bulk pdf file for hardcopy printing.

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- *Reprint Only*: Select this option to only generate a bulk pdf file for hardcopy printing.
- *Draft* check box: Select this check box to create draft statements for review prior to releasing the statements.

Statement Language This group box appears only when *Online and Print* or *Print Only* is selected.

Process Status to Include: Election Error, Finalized – Enrolled Select the check box to indicate the status for the statement data to be extracted.

Note: A Confirmation Statement is available to the employee only if the benefit data has a process status of Finalized - Enrolled (FE) or Election Error (EE).

Participants Selection When a Schedule ID is selected and the Include All Employees check box is deselected, a Participants group box is displayed. You can add specific employees here to generate statements for these employees only.

Note: If the Schedule ID is left blank, then the Include All Employees check box cannot be deselected.

Related Links

Understanding the Benefits Administration Process Status

Review Employee Statements Page

Use the Review Employee Statements page (BAS_STMT_LIST_FL) to review fluid benefits statements of employees.

Navigation

In the Workforce Administrator fluid homepage, select the Benefits Administrator tile. Select the Review Employee Benefits tab and from the navigation collection, select Review Employee Statements.

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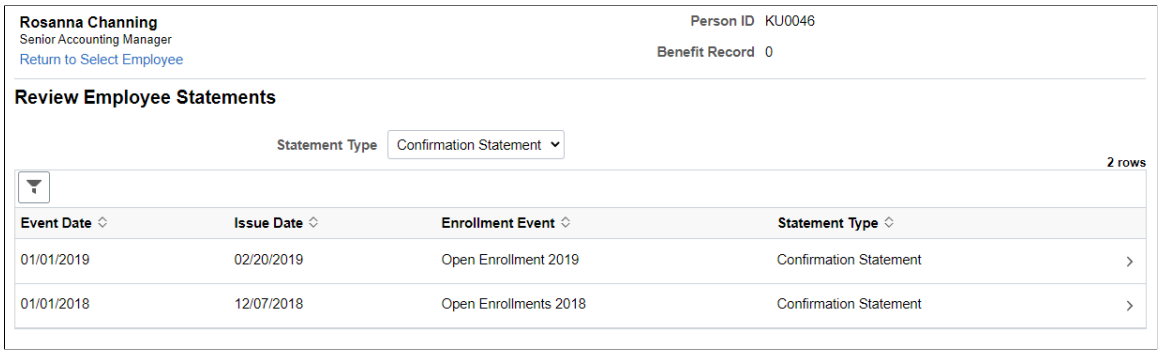
Image: Review Employee Statements page

This example illustrates the fields and controls on the Review Employee Statements page. You can find definitions for the fields and controls later on this page.



Return to Select Employee link — Click this link to return to the search page to select a different employee.

Statement Type drop down — The available statement types are *Enrollment Preview*, *Submitted Enrollment* and *Confirmation Statement*.

Filter icon — Use the filter to select statements according to event date range, issue date, sequence and event.

Click a row to view the benefits statement details for the selected employee. The Benefits Statement page displays the benefits enrollment details of the selected employee as collapsible sections. Expand each section to view details. Use the Print View button on the page to download the statement in a PDF format to save as a file or to print a hard copy.

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Image: Benefits Statement – Confirmation Statement

This example illustrates the fields and controls on the Benefits Statement – Confirmation Statement.

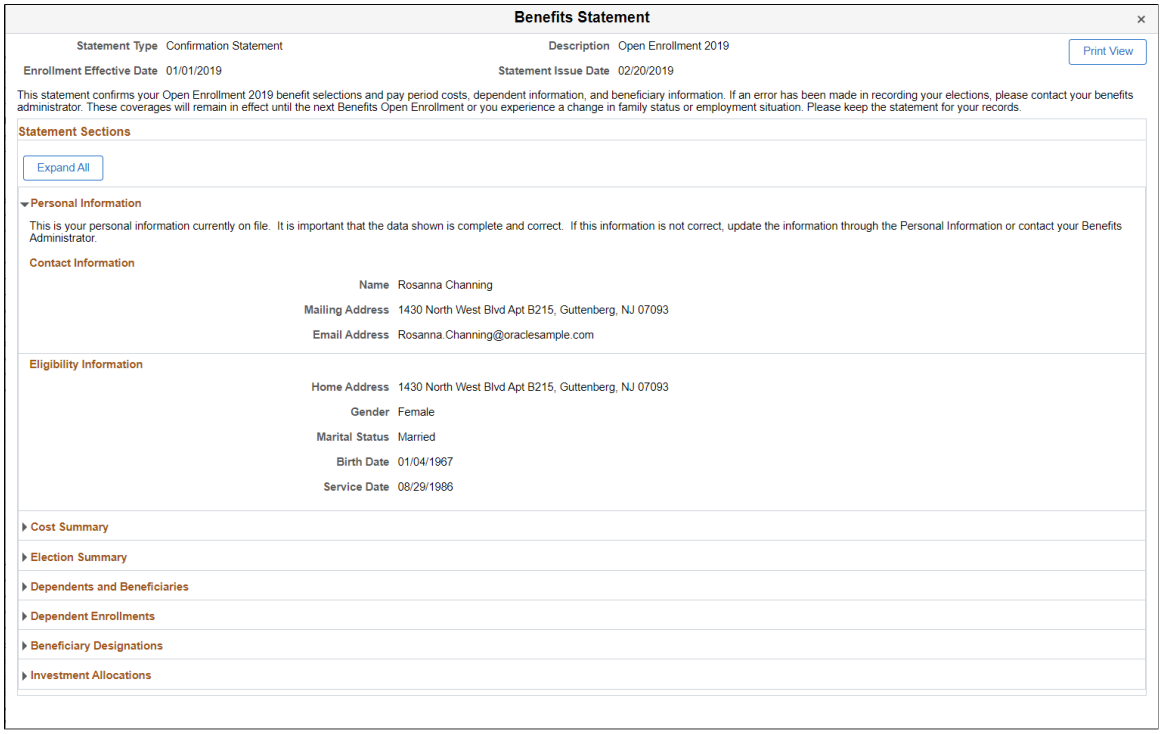

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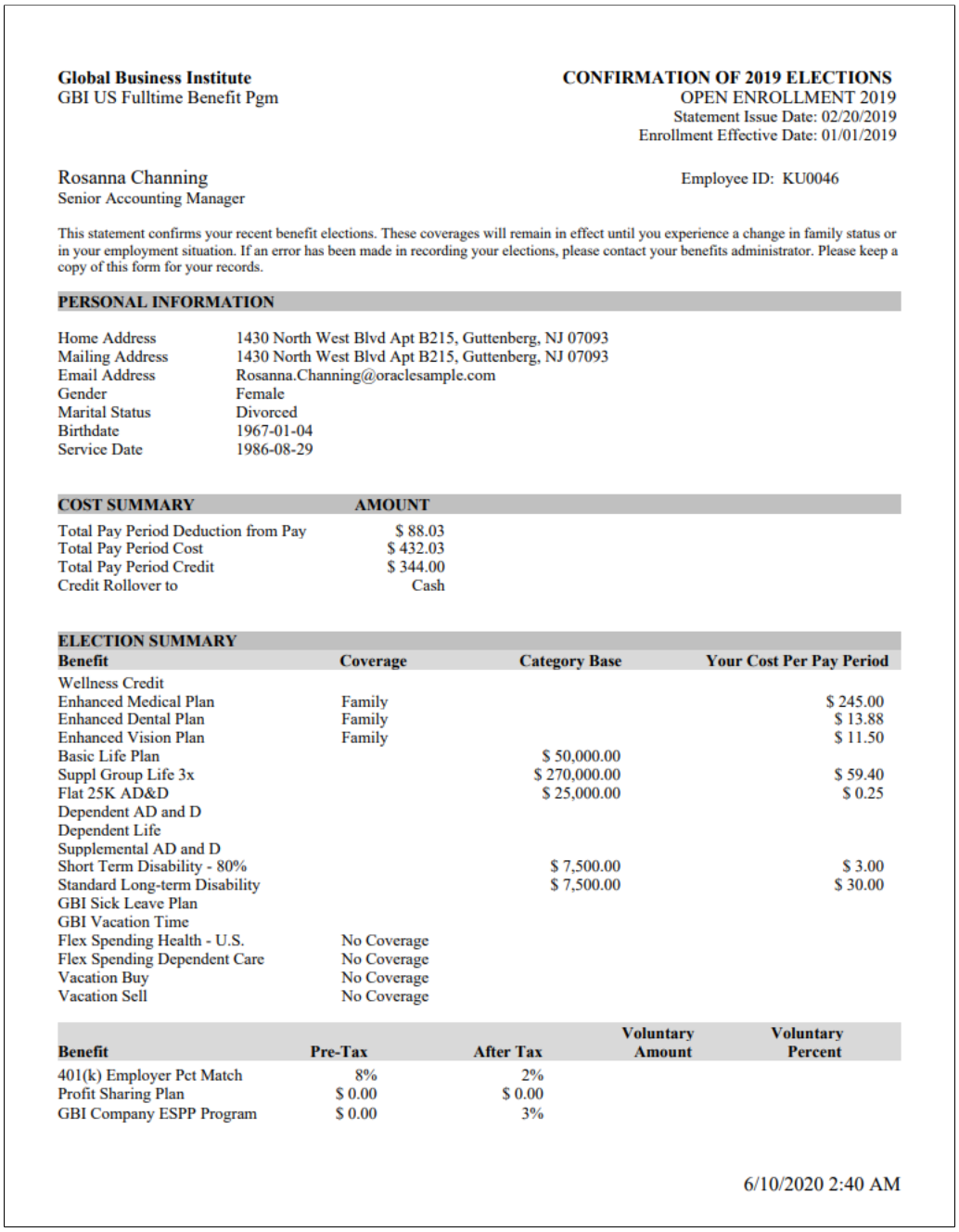
Image: Benefits Statement – Print view of the Confirmation Statement

This example illustrates the fields and controls on the Benefits Statement – Print view of the Confirmation Statement.



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CONFIRMATION OF 2019 ELECTIONS
OPEN ENROLLMENT 2019
Statement Issue Date: 02/20/2019
Enrollment Effective Date: 01/01/2019

Rosanna Channing
Senior Accounting Manager

Employee ID: KU0046

This statement confirms your recent benefit elections. These coverages will remain in effect until you experience a change in family status or in your employment situation. If an error has been made in recording your elections, please contact your benefits administrator. Please keep a copy of this form for your records.

PERSONAL INFORMATION

Home Address	1430 North West Blvd Apt B215, Guttenberg, NJ 07093
Mailing Address	1430 North West Blvd Apt B215, Guttenberg, NJ 07093
Email Address	Rosanna.Channing@oraclesample.com
Gender	Female
Marital Status	Divorced
Birthdate	1967-01-04
Service Date	1986-08-29

COST SUMMARY	AMOUNT
Total Pay Period Deduction from Pay	$ 88.03
Total Pay Period Cost	$ 432.03
Total Pay Period Credit	$ 344.00
Credit Rollover to	Cash

ELECTION SUMMARY

Benefit	Coverage	Category Base	Your Cost Per Pay Period
Wellness Credit			
Enhanced Medical Plan	Family		$ 245.00
Enhanced Dental Plan	Family		$ 13.88
Enhanced Vision Plan	Family		$ 11.50
Basic Life Plan		$ 50,000.00	
Suppl Group Life 3x		$ 270,000.00	$ 59.40
Flat 25K AD&D		$ 25,000.00	$ 0.25
Dependent AD and D			
Dependent Life			
Supplemental AD and D			
Short Term Disability - 80%		$ 7,500.00	$ 3.00
Standard Long-term Disability		$ 7,500.00	$ 30.00
GBI Sick Leave Plan			
GBI Vacation Time			
Flex Spending Health - U.S.	No Coverage		
Flex Spending Dependent Care	No Coverage		
Vacation Buy	No Coverage		
Vacation Sell	No Coverage		

Benefit	Pre-Tax	After Tax	Voluntary Amount	Voluntary Percent
401(k) Employer Pct Match	8%	2%		
Profit Sharing Plan	$ 0.00	$ 0.00		
GBI Company ESPP Program	$ 0.00	3%		

6/10/2020 2:40 AM

Viewing Fluid Benefit Statements as an Employee in Self Service

This topic discusses how employees view fluid benefits statements in Self Service.

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Pages Used to View Fluid Benefits Statements as an Employee in Self Service

Page Name	*Definition Name*	*Usage*
Benefits Statement Page	BAS_STATMNTS_FL	View a list of benefits enrollment previews, submitted enrollments and confirmation statements.

Benefits Statement Page

Use the Benefits Statement page (BAS_STATMNTS_FL) to view a list of benefits enrollment previews, submitted enrollments and confirmation statements.

Navigation

In the Employee Self Service fluid homepage, select the Benefit Details tile and then from the Benefit Details tile dashboard, select the Benefit Statements tile.

Image: Benefits Statement Page

This example illustrates the fields and controls on the Benefits Statement page.

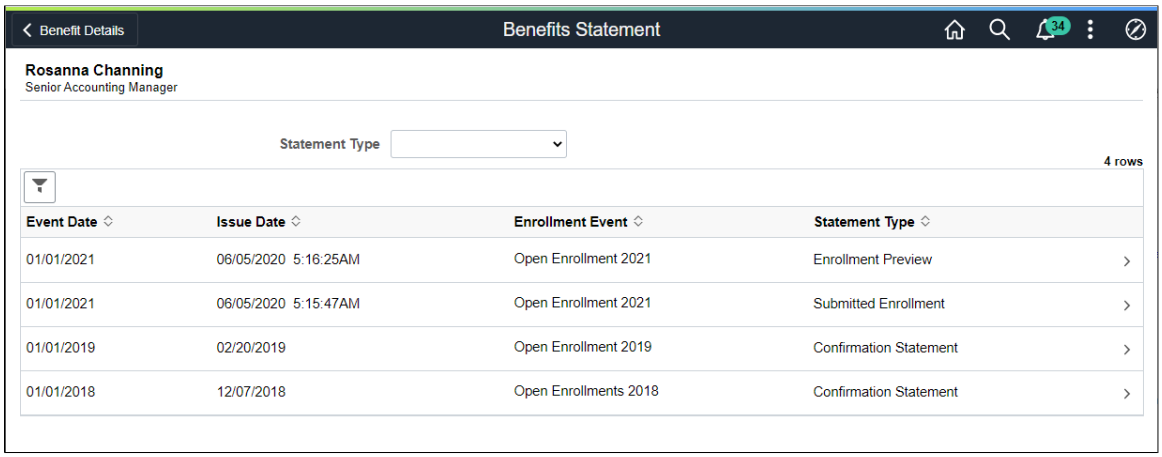

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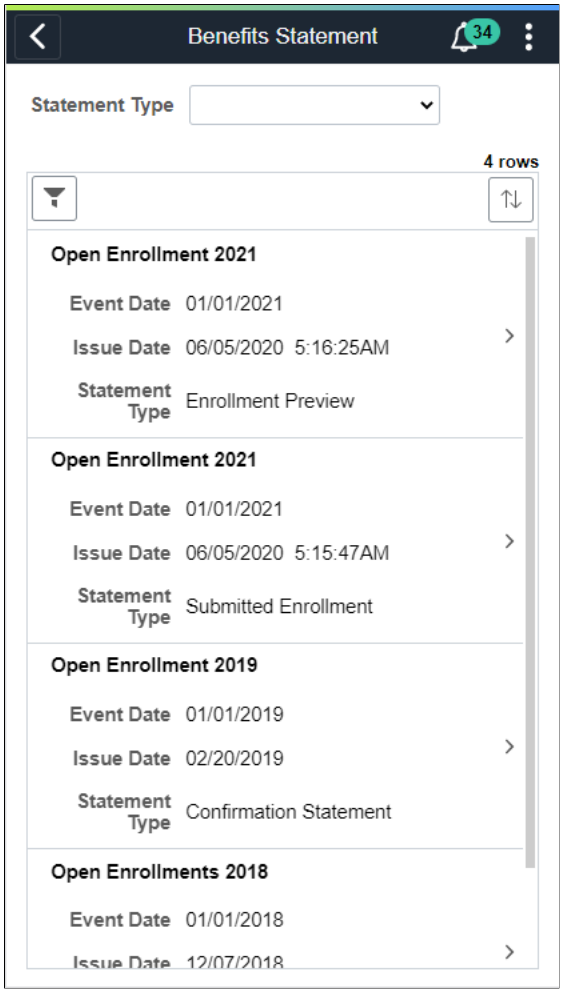
Image: Smartphone_Benefit Statements Page

This example illustrates the fields and controls on the Benefit Statements Page as seen on a smartphone.



Statement Type drop down — Select the type of the statement to view. The available statement types are *Enrollment Preview*, *Submitted Enrollment* and *Confirmation Statement*.

Filter icon — Use the filter to select statements according to event date range, job title and event.

Event Date — Displays the date when the enrolled benefits event start.

Issue Date — Displays the date and time of when the statement data was generated and stored.

Job Title — Displays the job title of the employee.

Enrollment Event — Displays the event description.

Statement Type — Displays the statement type. Available statement types are: *Confirmation Statement*, *Submitted Enrollment* and *Enrollment Preview.*

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Note: Confirmation statements are available to employees only if the benefit data has a process status of Finalized - Enrolled (FE) or Election Error (EE).

Click a row to view the benefits statement details. The Benefits Statement page displays the benefits enrollment details as collapsible sections. Expand each section to view details. Use the Print View button on the page to download the statement in a PDF format to save as a file or to print a hard copy.

