
PeopleSoft HCM 9.2: PeopleSoft Benefits Administration

May 2025

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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 PeopleSoft Online Help

If you're setting up an on-premises 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. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the [Oracle Software Delivery Cloud](#).

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, 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.

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.

<i>Typographical Convention</i>	<i>Description</i>
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W , hold down the Alt key while you press the W key.
. . . (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.

<i>Typographical Convention</i>	<i>Description</i>
⇒	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 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.

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.

PeopleSoft HCM Related Links

[Oracle Help Center](#)

[PeopleSoft Online Help Home](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

[HCM Abbreviations](#)

[PeopleSoft Spotlight Series](#)

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Please include the applications update image or PeopleTools release that you're using.

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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.

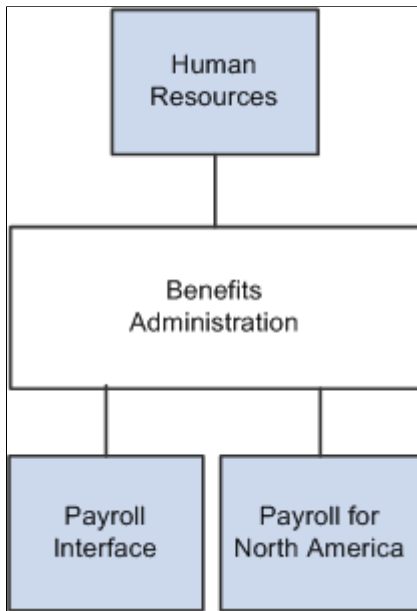
PeopleSoft Benefits Administration is a US-centric and Canada-centric product, supporting only US and Canadian legislative and regulatory requirements.

See “PeopleSoft Manage Base Benefits Overview” (PeopleSoft Human Resources Manage Base Benefits).

PeopleSoft Benefits Administration Integrations

PeopleSoft Benefits Administration integrates with the following PeopleSoft applications:

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.

Understanding PeopleSoft Benefits Administration

Common Elements Used for Benefits Administration

<i>Field or Control</i>	<i>Description</i>
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.

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” (Application Fundamentals)

Benefit Administration Business Processes

This section discusses:

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

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.

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” (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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Benefits Installation Page</u>	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

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

Benefits Installation

Last ID Assigned

Last COBRA Emplid Assigned

Last FSA Claim Nbr Assigned

Last Cdn FSA CryFwd Claim Nbr

Last Retro Ded Request Seq Nbr

Enrollment Buttons Configuration

*Submit and Preview

Enrollment Summary Section ▼

*Back to Top

Dynamically at the bottom ▼

Field or Control	Description
Submit and Preview	Select to configure the location where the Submit and Preview Statement buttons are displayed on the Benefits Enrollment page. Available options are <i>Bottom of the page</i> , <i>Enrollment Summary Section</i> , and <i>Upper right side of the page</i> .
Back to Top	Select option to configure the display of the Back to Top button in the Benefits Enrollment page. Available options are <i>Dynamically at the bottom</i> , and <i>Do not display</i> .

Related Links

“Setting Up Implementation Defaults” (Application Fundamentals)

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.

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 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.

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 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Excess Credit Calculation Page</u>	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

This image shows the Excess Credit Calculation page.

The screenshot shows the 'Excess Credit Calculation' page. At the top, the title 'Excess Credit Calculation' is displayed. Below it, the 'Benefit Program' is set to 'PSX'. The main section is titled 'Excess Credit Calculation Table'. It includes a search bar with 'Find | View All' and pagination controls showing 'First 1 of 1 Last'. Below the search bar, there are two input fields: '*Effective Date' with the value '01/01/1900' and a calendar icon, and 'Status' with a dropdown menu set to 'Active'. There are also '+' and '-' buttons. Below this, there is a section titled 'Plan Types / Deduction Classes to Include in Calculation' with 'Personalize | Find' and a table icon. It includes pagination controls 'First 1 of 1 Last'. Below this, there are two columns: '*Plan Type' and '*Deduction Classification'. The '*Plan Type' column has a dropdown menu set to 'Medical' and a '+' button. The '*Deduction Classification' column has a dropdown menu set to 'After-Tax' and a '-' button. At the bottom, there are 'Personalize | Find' and a table icon, and pagination controls 'First 1 of 1 Last'.

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

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**

- **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.

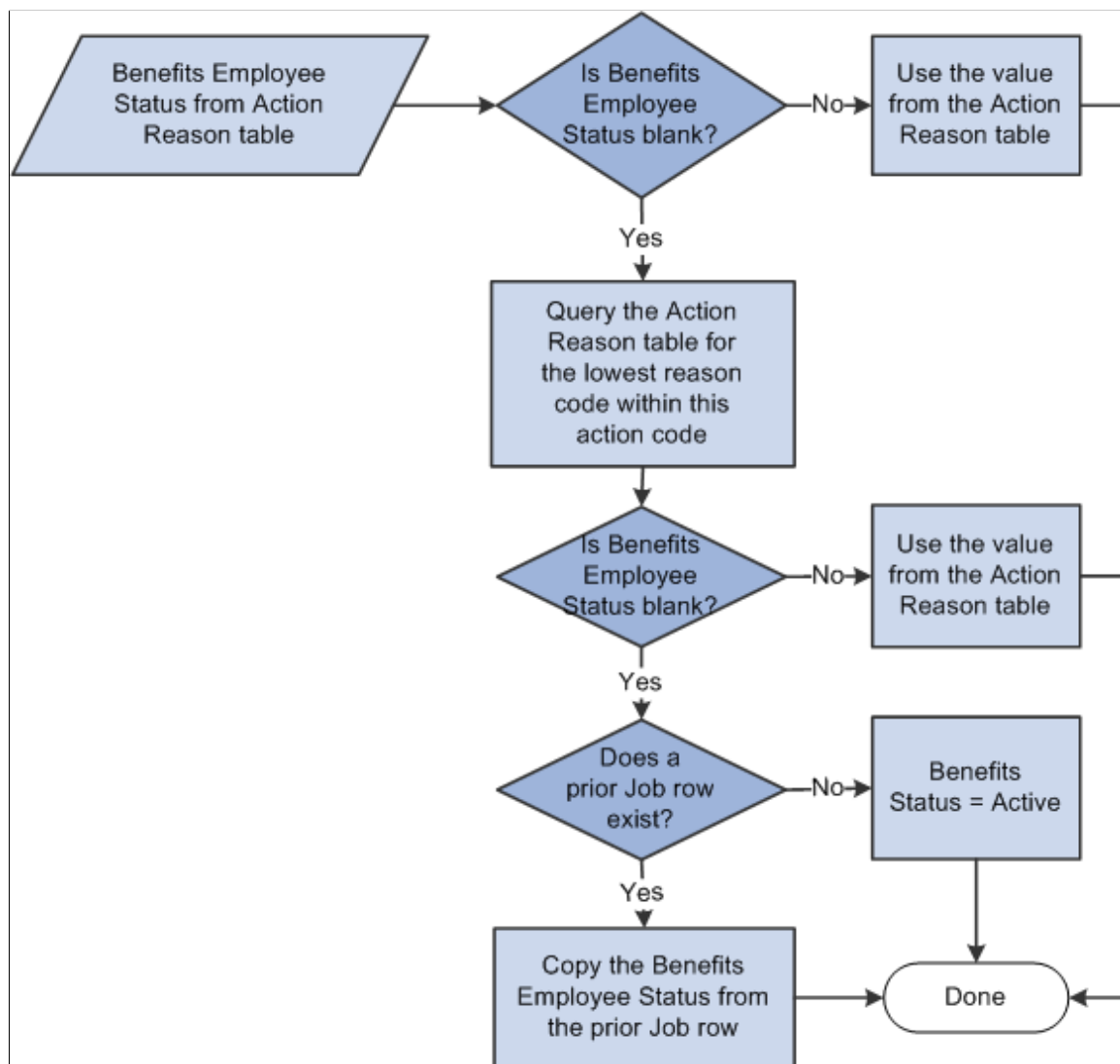
When employee actions occur, two employee status values can be affected: Employee Status and Benefits Status. PeopleSoft HR and PeopleSoft Payroll use Employee Status for a variety of functions. Benefits Status, on the other hand, is used only by Benefits Administration and does not conflict with HR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

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.

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



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 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Eligibility Rules Table Page</u>	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

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.

Eligibility Rules Table

Eligibility Rules ID B103

Eligibility Parameters ?

*Effective Date 01/01/1980

*Description Age 52

*Status Active

Short Description Age 52

Find | View All

First 1 of 1 Last

Eligibility Field

Personalize | View 10

First 1-29 of 29 Last

View Detail	Eligibility Field	In Use
	ACA Eligibility Status	☒
	Age	☒
	Benefits Status	☒
	Eligibility Config 1	☐
	Eligibility Config 2	☐
	Eligibility Config 3	☐
	Eligibility Config 4	☐
	Eligibility Config 5	☐
	Eligibility Config 6	☐
	Eligibility Config 7	☐
	Eligibility Config 8	☐
	Eligibility Config 9	☐
	Emplid Override	☐
	Employee Class	☐
	Employee Type	☐

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.

Field or Control	Description
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: <i>All Flagged Jobs:</i> Group all jobs for all benefit record numbers. <i>Flagged Jobs in Benefit Record:</i> Group all jobs within the current benefit record number. <i>Primary Job in Benefit Record:</i> Look only at the primary job within the current benefit record number.

Field or Control	Description
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. If the value is <i>Primary Job in Benefit Record</i> 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: <i>One or More in Group:</i> At least one job must satisfy the rule. <i>All in Group:</i> All jobs must satisfy the rule.
Eligibility or Ineligibility	Tells the system how to interpret a match with the criteria. Values are <i>Eligible</i> and <i>Ineligible</i>. 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.

Field or Control	Description
Affordable Care Act Common ID	Select the ACA Common ID.
ACA Eligibility Status	Select one of the following values: <i>Always Eligible</i> , <i>Eligible</i> , <i>Excluded Ineligible</i> , <i>To be determined</i> .

Age

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

Field or Control	Description
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 <i>64</i> 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.

Benefits Status

Field or Control	Description
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

Field or Control	Description
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

<i>Field or Control</i>	<i>Description</i>
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)

<i>Field or Control</i>	<i>Description</i>
Minimum FTE andMaximum FTE	Define an employee's benefit eligibility based on the employee's full time equivalency. Enter the minimum and the maximum amount the employee must meet to fulfill the requirement. The system always looks at the FTE eligibility field. If you don't want full-time equivalency to be a factor in determining eligibility, leave the default values in place.

Full/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

<i>Field or Control</i>	<i>Description</i>
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.

<i>Field or Control</i>	<i>Description</i>
Set ID	Enter a setID.
Sal Plan (salary plan)	Enter a salary plan.
Salary Grade	Enter a salary grade.

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.

<i>Field or Control</i>	<i>Description</i>
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

<i>Field or Control</i>	<i>Description</i>
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

<i>Field or Control</i>	<i>Description</i>
Based On	Determine benefit eligibility based on where the employee works or lives. Select from the following locations that you want evaluated: <i>Home:</i> The employee must live in the displayed postal codes or postal code ranges to be eligible. <i>Location:</i> The employee must work in the postal codes or postal code ranges to be eligible. <i>Both:</i> The employee must work and live in the displayed postal codes or postal code ranges to be eligible. <i>Either:</i> 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.

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 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**.
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.

Pages Used to Set Up Geographic Location Eligibility Rules

Page Name	Definition Name	Usage
<u>Geographic Location Elig Table Page</u>	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.

<i>Employee Location</i>	<i>Results</i>
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

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.

Geographic Location Elig Table

Location Table ID KRST

Geographic Location Elig Table

*Effective Date01/01/1980

*Effective StatusActive

*DescriptionKRST

Short Description

Based OnEither

*Eligible or IneligibleIneligible

Group MethodPrimary Job in Benefit Record

*Evaluation MethodOne or More in Group

Consider Active Jobs Only

Location Range

*Beginning of Range40000

*End of Range69999

<i>Field or Control</i>	<i>Description</i>
Based On	Select the location that you want evaluated by this set of postal code ranges. Select from the following values: <i>Home:</i> The employee must reside in the displayed postal codes or postal code ranges to pass. <i>Location:</i> The employee must work in the displayed postal codes or postal code ranges to pass. <i>Both:</i> The employee must both work and live in the displayed postal codes or postal code ranges to pass. <i>Either:</i> The employee must either work or live in the displayed postal codes or postal code ranges to pass.

Field or Control	Description
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: <i>All Flagged Jobs:</i> Group all jobs for all benefit record numbers. <i>Flagged Jobs in Benefit Record:</i> Group all jobs within the current benefit record number. <i>Primary Job in Benefit Record:</i> 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: <i>One or More in Group:</i> At least one job must satisfy the rule. <i>All in Group:</i> 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 <i>Primary Job in Benefit Record</i>, 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.

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:

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.

Fields	FSC Event Class (commonly used for plan types 1x–3x, 6x)	HIR Event Class
Default Method	<i>Assign Cur Covrg Else Option</i> (assign current coverage else option) and <i>Assign Cur Covrg Else Low Opt</i> (assign current coverage else low option) are typical selections.	<i>Default to Lowest Elig Option</i> (default to lowest eligible option) and <i>Default to Option and Coverage</i> are typical selections. If your organization processes employees with multiple jobs, use <i>Assign Cur Covrg Else Low Opt</i> or <i>Assign Cur Covrg Else Option</i> .
Select Allowed	<i>Current Plan + Waive</i> is the typical selection for plan type 1x. For plan types 2x and 3x, use <i>All Plans</i> . For plan type 6x, use <i>Current Plan</i> .	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).

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

Fields	FSC Event Class (commonly used for plan types 1x–3x, 6x)	HIR Event Class
Deduction + Flex Credits End <i>On Covg End Date</i> <i>1st Full PayPd after Event Dt</i> <i>Pay Pd Containing Event Date</i> <i>Pay Pd Preceding Covg EndDt</i>	Depends on company policy.	Depends on company policy.

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	<i>Assign Cur Covrg Else Option</i> and <i>Assign Cur Covrg Else Low Option</i> are common selections.	<i>Assign Cur Covrg Else Option</i> and <i>Assign Cur Covrg Else Low Option</i> are common selections, except for plan types 6x and 9x, which use <i>Terminate Coverage</i> .	<i>Assign Cur Covrg Else Low Option</i> .
Select Allowed	None. Use History controls whether the enrollment is allowed for an event.	<i>All Plans</i> .	<i>All Plans</i> .

Fields	MSC Event Class	OE Event Class	SNP Event Class
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.
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.

Fields	MSC Event Class	OE Event Class	SNP Event Class
Coverage Begins <i>On the Event Date</i> <i>Month-Begin On/Aft Event Dt</i> <i>On Pay Pd Begin after Event Dt</i>	Depends on company policy. For MSC events, <i>On the Event Date</i> is the common selection.	<i>On the Event Date</i> 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.	<i>On the Event Date</i> 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	<i>On the Event Date</i> is a common selection for FSC events.	<i>On the Event Date</i> is a common selection for OE events.	Zero days and months.
Coverage Ends <i>On the Event Date</i> <i>On Month-End after Event Dt</i> <i>On Pay Pd End After Event Dt</i>	Depends on company policy.	Depends on company policy.	Depends on company policy.
<i>Grace Period Days</i> <i>Grace Period Months</i>	<i>On the Event Date</i> is a common selection for FSC events.	<i>On the Event Date</i> is a common selection for OE events.	<i>On the Event Date</i> is a common selection for SNP events.
Deduction + Flex Credits Begin <i>1st Full PayPd After Covg BgDt</i> <i>On CovgBegin Date</i> <i>Pay Pd Containing Covg BegDt</i> <i>Pay Pd ePreceding Covg BgDt</i>	Depends on company policy.	Depends on company policy.	<i>1st Full Pay Pd After Covg BgDt.</i>

Fields	MSC Event Class	OE Event Class	SNP Event Class
Deduction + Flex Credits End <i>On Covg End Date</i> <i>1st Full PayPd after Event Dt</i> <i>Pay Pd Containing Event Date</i> <i>Pay Pd Preceding Covg EndDt</i>	Depends on company policy.	Depends on company policy.	<i>1st Full Pay Pd After Covg BgDt.</i>

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	<i>Terminate Coverage.</i>
Select Allowed	None.
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.

Fields	TER Event Class
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 <i>On the Event Date</i> <i>Month-Begin After Event Dt</i> <i>Month-Begin On/Aft Event Dt</i> <i>On Pay Pd Begin after Event Dt</i>	Not applicable; <i>On the Event Date</i> appears by default.
Waiting Period... Days Waiting Period... Months	Not applicable; 0 (zero) appears by default.
Coverage Ends <i>On the Event Date</i> <i>On Month-End After Event Dt</i> <i>On Pay Pd End after Event Dt</i>	Depends on company policy. Selection is typically based on benefit claims processing agreements with carriers and participants.
<i>Grace Period Days</i> <i>Grace Period Months</i>	Depends on company policy.
Deduction + Flex Credits Begin <i>1st Full PayPd After Covg BgDt</i> <i>On CovgBegin Date</i> <i>Pay Pd Containing Covg BegDt</i> <i>Pay Pd Preceding Covg BegDt</i>	Not applicable; <i>1st Full Pay Pd After Covg BegDt</i> appears by default.

Fields	TER Event Class
Deduction + Flex Credits End <i>On Covg End Date</i> <i>1st Full PayPd after Event Dt</i> <i>Pay Pd Containing Event Date</i> <i>Pay Pd Preceding Covg EndDt</i>	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 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.

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

This example illustrates the fields and controls on the Event Class Table page.

Event Class Table

Event Class

HIR

Status

Active

*Description

New Hire

Short Description

New Hire

Event Class Use

☒ Specific Event Class

☐ Open Enrollment Event Class

☐ Default Event Class

☐ Snapshot Event Class

*Event Priority

100

☒ Manual Events Allowed
☒ Available through Self Service

Forms

*Print Option

Print Both Forms

Days to Print

0

Benefits Notifications

Effective Date

01/01/2000

+

-

Activity Guide Category

ONBOARDING

OnBoarding

Activity Guide Template

*Template	Description	Days To Notify		
1 OBDUSA1	OnBoarding for USA	31	+	-

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

Event Class	Description	Event Class Use	Event Priority	Manual Events Allowed?
<i>FSC</i>	<i>Family status change</i>	Specific Event Class	<i>300</i>	Selected
<i>HIR</i>	<i>New hire</i>	Specific Event Class	<i>100</i>	Deselected
<i>MAR</i>	<i>Marriage</i>	Specific Event Class	<i>402</i>	Selected
<i>MSC</i>	<i>Miscellaneous</i>	Default Event Class	<i>400</i>	Selected
<i>OE</i>	<i>Open Enrollment</i>	Open Enrollment Event Class	<i>900</i>	Deselected
<i>SNP</i>	<i>Snapshot</i>	Snapshot Event Class	<i>50</i>	Deselected
<i>TER</i>	<i>Termination</i>	Specific Event Class	<i>200</i>	Deselected

Field or Control	Description
Status	Select to make the event class active or inactive. Note: For the employees to receive notification based on the event status, the Status should be <i>Active</i> and the Available through Self Service check box should be enabled. Use Notification Composer to generate notifications. For more information on using Notification Composer, see “Understanding Notification Composer” (Enterprise Components). Depending on the Notification Administration setting, notifications are generated as In-App alerts or emails. The Email alert for this notification is delivered as <i>Enabled</i>. The administrator can enable In-App alert for <i>BenefitsEnrollmentEmployee</i> under Notification Settings in Notification Administration. For more information see, <i>PeopleTools: Fluid User Interface Developer’s Guide, “Administering Notifications”</i>.
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.

Field or Control	Description
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. Note: For the employees to receive notification based on the event status, the Status should be <i>Active</i> and the Available through Self Service check box should be enabled. Use Notification Composer to generate notifications. For more information on using Notification Composer, see “Understanding Notification Composer” (Enterprise Components). Depending on the Notification Administration setting, notifications are generated as In-App alerts or emails. The Email alert for this notification is delivered as <i>Enabled</i>. The administrator can enable In-App alert for <i>BenefitsEnrollmentEmployee</i> under Notification Settings in Notification Administration. For more information see, <i>PeopleTools: Fluid User Interface Developer’s Guide, “Administering Notifications”</i>.

<i>Field or Control</i>	<i>Description</i>
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.
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.

Field or Control	Description
Benefits Notifications grid	Use the Benefits Notifications grid to define the <i>Activity Guide Category</i>, <i>Template</i>, and <i>Days To Notify</i>. The system checks the data entered in this grid before sending notification to the employees for the specific event class. This grid is optional. When an employee accesses the Benefits Enrollment step (mapped to an activity guide) as part of an open benefits self-service event, and the enrollment process is not complete or is in error, the administrator runs the process in the Generate Benefit Notifications Page to identify and notify these employees. The system checks the Event Class Table page to see if there is any notification criteria defined for the event class. Following scenarios are considered: • If the Activity Guide category and Template defined in the Event Class Table page matches the default template definition mapped to the user for the event class, then the system notifies the employee for the number of days defined in <i>Days To Notify</i> starting from the event date. • If the Activity Guide category and Template does not match the default template definition for the event class, then the system notifies the employee until the transaction is completed by the employee. • If the administrator hasn't configured the Benefits Notification grid, then the system notifies the employee until the transaction is completed by the employee. For Open Enrollment, the system uses the number of days to notify using the <i>Enrollment End Date</i> in the Open Enrollment Definition Page. For Life Event, the system uses the days to notify using the <i>Maximum Days to Notify</i> in the Life Event Rules Page. Use Notification Composer to generate notifications. For more information on using Notification Composer, see “Understanding Notification Composer” (Enterprise Components). Depending on the Notification Administration setting, notifications are generated as In-App alerts or emails. The Email alert for this notification is delivered as <i>Enabled</i>. The administrator can enable In-App alert for <i>BenefitsEnrollmentEmployee</i> under Notification Settings in Notification Administration. For more information see, <i>PeopleTools: Fluid User Interface Developer’s Guide</i>, “Administering Notifications”. Note: This grid is applicable only for customers using the Generate Benefit Notifications feature.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Review BAS Activity Page</u>	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.
<u>Passive Event Definition Page</u>	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:

<i>Non-Job Event</i>	<i>Cause</i>	<i>Processing Result</i>
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.
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.