Image: Benefits Statement – Enrollment Preview

This example illustrates the Benefits Statement – Enrollment Preview page.

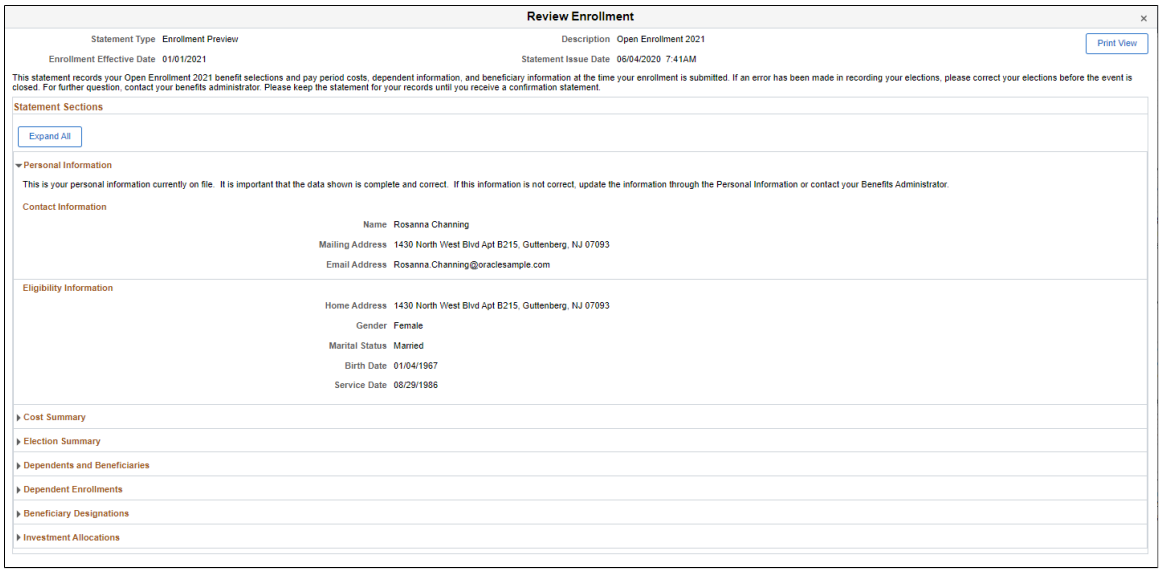

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Image: Smartphone_Benefits Statement – Enrollment Preview

This example illustrates the fields and controls on the Benefits Statement – Enrollment Preview as seen on a smartphone.

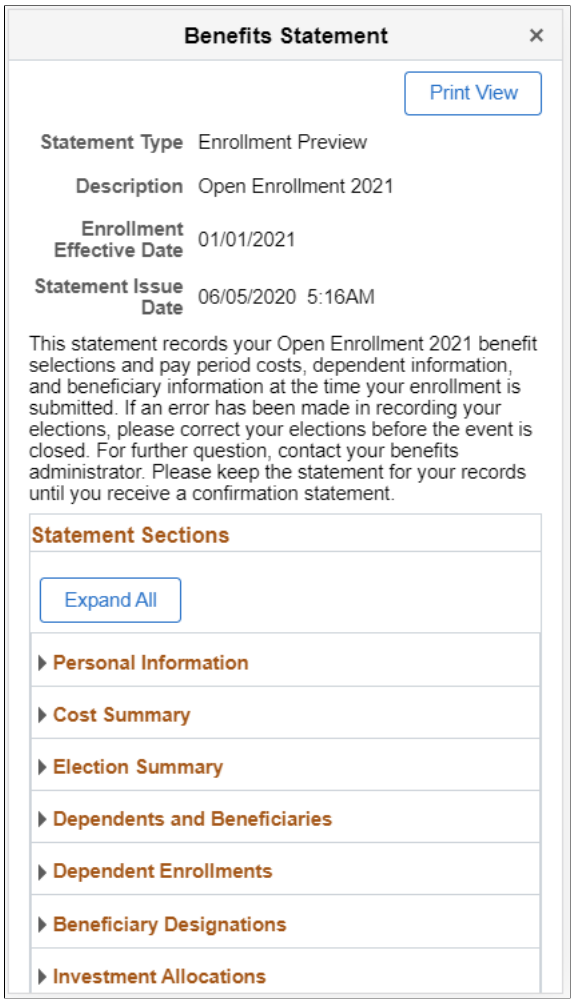

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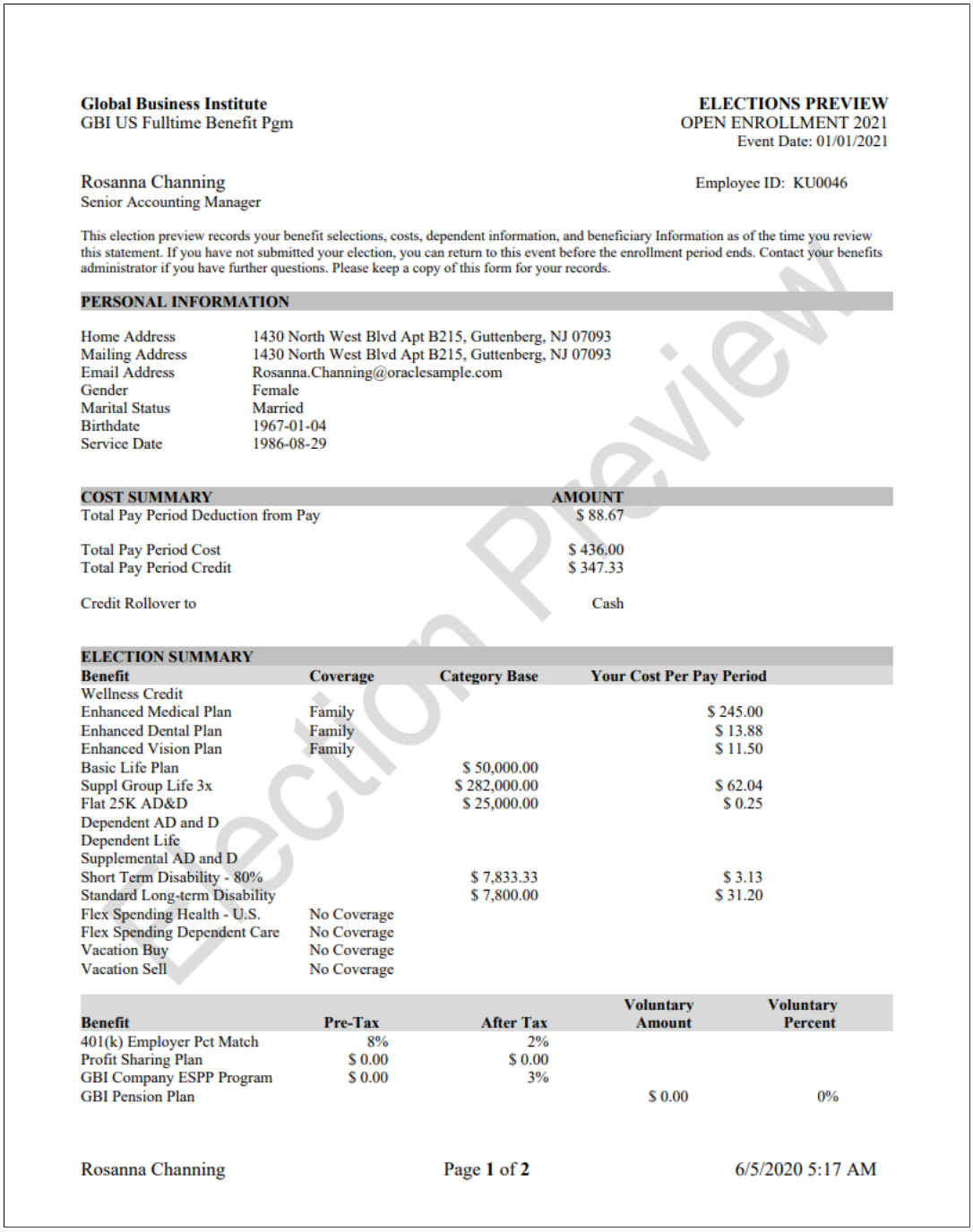
Image: Benefits Statement – Print view of the Elections Preview

This example illustrates the Benefits Statement page – Print view of the Elections Preview.



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ELECTIONS PREVIEW
OPEN ENROLLMENT 2021
Event Date: 01/01/2021

Rosanna Channing
Senior Accounting Manager

Employee ID: KU0046

This election preview records your benefit selections, costs, dependent information, and beneficiary Information as of the time you review this statement. If you have not submitted your election, you can return to this event before the enrollment period ends. Contact your benefits administrator if you have further questions. Please keep a copy of this form for your records.

PERSONAL INFORMATION

Home Address	1430 North West Blvd Apt B215, Guttenberg, NJ 07093
Mailing Address	1430 North West Blvd Apt B215, Guttenberg, NJ 07093
Email Address	Rosanna.Channing@oraclesample.com
Gender	Female
Marital Status	Married
Birthdate	1967-01-04
Service Date	1986-08-29

COST SUMMARY	AMOUNT
Total Pay Period Deduction from Pay	$ 88.67
Total Pay Period Cost	$ 436.00
Total Pay Period Credit	$ 347.33
Credit Rollover to	Cash

ELECTION SUMMARY

Benefit	Coverage	Category Base	Your Cost Per Pay Period
Wellness Credit			
Enhanced Medical Plan	Family		$ 245.00
Enhanced Dental Plan	Family		$ 13.88
Enhanced Vision Plan	Family		$ 11.50
Basic Life Plan		$ 50,000.00	
Suppl Group Life 3x		$ 282,000.00	$ 62.04
Flat 25K AD&D		$ 25,000.00	$ 0.25
Dependent AD and D			
Dependent Life			
Supplemental AD and D			
Short Term Disability - 80%		$ 7,833.33	$ 3.13
Standard Long-term Disability		$ 7,800.00	$ 31.20
Flex Spending Health - U.S.	No Coverage		
Flex Spending Dependent Care	No Coverage		
Vacation Buy	No Coverage		
Vacation Sell	No Coverage		

Benefit	Pre-Tax	After Tax	Voluntary Amount	Voluntary Percent
401(k) Employer Pct Match	8%	2%		
Profit Sharing Plan	$ 0.00	$ 0.00		
GBI Company ESPP Program	$ 0.00	3%		
GBI Pension Plan			$ 0.00	0%

Rosanna Channing Page **1** of **2** 6/5/2020 5:17 AM

Election Preview

Configuring Text on Benefits Pages

This topic provides an overview of Text Catalog configuration for Benefits pages and describes how to identify Text IDs for specific page elements and Maintain Text Catalog entries.

See also "Configuring the Text Catalog" (PeopleSoft HCM 9.2: Application Fundamentals)

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Page Used to Maintain Text Catalog Entries for Benefits Pages

Page Name	*Definition Name*	*Usage*
Maintain Text Catalog Page	HR_SSTEXT_TEXT	Define text catalog entries, and define the values for context-sensitive keys.

Maintain Text Catalog Page

Use the Maintain Text Catalog page (HR_SSTEXT_TEXT) to define text catalog entries and to define the values for context-sensitive keys.

Navigation

Set Up HCM >Common Definitions >Text Catalog and Notepad >Maintain Text Catalog

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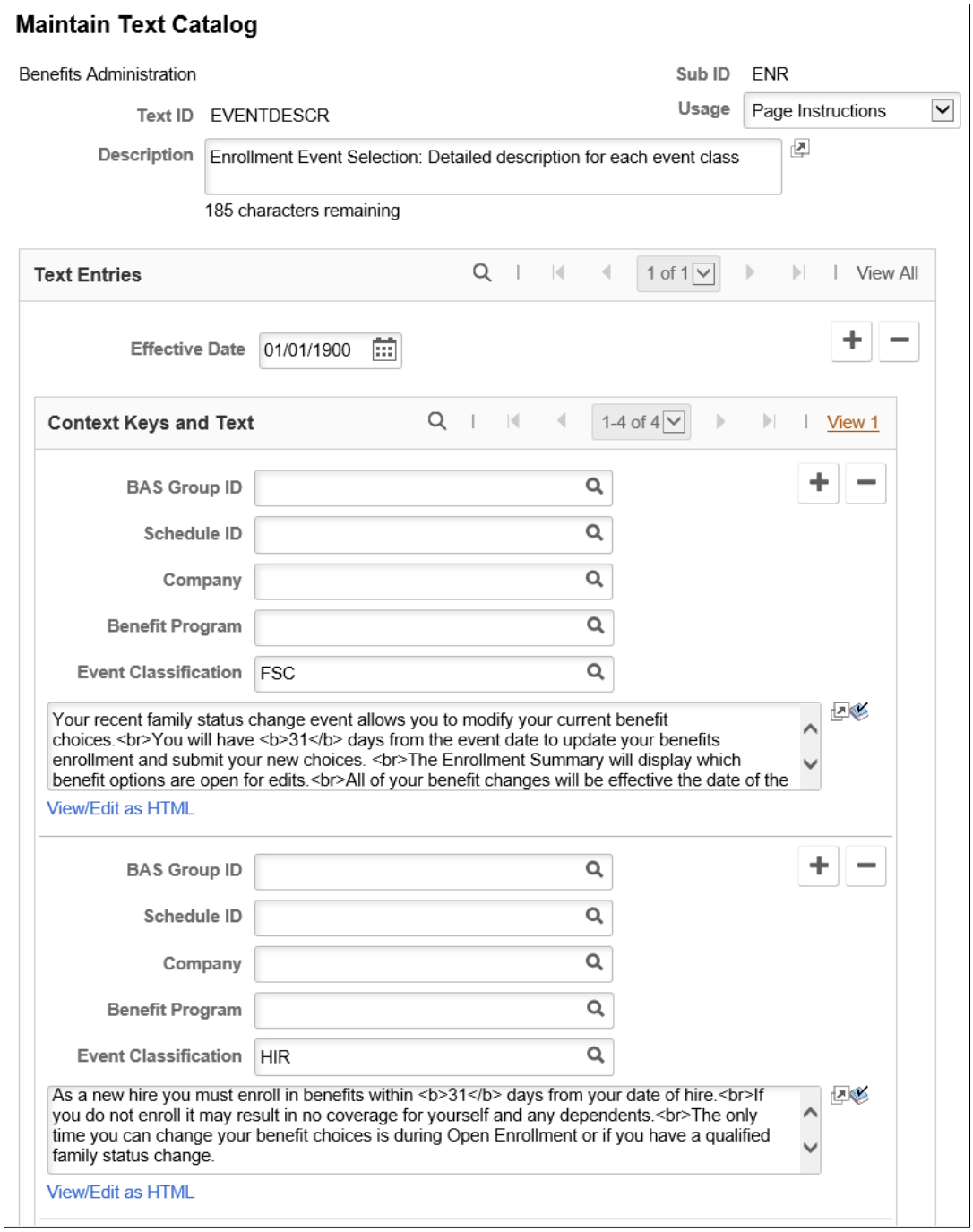
Image: Maintain Text Catalog page

This example illustrates the fields and controls on the Maintain Text Catalog page..



Displaying Text IDs on Benefits Pages

To find out the text id of an instructional text, you can configure to display the text ids of each text area in Benefits pages by using the Display Text Id check box in the "Configure Text Catalog Page" (PeopleSoft HCM 9.2: Application Fundamentals).

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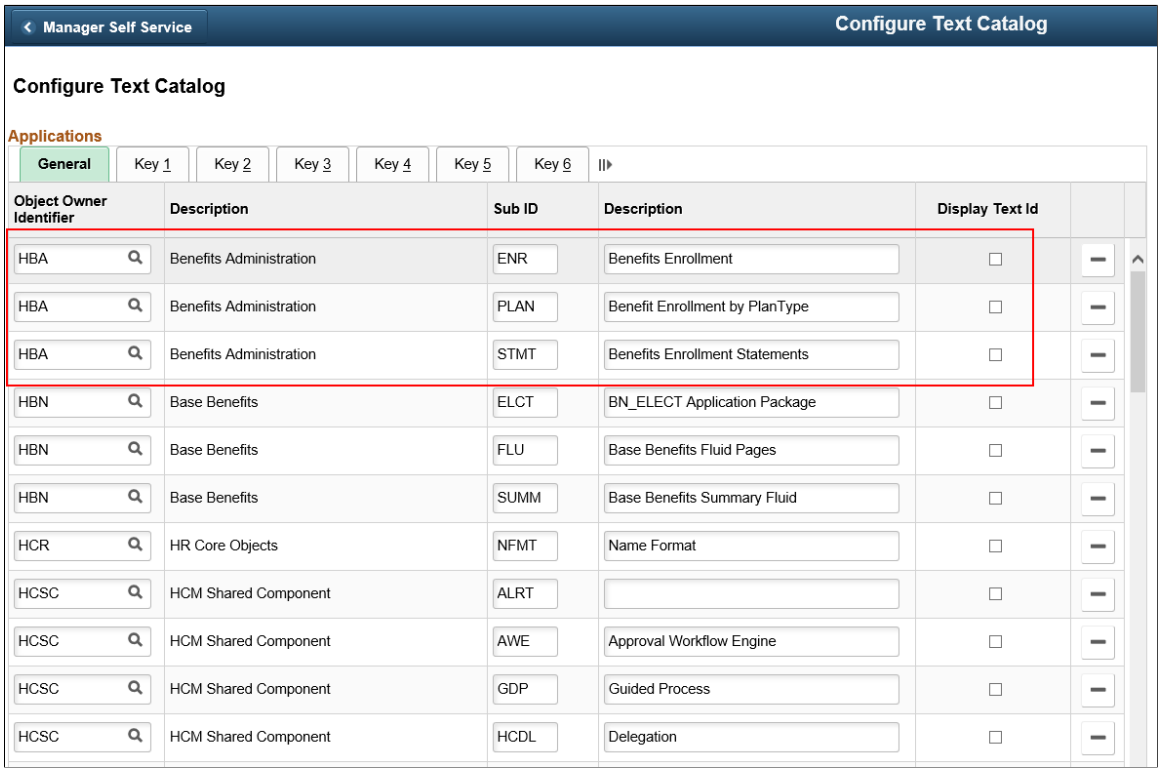
Image: Configure Text Catalog Page

This example illustrates the Configure Text Catalog page.