Non-Job Event	Cause	Processing Result
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
- 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

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.

Review BAS Activity										
BAS Activity										
*Empl ID	Name	*Action Source	All Jobs	Ben Record	Empl Record	*Event Date	Event Effseq	*BAS Action	Suppress Forms	COBRA Action
004	Phillip Lash	Job Data Change		0	0	01/01/2010	0	HIR		
005	Stacey Katzman	Job Data Change		0	0	01/01/2010	0	HIR		
300191	Jack Phenwan	Job Data Change		0	0	07/02/2012	0	HIR		
B-HPCOB305	Yogi Bear	Benefits Person		0	0	01/15/2000	0	MSC		
B-RETRO1	William Robert	Job Data Change		0	0	01/01/2012	0	HIR		
B-RETRO2	James Jameson	Job Data Change		0	0	01/01/2012	0	HIR		
B-SNP101	Jane Jones	Job Data Change		0	0	01/01/2010	0	DTA		
B-SNP106	Jessica Locks	Job Data Change		0	0	04/15/2000	0	DTA		
B-SNP107	Jill Sach	Job Data Change		0	0	01/01/2009	0	DTA		
BA-91CBR01	Allen Lee	Job Data Change		0	0	02/01/2001	0	HIR		
BA9001	Robert Conory	Manual Event	☒	0	0	01/01/2011	0	FSC		
BDU0005	Howard Shapiro	Job Data Change		0	0	01/01/2010	0	DTA		
BEU0010	Lionel Hu	Job Data Change		0	0	01/01/2011	0	REH		
BEU0010	Lionel Hu	Job Data Change		0	0	12/31/2010	0	TER		
BEU0010	Lionel Hu	Address Change		0	0	02/14/2006	0	ADR		

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.

Field or Control	Description
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: • <i>Manual</i>: Manual event. • <i>PasBirthDt</i>: Passive event - birthdate. • <i>PasSvcDt</i>: Passive event - service date. • <i>JobChg</i>: Job data change. • <i>MJChg</i>: Multiple job indicator change. • <i>AddressChg</i>: 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. 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

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.

Passive Event Definition

Passive Event ID A65

Passive Event Definition

*Status Active

*Description Age 65

Short Description Age 65

*Passive Event Type Employee's Birthdate

*Event Classification A65 Age 65 Passive event

COBRA Event Class

Event Limit - Months 780

Event Limit - Days 0

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

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

Example of Passive Event Definition

You might set up a passive event to determine which employees are eligible for certain benefits once they've worked for your organization for a year. To do this, you 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Event Rules Table – Event Rules Page	BAS_EVENT_RULES1	Define basic event rules for event classes.
Event Rules Table – 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.

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

This example illustrates the fields and controls on the Event Rules Table- Event Rules page (Page 1 of 2).

Event Rules Table

Event Rules EOI and Level Rules Date Rules Billing Rules

Event Rules ID KU4X

Event Rules 1 of 2 View All

*Effective Date 01/01/2025 Status Active + -

*Description Savings Event Rules Short Descr Savings

Event Class 1 of 9 View All

Event Classification OE Open Enrollment

☒ Pre-enter ☐ Elect Required ☐ Retain Covered Dependent ☐ Provide FlexCR Upon Default

*Default Method Assign Cur Covrg Else AutoEnrl

*Allowable FSA Pledge Changes Not Applicable

☐ Use History ☐ Ignore Plan ☐ Ignore Overage Dependent ☒ Ignore Dep/Ben Edits ☒ Ignore Investment Edits

Self-Service Configuration

☒ Collect Dep/Ben ☒ Allow Dep/Ben Additions ☐ Enable Dep Proof ☒ Collect Fund Allocations

Certification

Certificate ID

This example illustrates the fields and controls on the Event Rules Table- Event Rules page (Page 2 of 2).

Electable Options

*Select Allowed All Plans ☐ Coverage Code Control

Coverage Code Control

*Covered Person Type	Same	More	Less	*If No Current Coverage
	☐	☐	☐	Allowed

Event Class

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

Field or Control	Description
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 6x (FSA), and 9x (Vacation Buy/Sell) during open enrollment, because these plans types may legally require positive annual re-enrollment.

Field or Control	Description
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. 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 <i>None</i>, and all participate and waive level values to <i>99</i>. 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 <i>Assign Cur Covg Else Option</i>, <i>Assign Cur Covg Else Low Opt</i>, or <i>Assign Cur Covg Else None</i>. 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.

Field or Control	Description
	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 <i>None</i>, 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.
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.

Field or Control	Description
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 <i>Default Option for Excess Credit</i>, 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.

Field or Control	Description
Default Method	Indicates what happens when an employee does not select an election for a particular plan type. Values are: <i>Assign Cur Covrg Else AutoEnrl</i> (assign current coverage else auto enrollment): Select to assign and continue the participant's current coverage. If participants do not have current coverage, or have lost eligibility to current coverage, and are eligible for the auto enrollment, they are assigned to the savings plan for which auto enrollment is enabled in the Savings Plan Table. The participant must be eligible for the current election for it to be used as the default. Note: This is only for savings plans. For auto enrollment, the administrator must select the <i>Assign Cur Covrg Else AutoEnrl</i> option, enable Ignore Dep/Ben Edits, and Ignore Investment Edits. The Pre-empter and Ignore Plan options are automatically greyed out on selecting the <i>Assign Cur Covrg Else AutoEnrl</i> Default Method. <i>Assign Cur Covrg Else Option</i> (assign current coverage else option): Select to assign and continue the participant's current coverage. If participants do not have current coverage, or have lost eligibility to current coverage, they are assigned to the default for the specific plan type, as defined in the Benefit/Deduction Program table. The participant must be eligible for the current election for it to be used as the default. <i>Assign Cur Covrg Else None</i> (assign current coverage else none): If the employee loses eligibility for the current plan, another plan is not set up to replace the old one. <i>Assign Cur Covrg Else Low Opt</i> (assign current coverage else low option): 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. <i>Default to Lowest Elig Option</i> (default to lowest eligible option): Select to assign the lowest-level option for which the employee is eligible.

Field or Control	Description
	This option is not recommended for Savings, FSA, and Vacation Buy/Sell plan types. • <i>Default to Option and Coverage:</i> 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. • <i>Default Option for Exc Credit:</i> (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. • <i>Terminate Coverage:</i> 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 <i>Increase</i> or <i>decrease</i> 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 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 <i>N/A</i> 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:

Field or Control	Description
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.
Enable Dep Proof	Select to validate only qualified dependents while running the Benefits Admin process. If the dependent is not qualified, then the Ben Admin process will create an error.
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

Field or Control	Description
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.

Field or Control	Description
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: • <i>All Plans</i>: Select to enable employees to select from any option within the list of eligible options for the event. • <i>Current Plan</i>: Select to indicate that employees can make changes only to the current plan. • <i>Current Plan + Waive</i>: Select to enable employees to change only coverage levels (eligible options), including electing <i>Waive</i>, 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. • <i>None</i>: 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 <i>All Plans</i>.)

Field or Control	Description
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 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.

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.

Field or Control	Description
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. • <i>Child</i> • <i>Adult Child</i> • <i>Dom Partner</i> (domestic partner) • <i>Employee</i> • <i>NQ Dependent</i> (nonqualified dependent) • <i>Oth Q Dependent</i> (other qualified dependent) • <i>Spouse</i>

Field or Control	Description
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 depending on the situation. So you would select all three check boxes for the <i>Child</i> person type option. Continuing with the divorce event class example, you would add a row, select the <i>Spouse</i> 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 <i>Employee</i> 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. • <i>Allowed</i>: Select to indicate that enrollment for the covered person type is allowed. • <i>Not Allowed</i>: Select to indicate that enrollment for the covered person type is not allowed. • <i>Required</i>: 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.

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 Human Resources Manage Base Benefits).

See “Setting Up Dependent Relationships” (PeopleSoft Human Resources Manage Base Benefits).

See “Setting Up eBenefits” (PeopleSoft eBenefits)

See “Reviewing Dependent and Beneficiary Information” (PeopleSoft eBenefits).

Event Rules Table – 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

This example illustrates the fields and controls on the EOI and Level Rules page.

Event Rules Table

[Event Rules](#)
[EOI and Level Rules](#)
[Date Rules](#)
[Billing Rules](#)

Event Rules ID KU4X

Event Rules

|
<
>
1 of 1
|
[View All](#)

***Effective Date**

Status

+
-

***Description**

Short Descr

Event Class

|
<
>
1 of 9
|
[View All](#)

Event Classification

+
-

If currently Enrolled, or not participating

Max Number of Change Levels

Levels of Change w/o Proof

Proof Required at Plan Level

Amt Proof Required

If currently Waived

Max Number of Change Levels

Proof Required at Plan Level

Amt Proof Required

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.

<i>Field or Control</i>	<i>Description</i>
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.

Field or Control	Description
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.

Field or Control	Description
Max Number of Change Levels (maximum number of change levels)	Indicates how many levels a participant can change.
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

This example illustrates the fields and controls on the Event Rules Table - Date Rules page.

Event Rules Table

Event Rules

EOI and Level Rules

Date Rules

Billing Rules

Event Rules ID

KU4X

Event Rules ?

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1 of 1

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View All

Effective Date

01/01/2024

Status

Active

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Description

Savings Event Rules

Event Class

Q

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1 of 9

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View All

Event Classification

BIR

+

-

Coverage Begins ?

On the Event Date

Waiting Period...

Days

0

Months

0

Use Exist?

Coverage Ends ?

On the Event Date

Grace Period Days

0

Grace Period Months

0

Deduction + Flex Credits Begin ?

Pay Pd Containing Covg BegDt

Deduction + Flex Credits End ?

1st Full PayPd after Event Dt

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.

- 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.

Field or Control	Description
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*.

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.

Field or Control	Description
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.

- 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.

<i>Qualifying COBRA Event</i>	<i>User Action Trigger</i>	<i>Potential COBRA Beneficiaries</i>
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.
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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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.
- **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 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

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.

<i>Field or Control</i>	<i>Description</i>
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 Human Resources Manage Base Benefits)

“Understanding Benefits Billing” (PeopleSoft Human Resources Manage Base Benefits)

(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.

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” (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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Form Table Page</u>	PAY_FORM_TABLE	Set up form IDs for each type of FSA check stock that your organization uses.

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.
<u>Benefit Program Page</u>	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” (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

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 Table

Form ID B-FSCK

Form Details

***Description**

Short Description

Last Form Number Used

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

Field or Control	Description
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.

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

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.

The screenshot displays the 'Benefit Program' page with the following sections and fields:

- Benefit Program:** B01
- Effective Date:** 01/01/2000
- *Description:** Benefits Full Time Program
- Short Description:** Ben FT
- Status as of Effective Date:** Active
- Program Type:** Automated
- Currency Code:** USD
- COBRA Section:**
 - COBRA Surcharge %
 - COBRA Disabled Surcharge %
 - COBRA Contact ID
- FSA Section:**
 - Flexible Spending Acct Run ID
 - FSA Maximum Annual Pledge: 7000.00
- FMLA Section:**
 - FMLA Plan ID: KUB
 - Roll-Bkwd
- Benefits Administration Section:**
 - Apply Excess Credits to: C (Cash)
- Self-Service Configuration Section:**
 - ☒ Show Credits on Enrollment Form
 - ☐ Include Can Sales Tax on Form
 - ☐ Show Employer Costs on Form
 - ☐ Alert to Tax Impacts on Form
 - Cost Freq on Enrollment Form: Deduction Frequency
 - Handbook URL ID

Field or Control	Description
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.

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” \(PeopleSoft Human Resources Manage Base Benefits\)](#)

[“Defining Benefit Plans” \(PeopleSoft Human Resources Manage Base Benefits\)](#)

[“Setting Up Benefit Rates” \(PeopleSoft Human Resources Manage Base Benefits\)](#)

[“Setting Up Calculation Rules” \(PeopleSoft Human Resources Manage Base Benefits\)](#)

[“Setting Up Benefit Providers” \(PeopleSoft Human Resources Manage Base Benefits\)](#)

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.

Pages Used to Build the Benefit Program Table

Page Name	Definition Name	Usage
<u>Benefit Program Table - Benefit Program Page</u>	BEN_PROG_DEFN1	Define benefit program information.
<u>Benefit Program Table - Plan Type and Option Page</u>	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.
<u>Benefit Program Table - Cost Page</u>	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 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.

Navigation:

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

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.

Benefit Program Table	
Benefit Program	Plan Type and Option
Benefit Program: KU1 Effective Date: 01/01/2023 *Description: GBI US Fulltime Benefit Pgm Short Description: GBI US FT	Status as of Effective Date: Active Program Type: Automated Currency Code: USD
COBRA COBRA Surcharge %: 2 COBRA Disabled Surcharge %: 50 COBRA Contact ID:	Benefits Administration Apply Excess Credits to: Cash
FSA Flexible Spending Acct Run ID: KU1 FSA US FSA Maximum Annual Pledge: 7000.00	Self-Service Configuration ☒ Show Credits on Enrollment Form ☐ Include Can Sales Tax on Form ☐ Show Employer Costs on Form ☐ Alert to Tax Impacts on Form Cost Freq on Enrollment Form: Deduction Frequency Handbook URL ID: KUBENHANDBOOK
FMLA FMLA Plan ID: KUF Roll-Fwd	

Field or Control	Description
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 <i>Active</i> or <i>Inactive</i> . Processes ignore benefit programs designated as <i>Inactive</i> , even if the effective date defines the program as current.
Program Type	The type of program can be <i>Manual</i> or <i>Automated</i> . If you are using only the Manage Base Benefits business process, this option is automatically set to <i>Manual</i> . If you activate Benefits Administration on the Installation Table, it is automatically set to <i>Automated</i> .
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.

<i>Field or Control</i>	<i>Description</i>
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.

<i>Field or Control</i>	<i>Description</i>
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).

<i>Field or Control</i>	<i>Description</i>
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.

Field or Control	Description
Apply Excess Credits to	The system can convert excess flexible credit amounts to: <i>C</i> (Cash) <i>D</i> (FSA-Dependent Care) <i>F</i> (Forfeit Excess Credit) <i>H</i> (FSA-Health Care) <i>R</i> (FSA Retirement Counseling) <i>S</i> (Savings-401(k))

Self-Service Configuration

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

Field or Control	Description
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.

Field or Control	Description
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 <i>Annual:</i> Displays the costs as annual amounts. <i>Deduction:</i> 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 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

This example illustrates the fields and controls on the Benefit Program Table - Plan Type and Option page.(Page 1 of 2)

Benefit Program Table

Benefit Program Plan Type and Option Cost

Benefit Program KU1 Effective Date 01/01/2023

Plan Type Q | K < 3 of 25 > X | [View All](#)

*Plan Type Q Medical + -

DispPInSeq

Event Rules ID Q Medical/Dental/Vision Rules

Waive Coverage Q

Dependent Rules ID Q

Template ID Q ☒ Print Plan Comparison

☒ HIPAA Plan
☒ COBRA Plan
[Load Cross Plan Values](#)

Self-Service Configuration

☒ Collect Dependent/Beneficiary ☐ Collect Fund Allocations ☒ Show If no choice

Handbook URL ID Q

Additional Summary Configuration

☒ Update Dependent Information ☐ Update Beneficiary Information
☐ Update Beneficiary Designation ☐ Update Savings Contributions
☐ Update Fund Allocations ☒ Show Plan Details
☒ Show Latest Deductions

This example illustrates the fields and controls on the Benefit Program Table - Plan Type and Option page (Page 2 of 2).

Option Q Q Q < 1-5 of 38 > X | [View All](#)

Eligibility Cross Plan ID

Optn ID	*Option Type	Benefit Plan	Covg Code	Deductn Cd	Option Code	Default Option	Opt Level	Option Seq	Geog Locn	Elig ID		
1	General Credit			KUMED9 Q		☐		1			+	-
2	Waive Option			KUMED9 Q	W	☐		2			+	-
3	Option	KUMED1 Q	1 Q	KUMED9 Q	11	☐	1	11	KMID Q	KNUL Q	+	-
4	Option	KUMED1 Q	2 Q	KUMED9 Q	12	☐	1	12	KMID Q	KNUL Q	+	-
5	Option	KUMED1 Q	3 Q	KUMED9 Q	13	☐	1	13	KMID Q	KNUL Q	+	-

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.

Field or Control	Description
Dependent Rules ID	Select the dependent rule to be used when determining dependent age limits for this plan type. This field appears only for 1X (health) plan types. If you leave this field blank, the system uses the least restrictive options as the default limits: • Dependent Age Limit: 99 • Student Age Limit: 99 • Exclude Disabled from Age Limit: Selected • Dependent Ineligible if Married: Deselected Note: To generate COBRA event triggers during COBRA overage processing, the system uses the most restrictive settings from the dependent rules used by all of the 1X plan types under the benefit program (for example, the lowest age limits). The system uses these settings only when creating the initial COBRA event triggers. When the system processes the triggers to generate COBRA enrollments, it correctly applies the rules for specific plan types.
Template ID	Select a template ID if you want to compare plans during benefits enrollment for this plan type. Note: This is not applicable for Plan Type 01. For more information on defining plan comparison templates, see Comparison Template Page.
Print Plan Comparison	When the administrator enters a Template ID, the Print Plan Comparison check box is enabled by default. This allows employees to print the plan comparison report for the selected plan type in the Benefits Plan Comparison Page.
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 information on the fluid Benefit Summary and the plan enrollment pages.

Field or Control	Description
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	<i>01</i>	<i>1-5x, 7-9x</i>	<i>6x</i>
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 <i>N</i> (not allowed).	Allowed, but default is <i>N</i> (not allowed).

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

Additional Summary Configuration

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

Field or Control	Description
Update Dependent Information check box	This check box controls if updating dependent information is allowed or not.

Field or Control	Description
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.
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
<i>P</i> (program)	Required for automated benefit programs. It is allowed for the Benefit Program row (plan type <i>01</i>) only, and only one is allowed per benefit program.
<i>G</i> (general credit)	Optional, allowed for most plan types except 4x–9x. Only one is allowed per plan type.
<i>O</i> (option)	At least one is required per plan type except for the Benefit Program row (plan type <i>01</i>), where it is not allowed.

Values	Plan Type
<i>W</i> (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
Option Type	<i>P</i> - Program	<i>G</i> - General Credit	<i>W</i> - Waive Controlled by waive coverage.	<i>O</i> - 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

Field	Values	Values	Values	Values
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
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)	<i>G, P</i>
1x–3x	<i>G, W, O</i>
4x–9x	<i>W, O</i>

Setting Up the Benefit Program Row (Plan Type 01)

Access the Benefit Program Table - Plan Type and Option 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

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.

Employee Self Service

Benefit Program Table

Benefit Program

Plan Type and Option

Cost

Benefit Program

B01

Effective Date

01/01/2000

Plan Type

1 of 18

View All

Plan Type

01

Benefit Program

Option

1 of 2

View All

Option ID

1

Option Type

Program

Benefit Plan

Coverage Code

Cost

Cost Type	Cost ID	Benefit Rate Type	Rate ID	Earnings Code	Short Description	Calc TblID			

Field or Control	Description
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: <i>Price:</i> The system calculates deductions for employees who select this option according to the deduction code that you identify for this benefit option. <i>Credit:</i> 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.

Field or Control	Description
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 <i>Employee Portion</i> 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. 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	

Plan Type Series	Rate Table Required?	Calculation Rules Required?	Comments
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 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.

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 Payroll for North America)

“Setting Up FEGLI Codes” (PeopleSoft 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.

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.

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.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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.

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.

Benefit Program Table - Plan Type and Option Page: Cross Plan tab

Benefit Program: KU1 Effective Date: 01/01/2005

Plan Type: Find | View All First 3 of 23 Last

*Plan Type: 10 Medical

DispPlan Seq: 10

Event Rules ID: KU1X Medical/Dental/Vision Rules

Waive Coverage: Allowed with Proof

Dependent Rules ID: PU1DR

☒ HIPAA Plan

☒ COBRA Plan

Load Cross Plan Values

Self-Service Configuration

Option: Personalize | Find | View All First 1-5 of 38 Last

Optn ID	*Option Type	Benefit Plan	Covg Code	Deductn Cd	Option Code	Cross Plan Type	Cross Benefit Plan	Coverage Limit (Pct)	Check Dependents
1	General C			KUMED9					☐
2	Waive Op			KUMED9	W				☐
3	Option	KUMED1	1	KUMED9	11				☐
4	Option	KUMED1	2	KUMED9	12				☐
5	Option	KUMED1	3	KUMED9	13				☐

Option: Cross Plan Tab

<i>Field or Control</i>	<i>Description</i>
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 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.

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.

Field or Control	Description
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.

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.

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:

<i>Process</i>	<i>Usage</i>	<i>What the System Does</i>
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.

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

<i>Field or Control</i>	<i>Description</i>
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.
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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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.
- 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

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.