Benefits Administration uses three Sub IDs: ENR, PLAN and STMT.

Select the Display Text Id check box to display the text ids on the different Benefits pages.

Related Links

"Configuring the Text Catalog" (PeopleSoft HCM 9.2: Application Fundamentals)

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Chapter 20

Benefits Assistant Chatbot

Understanding Benefits Assistant

A chatbot is a computer program that maintains a conversation with a user in natural language, understands the intent of the user, and sends a response based on business rules and data of the organization. The Benefits Assistant is a PeopleSoft chatbot created for the Benefits users. This chatbot is designed to assist employees in looking up basic information about their current enrolled benefits, dependents and beneficiaries, vendor/provider information and administrator contacts. Apart from what PeopleSoft delivers, you can configure additional utterances for the chatbot based on your company's requirements.

The Benefits Assistant is available for all Benefits users as a tile and/or as a widget at the lower right-hand corner of fluid Benefits pages. Click the tile or widget to open a chat window. The employee may begin interacting with the chatbot via a simple greeting, or start directly with a question in a conversational way. This feature is available for both desktop and mobile users.

Working with Benefits Assistant Chatbot using ODA

With the Benefits Assistant tile, Benefits users can access the Benefits Assistant Chatbot for quick answers to queries related to benefits using Oracle Digital Assistant (ODA), the Oracle chatbot technology platform. ODA allows enterprises to create and deploy digital assistants for their users. With ODA, you create:

- Digital Assistants, which are artificial intelligence (AI)-driven interfaces that help users accomplish a variety of tasks in natural language conversations. For each digital assistant, you assemble one or more skills.
- Skills, which are individual bots that are focused on specific types of tasks, such as changing your dependants/beneficiaries, tracking inventory, submitting time cards, and creating expense reports.

  You can add skills to digital assistants or deploy them to a channel on their own. Intents allow your skill to understand what the user wants it to do. An intent categorizes typical user requests by the tasks and actions that your skill performs.

  For details, refer Oracle Digital Assistants and Skills

  For Benefits Chatbot, the Benefits Assistant skill consists of the following intents:

- EntryGreeting
- GetAdminContactInfo
- GetDependentBeneficiary
- GetLifeEventInfo

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- GetMainMenu
- GetOpenEnrollmentInfo
- GetPlanCost
- GetPlanDetail
- GetPlanProvider
- UpdateBenefitSummary
- ExitAssistant
- unresolvedIntent

The entities associated with each intent are defined within the skill.

Entities	***Associated Intents***
LIFEEVENT_TYPE	GetLifeEventInfo
PLAN_CATEGORY	GetDependentBeneficiary
	GetPlanCost
	GetPlanProvider
	GetPlanDetail
PLANTYPE	GetDependentBeneficiary
	GetPlanCost
	GetPlanProvider
	GetPlanDetail
	UpdateBenefitSummary
SUMM_UPD_FLAG SUMM_UPD_ACTION	UpdateBenefitSummary

These services can be used to call relevant application functionality as part of a query. The Chatbot Integration Framework delivers some services that can be used to help the chatbot carry out various tasks that these services allow to perform. To integrate the chatbot with the application services, you need to create a proxy user. This proxy user is used for the chatbot to communicate with the application services.

The dialog flow definition is the model for the conversation itself, one that lets you choreograph the interaction between a skill and its users.

The Services used in Benefits Assistant are:

- HCM.benefit.Services

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- HCM.benefit.GetChildNode

If users need to create new service, then they can use the Application Service Framework to create custom services.

For more information please refer the documentation on Application Service Framework https://support.oracle.com/epmos/faces/DocumentDisplay?id=2557046.1

For details, refer Configure a Component Service

"Understanding Application Service for Chatbot Integration Framework" (PeopleSoft 9.2: Enterprise Components)

Benefits Assistant Interface

The Benefits Assistant helps employees with their queries on benefits-related information such as their plan details, plan costs, administrator contacts, provider/vendor contacts, life events and open enrollment dates.

Note: The Benefits Assistant provides answers for queries related to Open Enrollment only for organizations with the PeopleSoft Benefits Administration.

The Benefit Details Navigation Collection users can access the Benefits Assistant as a widget. The Benefit Details Tile dashboard users get the tile system delivered on the Benefit Details Tile dashboard and as a widget on all the fluid Benefits pages.

Note: The roles and permission lists are part of the standard PeopleTools security administration, used to grant access to components and pages. The roles and permission lists are discussed in detail in the PeopleTools: Security Administration documentation.

Examples of Use Cases	***Benefits component from which the chatbot retrieves information***
• Tell me about my life insurance. • I want to know about my short term disability plan. • I want to know the plan detail for savings plan/ 401(K) plan/profit sharing/retirement/pension plans/vacation benefits/legal services?	Benefit Plan Detail
• What is my insurance? • What is my health plan? • Tell me about my benefits. • I want to know the benefit plans I am enrolled in. • Show me my benefits summary.	Benefit Plan Category Benefit Plan Type
• List my Dependents • Who all have I enrolled as beneficiaries?	Dependents/Beneficiaries

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Examples of Use Cases	*Benefits component from which the chatbot retrieves information*
• I want to know the provider for my medical plan. • Tell me my provider details.	Benefit Vendor Information
• I need an Admin contact • Health admin contact details • Ben admin • Contact details	Administrator Contacts

Setting Up Benefits Assistant

This topic discusses how to configure the Benefits Assistant chatbot for the Benefits users.

Pages Used to Configure Benefits Assistant Chatbot as an Administrator Using the PeopleSoft Fluid User Interface

Page Name	*Definition Name*	*Usage*
Content Ref Administration Page For details, refer topic in Enterprise Components: "Adding the Chatbot for a new skill to a PeopleSoft Page as a Tile" (PeopleSoft 9.2: Enterprise Components)	PORTAL_CREF_ADM	Add the Benefits Assistant tile to the Benefit Details Tile dashboard.
Bot Definitions Page For details, refer topic in Enterprise Components: "Bot Definition Page" (PeopleSoft 9.2: Enterprise Components)	EOCB_BOTSRCH_FL	View, edit or add a new bot definition.
"Add Bot Definition Page" (PeopleSoft 9.2: Enterprise Components)	EOCB_ADDBOTDEFN_FL	Add a new Bot Definition.
Maintain Bot Definition page For details, refer topic in Enterprise Components: "Maintain Bot Definition Page" (PeopleSoft 9.2: Enterprise Components)	EOCB_BOTDEFN_FL	View the existing definitions for a chatbot.
"Maintain Branding Template Page" (PeopleSoft 9.2: Enterprise Components)	EOCB_BRNDTMPL_FL	Control the branding aspects of the bot definition.

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Page Name	*Definition Name*	*Usage*
Component Mapping Page For details, refer topic in Enterprise Components: "Adding the Chatbot to a PeopleSoft Page as a Widget" (PeopleSoft 9.2: Enterprise Components)	EOCB_COMPSRCH_FL	Choose the component (that is, the Benefits fluid page) on which the Benefits Assistant widget should be made available.

Configuring the Benefits Assistant Tile

The Benefit Details Navigation Collection users with the appropriate roles can access the Benefits Assistant as a widget.

Note: Roles and permission lists are part of standard PeopleTools security administration, used to grant access to components and pages. For details, refer PeopleTools: Security Administration documentation.

The Benefit Details Tile dashboard users get the tile system delivered on the Benefit Details Tile dashboard and as a widget on all the fluid Benefits pages. The Administrator has to follow the steps below to set the tile up on the dashboard for their organization:

1. Using the *BEN_CHAT_ASST* that is delivered with the system, edit and add the bot app ID from the ODA channel.

   a. Navigate to Enterprise Components > Chatbot Configurations > Bot Definitions.

   b. Click the Edit button for *BEN_CHAT_ASST* (Benefits Assistant) and enter the Bot App ID value from the ODA channel.

   Oracle delivers a default branding template for the Benefits Assistant chatbot: PS_ORWEBSDK_DEFAULT_V1. You can choose to use this template without making any changes.

2. Your employees need access to the Benefits fluid pages and the Benefit Details Tile dashboard, along with the Benefit Chatbot role to access the Benefits Assistant. For this, ensure all employees have the appropriate roles.

   Note: For details on roles and permission lists, refer PeopleTools: Security Administration documentation.

Related Links

"Creating Bot Definitions" (PeopleSoft 9.2: Enterprise Components)

"Understanding the Chatbot Architecture" (PeopleSoft 9.2: Enterprise Components)

Content Ref Administration Page

Use the Content Ref Administration (PORTAL_CREF_ADM) page — Fluid Attributes tab (PORTAL_GROUPLET), to add the Benefits Assistant tile to the Benefit Details dashboard.

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Navigation

PeopleTools > Portal > Structure and Content.

Then select Self Service > HR Fluid Components.

Under Content References, select Edit for the label Benefits Assistant and select Fluid Attributes tab.

For details, refer the topic: "Adding Chatbot to Application pages" (PeopleSoft 9.2: Enterprise Components).

Image: Content Ref Administration page

This example illustrates the fields and controls on the Content Ref Administration page (1 of 2).

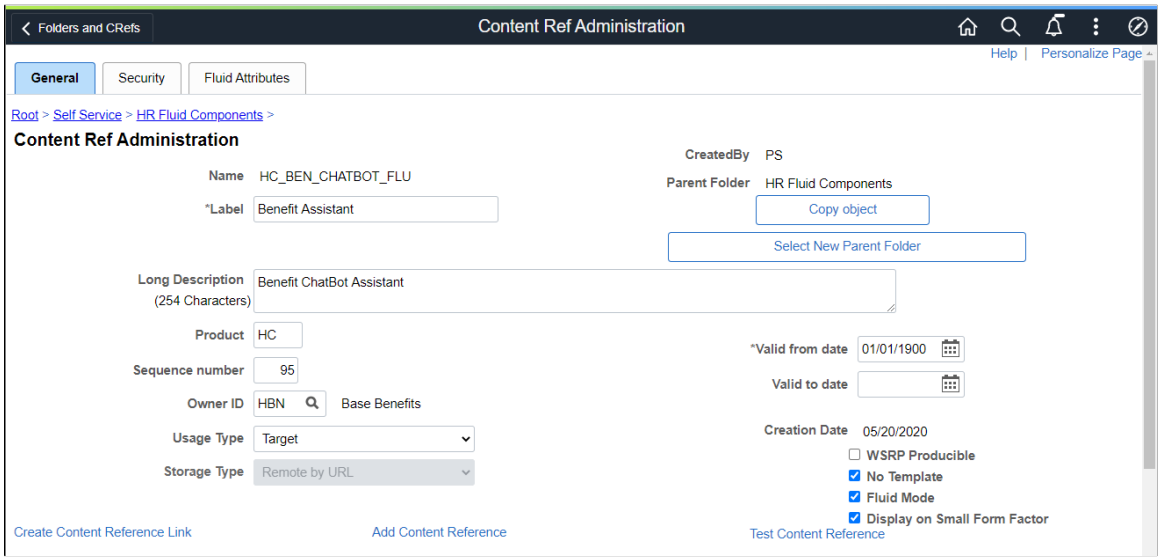
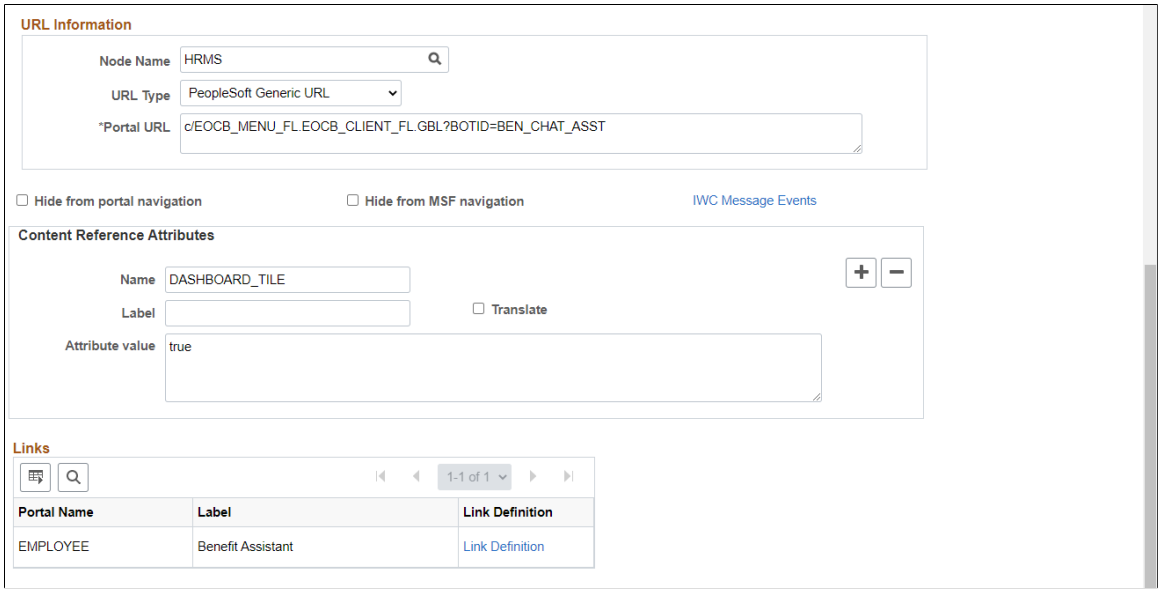


Image: Content Ref Administration page

This example illustrates the fields and controls on the Content Ref Administration page (2 of 2).



Select the Fluid Attributes tab to open the Tile Repository section.

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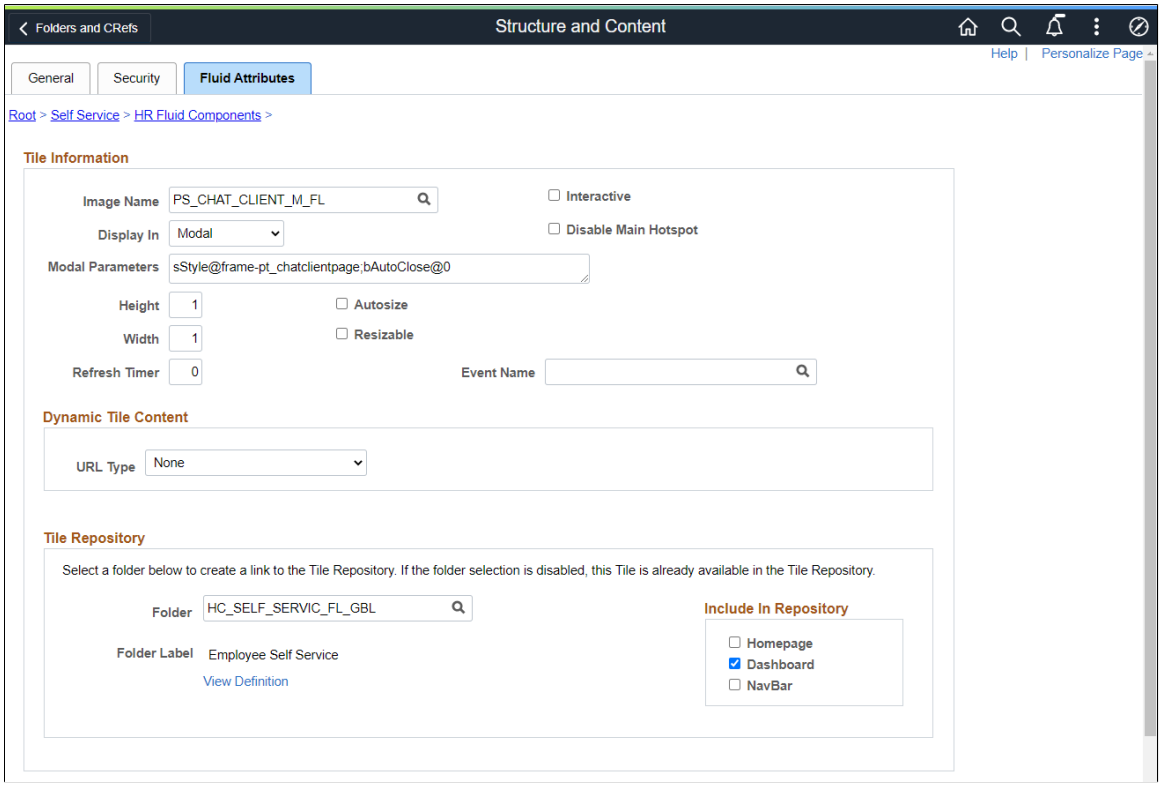
Image: Fluid Attributes tab

This example illustrates the fields and controls on the Fluid Attributes tab.



Select the Dashboard checkbox under Include In Repository to enable the Benefits Assistant tile to the Benefit Details Tile dashboard.

Bot Definitions Page

Use the Bot Definitions (EOCB_BOTSRCH_FL) page to view the existing chatbot identifiers and newly define a chatbot.