The screenshot displays the 'Create FSA Claims' web form. At the top, it shows the title 'Create FSA Claims' and a search bar for 'Empl ID' with the value 'KU0020' and the name 'Christelle Smith'. Below this, there are fields for '*Plan Type' (60), '*Claim ID' (NEW), '*Service From' (01/02/2000), and '*Service To' (01/03/2000). A table below these fields lists 'Benefit Plan', 'Account Status', 'Coverage Begin', 'Annual Pledge', 'Deduction Begin', and 'Amount Available' (4900.00). The 'Claim Details' section includes 'Action Date' (01/17/2014), '*Service Type' (Medical), '*Submitted Amount' (180.00), '*Submitted Date' (01/17/2014), 'Denied Amount', 'Denied Date', 'Approved Amount' (180.00), and 'Reason Denied'. At the bottom, there are fields for 'Patient Code' (Employee), 'Name', 'Service Provider', and 'Comments'. A 'Save and Add Next' button is located at the bottom left.

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.

Field or Control	Description
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 <i>NEW</i> . 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 for the employee, including the annual pledge. The data is based on the plan year.

Claim Details

Field or Control	Description
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.

Field or Control	Description
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: • <i>Already Paid</i> • <i>Claim Pended-Exceeds Avail Bal</i> (claim pended-exceeds available balance) • <i>Not a Covered Expense</i> • <i>Submitted Amt Exceeds Balance</i> (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 <i>Employee</i>. Other values are <i>Dependent</i>, <i>Spouse</i>, and <i>[None]</i>. If the patient code value is <i>Dependent</i> or <i>Spouse</i>, 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
<u>Create Health Care Claim Page</u>	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.

Page Name	Definition Name	Usage
Modify Health Care Claim - Claim Details	HC_CANAD_PARTIC2	Change detailed information about a particular participant health care claim.
Create Retirement Counsel Claim CAN	RC_CANAD_DATA_ENTY	Enter new retirement claims with a detailed level of information.
Modify Retirement Claim CAN- Comments	RC_CANAD_PARTIC	Review basic claim and comment information for a specific claim.
Modify Retirement Claim CAN- 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

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.

Create Health Care Claim

*Empl ID B-E195 Kevin O'Leary Empl Record 0

Plan Type Health FSA

Deduction Begin

Deduction End

Benefit Plan

Coverage Begin

Coverage End

Account Status

Annual Pledge 0.00

Amount Available 0.00

Claim Summary

*Claim ID NEW

*Service From 11/20/2002

*Service To 11/27/2002

Action Date 01/17/2014

Submitted Amount 0.00

Denied Amount 0.00

Approved Amount 0.00

Claim Details

Line Nbr 1

*Service From 11/20/2002

*Service To 11/27/2002

*Service Type

Total Amt Billed 0.00

*Submitted Amount 0.00

*Date 11/20/2002

Denied Amount 0.00

Date

Reason

Approved Amount 0.00

Patient Code

Name

Serv Provider

Comments

Save and Add Next

Field or Control	Description
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 <i>Employee</i> . Other values are <i>Dependent</i> , <i>Spouse</i> , and <i>[None]</i> . If the relationship is <i>Dependent</i> or <i>Spouse</i> , 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.

Pages Used to Process FSA Claim Payments

Page Name	Definition Name	Usage
FSA Processing Parameters CAN RUNCTL_FSA_CLAIMS	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 <i>Submitted</i> or <i>Pending</i> .
FSA Calculate Claim Payment FSA Calculate Payment CAN	PRCSRUNCNTL	Process all claim data with statuses of <i>Submitted</i> , <i>Pending</i> , or <i>Ready To Pay</i> .
Print Cheques Print FSA Checks	RUNCTL_FSA003CN RUNCTL_FORM_ID	Print FSA claim checks for records flagged in FSA001.
Print Cheque Register Print FSA 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.

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 FSA Checks 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 FSA 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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 CAN Page	FSA_PAYMENT_DETAIL	View payment detail for Canada and the U.S. for any claim payment.
FSA Year-to-Date Activity Page	FSA_YTD_ACTIVITY	View all year-to-date data for Canada and the U.S. for an employee.

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 CAN 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 CAN > FSA Claim Details CAN

Select the FSA Claim Details tab.

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.

FSA Claim Details

Antonio Santos

Employee

ID KU0010

Benefit Record Number 0

Enrollment Details

Plan Type FSA Health

Deduction Begin 01/01/2000

Deduction End

Benefit Plan KUHFS

Coverage Begin 01/01/2000

Coverage End

Account Status Active

Annual Pledge 2,000.00

Amount Available 970.00

Claim Details

Claim ID 00010014

Service From 02/18/2000

Service To 02/18/2000

Submitted Amount 50.00

Approved Amount 50.00

Status Fully Processed

Denied Amount 0.00

Paid To Date 50.00

☐ Split Claims

Approved Amount 50.00

Pended 0.00

Claim Payments

Personalize | Find | View All | | First 1 of 1 Last

Form ID	Check Nbr	Check Dt	FSA Payment Status	FSA Check Amount	Claim Amount Paid
KUFSA	1008	02/28/2000	Paid	350.00	50.00

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

Field or Control	Description
Status	When you enter claim data, the system sets the claim status to <i>Submitted</i> . When the system approves payment for a claim, it sets the status to <i>Ready to Pay</i> , <i>Pending</i> , or <i>Fully Processed</i> .
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 CAN Page

Use the FSA Payment Details CAN page or 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 > FSA Payment Details CAN**
- **Benefits > Admin Flex Spending Acct US > Review Claim/Payment Info > FSA Payment Details > FSA Payment Details**

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

FSA Payment Details CAN

Martina Griffiths

Employee

ID KC0001

Benefit Record Number 0

Check Details

1 of 1

View All

Form ID KCFSA

Check Nbr 1001

Check Dt 02/01/2000

FSA ChkAmt 92.30

Paymt Stat Paid

Year 2000

Plan Type FSA Retmnt

Benefit Plan KCRFSA

Claims Paid by Check

1-1 of 1

View All

Claim ID	FSA Claim Status	Claim Approved Amount	Paid To Date	Claim Amount Paid
00010037	Fully Processed	420.00	420.00	92.30

The layouts of FSA Payment Details CAN page and FSA Payment Details page are identical.

Field or Control	Description
Paymt Stat (payment status)	The system displays one of these values: <i>Pay This Run:</i> Payment has been calculated and authorized, but a check has not yet been printed. <i>Reversed:</i> Payment was canceled before a check was printed (although a check number was still allotted). <i>Paid:</i> A check has been printed. <i>Void:</i> A check was printed and subsequently voided.

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

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.

FSA Claim Details
Martina Griffiths Employee ID KC0001 Benefit Record Number 0

Enrollment Details					
Plan Type	Health FSA	Deduction Begin	01/01/2000	Deduction End	
Benefit Plan	KCHFSA	Coverage Begin	01/01/2000	Coverage End	
Account Status	Active	Annual Pledge	2,400.00	Amount Available	1,470.00

Claim Details					
Claim ID	00010035	Service From	01/05/2000	Service To	01/25/2000
Submitted Amount	350.00	Approved Amount	350.00	Status	Fully Processed
Denied Amount	0.00	Paid To Date	350.00	☐ Split Claims	
Approved Amount	350.00	Pended	0.00		

Claim Payments					
Form ID	Check Nbr	Check Dt	FSA Payment Status	FSA Check Amount	Claim Amount Paid
KCFSA	1006	05/31/2000	Paid	930.00	350.00

Field or Control	Description
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.

Field or Control	Description
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 <i>split</i> 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.

FSA Year-to-Date Activity Page

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

Navigation:

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

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

Year-to-Date Activity

Antonio Santos Employee ID KU0010 Benefit Record Number 0

FSA Plan Find | View All First 1 of 2 Last

Plan Type Flex Spending Health - U.S.

Year-to-Date Details Find | View All First 1 of 5 Last

Coverage Begin Date 01/01/2012 Effective Date 01/01/2012

Benefit Plan KUHFSA Healthcare FSA KU1

Employee Status Active

*FSA Account Status Active

Submitted Amount YTD	0.00	Annual Pledge	2500.00	Total Contributions	721.20
Approved Amount YTD	0.00	Approved Amount YTD	0.00	Paid Amount YTD	0.00
Paid Amount YTD	0.00	Amount Available	2500.00	Account Balance	721.20
Approved But Unpaid	0.00				

<i>Field or Control</i>	<i>Description</i>
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

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

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**

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.

Reverse Cheques in Error

Run Control ID 1
Report Manager
Process Monitor
Run

Reverse Details

Form ID
Check Nbr
Check Dt

Issued to

Empl ID	Name	Plan	FSA Check Amount

Claim Details

Claim ID	Service From	Service To	Submit Amt	Aprvd Amt	Paid To Dt	Amount Pd	Status

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.

<i>Field or Control</i>	<i>Description</i>
Claim ID	Displays the claim paid by the specified check.

<i>Field or Control</i>	<i>Description</i>
Service From and Service To	Displays the dates on which the eligible expenses occurred.
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.

<i>Field or Control</i>	<i>Description</i>
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.

Field or Control	Description
Amount Pd (amount paid)	Displays the amount paid for the claim.
Status	Displays the claim status. The claim's status is reset to <i>Pending</i> so that it will be picked up during the next FSA Processing run. The check's status is set to <i>Reversed</i> if it has not yet been printed or to <i>Void</i> 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**

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.

Cancel Claim/Reverse Cheque

Run Control ID PS Report Manager Process Monitor
Run

Reverse this FSA Claim

Empl ID
Plan Type
Claim ID
Serv From
To
For
Claim Status

Claim Reversal Details

Check Nbr	Check Dt	FSA ChkAmt	Status

Add'l Claims which will be affected

Claim ID	Service From	Service To	Submit Amt	Aprvd Amt	Check Nbr	Amount Pd	Status

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.

Field or Control	Description
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.

Pages Used to Report and Close FSAs

Page Name	Definition Name	Usage
<u>FSA Account Closure Report Page</u>	RUNCTL_FSA002	Close the prior year FSA accounts and produce the Account Closure Statement.
FSA Quarterly Acct Statement	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 (FSA Quarterly Acct Statement 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](#)

FSA Account Closure Report 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 > FSA Account Closure Report CAN > FSA Account Closure Report CAN**
- **Benefits > Admin Flex Spending Acct US > Create Account Reports > FSA Account Closure Report > FSA Account Closure Report**

This example illustrates the fields and controls on the FSA Account Closure Report page. 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.

Field or Control	Description
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 Human Resources Manage Base Benefits)

(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.

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 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.

<i>Item</i>	<i>How Calculated</i>	<i>Amount</i>	<i>Taxable Gross Definition ID</i>
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
<u>Deduction Table - Tax Class Page</u>	DEDUCTION_TABLE2	Set up deductions for the variable taxation benefit plans, and create the tax alteration deduction codes.
<u>General Deduction Table Page</u>	GENL_DEDUCTION_TBL	Define general deduction rules for tax alteration deductions.
<u>Company General Deductions Page</u>	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 alteration deduction.

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 Payroll for North America)

“Establishing Earnings Codes” (PeopleSoft 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Credit Allocation Table Page</u>	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.

Navigation:

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

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.

Credit Allocation Table

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

Benefit Program CNB

*Effective Date 01/01/1996

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

*Seq Nbr	*Plan Type	*Deduction Code	Description	Tax Alteration Deduction Code		
1	Flex Spending Health	CFAHC	FSA Health Care Can		+	-
2	Retirement Counseli	CFSARC	FSA Retire Counsel Can		+	-
3	Dental	CDEN	Dental Premiums B/Tax	CTAXBN	+	-
4	Major Medical	CEHB	Extended Health Premiums B/Tax	CTAXBN	+	-
5	AD and D	CADD2	AD&D Premiums B/Tax	CTAXBN	+	-

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.

Field or Control	Description
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

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.

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.

Translate Value — Covered Person Type

Use the translate value SS for the Covered Person Type of US same-sex spouse.

This example illustrates the fields and controls on the Maintain Translate Values — Covered Person Type page.

Use this page to maintain translate values

Field Name: **COVERED_PERSON_TYP** Length: **2**

Maintain Translate Values Personalize Find View All First 1-9 of 9 Last

General Last Updated

	*Value	Effective Date	Status	*Long Name	*Short Name		
1	AC	01/01/1900	Active	Adult Child	Adult Chld	+	-
2	CH	01/01/1900	Active	Child	Child	+	-
3	DP	01/01/1900	Active	Domestic Partner	Dom Partnr	+	-
4	EE	01/01/1900	Active	Employee	Employee	+	-
5	NQ	01/01/1900	Active	Non-Qualified Dependent	NQ Depdnt	+	-
6	OD	01/01/1900	Active	Other Qualified Dependent	Oth Q Dep	+	-
7	SP	01/01/1900	Active	Spouse	Spouse	+	-
8	SS	09/16/2013	Active	US Same-Sex Spouse	US SSSpous	+	-
9	XS	01/01/1900	Active	ExSpouse	ExSpouse	+	-

Translate Value — Dependent Relationship

Use the translate value SS for the US same-sex spouse relationship.

This example illustrates the fields and controls on the Maintain Translate Values — Relationship page.

Use this page to maintain translate values

Field Name: **RELATIONSHIP** Length: **2**

Maintain Translate Values Personalize Find View All First 1-29 of 29 Last

General Last Updated

	*Value	Effective Date	Status	*Long Name	*Short Name		
23	SC	01/01/1900	Active	Stepchild	Stepchild	+	-
24	SL	01/01/1900	Active	Self	Self	+	-
25	SP	01/01/1900	Active	Spouse	Spouse	+	-
26	SS	09/16/2013	Active	US Same-Sex Spouse	US SSSpous	+	-
27	T	01/01/1900	Active	Estate	Estate	+	-
28	X	01/01/1900	Active	ExSpouse	ExSpouse	+	-
29	XN	01/01/1900	Active	ExDomestic Partner	ExDP	+	-

The dependent relationship uses Covered Person Type = US Same-Sex Spouse and Gender Validation = Same Sex Only.

This example illustrates the fields and controls on the Dependent Relationships Table page.

Dependent Relationships Table

Relationship to Employee US Same-Sex Spouse

Dependent Types Personalize Find View All First 1 of 1 Last

*Effective Date	*Status	*Covered Person Type	Age Limit Flag	Certificate ID	Mutually Exclusive	*Gender Validation
09/16/2013	Active	US Same-Sex Spouse				Same Sex Only

Health Coverage Codes

Use the coverage codes 22 and 24 for the options - **employee + same-sex spouse**, and **family (with same-sex spouse)**.

This example illustrates the fields and controls on the Health Coverage Codes page for coverage code 22.

Health Coverage Codes

Coverage Code 22

Coverage Codes Find View All First 1 of 1 Last

*Effective Date 09/16/2013

*Status Active

*Description Employee + Same-Sex Spouse

Short Description EE+SSS

COBRA Coverage Set

Total Covered Persons

Total Minimum Covered 0

Total Maximum Covered 0

Allowable Covered Person Types Personalize Find First 1-2 of 2 Last

Covered Person Type	Minimum Covered	Maximum Covered
Employee	1	1
US Same-Sex Spouse	1	1

This example illustrates the fields and controls on the Health Coverage Codes page for coverage code 24.

Health Coverage Codes

Coverage Code 24

Coverage Codes Find View All First 1 of 1 Last

*Effective Date 09/16/2013

*Status Active

*Description Family (with Same-Sex Spouse)

Short Description Family-SSS

COBRA Coverage Set

Total Covered Persons

Total Minimum Covered 0

Total Maximum Covered 0

Allowable Covered Person Types Personalize Find First 1-3 of 3 Last

Covered Person Type	Minimum Covered	Maximum Covered
Child	1	99
Employee	1	1
US Same-Sex Spouse	1	1

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.

This example illustrates the fields and controls on the EDI 834 Transaction Map Table page for coverage code 22.

EDI 834 Transaction Map Table

Field Name Coverage Code

Original Value 22

EDI 834 Mapped Fields

Find | View All

First 1 of 1 Last

*Effective Date 09/16/2013

Original Description Employee + Same-Sex Spouse

EDI 834 Value ESP

*EDI 834 Description Employee and Spouse

This example illustrates the fields and controls on the EDI 834 Transaction Map Table page for coverage code 24.

EDI 834 Transaction Map Table

Field Name Coverage Code

Original Value 24

EDI 834 Mapped Fields

Find | View All

First 1 of 1 Last

*Effective Date

09/16/2013

Original Description

Family (with Same-Sex Spouse)

EDI 834 Value

E6D

*EDI 834 Description

Employee and Two or More Dependents

- Mapping value US Same Sex Spouse in the **Relationship** field.

This example illustrates the fields and controls on the EDI 834 Transaction Map Table page for the mapping value US Same Sex Spouse.

EDI 834 Transaction Map Table

Field Name Relationship

Original Value SS

EDI 834 Mapped Fields

Find | View All

First 1 of 1 Last

*Effective Date

09/16/2013

Original Description

US Same-Sex Spouse

EDI 834 Value

01

*EDI 834 Description

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.

This example illustrates the fields and controls on the Benefit Rates page.

Benefit Rates

Rate Table ID: KUMED

Benefit Rate Table: [Find](#) | [View All](#) | First 1 of 1 Last

*Effective Date: 09/16/2013 [B3](#) *Effective Status: Active [+](#) [-](#)

*Benefit Rate Type: Benefit Plan and Coverage Code

*Description: ku MED Short Description: ku MED

*Premium Frequency: Monthly *Rate per Unit: None

Currency Code: USD [Q](#) [Specify Optional Limit](#)

Rate Data [Personalize](#) | [Find](#) | [View All](#) | [1-20 of 20](#) Last

Composite Rates | Detail Rates | **Tax Adjustment** [\[...\]](#)

	Benefit Plan (=)	Coverage Code (=)	Total Rate	Employee Rate	Employer Rate	
1	KUMED Q	1 Q	148.00000	0.00000	0.00000	+ -
2	KUMED Q	12 Q	295.00000	0.00000	0.00000	+ -
3	KUMED Q	14 Q	622.00000	0.00000	0.00000	+ -
4	KUMED Q	2 Q	295.00000	0.00000	0.00000	+ -
5	KUMED Q	22 Q	155.00000	0.00000	0.00000	+ -
6	KUMED Q	24 Q	155.00000	0.00000	0.00000	+ -

This example illustrates the fields and controls on the Benefit Rates — Tax Adjustment page.

Rate Data [Personalize](#) | [Find](#) | [View All](#) | [1-19 of 19](#) Last

Composite Rates | Detail Rates | **Tax Adjustment** [\[...\]](#)

	Benefit Plan (=)	Coverage Code (=)	Tax Adjustment	
1	KUMED Q	1 Q	0.00000	+ -
2	KUMED Q	12 Q	0.00000	+ -
3	KUMED Q	14 Q	0.00000	+ -
4	KUMED Q	2 Q	0.00000	+ -
5	KUMED Q	22 Q	65.00000	+ -
6	KUMED Q	24 Q	60.00000	+ -

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.

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

Benefit Program KU1 Effective Date 09/16/2013

Plan Type Find | View All First 3 of 23 Last

*Plan Type 10 Medical
 DispPlnSeq 10
 Event Rules ID KU1X Medical/Dental/Vision Rules
 Waive Coverage Allowed with Proof
 Dependent Rules ID PU1DR

☒ HIPAA Plan
☒ COBRA Plan
 Load Cross Plan Values

Self-Service Configuration

Option Personalize | Find | View All First 18-22 of 40 Last

Eligibility Cross Plan

Optn ID	*Option Type	Benefit Plan	Covg Code	Deductn Cd	Option Code	Default Option	Opt Level	Option Seq	Geog Locn	Elig ID
30	Option	KUMED	4	KUMED9	34	☐	2	34	KNUL	
127	Option	KUMED	12	KUMED9	35	☐	2	35	KNUL	
128	Option	KUMED	14	KUMED9	36	☐	2	36	KNUL	
146	Option	KUMED	22	KUMED9	37	☐	2	37	KNUL	
147	Option	KUMED	24	KUMED9	38	☐	2	38	KNUL	

This example illustrates the fields and controls on the Benefit Program page for coverage codes 22 and 24.

Option ID 147 Option Type Option
 Benefit Plan KUMED Coverage Code 24

Cost

Cost Type	Cost ID	Benefit Rate Type	Rate ID	Earnings Code	Short Description	Calc TblID
Price	168	Benefit Plan and Coverage C	KUMED			KFL3

Option ID 146 Option Type Option
 Benefit Plan KUMED Coverage Code 22

Cost

Cost Type	Cost ID	Benefit Rate Type	Rate ID	Earnings Code	Short Description	Calc TblID
Price	169	Benefit Plan and Coverage C	KUMED			KFL3

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.

This example illustrates the fields and controls on the Benefit Plan Table page.

Benefit Plan Table

Plan Type 28 Spousal Life **Benefit Plan KUSSS**

Benefit Plans Find | View All First 1 of 1 Last

*Effective Date 09/16/2013 

*Description Same Sex Spousal life Short Description SSSplfmar

Set ID SHARE 

Vendor ID USAKUFARMR  Farmers Insurance Group

SPD URL ID 

Group Number 

Default Deduction Code BUSPL  BenData: Spousal Life

Minimum Spousal Allocation %

Pay Mode

Pay Mode Pay as Deducted 

AP Payment Date Type Check Date 

This example illustrates the fields and controls on the Life and AD/D Plan Table page.

Life and AD/D Plan Table

Plan Type 28 Spousal Life

Benefit Plan KUSSS Same Sex Spousal life

Life/ADD Plans Find | View All First 1 of 1 Last

*Effective Date 09/16/2013 

Coverage Group Code  ☐ Discriminatory Life

Coverage Type

☒ Plan Level Formula ID B4XJOBRATE 

☐ Employee Level

Insured Person Type

☐ Coverage Employee

☒ Coverage Dependents ☐ Dependent Specific Coverages?

Additionally, create a new benefit rate ID on the Benefit Rates Table with tax adjustment amounts for same-sex spouse.

This example illustrates the fields and controls on the Benefit Rates page.

Benefit Rates

Rate Table ID KSSS

Benefit Rate Table Find | View All First 1 of 1 Last

*Effective Date 09/16/2013 31 *Effective Status Active + -

*Benefit Rate Type Age-Graded (By Gender, Smoker) ▼

*Description KSSS Short Description KSSS

*Premium Frequency Monthly ▼ *Rate per Unit Per Thousand ▼

Currency Code USD Q Specify Optional Limit

Rate Data Personalize | Find | View All First 1-8 of 8 Last

Composite Rates Detail Rates Tax Adjustment ...

	Gender (=)	Smoker (=)	Age (>=)	Total Rate	Employee Rate	Employer Rate	
1	Female ▼	No ▼	30	0.00000	0.00000	0.00000	+ -
2	Female ▼	No ▼	35	0.00000	0.00000	0.00000	+ -
3	Female ▼	No ▼	40	0.00000	0.00000	0.00000	+ -
4	Female ▼	No ▼	45	0.00000	0.00000	0.00000	+ -
5	Female ▼	No ▼	50	0.00000	0.00000	0.00000	+ -
6	Female ▼	No ▼	55	0.00000	0.00000	0.00000	+ -
7	Female ▼	No ▼	60	0.00000	0.00000	0.00000	+ -

Add option entries for same-sex spouse using a separate benefit plan and different benefit rate ID.

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

Benefit Program **Plan Type and Option** **Cost**

Benefit Program KU1 **Effective Date** 09/16/2013

Plan Type Find | View All First 12 of 24 Last

*Plan Type 28 Q Spousal Life + -

DispPln Seq 28

Event Rules ID KU2X Q Life and ADD Event Rules

Waive Coverage Always Allowed ▼

☐ HIPAA Plan

☒ COBRA Plan

Load Cross Plan Values

Self-Service Configuration

Option Personalize | Find | View All First 1 of 1 Last

Eligibility **Cross Plan** ...

Optn ID	*Option Type	Benefit Plan	Covg Code	Deductn Cd	Option Code	Default Option	Opt Level	Option Seq	Geog Locn	Elig ID	
146	Option ▼	KUSSS Q		BUSPL Q	3	☐	1	3	Q	KNUL Q	+ -

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** field is automatically set to **Both**.

This example illustrates the fields and controls on the Dependent/Beneficiary Data - Personal Profile page.

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.

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

This example illustrates the fields and controls on the Eligibility Rules Table page.

Eligibility Rules Table

Eligibility Rules ID: ACA1

Eligibility Parameters: Find | View All | First | 1 of 1 | Last

*Effective Date: 01/01/2000 | *Status: Active | *Description: ACA Eligibility Rules 1 | Short Description: ACA Rule 1

Eligibility Field	In Use
ACA Eligibility Status	☒
Age	☒
Benefits Status	☐
Eligibility Config 1	☐
Eligibility Config 2	☐
Eligibility Config 3	☐
Eligibility Config 4	☐
Eligibility Config 5	☐
Eligibility Config 6	☐
Eligibility Config 7	☐

ACA Eligibility Status

Criteria: Personalize | Find | View All | First | 1 of 1 | Last

*Affordable Care Act Common ID	ACA Eligibility Status
1 AC1	Eligible

Reviewing Eligibility Results

This section provides an overview of how to review benefits options that an employee is eligible for.

Benefits Eligibility Results Page

Use the Benefits 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 > Benefits Eligibility Results

This example illustrates the fields and controls on the Benefits Eligibility Results page.

Review Eligibility Results

Empl ID KU0002 Charles Baran Ben Record 0

Eligibility Rule Find | View All First 1 of 96 Last

Rule ID ACA1 ACA Eligibility Rules 1 Option Type Option
 Rule Effective Date 01/01/2000 Type Eligibility Rule
 Benefit Program KU1 Rule Result Ineligible
 Sched ID KU15 Event ID Process Date 08/26/2014

Eligibility Fields

Details	Field Compared	Field Result	Active Only	Group Method	Evaluation Method
Details	Age	Eligible			
Details	Service Months	Eligible	☐	Primary Job in Benefit Record	One or More in Group
Details	Standard Hours	Eligible	☐	Primary Job in Benefit Record	One or More in Group
Details	FTE	Eligible	☐	Primary Job in Benefit Record	One or More in Group
Details	ACA Eligibility Status	Ineligible			

Job Eligibility Evaluation Page

Use the Job Eligibility Evaluation page to view the ACA Eligibility evaluation details.

Navigation:

Click the Details link on the [Benefits Eligibility Results Page](#).

This example illustrates the fields and controls on the Job Eligibility Evaluation page.

Job Eligibility Evaluation

Charles Baran ID KU0002 Ben Record 0

Rule ID ACA1 ACA Eligibility Rules 1
 Field Compared ACA Eligibility Status
 Field Result Ineligible

Employee Values

Ben Record	Empl Record	Payroll Status	Primary Job	Incl Elig	Field Value	Job Result
0	0		☐	☐	I	Ineligible

[Return](#)

If Criteria Met

Eligibility Rule	ACA Eligibility Status
Affordable Care Act Common ID	
AC1	Eligible

Reviewing the Benefits Enrollment Snapshot

The Enrollment Reporting Snapshot process extracts data that you specify on the **Enrollment 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.

This example illustrates the Eligibility Rules report.

Report ID: BAS703A						
PeopleSoft ELIGIBILITY RULES - BENEFITS ADMINISTRATION						
Eligibility Rules Definitions as of: 01/01/2000						
Rule ID	Effective Date	Short Description	Grouping Method	Evaluation Method	Active 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 BAEIIGLD 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	-	-	-	0-99 As of: Check Dt
		Age-Yrs	-	-	-	0-999 As of: Check Dt
		Svc-Mos	Primary	1 or More	N	0.00-99.00
		Std-Hours	Primary	1 or More	N	0.000000-9.999999
		FTE	Primary	1 or More	N	
		Eligible	ACA Status	-	-	AC1
ACA2	01/01/2000	ACA Rule 2	-	-	-	0-99 As of: Check Dt
		Age-Yrs	-	-	-	0-999 As of: Check Dt
		Svc-Mos	Primary	1 or More	N	0.00-99.00
		Std-Hours	Primary	1 or More	N	0.000000-9.999999
		FTE	Primary	1 or More	N	
		Ineligible	ACA Status	-	-	AC1

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

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 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 <i>None</i> 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.

<i>Base Benefits Audit</i>	<i>Audit Functions</i>	<i>Corrective Actions</i>
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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Group Identification Table	BAS_GROUP	Define BAS (Benefits Administration) group IDs.
<u>Benefit Program Participation Page</u>	JOB_DATA_BENPRG	Assign participants to a benefit group.
<u>Benefits/FEHB Data Page</u>	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.

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.

Benefit Program Participation

Antonio Santos
Employee

Empl ID KU0010
Empl Record 0

Benefit Status ? Find First 1 of 1 Last

Benefit Record Number 0

Go To Row

Effective Date 11/10/2008

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Pay Rate Change

Reason

Job Indicator Primary Job

*Benefits System Benefits Administration

Annual Benefits Base Rate USD

Benefits Employee Status Active

Benefits Administration Eligibility ?

BAS Group ID KU1 Basic US BAS Group

Elig Fld 1

Elig Fld 2

Elig Fld 3

Elig Fld 4

Elig Fld 5

Elig Fld 6

Elig Fld 7

Elig Fld 8

Elig Fld 9

Benefit Program Participation ? Find View All First 1 of 2 Last

*Effective Date 01/01/1999

Currency Code USD

*Benefit Program KU1

GBI Master US Benefit Program

Job Data Employment Data Earnings Distribution Benefits Program Participation

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 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 Human Resources Administer Workforce)

“Understanding the Administering PAR System” (PeopleSoft Human Resources Administer Workforce)

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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

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.

Open Enrollment Definition

Open Enrollment Definition ID KC00

*Period Begin Date 01/01/2000 *Period End Date 12/31/2000

*Description Canadian Open Enrollment 2000 Short Description CAN OE2000

Self-Service Configuration

Enrollment Begin Date Enrollment End Date

Benefit Programs Personalize Find View All First 1 of 1 Last

*Benefit Program	Description
KC1	GBI Master CAN Benefit Program

Field or Control	Description
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.

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:

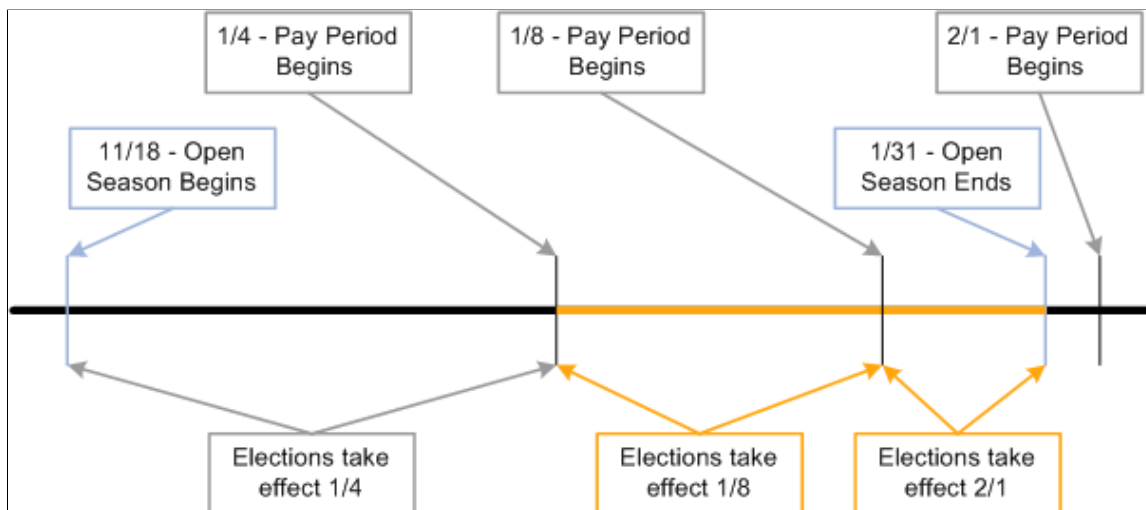
Open Season Processing Setup	Floating Event Date Outcome
System date or elect date is less than the period begin date.	Floating event date is the period begin date.
System date or elect date is greater than the open season end date.	Floating event date is the open season end date.
System date or elect 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.

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:

<i>If Elections Are Received...</i>	<i>...the Event Date Is...</i>	<i>...and Coverage Starts...</i>
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.

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

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.

Snapshot Definition

Definition ID KC01

*Period Begin Date 01/01/1999

*Description Canadian Snapshot

Short Description CAN Snap

☒ Validate Current Elections

☒ Calculate Option Prices

☐ Allow Finalization

Benefit Programs		Personalize Find View All		First	1 of 1	Last
*Benefit Program	Description					
KC1	GBI Master CAN Benefit Program					

Field or Control	Description
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 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.

Page Used to Establish a Processing Schedule

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Schedule Table Page</u>	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

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.

Schedule Table

Schedule ID KC00

*Description Canadian Open Enrollment 2000

Short Description CAN OE2000

*Ben Admin Type Open Enrollment

Company GBI Global Business Institute

BAS Group ID KC1 Basic Canadian BAS Group

☐ No New Events

☒ Available through Self Service

Open Enrollment Only

Open Enrollment Definition ID KC00 Canadian Open Enrollment 2000

Open Enrollment Status Flag S Scheduled

Snapshot Only

Snapshot Definition ID

Snapshot Status Flag U Unprocessed

Field or Control	Description
Ben Admin Type (Benefits Administration type)	Select from the following values: <i>Open Enrollment</i> , <i>Event Maintenance</i> , or <i>Snapshot</i> .
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](#)

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.

This example illustrates the layout of the Open Enrollment component showing the Summary page.

✕ Exit

Open Enrollment

⏪ Previous

Enrollment Period 7/1/2018 - 12/31/2018

Olivia James

Welcome

○ Visited

Personal Information

○ Visited

Dependent/Beneficiary Info

○ Visited

Benefits Summary

○ Visited

Benefits Enrollment

○ Visited

Summary

○ Visited

Summary

If you have submitted your enrollment, review your elections on the Benefits Statements step and keep a copy of your elections as a record. If you have not completed your elections, go to the Benefits Enrollment step and complete your elections and select the Submit Enrollment button.

You can return to this event before 11:59PM PST, 12/31/2018 by selecting the Open Enrollment tile on Employee Self Service. Once the open enrollment period ends, your elections will be validated and finalized. If you did not submit your elections, your enrollment will be based on the default options. Contact your benefits administrator if you have further question.

Steps

7 rows

Step	Status	Go to Step
Welcome	○ Visited	Go to Step
Name	○ Visited	Go to Step
Home and Mailing Address	○ Visited	Go to Step
Contact Information	○ Visited	Go to Step
Dependent/Beneficiary Info	○ Visited	Go to Step
Benefits Summary	○ Visited	Go to Step
Benefits Enrollment	○ Visited	Go to Step

Related Links

[“Understanding the Activity Guide Composer” \(Enterprise Components\)](#)

[Getting Started with the Activity Guide for Open Enrollment](#)

[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” (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

<i>Permission List</i>	<i>Role</i>	<i>Description</i>
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” (Enterprise Components) documentation and the [Working with Open Enrollment Categories](#) topic below.

3. Create Activity Guide Templates

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” (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 <i>OBI</i> parameter value as temporary data for this step as the acknowledgement parameter under the Additional Step Content section of the “AG Composer Categories - Steps Page” (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” (Enterprise Components).
ADDRESS	Home and Mailing Address	
BENEFIT SUMMARY	Benefits Summary	

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” (Enterprise Components)

“Cloning Activity Guide Categories” (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.

Related Links

“Managing Activity Guide Templates” (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” (Enterprise Components) and “Managing Activity Guide Templates” (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” (Enterprise Components)

- You can clone the delivered *Open Enrollment* category by accessing the “Clone Category Page” (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” (Enterprise Components)).

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” (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” (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” (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” (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.

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

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.

Open Enrollment Definition

Fluid Activity Guide

Open Enrollment Definition

Open Enrollment Definition ID TO19

*Period Begin Date 01/01/2019

*Period End Date 12/31/2019

*Description Test Ben Open Enrollment 2019

Short Description TbenOE19

Self-Service Configuration

Enrollment Begin Date 07/01/2018

Enrollment End Date 12/31/2018

Benefit Programs

1-1 of 1

View All

*Benefit Program	Description		
BTF	Benefits Test Fluid OE	+	-

Field or Control	Description
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.

Navigation:

Set Up HCM > Product Related > Automated Benefits > Processing Controls > Open Enrollment Definition > Fluid Activity Guide

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.

Open Enrollment Definition
Fluid Activity Guide

Open Enrollment Definition ID TO19 Test Ben Open Enrollment 2019

Tile Configuration

Tile Image PS_OPEN_ENROLL_L_FL



Activity Guide Configuration

Activity Guide Category OPENENROLLMENT

Template ENROLLM

Open Enrollment

Template Image PS_LOGO_L_FL



Field or Control	Description
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 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
<u>Open Enrollment Tile</u>	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.
<u>Welcome Page</u>	AGC_VIDEO_FL	Watch a video or read a transcript of the video.
<u>Personal Information – Name Page</u>	HR_EE_NAME_FL	Verify your name and make updates, if needed.
<u>Personal Information – Home and Mailing Address Page</u>	HR_EE_ADDR_FL	Verify your home and mailing address and make updates, if needed.

Page Name	Definition Name	Usage
<u>Personal Information – Contact Information Page</u>	HR_EE_CONTACTS_FL	Review or update your phone numbers, email addresses, and instant messaging IDs, if needed.
“Dependent and Beneficiary Information Page” (PeopleSoft eBenefits)	W3EB_DEPBNSMRY_FL	Review or update your dependent/beneficiary information, if needed.
<u>Benefits Enrollment Page</u>	BNE_CARD_SUMM_FL	Review your benefit plan elections.
<u>Benefits Statements Page</u>	BAS_STMT_LIST_FL	View a list of benefits enrollment preview and confirmation statements.
<u>Summary Page</u>	AGC_SUMMARY_FL	View a summary of your open enrollment activities or return to a specific step in your Open Enrollment activity guide.

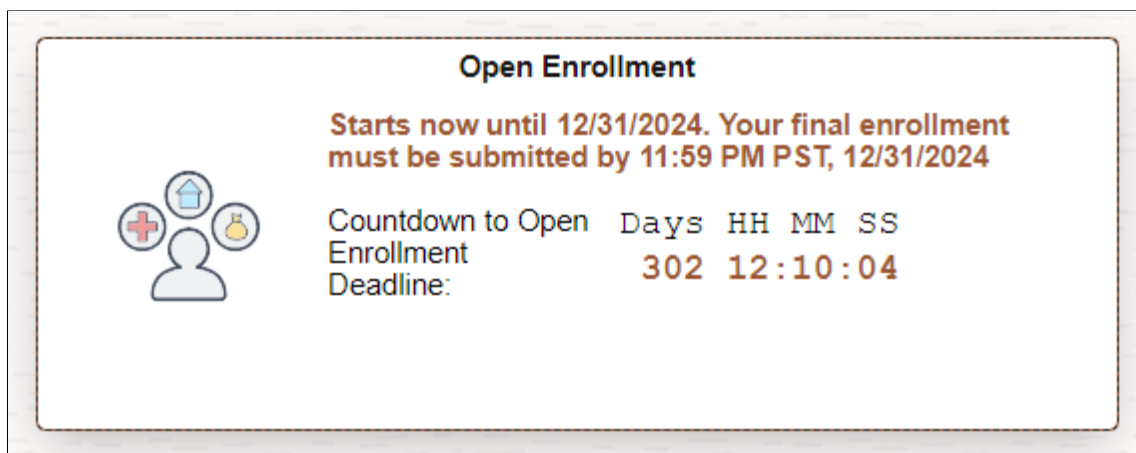
Open Enrollment Tile

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.

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.

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](#).

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.

Welcome Page

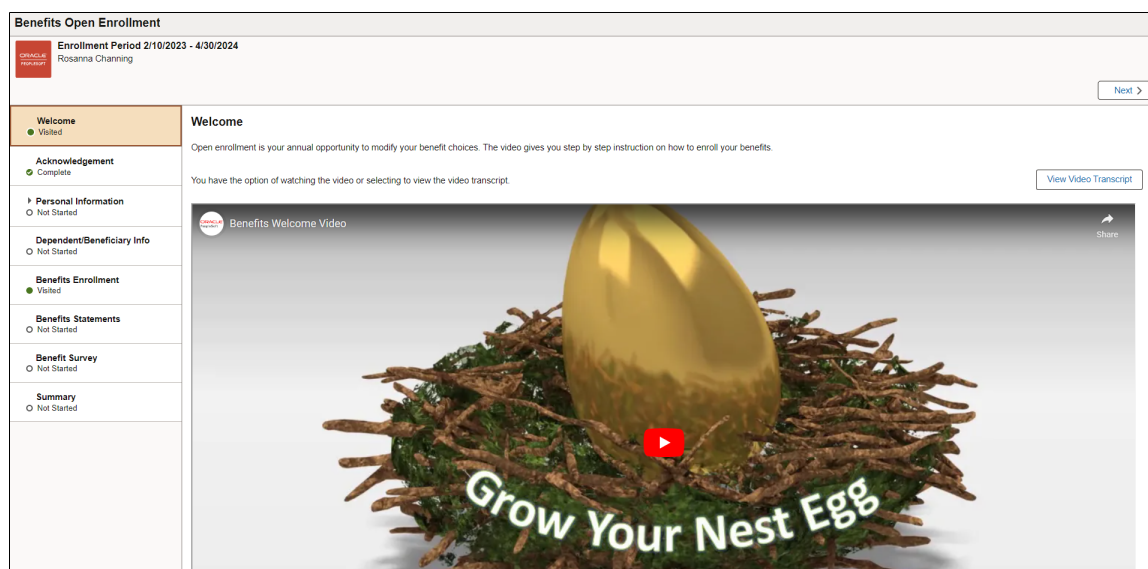
Use the Welcome page (AGC_VIDEO_FL) to watch a video or read a transcript of the video. This page may contain custom information about your organization.

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.

This example illustrates the Welcome page in the Open Enrollment activity guide.



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.

This example illustrates the Personal Information – Name page in the Open Enrollment activity guide.

Benefits Open Enrollment

Enrollment Period 2/10/2023 - 4/30/2024
Rosanna Channing

< Previous Next >

Welcome
● Visited

Acknowledgement
● Complete

Personal Information
● Visited

Name
● Visited

Home and Mailing Address
○ Not Started

Contact Information
○ Not Started

Dependent/Beneficiary Info
○ Not Started

Personal Information - Name

Your Format Name identifies you for official purposes such as government documents. Your Display Name is the name you wish to be known by and will appear on most transactions and reports.

Current

Format Name: Ms Rosanna Channing Display Name: Rosanna Channing Details ^

Name Prefix: Ms First Name: Rosanna
Middle Name: Channing Last Name: Channing
Name Suffix: Preferred First Name

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.

This example illustrates the Home and Mailing Address page in the Open Enrollment activity guide.

Benefits Open Enrollment

Enrollment Period 2/10/2023 - 4/30/2024
Rosanna Channing

< Previous Next >

Welcome
● Visited

Acknowledgement
● Complete

Personal Information
● Visited

Name
● Visited

Home and Mailing Address
● Visited

Contact Information
○ Not Started

Personal Information - Home and Mailing Address

Home Address

1430 North West Blvd
Apt B215
Guttenberg, NJ 07093 Current

Mailing Address

1430 North West Blvd
Apt B215
Guttenberg, NJ 07093 Current

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.