Navigation

Enterprise Components > Chatbot Configurations > Bot Definition

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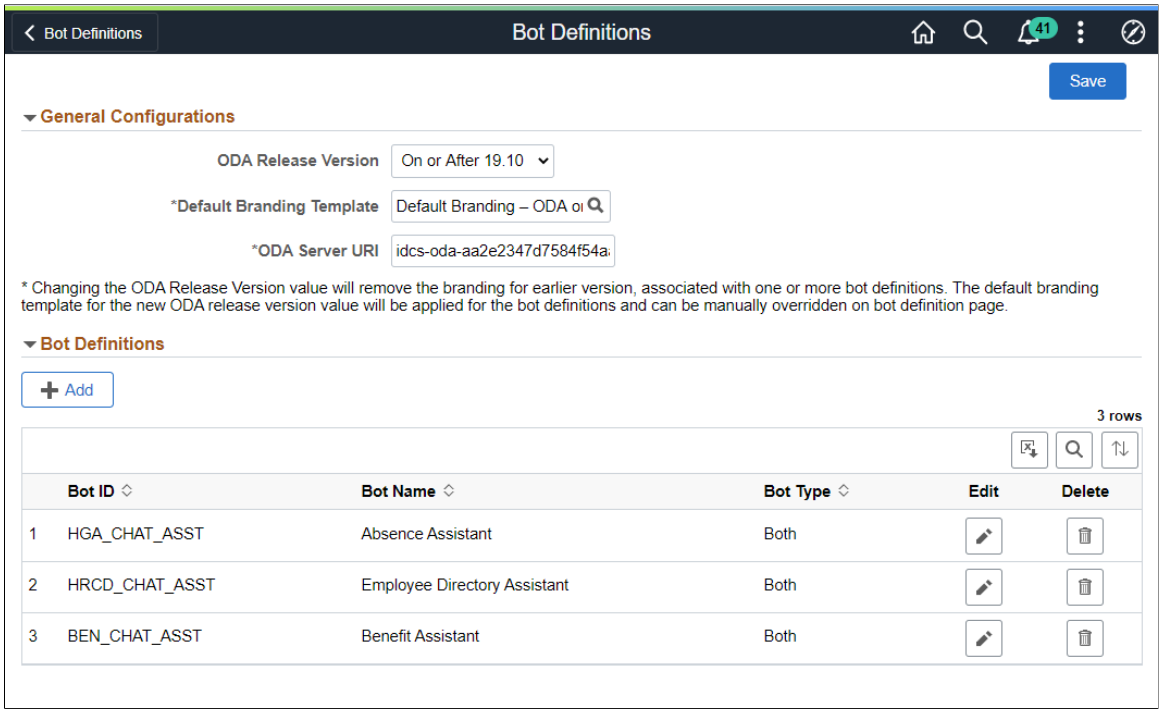
Image: Bot Definitions Page

This example illustrates the fields and controls on the Bot Definition Page. You can find definitions for the fields and controls later on this page.



Select Add to open the Add Bot Definition page to create a new bot definition.

Maintain Bot Definition page

Use the Maintain Bot Definition page (EOCB_BOTDEFN_FL) to view the existing definitions for a chatbot.

Navigation

Enterprise Components > Chatbot Configurations > Bot Definitions

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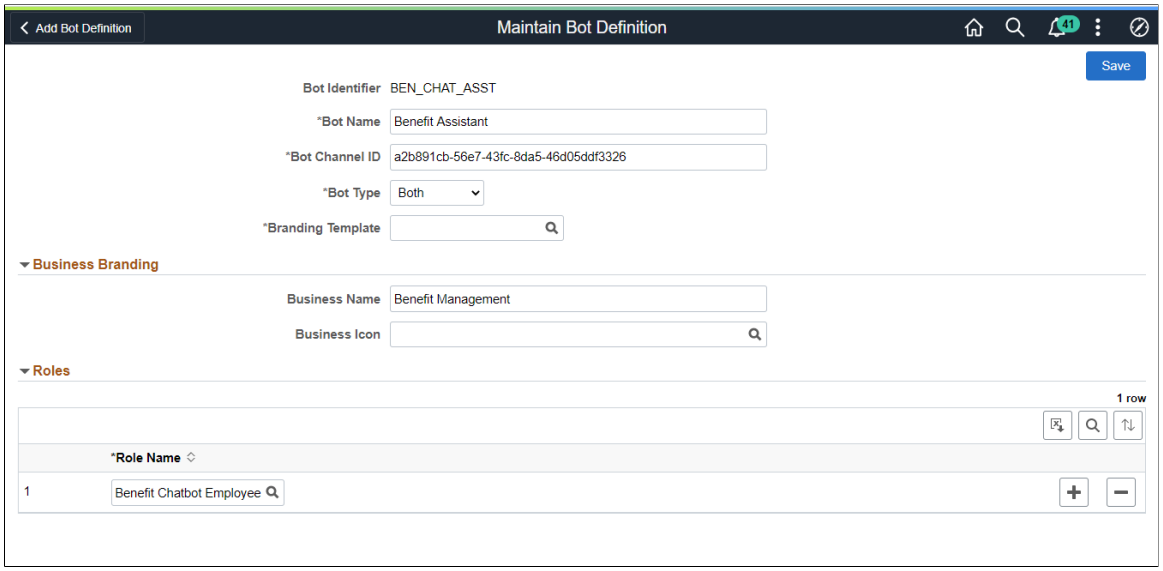
Image: Maintain Bot Definition page

This example illustrates the fields and controls on the Maintain Bot Definition page. You can find definitions for the fields and controls later on this page.



Bot Identifier Displays the root package ID defined in the application server.

Bot Name Enter the name of the chatbot.

Bot Channel ID Specify the channel ID generated by the ODA Skill created for this chatbot. This ID links the chatbot with the skills in the ODA.

Bot Type Choose whether to deploy the chatbot client as a tile or as a widget in a page or both. Bot types are embedded (for components) and widget (lower right-hand corner button).

Branding Template Choose the Branding template for the bot.

Business Name Name of the chatbot as it will appear to the users.

Business Icon Choose the bot icon according to your business need. Refer, PeopleTools: Creating Image Definitions, for more information.

Role Name Choose the roles that should be given access to this chatbot.

For details, refer Enterprise Components Documentation "Understanding the Chatbot Architecture" (PeopleSoft 9.2: Enterprise Components).

Component Mapping Page

Use the Component Mapping page (EOCB_COMPSRCH_FL) to choose the component (that is, the Benefits fluid page) on which the Benefits Assistant widget should be made available.

Navigation

Enterprise Components >Chatbot Configurations >Component Mapping

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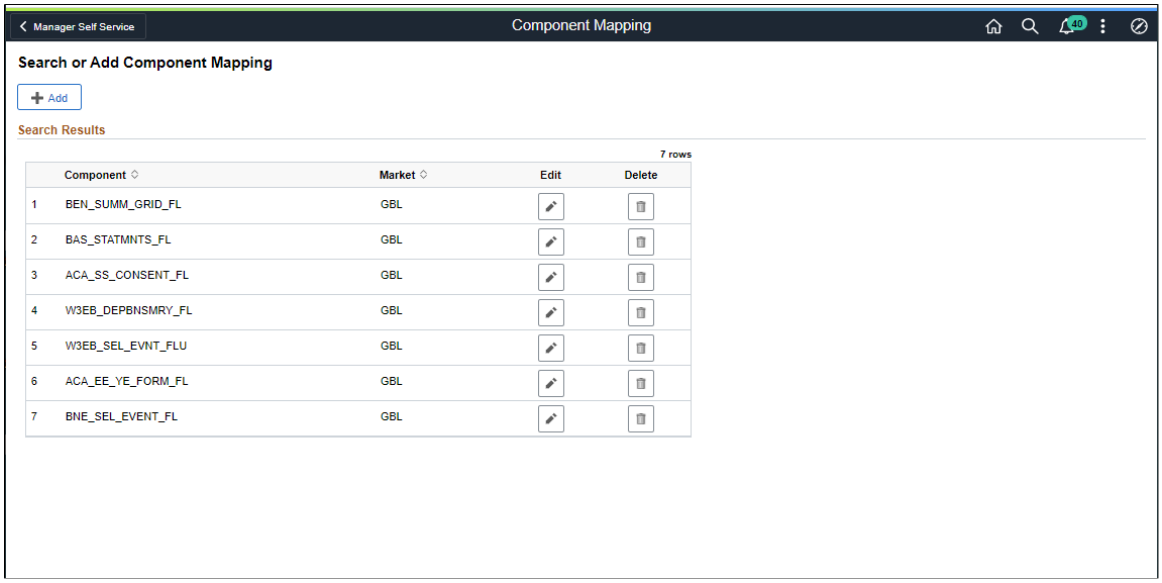
Image: Component Mapping Page

This example illustrates the fields and controls on the Component Mapping Page.

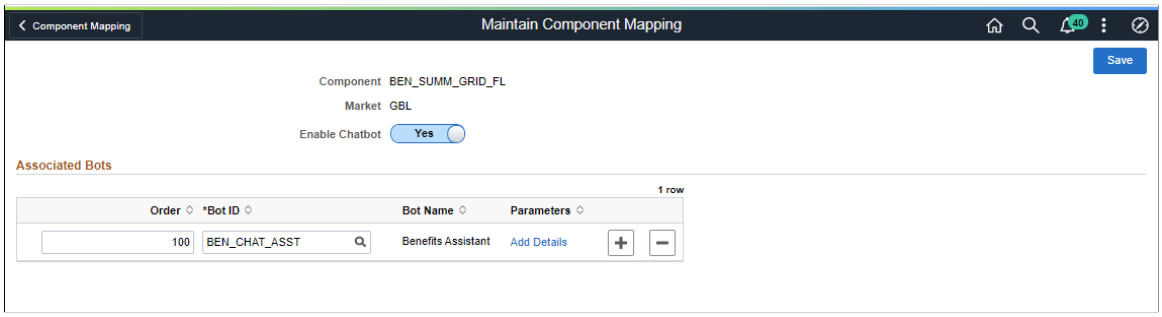


Component Displays the fluid components or fluid Benefits pages on which the Benefits Assistant widget can be enabled.

Edit Click the Edit button to access the Maintain Component Mapping page and enable the Benefits Assistant chatbot on the component pages.

Image: Maintain Component Mapping Page

This example illustrates the fields and controls on the Maintain Component Mapping Page.



Communicating with Benefits Assistant

This topic provides an overview of how employees can interact with the Benefits Assistant chatbot.

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Pages Used to Communicate with the Benefits Assistant Chatbot

Page Name	*Definition Name*	*Usage*
Benefits Assistant Tile	HC_HGA_CHAT_ASST_FLU (cref for the tile)	Launch the Benefits Assistant chatbot from the Benefit Details Tile dashboard.
Benefits Assistant Page	EOCB_CLIENT_FL	Begin the interaction with the Benefits Assistant chatbot for quick answers to queries on benefits-related information such as plan details, plan costs, administrator contacts, provider/vendor contacts, life events and open enrollment dates.

Benefits Assistant Tile

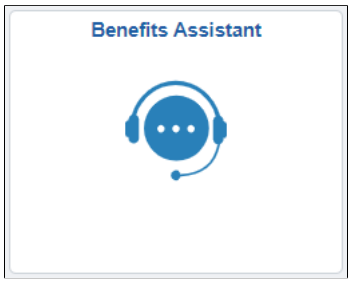
Use the Benefits Assistant tile (HC_HGA_CHAT_ASST_FLU - cref for the tile) to launch the Benefits Assistant chatbot from the Benefit Details Tile dashboard.

Navigation

Employee Self Service >Benefit Details Tile >Benefits Assistant Tile

Image: Benefits Assistant tile

This example illustrates the Benefits Assistant tile.



Benefits Assistant Page

Use the Benefits Assistant page (EOCB_CLIENT_FL) to ask queries on benefits-related information such as plan details, plan costs, administrator contacts, provider/vendor contacts, life events and open enrollment dates.

Note: The Benefits Assistant provides answers for queries related to Open Enrollment only for organizations with the PeopleSoft Benefits Administration.

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Navigation

- Benefit Details Tile dashboard users can select the Benefits Assistant tile from the tile dashboard to access the Benefits Assistant chatbot window.
- Benefit Details Tile dashboard users can also click the Benefits Assistant widget at the lower right-hand corner of a fluid Benefits page to open the Benefits Assistant chatbot window.

  Note: The Benefits Assistant widget is not available on the Open Enrollment page.

- Benefit Details Navigation Collection users can click the Benefits Assistant widget at the lower right-hand corner of the page to open the Benefits Assistant chatbot window.

Image: Benefits Assistant Page

This example illustrates the Benefits Assistant page accessed from the Benefits Details Tile dashboard.

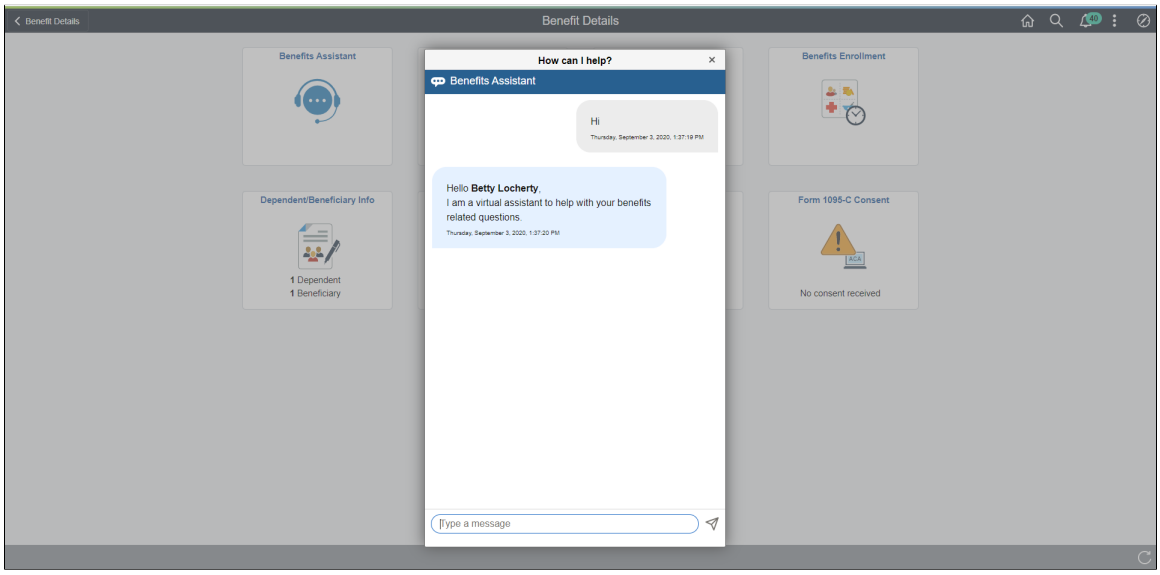

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Image: Benefits Assistant widget

This example illustrates the Benefits Assistant widget as seen in a fluid Benefits Summary page on a laptop device.

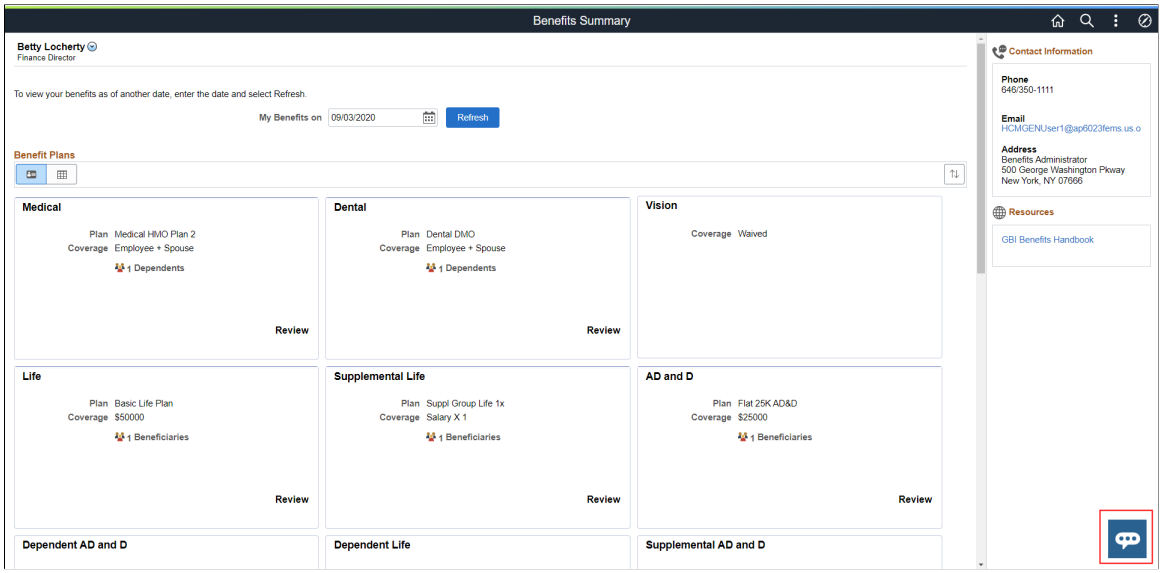

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Image: Benefits Assistant widget as seen on a smartphone

This example illustrates the Benefits Assistant widget as seen on a smartphone.