This example illustrates the Contact Information page in the Open Enrollment activity guide.

Benefits Open Enrollment

Enrollment Period 2/10/2023 - 4/30/2024

Rosanna Channing

< Previous

Next >

Welcome

Visited

Acknowledgement

Complete

Personal Information

Visited

Name

Visited

Home and Mailing Address

Visited

Contact Information

Visited

Dependent/Beneficiary Info

Not Started

Benefits Enrollment

Visited

Benefits Statements

Not Started

Benefit Survey

Not Started

Personal Information - Contact Information

Phone

+

Number	Extension	Type	Preferred	
925 555 1234		Business	✓	>
925 555 1111		Mobile		>

Email

+

Email Address	Type	Preferred	
Rosanna.Channing@oraclesample.com	Business	✓	>

Instant Message

+

ID	Protocol	Domain	Preferred	
RosannaChanning	YAHOO	YAHOO	✓	>

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.

This example illustrates the fields and controls on the Dependent/Beneficiary Info page.

Benefits Open Enrollment

Enrollment Period 2/10/2023 - 4/30/2024

Rosanna Channing

< Previous

Next >

Welcome

Visited

Acknowledgement

Complete

Personal Information

Visited

Dependent/Beneficiary Info

Visited

Benefits Enrollment

Visited

Benefits Statements

Not Started

Benefit Survey

Not Started

Summary

Not Started

Dependent/Beneficiary Info

Add Individual

Name	Relationship	Beneficiary	Dependent	
Robert Channing	Spouse	✓	✓	>
Jason Channing	Child	✓	✓	>

For details on this page, refer “Dependent and Beneficiary Information Page” (PeopleSoft 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.

This example illustrates the Benefits Enrollment page in the Open Enrollment activity guide.

Benefits Open Enrollment
Enrollment Period 2/10/2023 - 4/30/2024
Rosanna Channing

Benefits Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

Enrollment Summary

Your Pay Period Cost: **\$-24.56**
Status: **Pending Review**
*Excess Credit: **Cash**
[Preview Statement](#)
[Submit](#)

Full Cost: **\$322.77**
General Credits: **\$-278.33**
Plan Credits: **\$-69.00**

Benefit Plans

Wellness Credit	Medical	Dental
Current: No Coverage New: No Coverage Status: Pending Review	Current: Enhanced Medical Plan New: Enhanced Medical Plan Status: Pending Review 1 Dependents	Current: Enhanced Dental Plan New: Enhanced Dental Plan Status: Pending Review 1 Dependents
Pay Period Cost: \$0.00 Review	Pay Period Cost: \$83.00 Review	Pay Period Cost: \$8.25 Review

Contact Information
Phone: 646/350-1111
Email: HCNSENUser1@mailtest.com
Address: Benefits Administrator
500 George Washington Ploway
New York, NY 07696

Resources
[GBI Benefits Handbook](#)

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, submitted enrollment, and confirmation statements.

Navigation:

Select the Benefits Statements step from the activity guide navigation, or use the Next button to navigate to the page.

This example illustrates the Benefits Statements page.

Benefits Open Enrollment
Enrollment Period 2/10/2023 - 4/30/2024
Rosanna Channing

Benefits Statements

Statement Type:

Event Date	Issue Date	Enrollment Event	Statement Type
01/01/2019	20/02/2019	Open Enrollment 2019	Confirmation Statement
01/01/2018	07/12/2018	Open Enrollments 2018	Confirmation Statement

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.

This example illustrates the Summary Page in the Open Enrollment activity guide.

Benefits Open Enrollment			
ORACLE Enrollment Period 2/10/2023 - 4/30/2024 Rossanna Channing Previous			
Welcome ● Visited	Summary		
Acknowledgement ● Complete	If you have submitted your enrollment, review your elections on the Benefits Statements step and keep a copy of your elections as a record. If you have not completed your elections, go to the Benefits Enrollment step and complete your elections and select the Submit Enrollment button.		
Personal Information ● Visited	You can return to this event before 11:59PM PST, 4/30/2024 by selecting the Open Enrollment tile on Employee Self Service. Once the open enrollment period ends, your elections will be validated and finalized. If you did not submit your elections, your enrollment will be based on the default options. Contact your benefits administrator if you have further question.		
Dependent/Beneficiary Info ● Visited	Steps 9 rows 1		
Benefits Enrollment ● Visited	Step	Status	Date CompletedGo to Step
Benefits Statements ● Visited	Welcome	● Visited	Go to Step
Benefit Survey ● Visited	Acknowledgement	● Complete	01/04/2024Go to Step
Summary ● Visited	Name	● Visited	Go to Step
	Home and Mailing Address	● Visited	Go to Step
	Contact Information	● Visited	Go to Step
	Dependent/Beneficiary Info	● Visited	Go to Step

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.

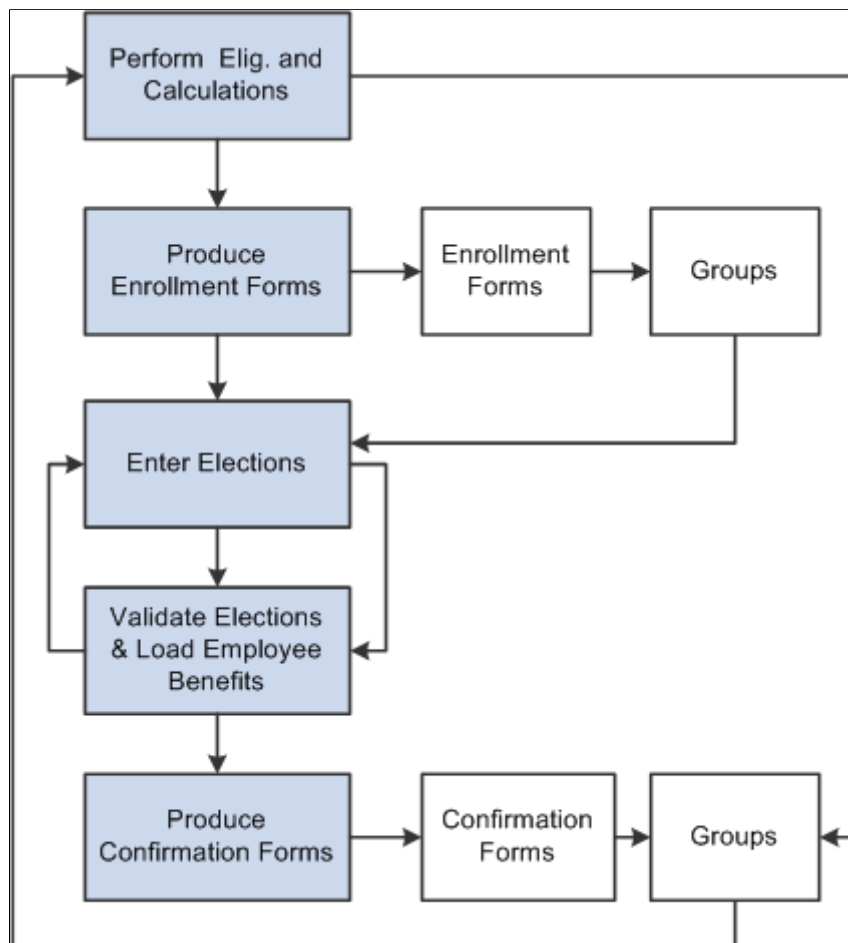
Open Enrollment

You use open enrollment for periodic benefits reenrollment across your employee population.

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:

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:

- 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.

- 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.

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 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:

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: <i>AS</i> (Assigned) or <i>AN</i> (Assigned None). If scheduling is not successful: <i>AE</i> (Assigned Error). If option preparation is successful: <i>PR</i> (Prepared), <i>FA</i> (Finalized Program None), or <i>FP</i> (Finalized Prepared None). No additional processing will occur for participants with an <i>FA</i> or <i>FP</i> Process Status. If option preparation is unsuccessful: <i>PE</i> (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).	

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 <i>NT</i> (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 <i>ET</i> (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 <i>FE</i> (Finalized - Enrolled). If errors occur in the validation and load process, the participant's process status will be <i>EE</i> (Election Error).
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.	

Step	Description	Details	Pages or Processes Used	Process Status Result
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 <i>FE</i> (Finalized - Enrolled).
12	Create and deliver confirmation letters to participants.		(BAS005) Confirmation Statements.	

Understanding the Benefits Administration Process Status

This section discusses:

- 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:

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.

Process Status	Description	Next Processing Steps
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:

- 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:

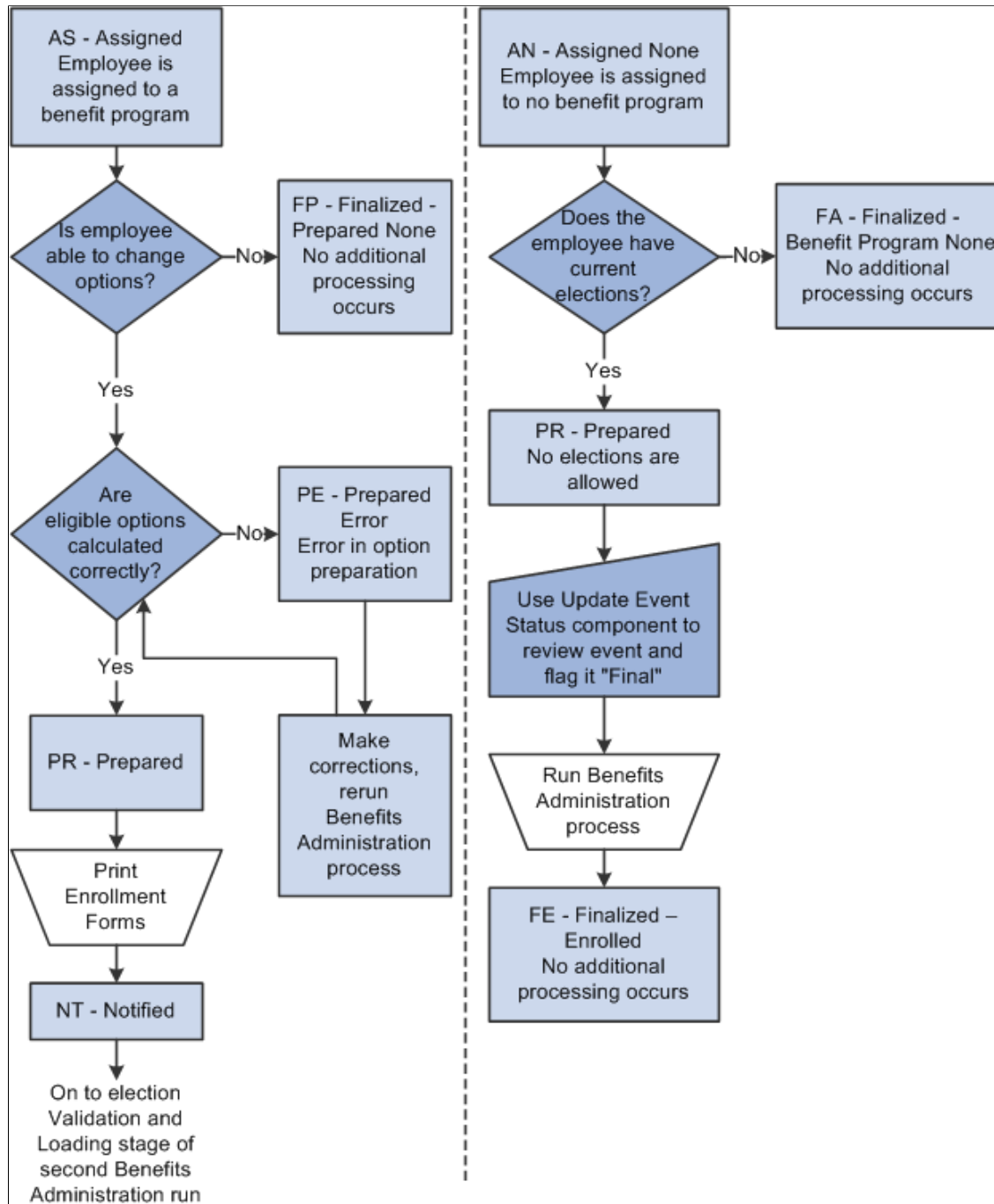
<i>Process Status</i>	<i>Description</i>	<i>Next Processing Steps</i>
FA - Finalized - Benefit Program None	Participant event has no program assignment and no current elections. Used for events assigned an AN process status during the Scheduling and Program Assignment and for which associated participants 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.

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:

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:

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 <i>force finalize</i> 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.

Related Links

[Process Status and Reprocessing Finalized Events](#)

Process Status and Reprocessing Finalized Events

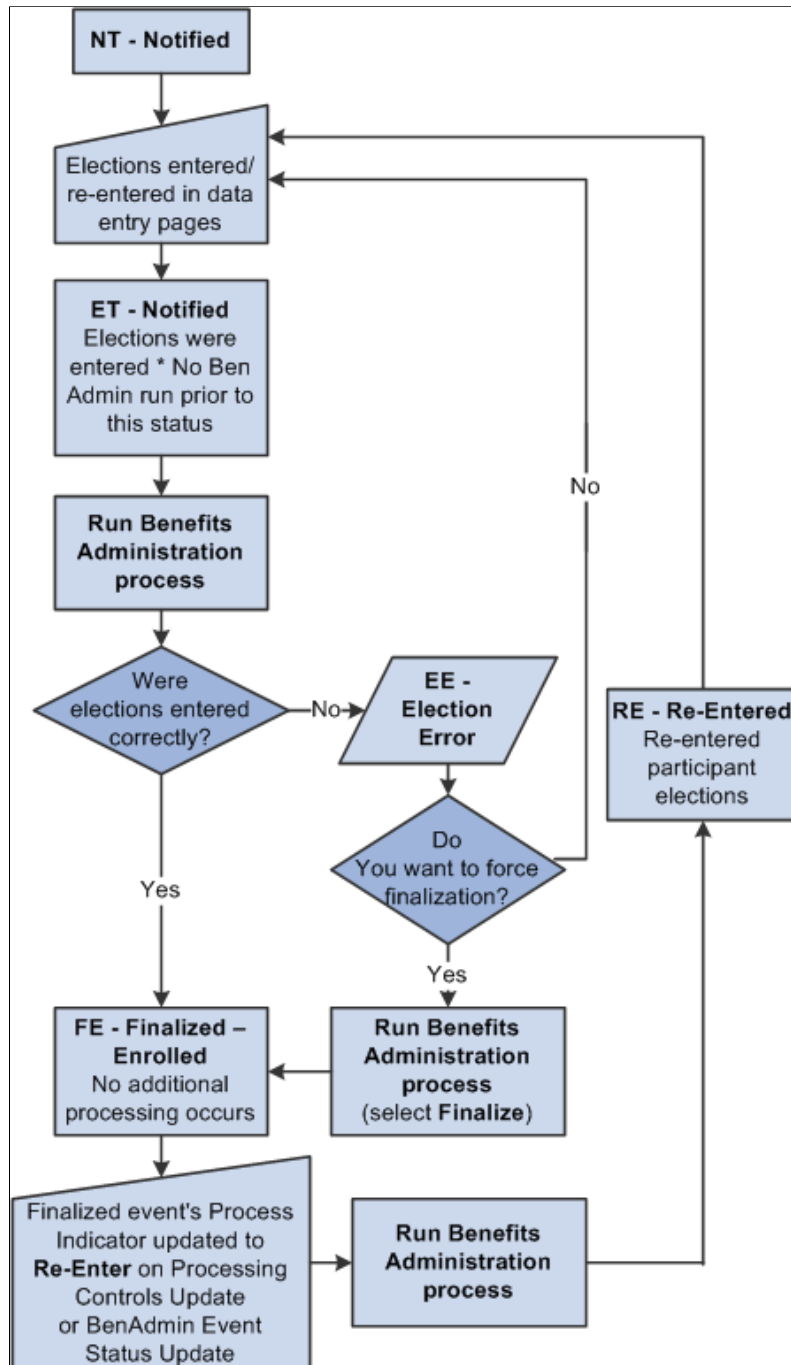
You can reprocess events at almost every stage of the Benefits Administration process, from scheduling to election entry. In many cases, event reprocessing does not involve process status values other than those described previously, but when you're planning to reenter participant benefit option elections, 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:

<i>Process Status</i>	<i>Description</i>	<i>Next Processing Steps</i>
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:

This image describes the process status flow for election entry, validation, loading, and reentry.



Related Links

[Process Status and Reprocessing Finalized Events](#)

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.

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.

Page Name	Definition Name	Usage
<u>Participant Lists Page</u>	BAS_RUNCTL2	Add participants to a schedule you're processing, or process a specific set of employees.
<u>OE/Snapshot Page</u>	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.
<u>Passive Event Processing Page</u>	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

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 and Chkpt Restart		<u>Participant Lists</u>	<u>OE/Snapshot</u>	<u>Passive Event Processing</u>								
Run Control ID 1		Report Manager	Process Monitor	Run								
Process Date 01/17/2014 *Schedule ID BEM101 Canadian Employees EM *EM Process Mode Schedule and Process Events												
BAS Type E		Event Maintenance										
Company												
BAS Group ID B02		Canadian Employees										
Restart/Debug Information ?		Restart Position ?										
Chk Point Interval in Minutes 0.50 BAS Processing Phase R Ready ☐ Record Eligibility Results		<table border="1"> <tr> <td>Benefit Program</td> <td>Passive Event ID</td> </tr> <tr> <td>Event Date</td> <td></td> </tr> <tr> <td>Empl ID</td> <td>Ben Record 0</td> </tr> <tr> <td>Event ID</td> <td> Clear </td> </tr> </table>			Benefit Program	Passive Event ID	Event Date		Empl ID	Ben Record 0	Event ID	Clear
Benefit Program	Passive Event ID											
Event Date												
Empl ID	Ben Record 0											
Event ID	Clear											

Field or Control	Description
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: • <i>Schedule and Process Events</i>: 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. • <i>Schedule New Events Only</i>: 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. • <i>Process Existing Events Only</i>: 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.

Field or Control	Description
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 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

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.

<i>Field or Control</i>	<i>Description</i>
Process From Participant List	Select to use the remaining features on this page.
Schedule Only Employee(s)	Indicate which specific employees should have new events added to an Open Enrollment or Event Maintenance schedule.
Process Only Participant(s)	Use to process a list of specific participants with existing events (rather than processing all participants within the schedule), sorted by benefit record number (for employees with multiple jobs) and event ID. You may need to go to the Event Status Update page and indicate the phase to process for this employee (update the Process Indicator field).

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

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.

The screenshot shows the OE/Snapshot page with the following elements:

- Tabs: [Schedule and Chkpt Restart](#), [Participant Lists](#), **OE/Snapshot**, [Passive Event Processing](#)
- Links: [Run Control ID 1](#), [Report Manager](#), [Process Monitor](#), [Run](#)
- Reprocess section:
 - ☒ None
 - ☐ Schedule
 - ☐ Assign Benefit Pgm
 - ☐ Prepare Options
 - ☐ Elect Options
- Checkboxes:
 - ☐ Schedule New Participants
 - ☐ Finalize/Apply Defaults

Use this page to reset the entire population in your Open Enrollment or Snapshot schedule to the selected action.

Field or Control	Description
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.
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.

Field or Control	Description
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

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.

Field or Control	Description
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.

Field or Control	Description
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.

Related Links

[Passive Benefits 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
Benefits Processing Messages Page	BAS_MESSAGES	Review errors that occurred during the last batch of BenAdmin processing.
Enrollment 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).

Page Name	Definition Name	Usage
<u>Option and Cost Page</u>	BAS_PARTIC_INQ4	Review costs and credits for a participant and plan type.
<u>Passive Benefits Event History Page</u>	PASSIVE_EVENT_HIST	Review passive event history for a specified process date.

Benefits Processing Messages Page

Use the Benefits Processing Messages page (BAS_MESSAGES) to review errors that occurred during the last batch of BenAdmin processing.

Navigation:

Benefits > Manage Automated Enrollment > Review Processing Results > Benefits Processing Messages > Processing Messages > Benefits 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.

Error Category	Description	Solution
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.

Enrollment Schedule Summary Page

Use the Enrollment Schedule Summary page (BAS_PARTIC_SUM) to review employee counts for all available status values.

Review process results for schedules.

Navigation:

Benefits > Manage Automated Enrollment > Review Processing Results > Enrollment Schedule Summary > Enrollment Schedule Summary

This example illustrates the fields and controls on the Enrollment Schedule Summary page. You can find definitions for the fields and controls later on this page.

Schedule Summary			
Schedule ID KUEM		US Event Maintenance	
Participant Count 80			
Process Status Totals		Event Status Totals	
Assn Error	0 0.00%	Open	7 8.75%
Assn None	0 0.00%	Closed	73 91.25%
Assigned	0 0.00%	Voided	0 0.00%
Prep Error	0 0.00%	Process Indicator Totals	
Prepared	7 8.75%	Normal	80 100.00%
Notified	0 0.00%	Assign	0 0.00%
Re-Enter	0 0.00%	Prepare	0 0.00%
Entered	0 0.00%	Re-Enter	0 0.00%
Elect Err	0 0.00%	Elect	0 0.00%
Enrolled	62 77.50%	Void	0 0.00%
Prog None	1 1.25%	Finalize Totals	
Prep None	10 12.50%	Finalize	0 0.00%
		Elig Changed Totals	
		Address	0 0.00%
		Job	1 1.25%
		MultiJob	0 0.00%
		Out of Sequence Totals	
		Seq	0 0.00%
		Disconnected Event Totals	
		Disc	0 0.00%

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.

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 Event Process Controls > BenAdmin Processing Controls

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.

The screenshot shows the 'BenAdmin Processing Controls' page. It has two main sections: 'Required Search Fields' and 'Optional Search Fields'.
 Under 'Required Search Fields':
 - 'Schedule ID' is set to 'KUEM' with a magnifying glass icon and the text 'US Event Maintenance' to its right.
 - 'Empl ID' is set to 'KU0011' with a magnifying glass icon and the text 'Patrick Seto' to its right.
 Under 'Optional Search Fields':
 - 'Benefit Program' is set to 'KU1' with a magnifying glass icon and the text 'GBI US Fulltime Benefit Pgm' to its right.
 - 'Event Classification' is set to 'FSC' with a magnifying glass icon and the text 'Family Status Change' to its right.
 - 'Event Status' is set to 'O' with a magnifying glass icon and the text 'Open for Processing' to its right.
 - 'Process Status' is set to 'AE' with a magnifying glass icon and the text 'Program Elig Assign Error' to its right.
 - 'Process Indicator' is set to 'E' with a magnifying glass icon and the text 'Elect Options' to its right.
 Below these are several checkboxes:
 - ☐ Finalize/Apply Defaults
 - ☐ Event Disconnected
 - ☐ MultiJob Indicator Changed
 - ☐ Event Out of Sequence
 - ☐ Address Eligibility Changed
 - ☐ Job Eligibility Changed

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.

Field or Control	Description
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.

Navigation:

Benefits > Manage Automated Enrollment > Events > Update Event Process Controls > BenAdmin Processing Controls

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.

The screenshot shows the 'BenAdmin Processing Controls' page with a search results table. The table has columns: Sched ID, Empl ID, Ben Record, Event Date, Event Class, Event ID, Pgm, and Event Status. Two results are shown for event class 'Misc Chang'.

Sched ID	Empl ID	Ben Record	Event Date	Event Class	Event ID	Pgm	Event Status
KUEM	KU0002	0 Charles Baran	11/10/2008	Misc Chang	1	KU1	Closed
Process Status: Enrolled *Process Indicator: Normal Processing (dropdown) ☐ Addr Elig Chg ☐ MultJobChg Suppress Forms: Print Both Forms (dropdown) ☐ Event Out of Sequence ☒ Disconnected ☐ Job Elig Chg ☐ Final/Dflt							
KUEM	KU0003	0 Jean Parsons	11/04/2008	Misc Chang	1	KU1	Closed
Process Status: Enrolled *Process Indicator: Normal Processing (dropdown) ☐ Addr Elig Chg ☐ MultJobChg Suppress Forms: Print Both Forms (dropdown) ☐ Event Out of Sequence ☒ Disconnected ☐ Job Elig Chg ☐ Final/Dflt							

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

Field or Control	Description
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 Human Resources Manage Base Benefits)

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 Enroll Event Detail > Participant

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

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

Field or Control	Description
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.

Field or Control	Description
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.
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 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 Enroll Event Detail > Plan Type

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.

Field or Control	Description
Curr Election (current election)	Options are: <i>Yes</i>: The employee had coverage in this plan type as of the event date. <i>No</i>: The employee did not have coverage in this plan type as of the event date. <i>Only</i>: 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 <i>only</i> because it will be terminated. <i>Future</i>: 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 <i>None</i> and <i>Elect</i>. After finalization, Enroll Action can be either: <i>None</i>: No action occurred for this plan. <i>Enroll</i>: Coverage Elect is set to <i>Waive</i> or <i>Elect</i>. <i>Term</i>: Coverage Elect is set to <i>Terminate</i>. A participant receives an enroll action of <i>None</i> 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 <i>None</i> if an error occurs with the election, or no current election, when the participant is finalized.

Field or Control	Description
BAS Error (Benefits Administration system error)	An error has occurred during eligibility, event rule, or election processing for this plan type.
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 Enroll Event Detail > Option and Cost

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.

Participant Plan Type **Option and Cost**

Sched ID KC00 Empl ID KC0001 Ben Record 0 Event ID 0

Plan Types Find | View All First 3 of 19 Last

Plan Seq 14 Plan Type Vision

Options Find | View All First 1 of 4 Last

Option Seq 1 Option ID 1 Option Type Waive Option

Benefit Plan Coverage Code

Option Code W Option Level ☐ Default Election

Coverage Base Premium Base ☐ Proof Required

Dedn Class ☐ Potential Tax Impact ☐ History Only

Applies To Pay Periods

☐ First ☐ Second ☐ Third ☐ Fourth ☐ Fifth

Option Cost

Cost ID	Cost Type	Earn Code	Description	Annual After Tax	Annual Before Tax	Annual ER	After Tax Deduction	Before Tax Deduction	Employer Deduction

Field or Control	Description
Default Election	When selected, this option indicates that the option will be assigned as a default to participants who fail to make their elections. It does not mean that this option has already been assigned to this participant as a default option.
Proof Required	When selected, 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 <i>employer</i> cost represents the sum of any N-Tax and T-Tax cost components.

Field or Control	Description
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 <i>employer</i> 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 Benefits Event History Page

Use the Passive Benefits 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 Benefits Event History > Passive Benefits Event History

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

The screenshot shows the 'Passive Event History' page. At the top, there is a 'Search Criteria' section. It contains four input fields: 'Process Run Date', 'From Date', 'Passive Event ID', and 'To Date'. Each date field has a small calendar icon to its right. Below these fields is an orange 'Search' button.

Field or Control	Description
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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Update Event Status Page</u>	BAS_PARTIC_STS	Identify event status information for events that are updated or reprocessed.

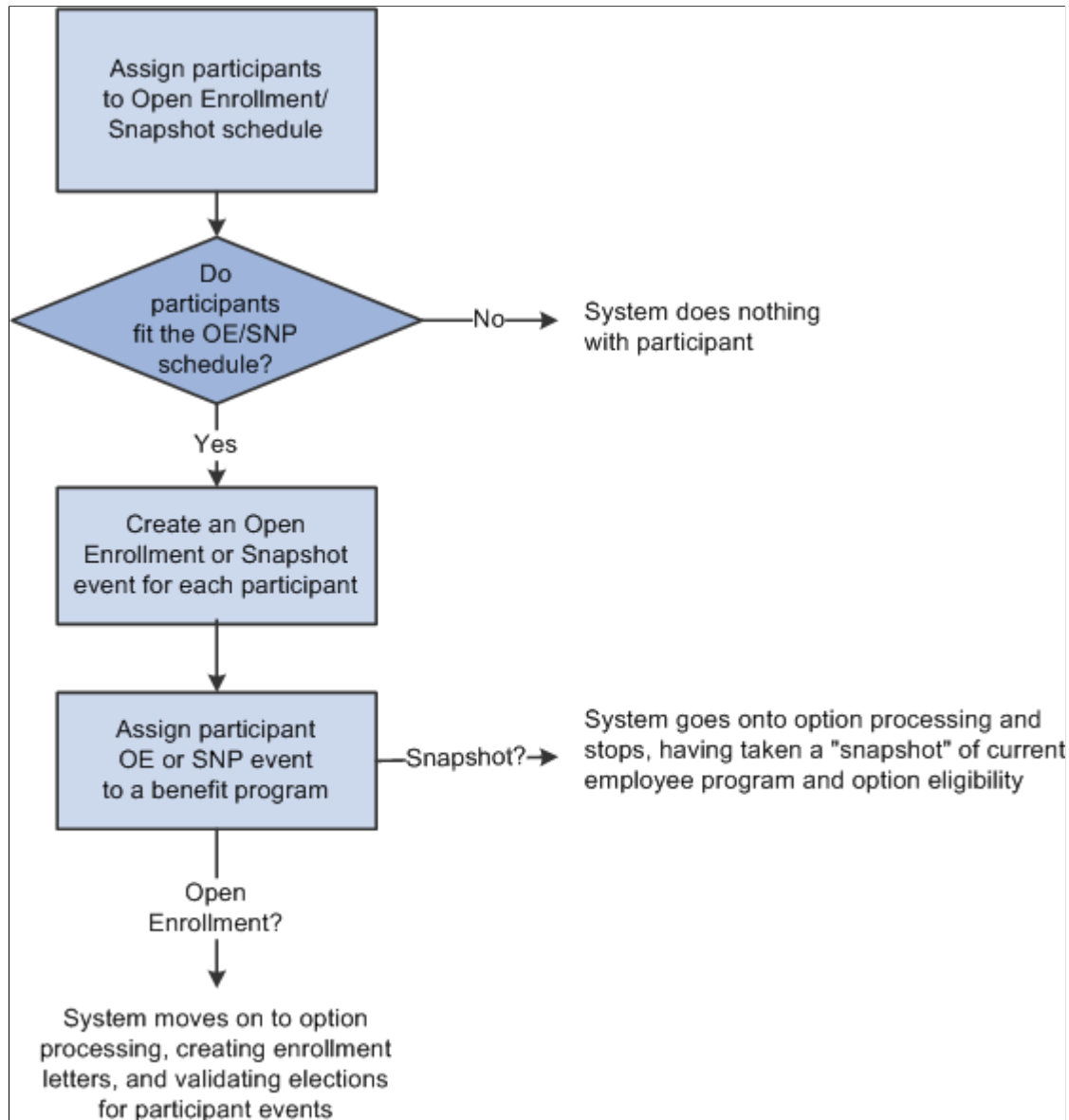
Scheduling Events and Assigning Programs for Open Enrollment

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:

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.

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:

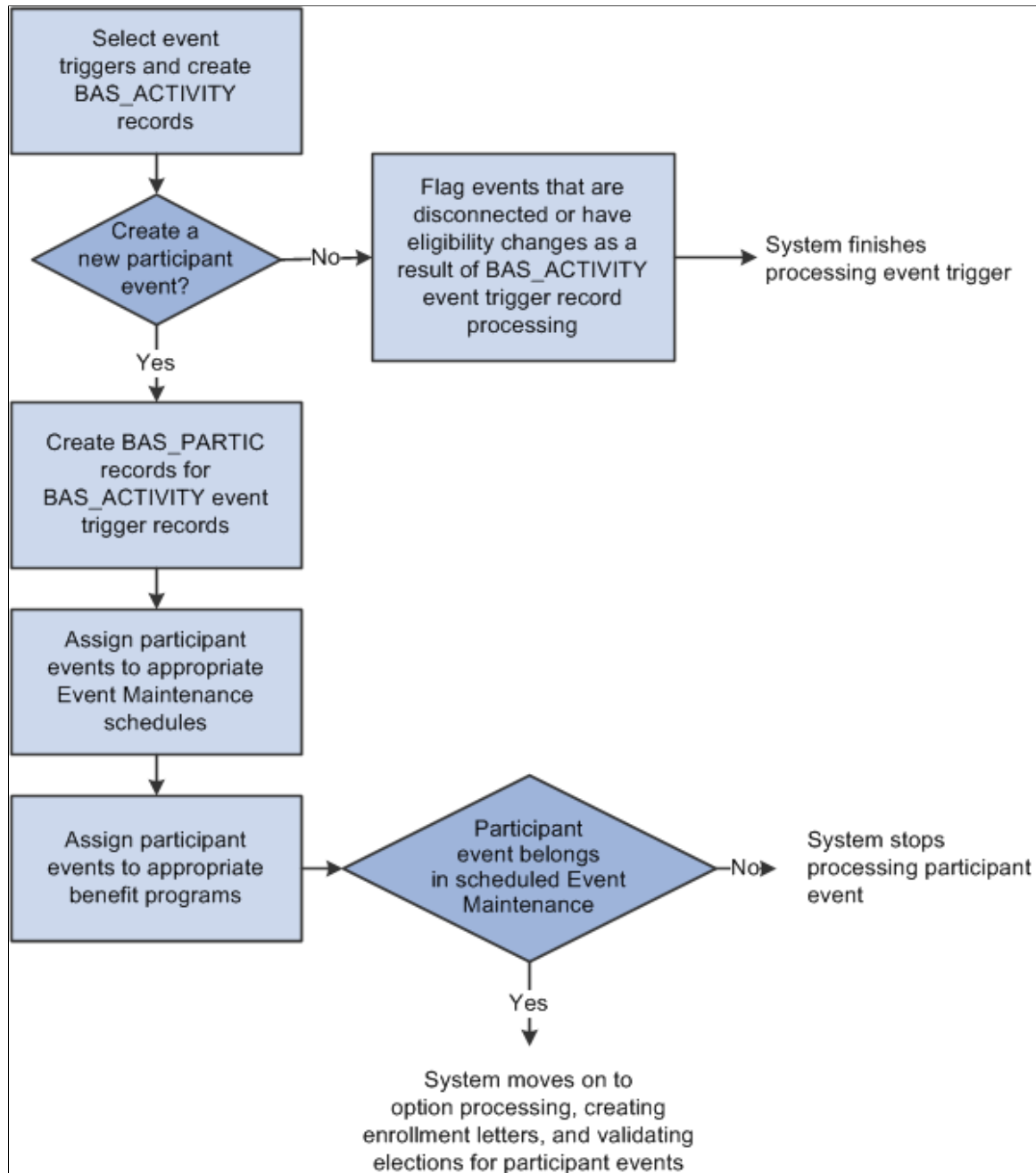
- Create a new participant event for the activity in BAS_PARTIC.
- If the creation of the new participant event affects the eligibility processing for an existing event, flag that event to indicate that it may need reprocessing.
- If the trigger information for the event has been deleted or changed, 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:

This image illustrates the event maintenance scheduling and program assignment flowchart.



Related Links

[Analyzing Disconnected Events](#)

[Managing Unprocessed Activities for Event Maintenance](#)

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](#)

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.

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.

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.

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
Benefits 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 Event Process Status	RUNCTL_BAS027	Lists all participants in a particular process status or set of status levels.
Report on Flagged Events 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 Report	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 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.

Page Name	Definition Name	Usage
Invalid Elections Report	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 Report	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 Benefits 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](#)

Benefits Eligibility Results Page

Use the Benefits Eligibility Results page (BAS_ELIG_DEBUG) to review the results of program eligibility processing for specific employees.

Navigation:

Benefits > Manage Automated Enrollment > Investigate Exceptions > Benefits Eligibility Results > Benefits Eligibility Results

<i>Field or Control</i>	<i>Description</i>
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.

<i>Field or Control</i>	<i>Description</i>
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:

Click a link in the **Eligibility Fields** group box of the [Benefits Eligibility Results Page](#) to access the Job Eligibility Evaluation page.

Field or Control	Description
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.
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: • <i>Eligible</i>: The job passed the eligibility check. • <i>Ineligible</i>: The job did not pass the eligibility check. • <i>Not evaluated</i>: 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 Events Page

Use the Report on Flagged Events 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 Events > Report on Flagged Events

This example illustrates the fields and controls on the Report on Flagged Events page. You can find definitions for the fields and controls later on this page.

Report On Flagged Items

Run Control ID PS
Report Manager
Process Monitor
Run

Language English

Schedule ID
(Leave blank for all schedules)

From Date 01/01/2014

Thru Date 01/17/2014

☐ Include Summary

Report Participants Flagged for

☐ Address Eligibility Changed
☐ Event Disconnected
☐ MultiJob Indicator Changed
☐ Event Out of Sequence
☒ Job Eligibility Changed

Field or Control	Description
Schedule ID	To print flagged events from all schedules, leave this field blank.
Include Summary	Select to include summary information on all flagged participant events.
Reports Participants Flagged for	Select all of the criteria in this group box to use when reporting on 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 Participant Statement Page	BAS_PRINT	Set up print IDs for reprinting statements.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Print Benefits 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.

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

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.

Field or Control	Description
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.

Field or Control	Description
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.

Field or Control	Description
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 Participant Statement Page

Use the Reprint Participant Statement page (BAS_PRINT) to set up print IDs for reprinting statements.

Navigation:

Benefits > Manage Automated Enrollment > Participant Enrollment > Reprint Participant Statement > Reprint Participant Statement

This example illustrates the fields and controls on the Reprint Participant Statement 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*.

Field or Control	Description
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 <i>1</i> or higher for an Event Maintenance schedule. An event ID of <i>0</i> 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 <i>0</i>.

Related Links

“Understanding Multiple Jobs” (PeopleSoft Human Resources Manage Base Benefits)

Entering Participant Benefit Elections

This section provides an overview of data entry for participant benefit elections.

Pages Used to Enter Participant Benefit Elections

Page Name	Definition Name	Usage
<u>Event/Participant Selection Page</u>	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.
<u>Option Election Page</u>	BAS_ELECT_ENROLL2	Enter benefit elections.
<u>Dependents/Beneficiaries Page</u>	BAS_ELECT_DEPBENEF	Enroll dependents and assign beneficiaries.
<u>Supplemental Enrollment Page</u>	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.

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 Benefit Election Entry > Event/Participant Selection

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.

Field or Control	Description
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.
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.

Field or Control	Description
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 Benefit Election Entry > Option Election

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.

The screenshot shows the 'Option Election' page in a PeopleSoft application. The top navigation bar includes tabs for 'Event / Participant Selection', 'Option Election' (which is selected), and 'Dependents / Beneficiaries'. Below the tabs, there are several data fields: 'Sched ID' (KUEM), 'Empl ID' (KUX126), 'Jackie Moller', 'Ben Record' (0), 'Event ID' (1), 'Event Data' (01/01/2000 New Hire), and 'Excess Credit Rollover To' (Cash). The main content area is titled 'Available Plans and Options' with a 'Find' button and '1-24 of 24' results. It shows 'Plan Type 10 : Medical'. Below this, there is an 'Option Code' field with a search icon, a 'Health Provider ID' field, a 'Flat Amount' field, and a 'Previously Seen' checkbox. A link for 'Special Requirements' is also visible. At the bottom, there is a 'Dependents/Beneficiaries' section with an 'Enroll All' button and a table for dependents. The table has columns for *ID, Name, Relationship to Employee, Health Provider ID, Previously Seen, Covered Person Type, and Age Limit Flag. There is a search icon in the *ID column and a minus sign in the Age Limit Flag column.

Field or Control	Description
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.

Field or Control	Description
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.

For more information on defining eligible dependents to Life and ADD Plans, see “Setting Up Life Insurance and Accidental Death Plans” (PeopleSoft Human Resources Manage Base Benefits).

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.

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.

Related Links

“Defining Benefit Plans” (PeopleSoft Human Resources Manage Base Benefits)

“Enrolling Participants in Benefit Programs and Plans” (PeopleSoft 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 Benefit Election Entry > Dependents/Beneficiaries

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.

Event / Participant Selection		Option Election		Dependents / Beneficiaries	
Schedule ID	KUEM	Employee ID	KUX121	Mary McGuire	
Event ID	1	Event Data	01/01/2000	New Hire	
Benefit Record	0	Excess Credit Rollover To	Cash		
Dependent/Beneficiaries Currently on Record					
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth		
McGuire, Antonio	Spouse	Both	10/12/1985		
McGuire, Marguerita	Child	Both	03/13/1992		
McGuire, Sean	Child	Both	09/18/1998		
Change/Add Dependent Data					

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.

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.

Field or Control	Description
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 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.

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.

Supplemental Enrollment for Plan: 11



Dependents/Beneficiaries					
ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	
02	McGuire, Marguerite	Child		☐	-
03	McGuire, Sean	Child		☐	-
+					

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).

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 Enrollment Event Status Page](#)

[Defining Open Enrollment and Snapshot IDs](#)

Finding Prepared Participants Who Qualify for Termination

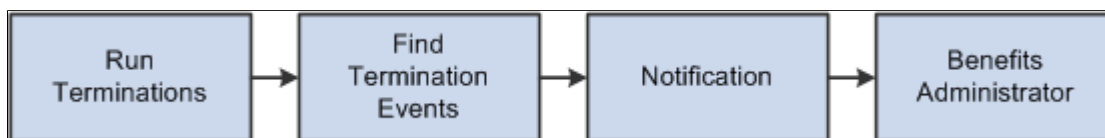
When the Event Maintenance process is run, participants can be identified as qualifying for termination when their participant events reach a process status of PR. The benefits administrator must terminate these employees manually by force-finalizing them.

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:

This image describes the Find Terminations Workflow process.



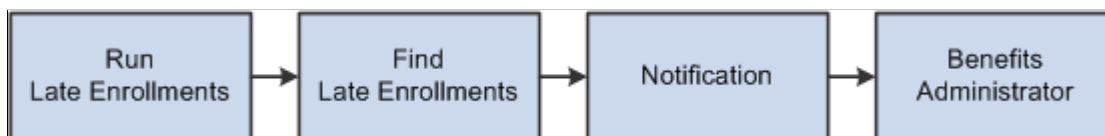
Finding Employees with Late Enrollment Forms

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 > Enrollment Non-Respondents**.

This chart illustrates the 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.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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.

Note: The confirmation statement has been replaced by the Benefits Statement page in Fluid. For more information, see [Viewing Employee Benefits Summary Data as an Administrator](#).

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

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.

Print Confirmation Statements

Run Control ID PS Report Manager Process Monitor Run

Language English ☒ Specified Language ☐ Recipient's Language

Schedule ID KUEM (Leave blank for all schedules)

Print Single Event

Empl ID (Leave blank for all employees)

Ben Record 0

Event ID 0

Process Status to Include

☐ Election Error

☐ Finalized - Enrolled

Reprint Options

☐ Reprint Report

Print ID

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 Enrollment 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.

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 Enrollment Event Status Page

Use the Update Enrollment Event Status (benefits administration event status update) page (BAS_PARTIC_STS) to reprocess individual participant events.

Navigation:

Benefits > Manage Automated Enrollments > Events > Update Enrollment Event Status > Update Enrollment Event Status

This example illustrates the fields and controls on the Update Enrollment Event Status page. You can find definitions for the fields and controls later on this page.