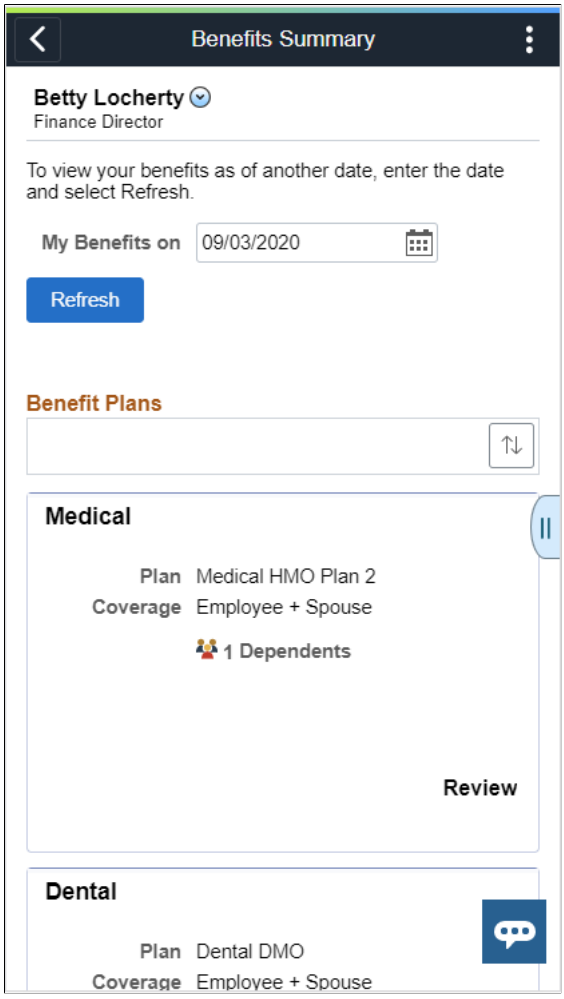

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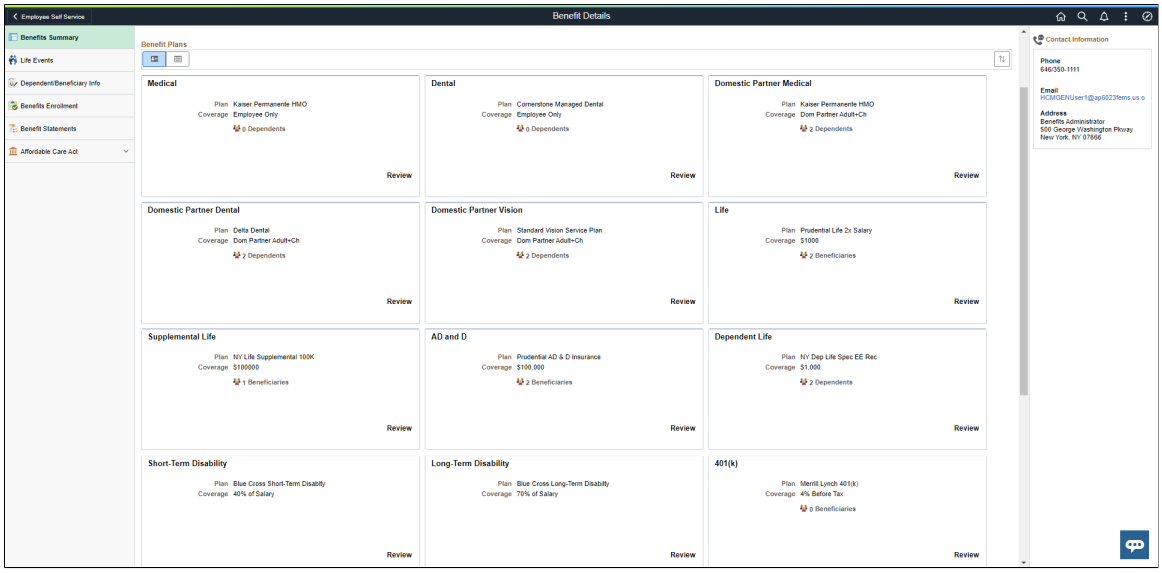
Image: Benefits Assistant widget for the Navigation Collection users

This example illustrates the Benefits Assistant widget for the Navigation Collection users.



Queries on Current Enrollments

When employees ask general benefit questions, the chatbot offers guidance by displaying a list of choices which the employee can select to view additional details.

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Image: A general query on benefit plans

This example illustrates a general query on benefit plans.

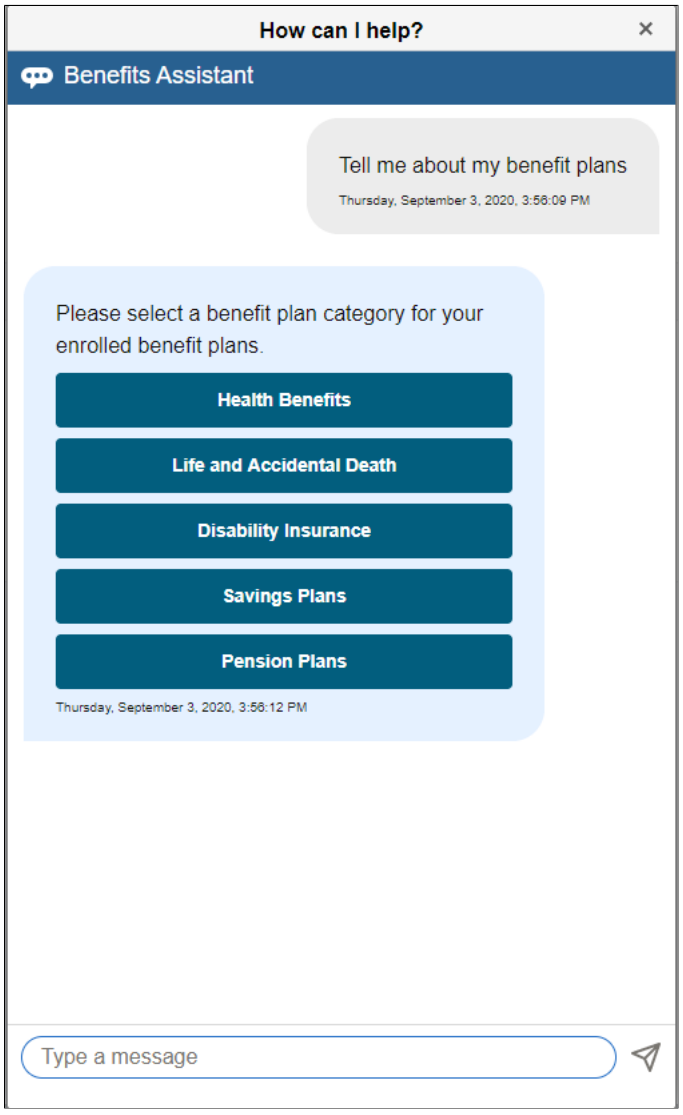

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Image: A general query on benefit plans — Options list 1

This example illustrates a general query on benefit plans — Options list 1.

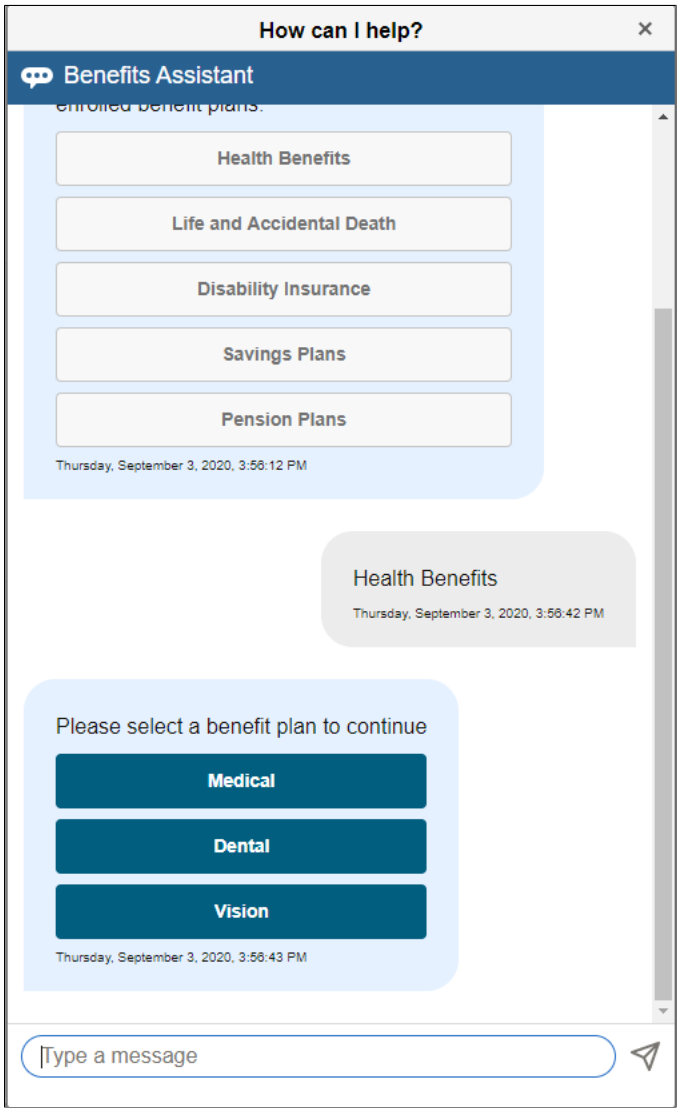

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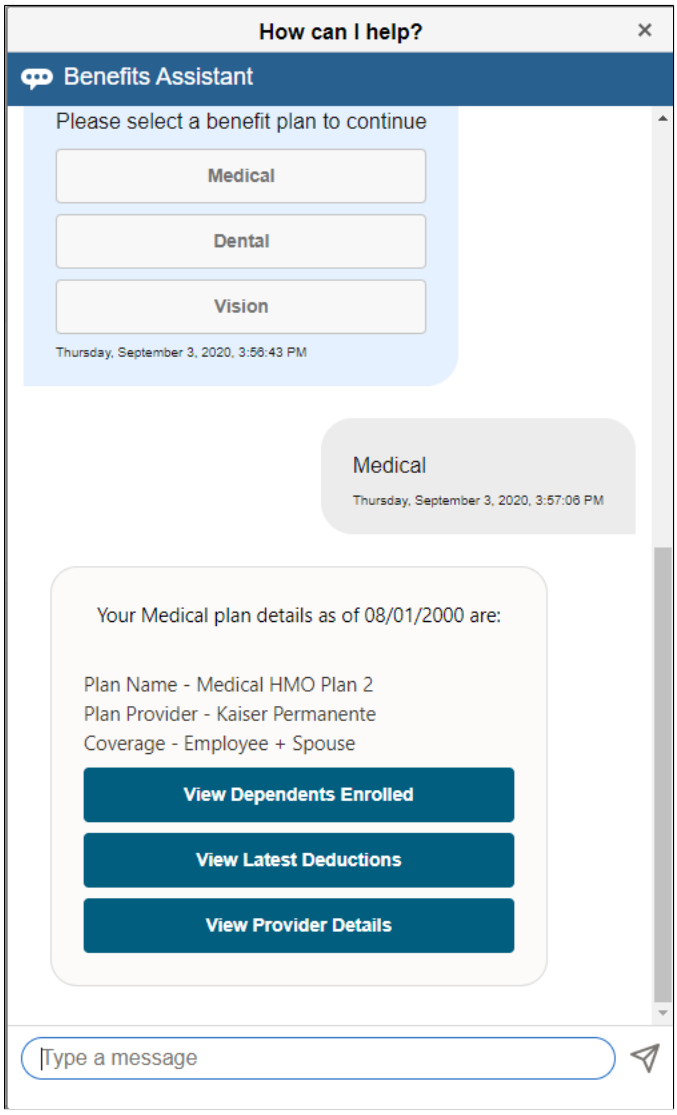
Image: A general query on benefit plans — Options list 2

This example illustrates a general query on benefit plans — Options list 2.



Note: The options to view the latest deductions are available only for organizations with the PeopleSoft Payroll for North America.

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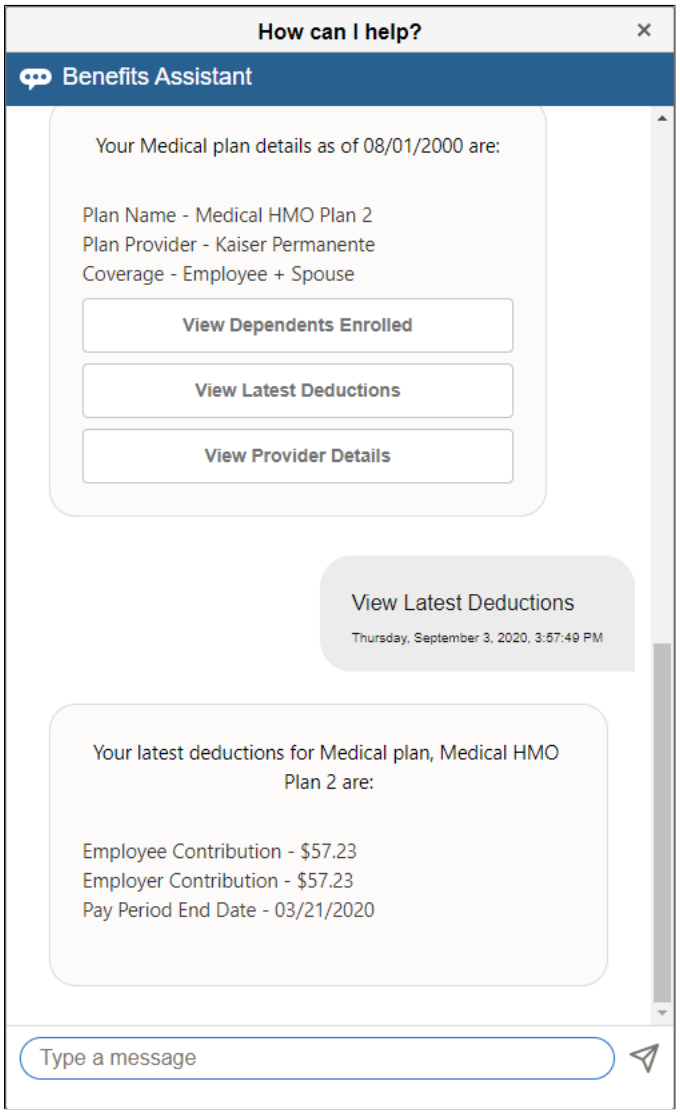
Image: A general query on benefit plans — latest deductions

This example illustrates a general query on benefit plans — latest deductions.



Note: Once the employee has chosen an option from the list, the entire list gets grayed out. The employee cannot go back and select a different option, instead he/she can repeat the question or even ask another one.

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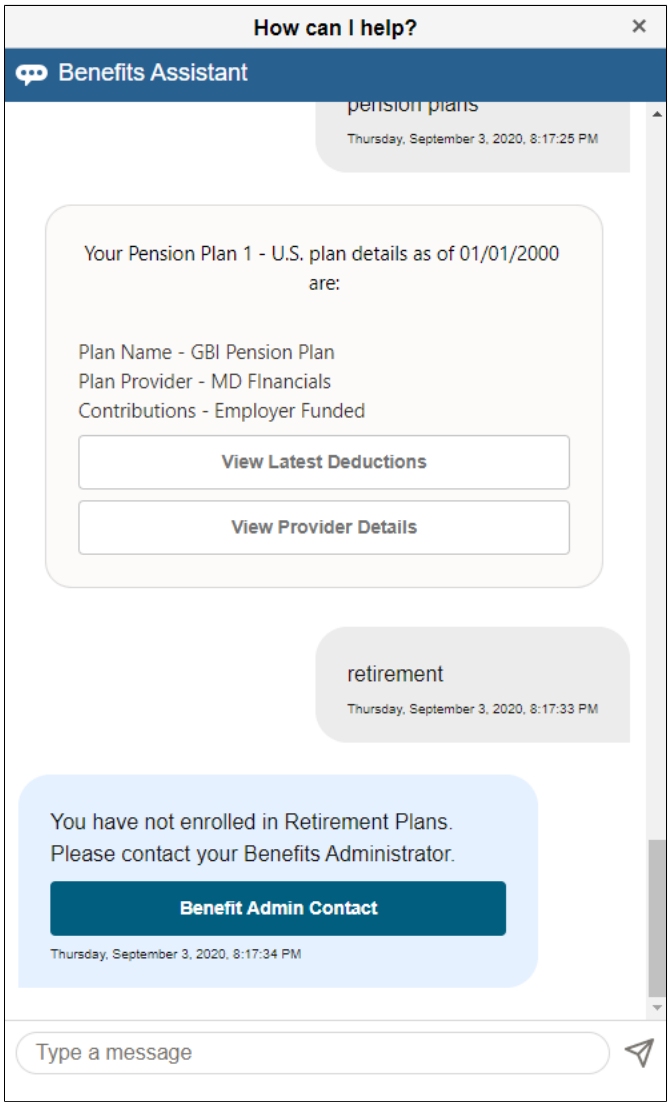
Image: A query on a plan not enrolled in

This example illustrates a query on a plan not enrolled in.



Queries on Dependents and Beneficiaries

For queries on dependents and beneficiaries the chatbot returns the details as listed in the employee's profile as well as options to view enrolled dependents and beneficiary designations. For queries on changing or updating beneficiary designation, the chatbot directs the employees to the Benefits Summary page from where they can complete the task.

Note: Your organization must have the PeopleSoft Benefits Administration product for access to the enrollment features.
Employees are able to change and update beneficiary designations based on the setup on the Benefits Program Table.

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Image: Dependents/Beneficiaries 1

This example illustrates a query for Dependents/Beneficiaries.