Update Event Status

Empl ID KC0002 Kirby Dunbar Ben Record 0

Event Status Update ? Find First 1-4 of 4 Last

Schedule ID KC12	Event Date 01/01/2012	☐ Event Disconnected	☐ Address Eligibility Changed	☐ MultiJob Indicator Changed	☐ Job Eligibility Changed	☐ Event Out of Sequence	☐ Finalize/Apply Defaults	Print Option Print Both Forms	*Process Normal Processing	*Event Status Closed to Processing
Event ID 0	Event Class OE Open Enrollment	Event Priority 900	Benefit Program KC1	Process Status Finalized - Enrolled	Action Source Open Enrollment					
Schedule ID KC08	Event Date 01/01/2008	☐ Event Disconnected	☐ Address Eligibility Changed	☐ MultiJob Indicator Changed	☐ Job Eligibility Changed	☐ Event Out of Sequence	☐ Finalize/Apply Defaults	Print Option Print Both Forms	*Process Normal Processing	*Event Status Closed to Processing
Event ID 0	Event Class OE Open Enrollment	Event Priority 900	Benefit Program KC1	Process Status Finalized - Enrolled	Action Source Open Enrollment					
Schedule ID KC00	Event Date 01/01/2000	☐ Event Disconnected	☐ Address Eligibility Changed	☐ MultiJob Indicator Changed	☐ Job Eligibility Changed	☐ Event Out of Sequence	☐ Finalize/Apply Defaults	Print Option	*Process Normal Processing	*Event Status Closed to Processing
Event ID 0	Event Class OE Open Enrollment	Event Priority 900	Benefit Program KC1	Process Status Finalized - Enrolled	Action Source Open Enrollment					

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.

Field or Control	Description
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, MultitJob Indicator Changed (multiple job indicator change), Job Eligibility Changed , and Event Out of Sequence	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. 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 <i>Open</i>. 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 <i>PR</i> status.

Process Indicator	Processing
Elect Optn (elect options)	Event status must be <i>Open</i>. 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 no errors occur, the final process status is set to <i>FE</i>. If errors occur, the process status is set to <i>EE</i>.
Normal Prc (normal processing)	Standard processing for Benefits Administration. Nothing is reprocessed.
Prep Optn (prepare options)	Event status must be <i>Open</i>. 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 <i>PR</i> 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 <i>Open</i>. 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 <i>RE</i>. 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 <i>ET</i>.

Process Indicator	Processing
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 <i>RE</i>. 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](#)

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 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.

<i>Reprocess Indicator Value</i>	<i>Processing</i>
None	Standard processing for Benefits Administration.
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 <i>NT</i>, <i>EE</i>, <i>ET</i>, <i>RE</i>, or <i>FE</i>. 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 <i>PR</i> 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 <i>PR</i> 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 <i>PR</i> process status.

<i>Reprocess Indicator Value</i>	<i>Processing</i>
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 <i>FE</i>.

Related Links

[Defining Open Enrollment and Snapshot IDs](#)

Generating Notifications for Benefits Events

This topic discusses the process to generate notifications for Benefits events.

Setting Up Notifications for Benefits Events

The sections describes the steps to generate notification for Benefits events.

1. Navigate to **People Tools > Security > User Profiles > User Profiles** and search for your user profile. To add the role and permission list to the user profile, follow below steps:
 - a. Go to the **Roles** page and add the *Benefits Administrator* role under the User Roles grid. Save the page.
 - b. Select **View Definition** link for the *Benefits Administrator* row, to open the *Roles* page.
2. To access the **Generate Benefit Notifications** page from Benefits WorkCenter, add the role *Benefits Administrator FL WC* for the user in **User Profiles** page.
3. Enable Notification Composer to receive notifications through Notification Composer framework. To enable, navigate to **Set Up HCM > Install > Installation Table** and select **HCM Options** tab. Select **Enable Notification Composer**. For more information, see “Understanding Notification Composer” (Enterprise Components).
4. Navigate to **Benefits > Manage Automated Enrollment > Participant Enrollment > Generate Benefit Notifications**, and run the process to generate notifications for the required Schedule ID, benefit program, employees and notification criteria.

Pages Used to Generate Notifications for Benefits Events

This table lists the page used to generate notifications for Benefits events.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Generate Benefit Notifications Page</u>	BN_NOTIF_RNCTL	Run the process to generate notifications for selected employees for a combination of Schedule ID and Benefit Program.

Generate Benefit Notifications Page

Use the Generate Benefit Notifications page (BN_NOTIF_RNCTL) to run the process to generate notifications for selected employees for a combination of Schedule ID and Benefit Program.

Navigation:

Benefits > Manage Automated Enrollment > Participant Enrollment > Generate Benefit Notifications

You can also access the Generate Benefit Notifications page from the Benefits WorkCenter.

Navigate to **Workforce Administrator > Manage Benefits > Benefits WorkCenter > Reports/Processes > Benefits Event Processing > Generate Benefit Notifications**

This example illustrates the fields and controls on the Generate Benefit Notifications page.

Generate Benefit Notifications

Run Control ID BEN
Report Manager
Process Monitor
Run

Request Parameters

*Schedule ID KUEM

US Event Maintenance

Benefit Program Selection
|
|<
<
1 of 1
>
|>
View All

Benefit Program KU1 GBI US Fulltime Benefit Pgm

+

-

☐ Include All Employees

Participant Selection

|<
<
1-1 of 1
>
|>
View All

	Empl ID	Benefit Record Number	Event Identification		
1	KU0046	0	0	+	-

Notification Criteria

|<
<
1-1 of 1
>
|>
View All

	Election Status		
1	Unsubmitted Elections	+	-

Field or Control	Description
Schedule ID	Select the Schedule ID. The schedule can be for open enrollment or event maintenance.
Benefit Program	Select the benefit program.

Field or Control	Description
Election Status	Select to define the notification criteria for the selected employees. When the process to generate notifications is run, a notification is sent to the selected employees based on this election status. Available options are: • Changed-Resubmit Required: Employees who made election changes to their submitted benefits enrollment and did not resubmit their changes. • Elections in Error: Employees who made benefits elections that resulted in error. • Unsubmitted Elections: Employees who made benefits elections but did not submit their enrollment.
Run	Select to run the process (BN_EVT_NOTIF) to generate notifications for the selected employees based on the Schedule ID, Benefit Program and election status. Employees receive In-App and email notifications. Notifications can be generated for all benefit events available through Self Service.

Running the Savings Plan Escalation

This topic discusses how to run the savings plan escalation process and to review the escalation results.

Pages Used to Run and Review the Savings Plan Escalation

This section describes the pages used to run the savings plan escalation process and review the auto escalation results.

Page Name	Definition Name	Usage
<u>Run Savings Plan Escalation Page</u>	BN_SAVPLN_AT_ESC	Run the auto escalation process for the employee's savings plan contributions.
<u>Savings Plan Auto Escalation Report Page</u>	BNE_SAVPLN_AE_R_PG	View auto escalation preview, and confirmation reports.

Run Savings Plan Escalation Page

Use the Run Savings Plan Escalation page (BN_SAVPLN_AT_ESC) to run the auto escalation process for the employee's savings plan contributions.

Navigation:

- **Benefits > Savings Plan Auto Escalation > Run Savings Plan Escalation**

- **Workforce Administrator > Manage Benefits > Benefits WorkCenter > Links > Enrollment Administration > Run Savings Plan Escalation**

This example illustrates the fields and controls on the Run Savings Plan Escalation page.

Run Savings Plan Escalation

Request Parameters

*Year

Benefit Program

*Process Action

Plan Details

☒ All Auto-Escalation Plans

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>

1-2 of 2

>

>

View All

	Plan Type	Benefit Plan	Plan Year Begin Date		
1	40	KU401M	15/01/2026		
2	46	KU403B	01/01/2026		

Notification Details

☐ Notify All Employees

<

>

1-1 of 1

>

>

View All

	Empl ID	Benefit Record Number		
1		0	+	-

Field or Control	Description
Year	Enter the year for which the employee's contributions to the savings plan need to be escalated. The lookup for Year displays the previous year, current year and the next year. The <i>Plan Year Begin Date</i> is calculated based on the Year , along with the Plan Year Starts On Month and Day provided in the Savings Plan Table page for the savings plan. See “Auto Enroll and Escalate Page” (PeopleSoft Human Resources Manage Base Benefits).

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Field or Control	Description
Benefit Program	Enter the benefit program which has the savings plan to be processed. Note: If the field is kept blank, the <i>Plan Details</i> grid displays all the savings plans for which auto escalation is turned on.
Process Action	Select the action to determine how to process the escalation for the savings plan. Available values are: • <i>Escalation only</i>: Select to escalate the eligible employees and not send notifications to the employees. • <i>Escalation with notifications</i>: Select to escalate the eligible employees and send notifications to the employees. • <i>Notifications only</i>: Select to send notifications to employees whose contributions are escalated. • <i>Preview Report</i>: Select to generate a preview report for the eligible employees. The gives an initial report on the data that will be populated in the savings plan table for the employees when the escalation is run. Note: Use the Notification Composer to configure the notifications. See “Creating and Managing Notifications with Notification Composer” (Enterprise Components).
Plan Details grid	Displays the details of all savings plans that has auto escalation enabled. The Plan Year Begin Date is calculated based on the Year, along with the Plan Year Starts On Month and Day provided in the Savings Plan Table page for the savings plan. See “Auto Enroll and Escalate Page” (PeopleSoft Human Resources Manage Base Benefits).
All Auto-Escalation Plans	Select to list all the savings plans that are eligible for auto escalation for the selected Year and Benefit Program. Uncheck this option to edit the Plan Details grid and run the process for a subset of the listed savings plans.
Notification Details grid	Use the Notification Details grid to determine the employees to whom notifications are sent after the escalation. The employees are notified using In-App alert and email. Use the Notification Composer to configure the notifications. See “Creating and Managing Notifications with Notification Composer” (Enterprise Components).
Notify All Employees	Select to notify all the employees who have their contributions escalated in the run.
Empl ID and Benefit Record Number	Enter the Employee ID and Benefit Record Number of employees who are to be notified on the auto escalation.

Field or Control	Description
Run	Select to run the auto escalation based on the selected <i>Process Action</i>. Once the process is run, an escalation report is generated and the administrator can view the report using the Savings Plan Auto Escalation Report Page. Note: A report is generated for all options of Process Action except <i>Notifications only</i>.

Savings Plan Auto Escalation Report Page

Use the Savings Plan Auto Escalation Report page (BNE_SAVPLN_AE_R_PG) to view the auto escalation preview and confirmation reports.

Navigation:

- **Benefits > Savings Plan Auto Escal Report > Savings Plan Escalation Report**
- **Workforce Administrator > Manage Benefits > Benefits WorkCenter > Links > Enrollment Administration > Savings Plan Escalation Report**

The Savings Plan Auto Escalation Report page allows the benefits administrator to view the auto escalation preview, and confirmation reports. Select the **Report Type** in the search page to view the reports. Select *Preview* to view the auto escalation preview reports and *Confirmation* to view the auto escalation confirmation reports.

This example illustrates the fields on the Savings Plan Auto Escalation Report page for a Preview Report.

Savings Plan Auto Escalation Report												
Report Type: Preview Company: GBI Year: 2026 Benefit Program: KU1												
Escalation Details < > 1-3 of 3												
Empl ID	Name	Plan Type	Benefit Plan	Description	Auto Enrollment Date	Auto Enrollment Status	Auto Escalation Date	Auto Escalation Status	BT Contribution Before Escalation	BT Contribution After Escalation	AT Contribution Before Escalation	AT Contribution After Escalation
KU0003	Jean Parsons	401(k)	KU401M	401(k) Employer Pct Match	01/01/2025	Enrolled	01/06/2026	Escalated	3.000	4.000	0.000	0.000
KU0003	Jean Parsons	403(b)	KU403B	403(b) Annuity	01/01/2025	Enrolled	01/06/2026	Escalated	3.000	5.000	0.000	0.000
KU0004	Kenneth Grafton	403(b)	KU403B	403(b) Annuity	01/01/2025	Enrolled	01/06/2026	Escalated	3.000	5.000	0.000	0.000

This example illustrates the fields on the Savings Plan Auto Escalation Report page for a Confirmation Report.

Savings Plan Auto Escalation Report												
Report Type: Confirmation Company: GBI Year: 2023 Benefit Program: KU1												
Escalation Details < > 1-1 of 1												
Empl ID	Name	Plan Type	Benefit Plan	Description	Auto Enrollment Date	Auto Enrollment Status	Auto Escalation Date	Auto Escalation Status	BT Contribution Before Escalation	BT Contribution After Escalation	AT Contribution Before Escalation	AT Contribution After Escalation
KU0054	Stanley Lowe	401(k)	KU401M	401(k) Employer Pct Match	01/07/2022	Enrolled	01/06/2023	Escalated	2.000	4.000	3.000	5.000

<i>Field or Control</i>	<i>Description</i>
Escalation Details	Displays the employee and benefit plan details, along with auto enrollment and auto escalation details, the employee contribution before and after escalation. For preview report, the grid displays the details before the auto escalation process is run. For confirmation report, the grid displays the details after the auto escalation process is run.

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](#)

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>On-Demand Event Process Page</u>	BAS_ON_DEM_EM	Process a single participant through all stages of the Benefits Administration process.
<u>BAS Activity Page</u>	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 Process Page

Use the On-Demand Event Process 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 Process > On-Demand Event Process

This example illustrates the fields and controls on the On-Demand Event Process page. You can find definitions for the fields and controls later on this page.

On-Demand Event Maintenance
Betty Locherty

Person ID KU0007 Ben Record 0

Activity Date 01/26/2009
Schedule/Prepare Activity

Source Job Data Change
Pending Activities 1

Empl Record 0
Action DTA

Show Activities

Event ID 0 Event Date 01/01/2013 Status Prepared Class OE

Prepare Options

Enrollment Statement

Election Entry

Validate/Finalize

Confirmation Statement

Event Status Update

Event Status Open for Processing

Frequency
☒ Deduction Frequency ☐ Annual Frequency

Run Date
Entered 0 of 22
Errors 0

Show Plans
Show Errors

☐ Finalize/Apply Defaults

Reprocess

Process Indicator Normal Processing

Field or Control	Description
Empl Record (employee record number)	Used for employees with multiple jobs. Employees with multiple jobs can have different sets of benefits elections. The system keeps track of the different sets of elections by assigning benefit record numbers for each benefits package.
Activity Date and Show Activities	This is the date on which the trigger activity for the 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 combination and select one to be processed.

Navigation:

Click the **Show Activities** button on the On-Demand Event Maintenance 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.

Betty Locherty
Person ID KU0007

BAS Activity

Personalize | Find |  

First  1 of 1  Last

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
☒	0	Job Data Change	01/26/2009	0	DTA			

Field or Control	Description
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.
- 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).

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.

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
<i>A</i> (assign benefit program)	Event status must be <i>Open</i>. 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 <i>PR</i> status.
<i>E</i> (elect options)	Event status must be <i>Open</i>. 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 <i>FE</i>.
<i>N</i> (normal processing)	Standard processing for Benefits Administration.
<i>P</i> (prepare options)	Event status must be <i>Open</i>. 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 <i>PR</i> status.

Process Indicator	Processing
<i>R</i> (reenter)	Use to correct election errors for finalized events when enrollment information has been loaded to benefit tables. Event status must be <i>Open</i>. 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 <i>ET</i>.
<i>V</i> (void)	The system updates the event status to <i>Void</i> 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 <i>FE-Enrolled</i>, 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 <i>RE</i>.

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.

Page Name	Definition Name	Usage
<u>Update Event Status Page</u>	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

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.

Online Printing

User ID PS

Run Location

Server Name  NT Server Agent

Output Destination

Output Destination Type

Output Destination Format

Output Destination

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.

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.

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		01/01/2013	KU2	10	Medical		11		
OE13		01/01/2013	KU2	20	Life		1		
OE13		01/01/2013	KU2	21	Supplemental Life		3		
OE13		01/01/2013	KU2	22	AD and D		1		
OE13		01/01/2013	KU2	27	Supplemental AD and D		W		
OE13		01/01/2013	KU2	61	Flex Spending Dependent Care				
OE13		01/01/2013	KU2	41	Profit Sharing		1		
OE13		01/01/2013	KU2	4A	Employee Stock Purchase		W		
OE13		01/01/2013	KU2	50	Sick		1		
OE13		01/01/2013	KU2	51	Vacation		1		
OE13		01/01/2013	KU2	60	Flex Spending Health - U.S.				
OE13		01/01/2013	KU2	40	401(k)		1		

Return

Field or Control	Description
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.

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.

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.

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

This example illustrates the fields and controls on the Manage Archive Objects page.

Manage Archive Objects

Archive Object: BAS_PARTIC_ARCHIVE
Description: BAS PARTIC Tables Archive

Records in Archive Object					Find	View All	1-7 of 7	First	Last
	Base Record	*Archiving Record	Description	*History Record					
1	☒	BAS_PARTIC	BAS Participant	BAS_PARTIC_HST					
2	☐	BAS_PARTIC_COST	BAS Participant Cost	BAS_P_COST_HST					
3	☐	BAS_PARTIC_DPND	BAS Participant Dependent	BAS_P_DPND_HST					
4	☐	BAS_PARTIC_ELIG	BAS Participant Eligibility	BAS_P_ELIG_HST					
5	☐	BAS_PARTIC_INVT	BAS Participant Investment	BAS_P_INVT_HST					
6	☐	BAS_PARTIC_OPTN	BAS Participant Option	BAS_P_OPTN_HST					
7	☐	BAS_PARTIC_PLAN	BAS Participant Plan	BAS_P_PLAN_HST					

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

This example illustrates the fields and controls on the Manage Archive Templates page.

Manage Archive Templates

Archive Template: BAS_PART Description: Bas Partic Archive

Archive Template Objects

Find | View All | First 1 of 1 Last

Base Object	*Archive Object		
☒	BAS_PARTIC_ARCH	BAS PARTIC Tables Archive	

Selective Archiving Queries

Find | View All | First 1 of 1 Last

*Query Name	Description		
BAS_PARTIC_AR_QRY	Bas Partic Archive Query		

☒ Template Allows Selective Restoring of Data From History

Selective Restoring Queries

Find | View All | First 1 of 1 Last

*Query Name	Description		
BAS_PARTIC_RS_QRY	BAS Partic Restore Query		

AE Processes

Find | View All | First 1 of 1 Last

*Archive Process	Pre AE Program	Post AE Program		

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

This example illustrates the fields and controls on the Archive Data To History page.

The screenshot displays the 'Archive Data To History' configuration page. At the top, there are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. The page is divided into several sections:

- Archive Template:** Contains a text field with 'BAS_PART' and a magnifying glass icon, followed by the text 'Bas Partic Archive'.
- Archive Process:** Contains a dropdown menu for '*Process Type' set to 'Selection', with a description 'copying from on-line tables to history tables'.
- Selection Criteria:** Contains two radio buttons. The first, 'Selective Query', is selected and has a dropdown menu set to 'BAS_PARTIC_AR_QRY' with the text 'Bas Partic Archive Query' next to it. The second, 'Batch Number', has an empty text field. A 'View Details' link is on the right.
- Commit Processing:** Contains three radio buttons: 'Commit at End', 'Set-Based Processing', and 'Row-Based Processing' (which is selected). Next to 'Row-Based Processing' is a 'Commit Frequency' field set to '10,000'. Below this is a checkbox for 'Audit Row Count'.

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.

Audit Archiving Page

Use the Audit Archiving page (PSARCHIVEAUDIT) to view the results of an archive job.

Navigation:

PeopleTools > Data Archive Manager > Audit Archiving

This example illustrates the fields and controls on the Audit Archiving page.

Audit Archiving

User ID:

Archive ID: Bas Partic Archive

From Date: To Date:

Archive Processes										Personalize Find View All	First 1-6 of 7 Last
Archive ID	Event Date/Time	Archive Process	Archive Batch Number	Record (Table) Name	Number of Rows	User ID	Run Control ID	Process Instance	View Details		
1 BAS_PART	06/13/16 10:56AM	Archive Selection	9	BAS_PARTIC_COST	NA	PS	RB	122470	View Details		
2 BAS_PART	06/13/16 10:56AM	Archive Selection	9	BAS_PARTIC_ELIG	NA	PS	RB	122470	View Details		
3 BAS_PART	06/13/16 10:56AM	Archive Selection	9	BAS_PARTIC_OPTN	NA	PS	RB	122470	View Details		
4 BAS_PART	06/13/16 10:56AM	Archive Selection	9	BAS_PARTIC_PLAN	NA	PS	RB	122470	View Details		
5 BAS_PART	06/13/16 10:56AM	Archive Selection	9	BAS_PARTIC_INVT	NA	PS	RB	122470	View Details		
6 BAS_PART	06/13/16 10:56AM	Archive Selection	9	BAS_PARTIC	NA	PS	RB	122470	View Details		

Managing Life Events

Understanding Life Events

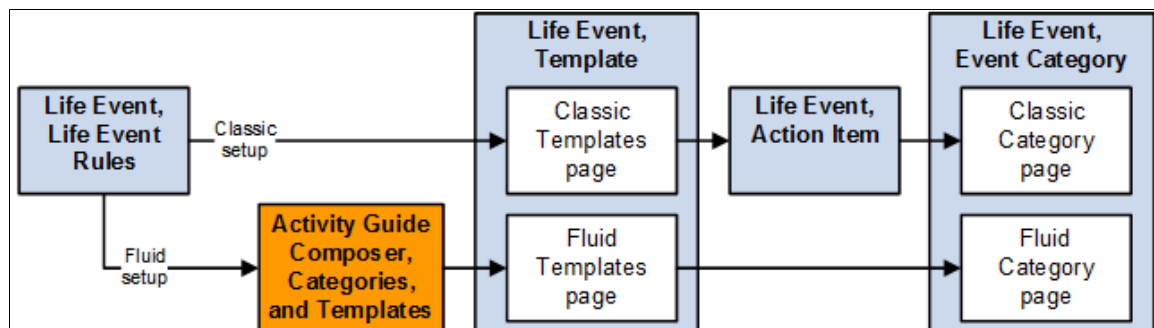
Life Events transactions can streamline the life event process for employees by enabling them to update personal data and then change their benefit enrollments, all from one self-service transaction. PeopleSoft eBenefits, by default, delivers four major life event transactions that have immediate impact 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.