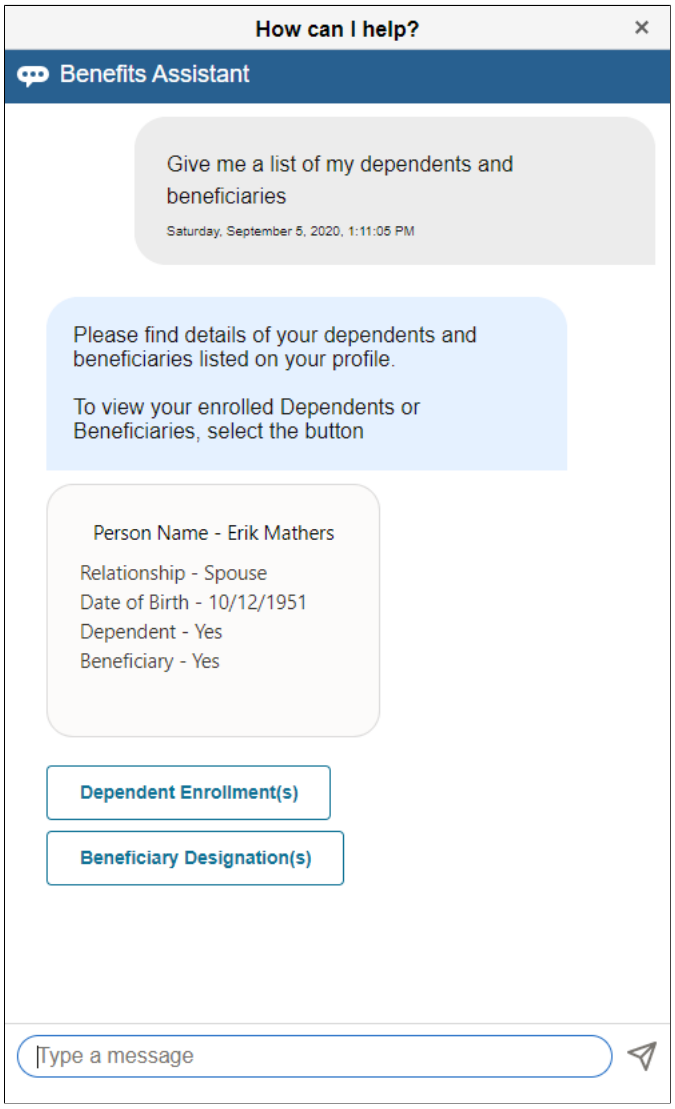

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Image: Dependents/Beneficiaries 2

This example illustrates a query for Dependents/Beneficiaries.

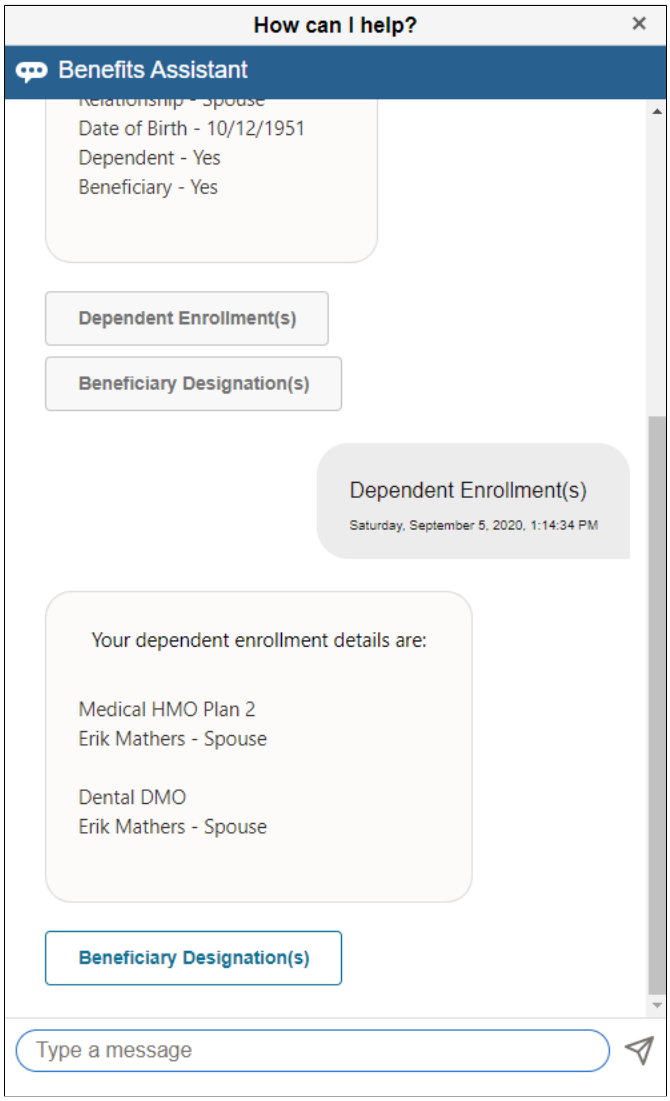

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Image: Dependents/Beneficiaries 3

This example illustrates a query for Dependents/Beneficiaries.

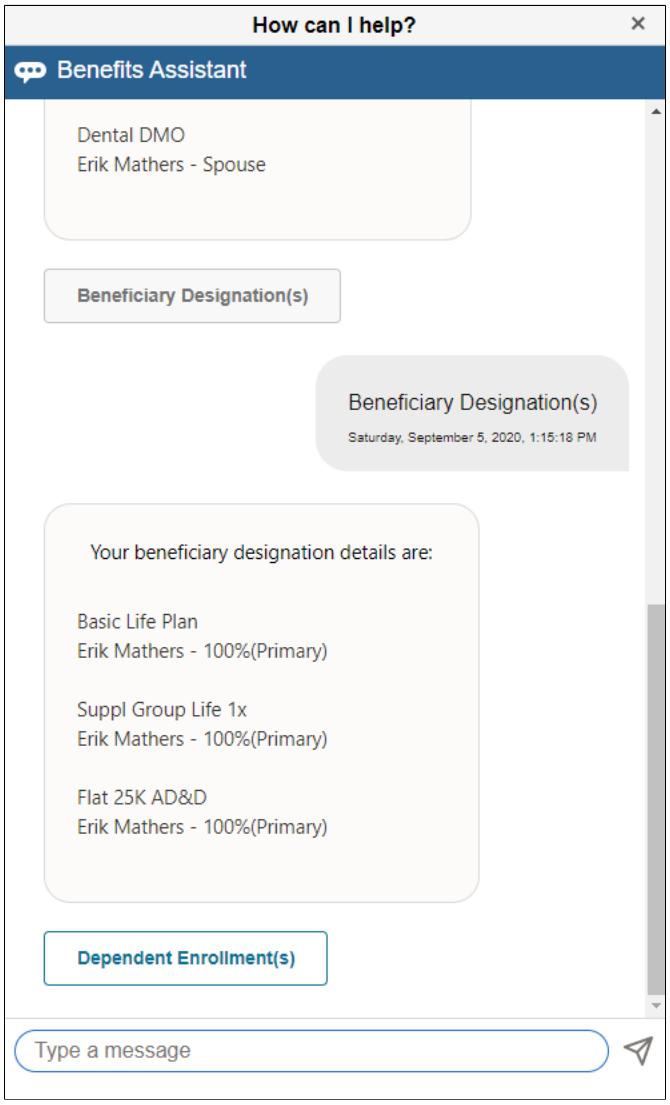

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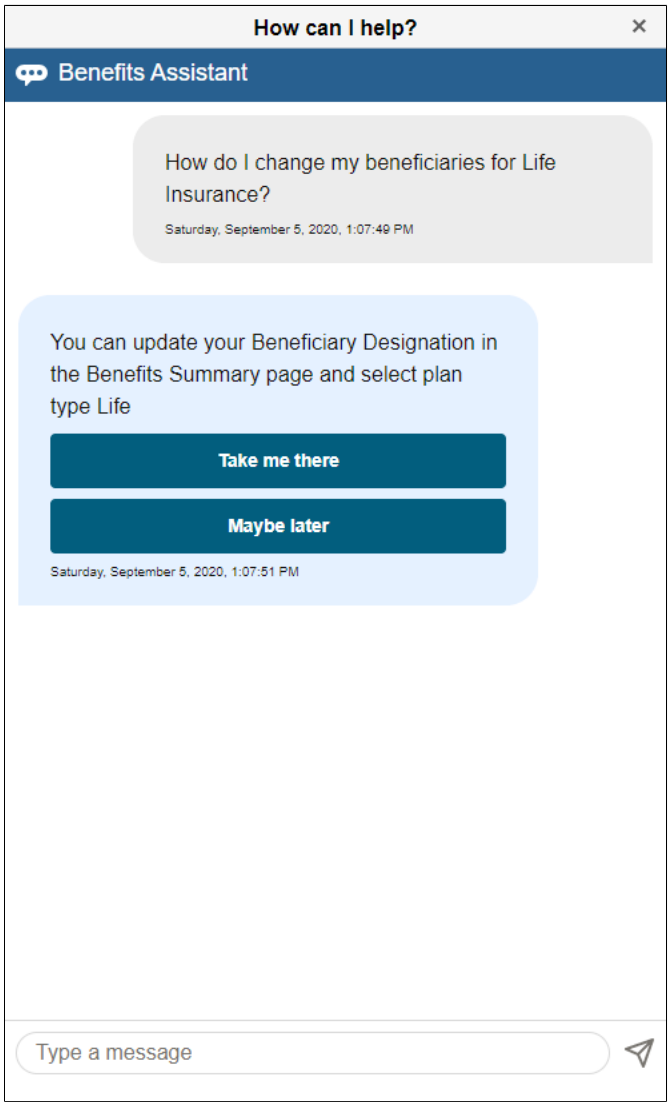
Image: Update Beneficiary Designation

This example illustrates the query to the chatbot updating beneficiary designation.



Queries on Life Event

Employees can ask the chatbot how to start life events or how to update their dependents/beneficiaries based on recent life event changes like marriage, childbirth, adoption, divorce etc.

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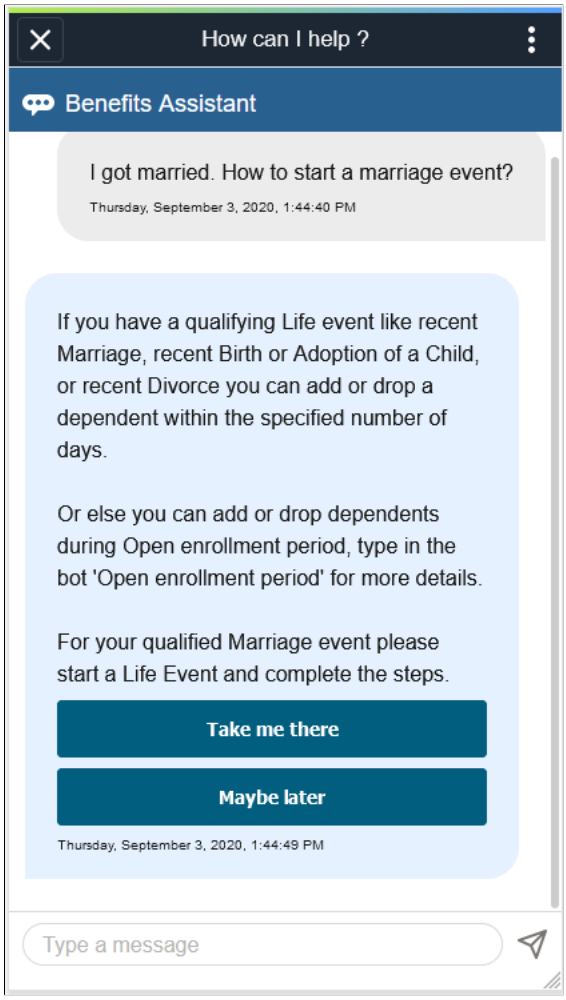
Image: Query on starting a life event

This example illustrates the query to the Benefits Assistant on starting a life event as seen on a smartphone.



For queries related to life event transactions, the chatbot offers two options: Take me there and Maybe later. The Take me there button directs the employee to the relevant page from where he/she can complete the task. The Maybe later button, does not direct the employee elsewhere but remains in focus for additional questions.

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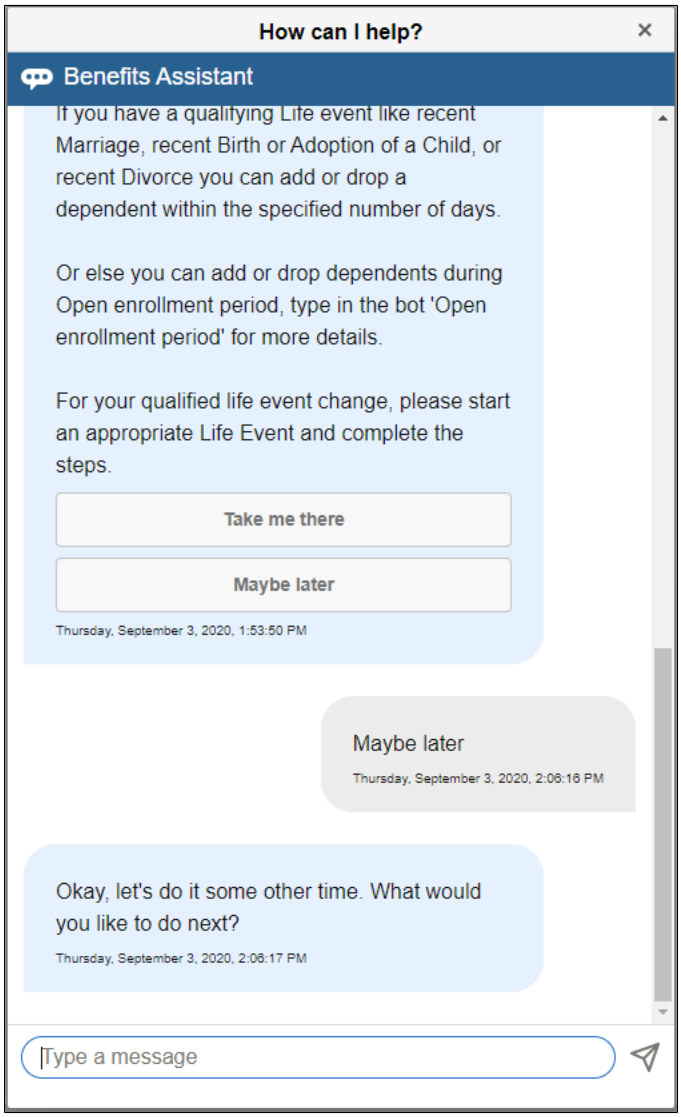
Image: Maybe later button

This example illustrates the Maybe later button.



Queries on Open Enrollment Periods

Employees can ask the chatbot for the Open Enrollment start or end dates and the chatbot returns the requested information. In case open enrollment is not available at the time, the chatbot offers the Benefit Administrator Contact for more information.

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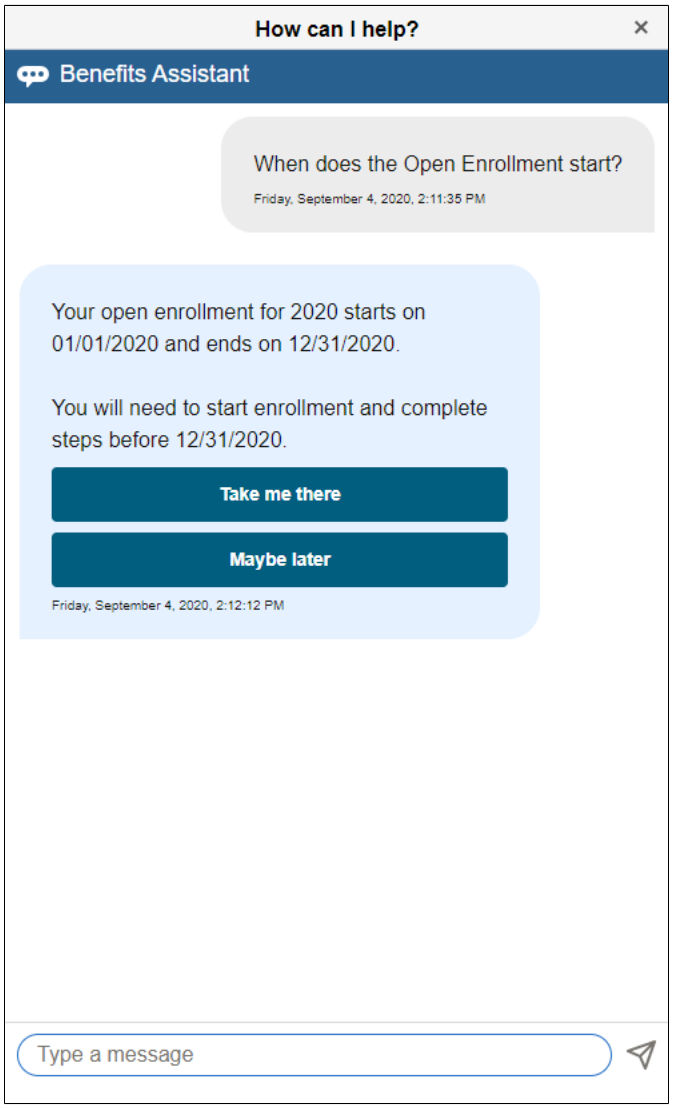
Image: A query on Open Enrollment

This example illustrates an answer to a query on Open Enrollment.



Note: For organizations with only the PeopleSoft Base Benefits product, the Open Enrollment information is not available in the PeopleSoft system.

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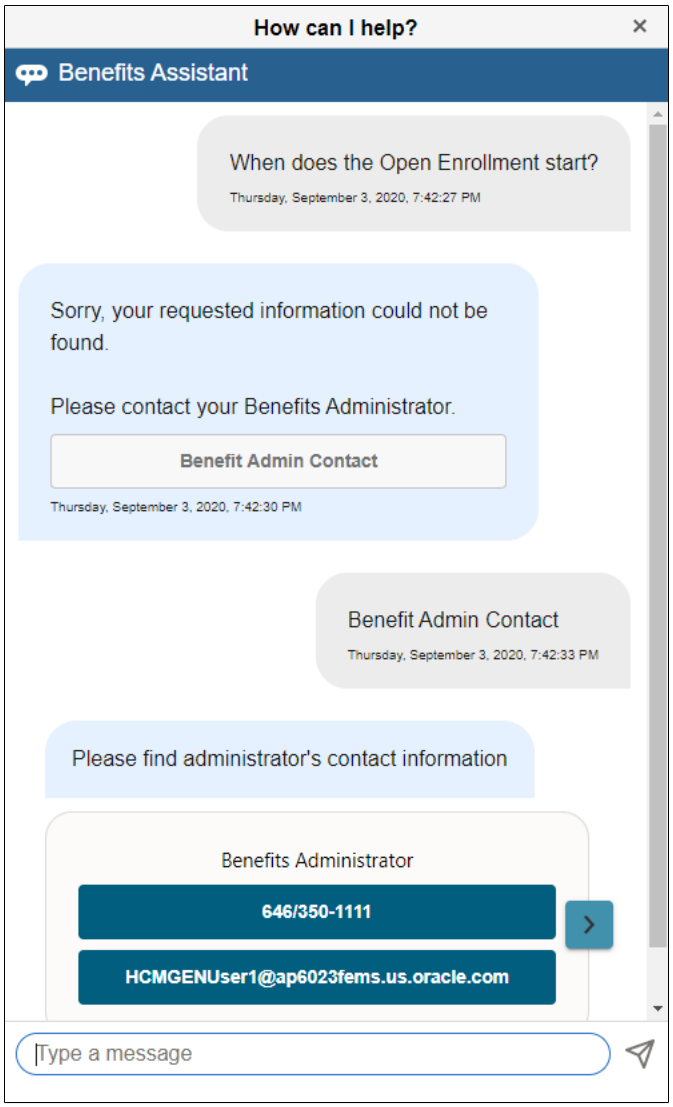
Image: A query on Open Enrollment in organizations with only the PeopleSoft Base Benefits product

This example illustrates an answer to a query on Open Enrollment in organizations with only the PeopleSoft Base Benefits product.



A chevron appears at the right side of the contact information box when there are multiple administrator contacts available. Click the chevron to view details of the next administrator contact.

Queries on Benefit Plan Costs

Employees can ask the chatbot about the costs of their benefit plans. The chatbot offers different lists with options from which the employees can choose to view the desired information.

Note: The plan cost information is available only for organizations with the PeopleSoft Payroll for North America.

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Image: A query on benefit plan cost

This example illustrates a query on benefit plan cost.

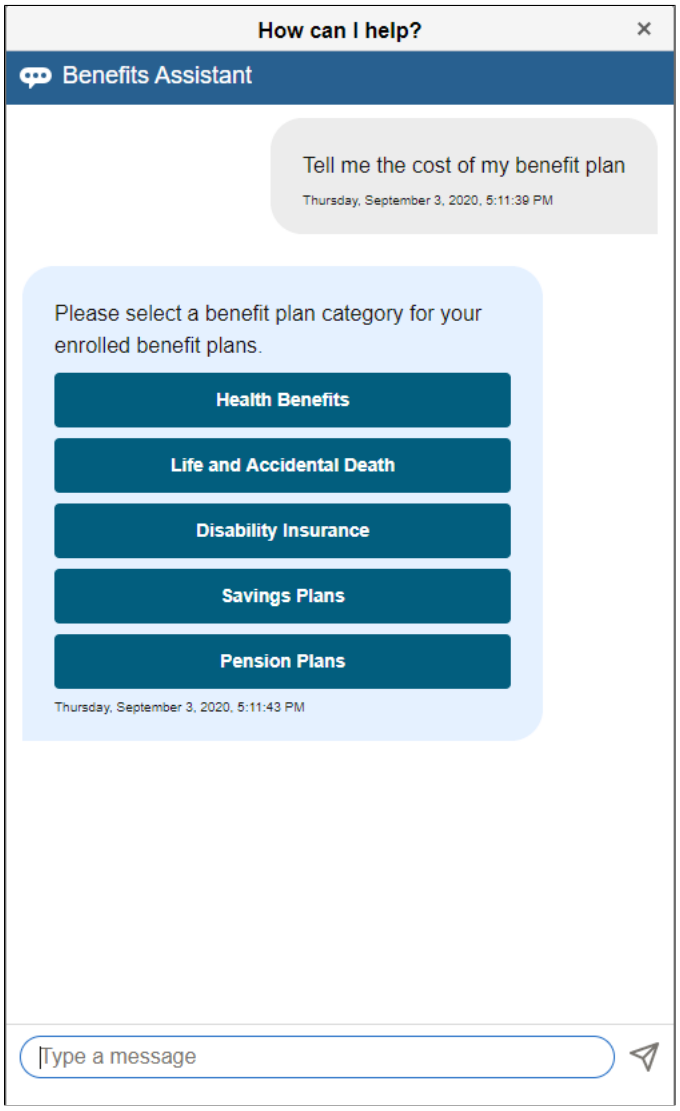

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Image: A query on benefit plan cost — Options list 1

This example illustrates a query on benefit plan cost — Options list 1.

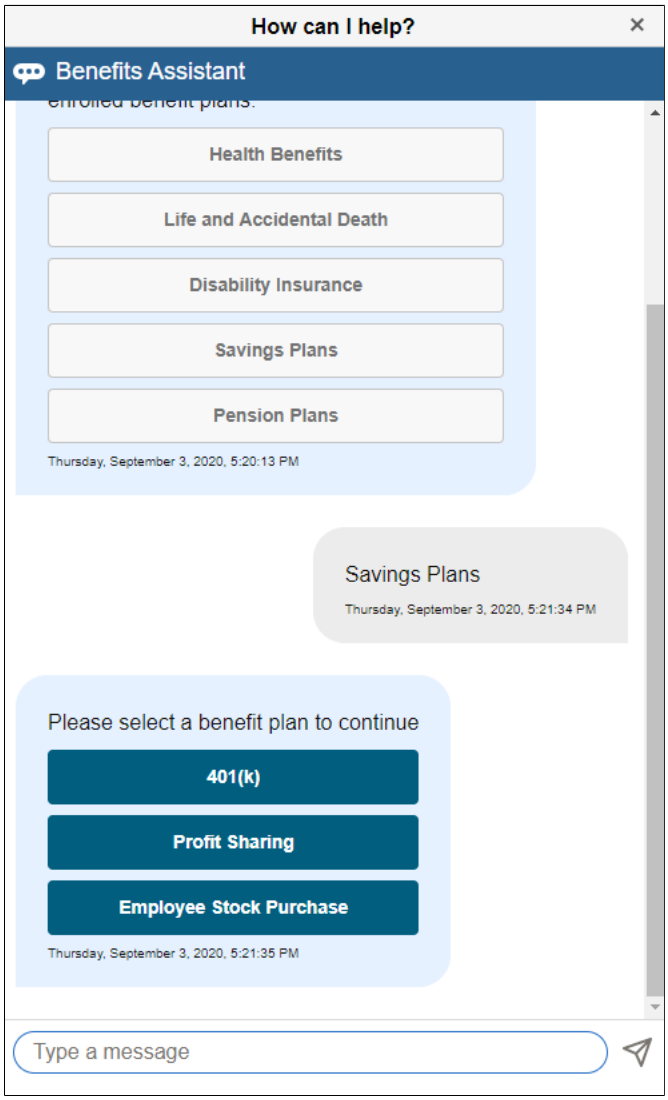

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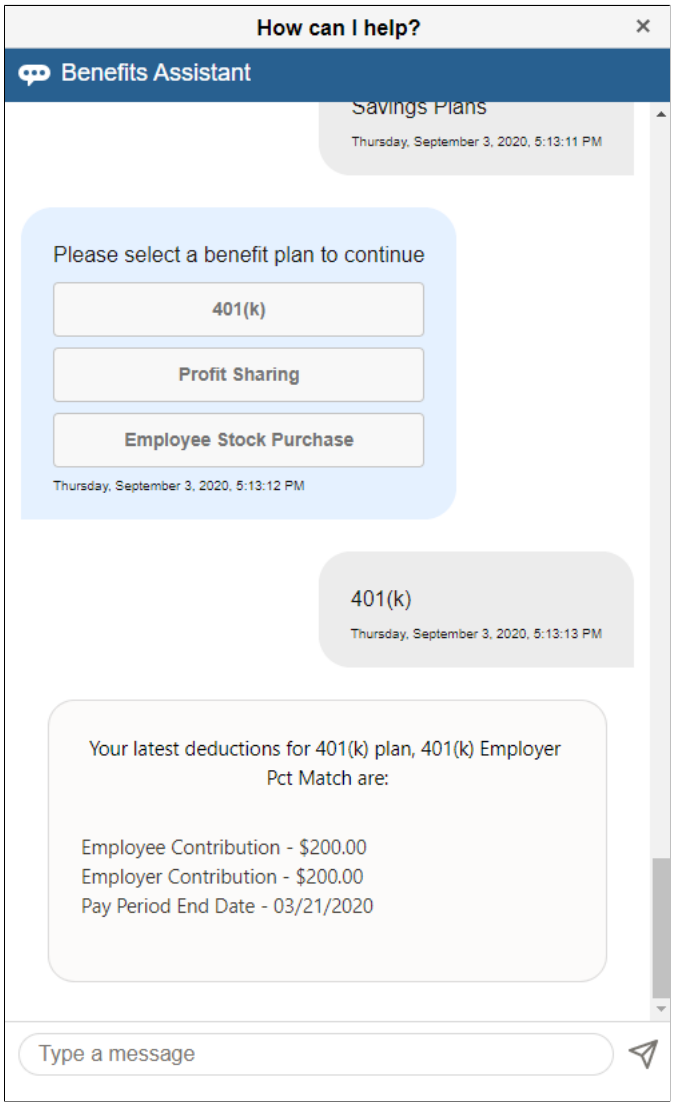
Image: A query on benefit plan cost — details

This example illustrates a query on benefit plan cost — details



Note: The options to view the latest deductions are available only for organizations with the PeopleSoft Payroll for North America.

Queries on Updating Savings Contributions

When an employee asks the chatbot how to update the savings contribution, the chatbot directs him/her to the Benefits Summary page from where he/she can make the updates.

Note: Employees are able to change and update their savings contributions based on the setup on the Benefits Program Table.

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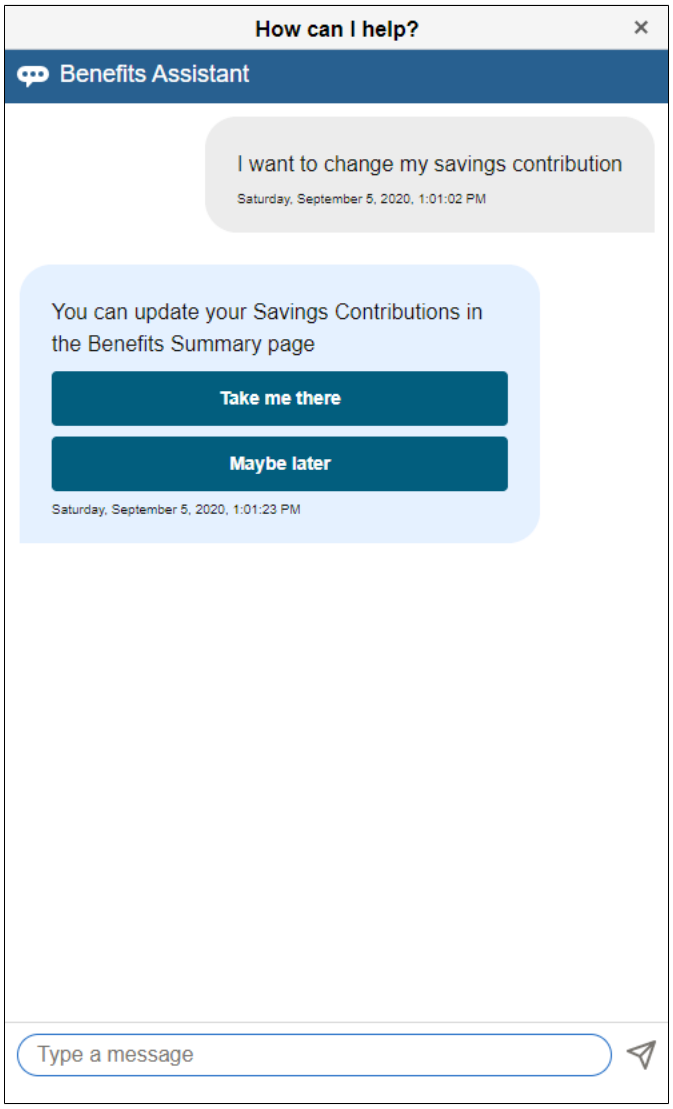
Image: Update Savings Contribution

This example illustrates a query to the chatbot updating savings contribution.



Note: When the employee is already on the Benefits Summary page and asks the chatbot a query on updating a benefits-related information, the chatbot simply states that the task can be completed from the Benefits Summary page instead of providing a link to the page.

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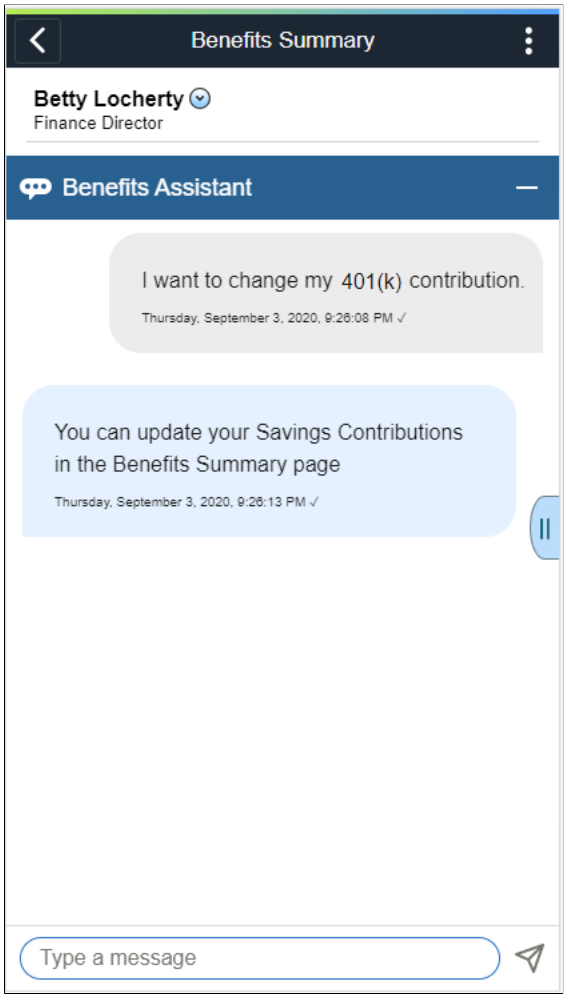
Image: A query on updating a savings contribution on a smartphone

This example illustrates a query on updating a savings contribution on a smartphone, when the employee is already on the Benefits Summary page.



Queries on Benefit Vendor Information

For general provider/vendor information queries, the chatbot determines the specific benefit plan the employee is seeking and lists the details as available in the Provider/Vendor Table.

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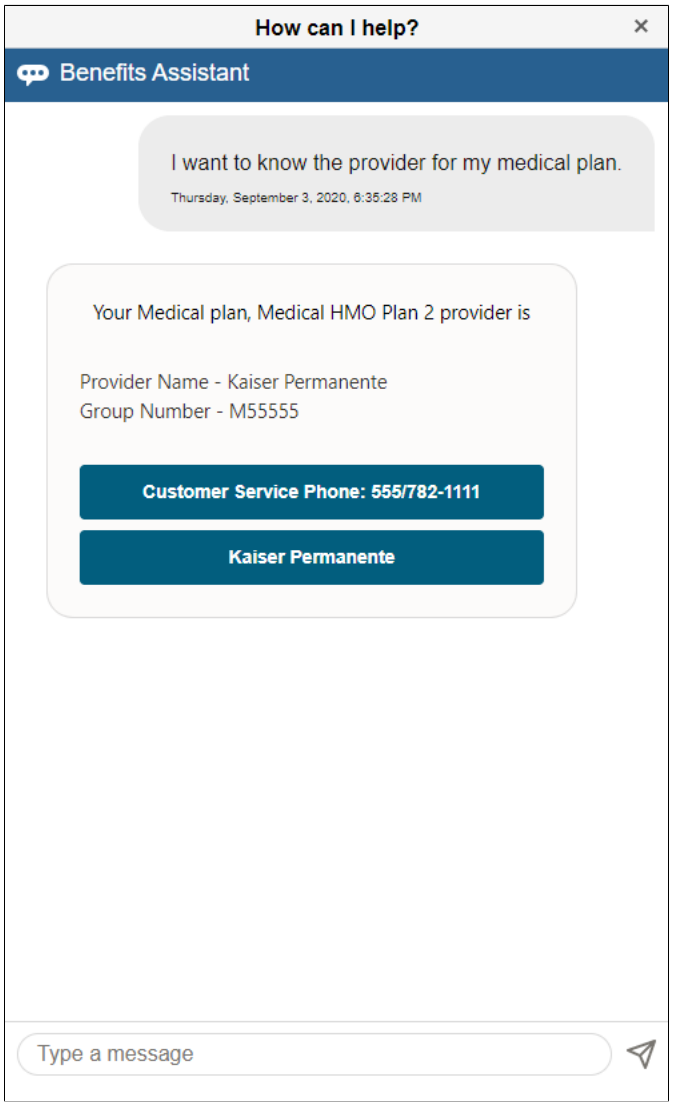
Image: A query for the medical plan provider info

This example illustrates a query for the medical plan provider info.



In this example, the Kaiser Permanente button takes the employee to a third-party website as configured in the Provider/Vendor Table ("Policy Information Page" (PeopleSoft HCM 9.2: Application Fundamentals)).

Queries for Administrator Contacts

When employees request administrator contacts, the chatbot lists the contact name, email, and phone number as available in the Administrative Contacts page. When there are multiple contacts available, a chevron appears at the right side of the contact information box. Employees can click the chevron to view details of the next contact.

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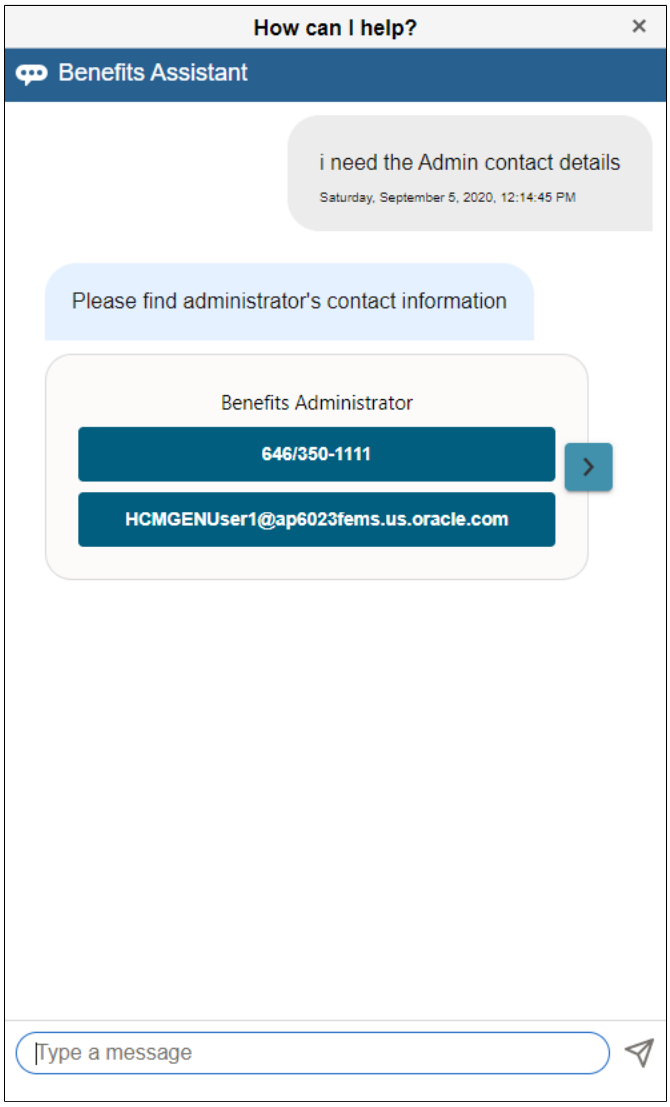
Image: Administrator Contacts

This example illustrates the Administrator Contacts.



Main Menu

When an employee types an ambiguous query, an informal abbreviation or an incorrect spelling (for example Dnt pln or Benfit pln instead of dental plan or benefit plan), the chatbot returns the main menu with options for current enrollments, dependents/beneficiaries and Benefit Administrator contact.

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Image: Main Menu

This example illustrates the Main Menu on the Benefits Assistant chatbot.

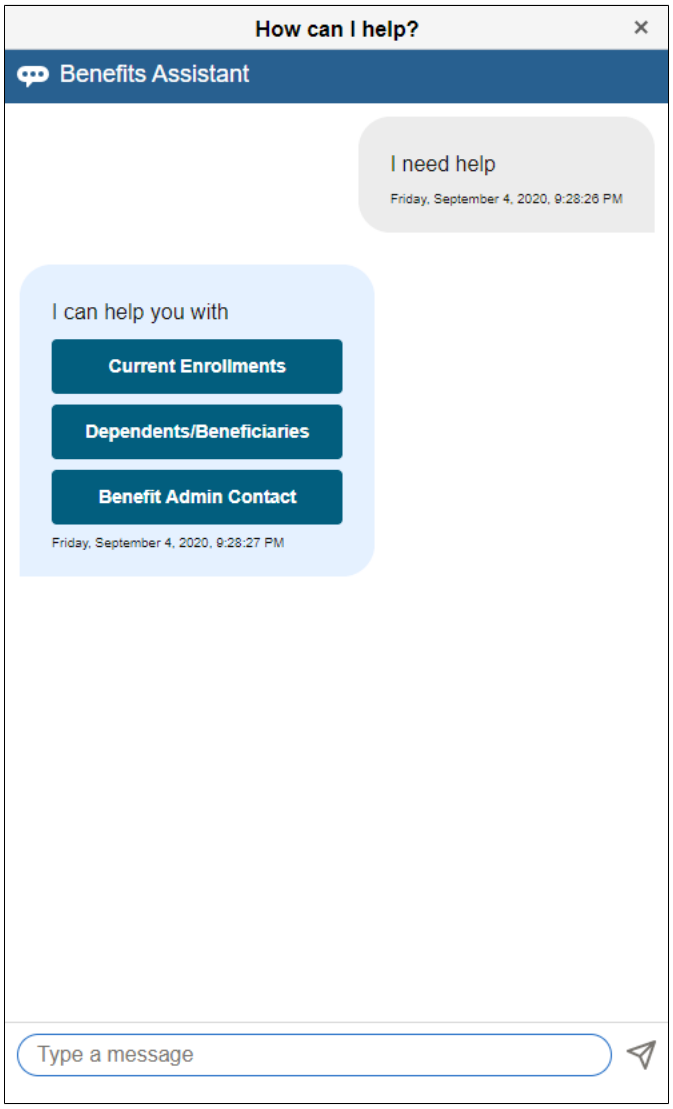

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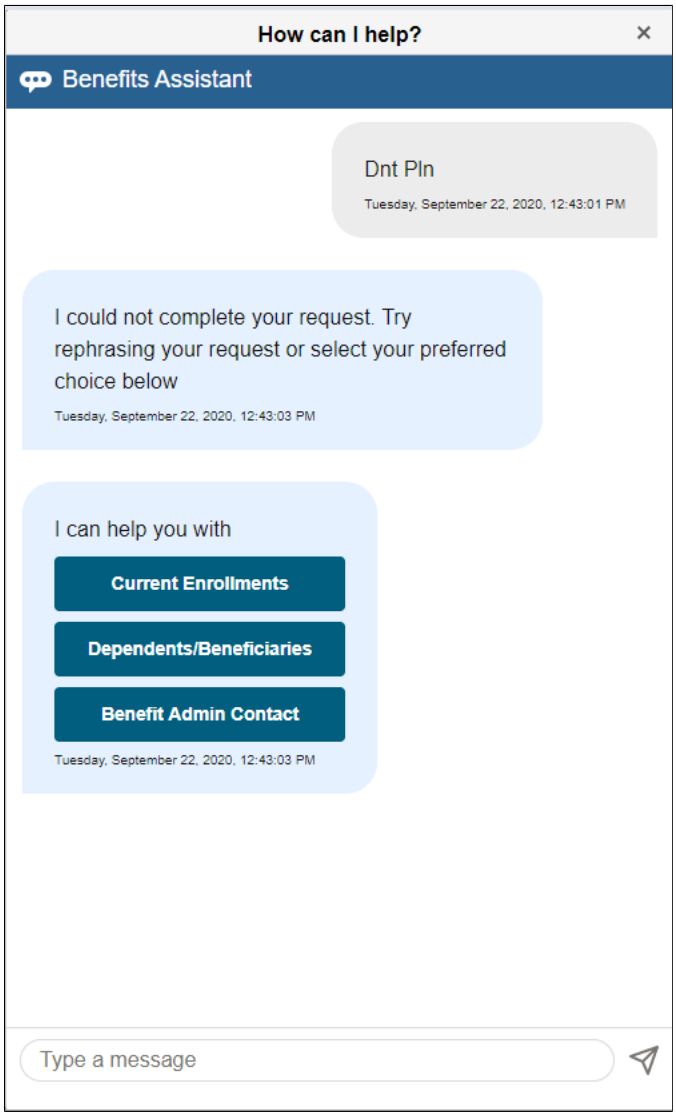
Image: An example for a query with incorrect spelling

This example illustrates an example for a query with incorrect spelling.



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Appendix A

Benefits Administration Delivered Workflows

Delivered Workflows for PeopleSoft Benefits Administration

This section discusses Benefits Administration workflows. The workflows are listed alphabetically by workflow name.

Dependent

This section discusses the dependent workflow.

Description

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

Workflow Objects

Information Type	*Description*
Event	W3EB_DEP_WF
Workflow Action	Automatic
Role	Benefits administrator
Notification Form	Worklist
Business Process	Benefits WF Dependents Notification CI
Business Activity	Find dependent enrollments.
Business Event	Notification

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Late Enrollment

This section discusses the Late Enrollment workflow.

Description

Information Type	*Description*
Event Description	Late enrollments.
Action Description	The system notifies the benefits administrator of late enrollments.
Notification Method	Worklist

Workflow Objects

Information Type	*Description*
Event	BN_WF_NOTIFY
Workflow Action	Automatic
Role	Benefits administrator
Notification Form	Worklist
Business Process	Benefits WF Notification CI
Business Activity	Find late enrollments.
Business Event	Notification

Leave Request

This section discusses the Leave Request workflow.

Description

Information Type	*Description*
Event Description	When you enter leave requests, a worklist item is routed to the benefits administrator for review and approval.
Action Description	The system notifies the benefits administrator of leave requests.

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Information Type	*Description*
Notification Method	Worklist

Workflow Objects

Information Type	*Description*
Event	FMLA_LEAVE_ADMIN
Workflow Action	Automatic
Role	Benefits administrator
Notification Form	Worklist
Business Process	Enter Leave Requests
Business Activity	Find terminations.
Business Event	Notification

Termination

This section discusses the Termination workflow.

Description

Information Type	*Description*
Event Description	When you terminate an employee, the system generates worklists and emails, routing them to different function administrators to notify them of the termination.
Action Description	The system notifies the benefits administrator of terminations.
Notification Method	Worklist

Workflow Objects

Information Type	*Description*
Event	BN_WF_NOTIFY
Workflow Action	Automatic
Role	Benefits administrator

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Information Type	*Description*
Notification Form	Worklist
Business Process	Benefits WF Notification CI
Business Activity	Find terminations.
Business Event	Notification

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Appendix B

Benefits Administration Reports

Benefits Administration Reports: A to Z

This table lists the Benefits Administration reports, sorted alphanumerical by report ID. The reports listed are all Structured Query Reports (SQRs). If you need more information about a report, refer to the report details at the end. For samples of these reports, see the Portable Document Format (PDF) files that are published with your online documentation.

For more information about running these reports, refer to:

- The corresponding topic in this product documentation.
- *PeopleTools: Process Scheduler*
- *PeopleTools: BI Publisher for PeopleSoft*.
- *PeopleTools: SQR Language Reference for PeopleSoft*

Report ID and Report Name	***Description***	***Run Control Page***
BAS001 Eligible Participants	Lists, by schedule and benefit program, employees who are eligible to participate in company benefit programs with details on plan and option eligibility.	RUNCTL_BAS001
BAS002 Benefit Program Mailing Labels	Prints a set of 4-across mailing labels for employees participating in benefit programs. Compiles the list from the BAS Participant tables created during open enrollment or event maintenance processing.	RUNCTL_BAS002
BAS003 Invalid Benefit Elections	Lists, by schedule and event, participants and their dependents, showing any errors such as coverage over the maximum or under the minimum, invalid choices, failure to meet eligibility requirements, and so on.	RUNCTL_BAS_SCHED
BAS004 Benefit Enrollment Form	Prints a generic enrollment statement for each eligible benefit program participant in the BAS Participation table. Includes the name and address of each participant, with options for which the participant is eligible and the associated price tags and credits (if applicable) for the options.	RUNCTL_BAS004

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Report ID and Report Name	Description	Run Control Page
BAS005 Confirmation Statement	Prints a generic confirmation statement for each valid benefit program participant. Includes coverage and per pay period costs.	RUNCTL_BAS005
BAS006 Missing Elections	Lists and provides location information for participants who did not return enrollment statements.	RUNCTL_BAS_SCHED
BAS007 Dependent/Beneficiary Election	Lists all dependents with current or new elections.	RUNCTL_BAS_SCHED
BAS008 Flagged Participant Report	Lists events that have had job, address, or union eligibility information changed, events that have been processed out of sequence, and events that have been disconnected during processing.	RUNCTL_BAS008
BAS010 Ineligible Participants	Lists all participants who are ineligible for any benefit program (events processed to AN status) and their eligibility parameters, such as birth date and status.	RUNCTL_BAS_SCHED
BAS027 Employee Processing Status	Lists all participants in a particular process status or set of status levels.	RUNCTL_BAS027
BAS701 Geographic Location Eligibilit	Prints location IDs, effective dates, and from and to ranges for the U.S. and Canadian postal code ranges that you've defined to determine benefit eligibility.	RUNCTL_BEN_LANG
BAS702A Benefit Program/Plan/Options	For a specified benefit program, prints program-level information (effective date and status, program type, COBRA, FMLA, and FSA parameters and self-service configuration) along with the plan-level and option-level structure (event rules, dependent rules, eligibility rules, coverage levels, and deduction codes).	RUNCTL_BAS_PGM
BAS702B Benefit Program Costs	For a specified benefit program, prints the program description along with the cost and credit structure for all of the offered options (deduction and earnings codes, rate information, and calculation rules).	RUNCTL_BAS_PGM

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Report ID and Report Name	Description	Run Control Page
BAS703A Eligibility Rules Table	For each plan type in a benefit program, prints the rules for minimum standard hours, maximum standard hours, minimum service, maximum service, minimum age, maximum age, service and age as of information, employee class, employee status, employee type, full/part, reg/temp, officer code, union code, company, location, state, and eligibility configuration. For each eligibility rule definition, prints the minimum/maximum criteria (standard hours, service months and age) and the membership criteria (such as employee class, full or part time, company and paygroup, union code, state, and so on) along with the applicable grouping methods and evaluation rules.	RUNCTL_BAS703A
BAS703B Event Rules Table	Prints event rules for benefit plan types. For an event rule definition, prints each event class with its basic change restrictions (type of changes allowed and option-level movement), date rules (coverage and deduction dates with waiting periods), and other event controls (defaulting, editing, and exceptions).	RUNCTL_BAS703B
BAS703C Event Rules Table (Billing)	Lists the parameters in which billing enrollments are created or updated during the Benefits Administration process. Displays the event rules, event class, billing action, billing action date, and rate qualifier.	RUNCTL_BAS703B
BAS714 Benefits Admin Scheduling	Lists the criteria that make up a schedule. Use to review schedules that have been entered into the system and to ensure that no employee overlaps exist.	RUNCTL_BAS_SCHED
FSA001 FSA Claim Payment Process (flexible spending account claim payment process)	Process all claim data with the following statuses: *Submitted, Pending,* and *Ready To Pay.*	PRCSRUNCNTL
FSA002 FSA Account Closure	Initiate an SQR that updates the account status to *Closed* for FSA participants who had an active FSA at the end of the calendar year.	RUNCTL_FSA002(CN)

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Report ID and Report Name	*Description*	*Run Control Page*
FSA003 FSA Check Printing	Print FSA claim checks for records flagged in FSA001. Run this process for each type of check stock that you use. Set up the FSA Claims Processing Run Ctl page, and then run Processing Claim Payments.	RUNCTL_FORM_ID
FSA004 FSA Check Register	Print a list of checks printed by the FSA Check Print Report. Set up the FSA Claims Processing Run Ctl page, and then run Processing Claim Payments.	RUNCTL_FSA004(CN)
FSA005 FSA Quarterly Statement	Create and print quarterly statements for FSA participants who had activity in one of their spending accounts during the current quarter.	PRCSRUNCNTL
FSA006 FSA Check Reversal (flexible spending account check reversal)	Reverse FSA payment checks that were created in error.	RUNCTL_FSA006
FSA007 FSA Claim Reversal (flexible spending account claim reversal)	Enter the parameters for the check reversal process.	RUNCTL_FSA007

Benefits Administration Selected Reports

This section provides detailed information about individual reports, including important fields and source records. The reports are listed alphabetically by report ID.

BAS002 - Benefit Program Mailing Labels (4-Up)

Note: Be sure to load the correct label stock in your printer before initiating this report.

Related Links

Understanding the Benefits Administration Process
Investigating Participant Eligibility

BAS003 - BenAdmin Preparation and Election Errors

Note: You can use this report as an audit trail for fixing errors by having staff check off each error as they make a correction.

Related Links

Understanding the Benefits Administration Process

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Investigating Participant Eligibility

FSA002 - Flexible Spending Account Closure

The Flexible Spending Account Closure report provides an audit trail of the account information for a plan year. You can use it to review annual pledge amounts, contributions, claims paid, forfeited amounts, and excess payment amounts for employees and to view program and plan totals for these categories.

This information enables you to see how various FSA benefit plans are used. Over time, you might learn which plans are most appreciated by employees and how you might structure FSAs to meet employees' needs.

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