While most of the setup tables are located within the Life Event menu category (**Set Up HCM > Product Specific > eBenefits > Life Events**) you will use 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:

- 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Life Event Rules Page</u>	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 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.

<i>Update to HR Database</i>	<i>Requirement</i>
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.

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 Required is 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 <i>Divorce</i>. • 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

This example illustrates the fields and controls on the Life Event Rules page.

Life Event Rules New Window

Life Event Rules ⓘ

1-4 of 4

*Life Event Type	*Description	Maximum Days To Notify	Notify Administrator	Proof Required	Approve Document(s)	Allow Event Creation	Source of Action	BAS Action	Notification Events	Add/Update Individual Configuration
A	Adoption	31	☒	☒	☐	☐			Notification Events	Update
B	Birth	31	☒	☒	☐	☐			Notification Events	Update
D	Divorce	31	☒	☐	☐	☒	Manual Ew	FSC	Notification Events	Update
M	Marriage	31	☒	☐	☐	☒	Manual Ew	FSC	Notification Events	Update

+

Field or Control	Description
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.

Field or Control	Description
Allow Event Creation	This field is available if Benefits Administration is selected on the Installation table and Proof Required is not selected. A BAS Activity trigger is created only if the employee has at least one job managed by Benefits Administration as of the life event effective date. Selecting this field indicates that you want the system to trigger a BAS Activity for this type of life event and allows the employee to change benefit election through the eBenefit election pages.
Source of Action	This field is available and is required if Benefits Administration is selected on the Installation table and Allow Event Creation is selected. For a BAS Activity trigger to be created, you must enter <i>Manual</i> in the field.
BAS Action	This field is available and required if Benefits Administration is selected on the Installation table and Allow Event Creation is selected. Enter a BAS action code that is appropriate for this life event. Typically, this is <i>FSC</i> - Family Status Change.
COBRA Action	This field is available if both COBRA Administration and Benefits Administration are selected on the Installation table. This field is 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.
Notification Events	Select to open the Notifications page and define the Notification ID for the life event.
Add/Update Individual Configuration	Select Update link to open the <i>Add/Update Individual Config</i> modal window and define the relationship types that can be added and updated as part of the selected life event type.

This example illustrates the fields and controls on the Add/Update Individual Config modal window.

×

Add/Update Individual Setup

[Help](#)

Life Event Type
M
Marriage

Add New Dependents/Beneficiaries

< < 1-2 of 2 > >

	Allowed Relationship Type	Number Allowed		
1	Spouse	1	+	-
2	Child	3	+	-

Modify Existing Dependents/Beneficiaries

< < 1-2 of 2 > >

	Existing Relationship Type	New Relationship Type		
1	Friend	Spouse	+	-
2	Neighbor	Spouse	+	-

OK

Cancel

Field or Control	Description
Allowed Relationship Type	Select the relationship type that will be available to the employee in the Add Individual/Beneficiary Information page when he adds a dependent or beneficiary as part of a life event. For example, if the Allowed Relationship Type is <i>All Relationships</i> , then the employee can add dependents with any relationship type. If there are two rows, one with Allowed Relationship Type as <i>Spouse</i> and second row with Allowed Relationship Type as <i>Child</i> , then the employee can add only relationships of type <i>Spouse</i> or <i>Child</i> . By default, <i>All Relationships</i> are selected. To know more on Individual/Beneficiary Information page, see Dependent/Beneficiary Info Page .
Number Allowed	Enter the number of dependents or beneficiaries the employee can add for the selected relationship type.

Field or Control	Description
Existing Relationship Type and New Relationship Type	For each row you add, select the Existing Relationship Type and the New Relationship Type . This defines the relationships the employee can update and to which relationship it can be updated to. For example, if both Existing Relationship Type and New Relationship Type is set to <i>All Relationships</i> , then the employee can update his existing dependents or beneficiaries with any relationship type to any other relationship. If Existing Relationship Type is set to <i>Friend</i> and New Relationship Type is set to <i>Spouse</i> , then employee can only update relationships of type <i>Friend</i> and it can be updated to only relationship type <i>Spouse</i> . By default, <i>All Relationships</i> are selected.

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” (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.

Pages Used to Configure Life Event Templates and Action Items in Benefits

Page Name	Definition Name	Usage
<u>Classic Templates Page</u>	W3EB_LE_LIST	Define life event templates for the classic Life Event pages.

Page Name	Definition Name	Usage
<u>Fluid Templates Page</u>	W3EB_LE_FLU_LIST	Associate an Activity Guide Composer template with the Benefits Life Event template for the fluid Life Event pages.
<u>Action Item Page</u>	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.
<u>Child Action Item Page</u>	W3EB_LE_ITEM_SEC	Create sub-steps for a life event action item using the classic Life Events pages.
<u>Dependent Action Item Page</u>	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.

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 Human Resources Manage Base Benefits).

- (Fluid) Use the “Clone Template Page” (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” (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 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” (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” (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.

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

Step	Description
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” (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:

- *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” (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

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.

Classic Templates

Fluid Templates

Template

Template

Personalize

Find

First

1-4 of 4

Last

*Template Title	Welcome Text ID	Print Text ID	*Life Event Type	Description	Active	Action Item(s)		
Adoption Event	WELCOME_BIRTH	PRINT_BIRTH	A	Adoption	☒	Action Item(s)		
Birth Event	WELCOME_BIRTH	PRINT_BIRTH	B	Birth	☒	Action Item(s)		
Divorce Event	WELCOME	PRINT	D	Divorce	☒	Action Item(s)		
Marriage Event	WELCOME_MARRIAGE	PRINT_MARRIAGE	M	Marriage	☒	Action Item(s)		

Field or Control	Description
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 <i>HEB</i> and the sub ID is equal to <i>LE</i> 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

Field or Control	Description
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 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

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.

Classic Templates

Fluid Templates

Template

Template ?

Personalize | Find | |

First 1-4 of 4 Last

*Template Title	*Life Event Type	Description	Active	Action
Adoption Event	A	Adoption	☒	Template Composer
Birth Event	B	Birth	☒	Template Composer
Divorce Event	D	Divorce	☒	Template Composer
Marriage Event	M	Marriage	☒	Template Composer

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.

Field or Control	Description
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: • <i>Adoption Event</i> • <i>Birth Event</i> • <i>Divorce Event</i> • <i>Marriage Event</i> To create, update, delete, or clone an existing template, use the “Activity Guide Templates Page” (Enterprise Components). 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.

Field or Control	Description
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” (Enterprise Components) to add steps to a fluid template.

Navigation:

- **Set Up HCM > Product Related > eBenefits > Life Event > Action Item > Action Item**
- Click the **Action Item(s)** link from the [Classic Templates 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.

Action Item

Template Title: Separation Event

Life Event Type: Divorce

Life Event - Action Item

Personalize | Find | First 1-2 of 2 Last

Copy Existing Item	*Sequence Number	*Action Item Title	Required Action Item	Parent Action Item	Child Action Item	Depend Action exist	Depend Action Item	Transaction Page
	1	Welcome	☒	☐	Child Action Item	☐	Depend Action Item	W3EB_LE_WELCOME
	10	Separation Date	☒	☐	Child Action Item	☐	Depend Action Item	EF_HR_EE_MAR_STATUS

Save Return to Search

Field or Control	Description
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. 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.

Field or Control	Description
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: <i>PeopleTools: Applications User's Guide</i>

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 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 Templates Page” (Enterprise Components) to create fluid life event templates. Use the “Activity Guide Composer - Organize and Configure Steps Page” (Enterprise Components) to manage steps for fluid.

Navigation:

Select the **Child Action Item** link on the Action Item page.

This example illustrates the fields and controls on the Child Action Item page.

Child Action Item

Parent Action Item Title Personal Information

Sequence Number 400

Child Action Item

Personalize | Find |   First 1-4 of 4 Last

Sequence Number	Action Item Title	Required Action Item	Transaction Page		
410	Name	☐	EF_HR_EE_NAME		
420	Home and Mailing Address	☐	EF_HR_HOME_MAILING		
430	Phone	☐	EF_HR_PERSONAL_PHONE		
440	Emergency Contact	☐	EF_HR_EMERGENCY_CNTCT		

OK

Cancel

Field or Control	Description
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 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 Templates Page” (Enterprise Components) to create fluid life event templates. Use the “Activity Guide Composer - Organize and Configure Steps Page” (Enterprise Components) to manage steps for fluid.

Navigation:

Select the **Depend Action Item** link on the 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.

Dependent Action Item

Action Item Title

Benefit Enrollment

Sequence Number

700

Dependencies

Title	Sequence		
Marital Status		100	+ -

OK

Cancel

Field or Control	Description
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 and Working With Attachments” (Application Fundamentals) for detailed information on configuring the common attachment framework.

Page Name	Definition Name	Usage
“Define Attachments Page” (Application Fundamentals)	HR_ATT_CNFG	Create configuration ID based on the required attachment type.

Page Name	Definition Name	Usage
<u>Maintain Definitions Page</u>	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.
<u>Review Benefits Attachment Page</u>	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, for example, certificates of marriage, adoption, or divorce, 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 Lists

Role	Permission List
My Benefits Fluid This role is necessary for employees to access 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 to access the Review Benefits Attachment.	HCCPBN1020

Role	Permission List
Benefits Administrator Fluid	HCCPBN1050 This permission list is necessary to use the Benefits WorkCenter.
Workforce Admin Homepage Fluid This role is necessary for administrator to access the Workforce Administrator home page.	

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

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.

Maintain Definitions

Object Owner ID HBN
Sub Id LE

Definition

*Effective Date 01/01/1900  *Status Active   

Context

*Sequence Number 10  

Context Keys

	Key Field	Key Value	Key Date	Key Number	All values
1	Life Event Type	M 			☐

Attachments

	*Configuration ID	*Sequence	*Group Box	*Upload Requirement	Approval Required		
1	BN_MARRIAGE 	10	None 	Required 	☒		
2	BN_SSN_COPY 	20	None 	Required 	☐		
3	BN_MISC 	30	None 	Require at least one 	☐		








In the Key Value field, select the required life event type. Here, in this example ‘M’ – Marriage is selected as the Life Event Type.

Attachments

Field or Control	Description
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.

Field or Control	Description
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” (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:

Workforce Administrator > Manage Benefits > Benefits WorkCenter > Links > Employee/Dependent Information > Review Benefits Attachment

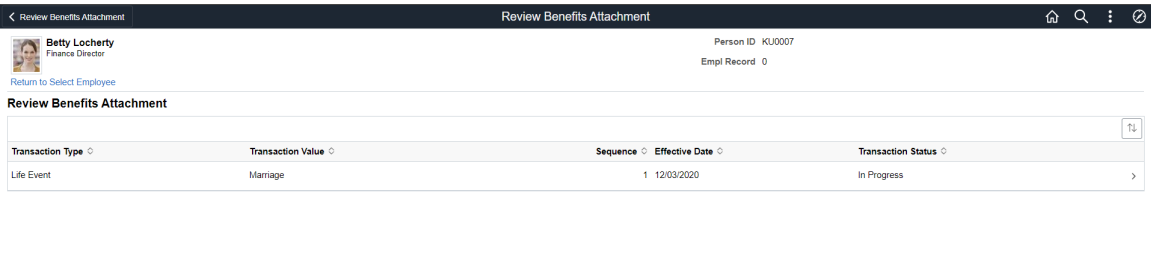
Administrator can search for the required employee.

This example illustrates the Review Benefits Attachment page.

The screenshot displays the 'Review Benefits Attachment' page. On the left, a navigation pane shows a tree structure with 'Review Benefits Attachment' selected. The main content area is titled 'Review Benefits Attachment' and contains a 'Search Options' section. This section includes several input fields for searching: 'Empl ID (begins with)', 'Empl Record =', 'Name (begins with)', 'Last Name (begins with)', 'Business Unit (begins with)', 'Department Set ID =', and 'Department ='. Each field has a magnifying glass icon to its right. At the bottom of the search options, there are 'Search' and 'Clear' buttons.

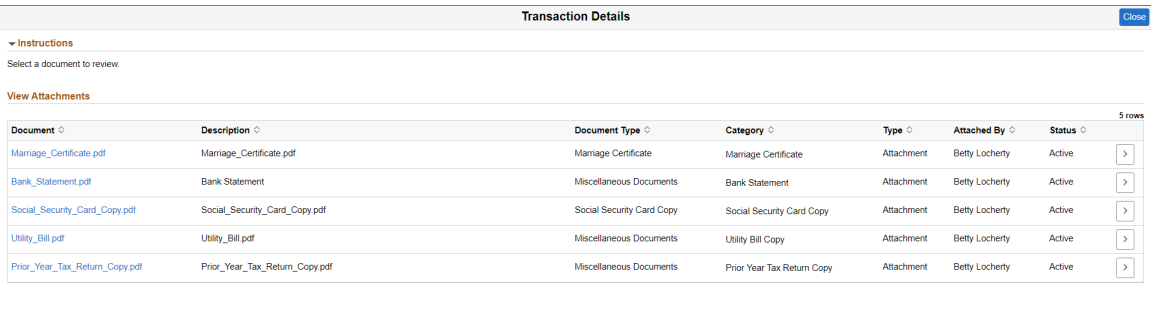
Attachment details of the selected employee is displayed.

This example illustrates the Review Benefits Attachment page.



Click the row to open the 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 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.

Page Name	Definition Name	Usage
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

This example illustrates the fields and controls on the Classic Category page.

Classic Category | Fluid Category

Event Category EMPL

Category ? Find | View All First 1 of 1 Last

*Effective Date 01/01/1900

*Description Employee

*Category Sequence 10

*SeqNum	*Description	*Template Title	Template ID
100	I got married	Marriage Event	EF_M4LLLL
200	I had a baby	Birth Event	EF_B2LLLL
300	I adopted or gained legal custody/guard	Adoption Event	EF_A1LLLL
400	I got divorced/legally separated	Divorce Event	EF_D3LLLL

Use this page to set up the templates that should appear for this category on the classic life event self-service home page.

Field or Control	Description
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.

Field or Control	Description
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

This example illustrates the fields and controls on the Fluid Category page.

Classic Category

Fluid Category

Event CategoryEMPL

Category?Find | View AllFirst1 of 1Last

*Effective Date01/01/1900

*DescriptionEmployee

*Category Sequence10

Life Event Menu Description?

Personalize | Find |

First1-4 of 4Last

*SeqNum	*Description	*Template Title	Template ID		
100	I got married	Marriage Event	EF_M4FF	+	-
200	I had a baby	Birth Event	EF_B2FF	+	-
300	I adopted or gained legal custody/guard	Adoption Event	EF_A1FF	+	-
400	I got divorced/legally separated	Divorce Event	EF_D3FF	+	-

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.

Field or Control	Description
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” (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.

Field or Control	Description
Template ID	Displays the ID that was used when creating the template in the Activity Guide Composer. 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: <i>EF_</i>, <i>x</i> (where <i>x</i> equals <i>A</i> for adoption, <i>B</i> for birth, <i>D</i> for divorce, or <i>M</i> for marriage). For example, an organization may create the template ID <i>EF_B100</i> for a birth, or <i>EF_D200</i> 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” (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
<u>Maintain Text Catalog Page</u>	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

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.

Maintain Text Catalog

eBenefits

Sub ID LE

Text ID WELCOME

Usage Page Instructions

DescriptionText for the Life Event general welcome page.

Text Entries

Find | View All

First 1 of 1 Last

Effective Date01/01/1900

Context Keys and Text

Find | View All

First 1 of 1 Last

Life Event Type

If you have experienced a life event change it may impact your Benefit choices and enrollments.

 This guide will take you through all the steps necessary to ensure that your personal profile, benefits, and payroll information are updated to reflect this event in your life.

View/Edit as HTML

Field and Control Definitions

Field and Control Definitions

Field or Control	Description
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

<i>Field or Control</i>	<i>Description</i>
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 eBenefits)

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.

Note: This report has been replaced in Fluid. For more information, see [Viewing Fluid Benefit Statements as an Employee in Self Service](#).

Page Used to Configure the Employee Enrollment Summary Statement

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
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

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

<i>Field or Control</i>	<i>Description</i>
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

<i>Field or Control</i>	<i>Description</i>
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.

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 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 tile.

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.

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

Note: Classic pages used in this feature have been replaced by equivalent pages in Fluid.

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 (<u>Marital Status</u> or <u>Divorce Status Page</u>)	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 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.

Classic Page Name	Classic Definition Name	Fluid Page Name	Fluid Definition Name	Usage
Benefits Summary Page	W3EB_GRID	<u>Benefits Summary Page</u>	BEN_SUMM_GRID_FL	Review current benefits.
Name Change Page	HR_EE_NAME	Personal Information - “Name (Summary) Page” (PeopleSoft 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 eProfile))	HR_EE_ADDR_FL	Enter valid home and mailing addresses.
Phone Numbers Page	HR_PERSONAL_PHONE	Personal Information - Contact Information Page (see “Contact Details Page” (PeopleSoft eProfile))	HR_EE_CONTACTS_FL	Enter valid phone numbers.
Emergency Contacts Page	HR_EMERGENCY_CNTCT	Personal Information - “Emergency Contacts (Summary) Page” (PeopleSoft eProfile))	HR_EMERG_CNTCT_FL	Enter emergency contact information.
Add/Review Dependent/Beneficiary Page	W3EB_DEPBEN_RVW	<u>Dependent/Beneficiary Info Page</u>	W3EB_DEPBNSMRY_FL	Update dependent/beneficiary information.
W-4 Withholding Certificate Page	PY_IC_W4_DATA_2020	Pay and Compensation - “Tax Withholding Page” (PeopleSoft ePay)	PY_IC_W4_FL	Review and change tax information.
Direct Deposit Page	PY_IC_DD_LIST	<u>Pay and Compensation - Direct Deposit Page</u>	PY_IC_DIR_DEP_FL	Review direct deposit information.

Classic Page Name	Classic Definition Name	Fluid Page Name	Fluid Definition Name	Usage
Benefit Enrollment Page	W3EB_LE_ENROLL	<u>Benefits Enrollment Page</u>	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 marital status.
Benefits Election Review Page	W3EB_LE_CONFIRM	<u>Benefits Statement Page</u>	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.

Classic Page Name	Classic Definition Name	Fluid Page Name	Fluid Definition Name	Usage
Event Completion and Exit Page	W3EB_LE_PRINT	<u>Summary Page</u>	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.

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” (Enterprise Components), the **Life Event Rules** page and the Action Items for the Child Birth transaction).

Pages Used to Process the Child Birth Event

Note: Classic pages used in this feature have been replaced by equivalent pages in Fluid.

Classic Page Name	Classic Definition Name	Fluid Page Name	Fluid Definition Name	Usage
Welcome Page	W3EB_LE_WELCOME	<u>Welcome to <Transaction Name> Event Page</u>	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 (<u>Birth Date or Adoption Date Page</u>)	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 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	<u>Benefits Summary Page</u>	BEN_SUMM_GRID_FL	Review your current benefits.
Dependent and Beneficiary Coverage Summary Page	W3EB_DEPBEN_SUM	<u>Dependent and Beneficiary Coverage Summary Page</u>	W3EB_DEPBEN_SUM	Review summary information about dependent/beneficiary benefits.
Add/Review Dependent/Beneficiary Page	W3EB_DEPBEN_RVW	<u>Dependent/Beneficiary Info Page</u>	W3EB_DEPBNSMRY_FL	Update dependent/beneficiary information.
W-4 Withholding Certificate Page	PY_IC_W4_DATA_2020	Pay and Compensation - “Tax Withholding Page” (PeopleSoft ePay)	PY_IC_W4_FL	Review and change W-4 tax information.
Direct Deposit Page	PY_IC_DD_LIST	<u>Pay and Compensation - Direct Deposit Page</u>	PY_IC_DIR_DEP_FL	Review and change direct deposit information.

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.

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

Note: Classic pages used in this feature have been replaced by equivalent pages in Fluid.

<i>Page Name</i>	<i>Definition Name</i>	<i>Fluid Page Name</i>	<i>Fluid Definition Name</i>	<i>Usage</i>
Welcome Page	W3EB_LE_WELCOME	<u>Welcome to</u> <u><Transaction Name></u> <u>Event Page</u>	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 (<u>Birth Date or Adoption Date Page</u>)	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 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	<u>Benefits Summary Page</u>	BEN_SUMM_GRID_FL	Review your current benefits.

Page Name	Definition Name	Fluid Page Name	Fluid Definition Name	Usage
Dependent and Beneficiary Coverage Summary Page	W3EB_DEPBEN_SUM	<u>Dependent and Beneficiary Coverage Summary Page</u>	W3EB_DEPBEN_SUM	Review summary information about dependent/beneficiary benefits.
Add/Review Dependent/Beneficiary Page	W3EB_DEPBEN_RVW	<u>Dependent/Beneficiary Info Page</u>	W3EB_DEPBNSMRY_FL	Update dependent/beneficiary information.
W-4 Withholding Certificate Page	PY_IC_W4_DATA_2020	Pay and Compensation - "Tax Withholding Page" (PeopleSoft ePay)	PY_IC_W4_FL	Review and change W-4 tax information.
Direct Deposit Page	PY_IC_DD_LIST	<u>Pay and Compensation - Direct Deposit Page</u>	PY_IC_DIR_DEP_FL	Review and change direct deposit information.
Benefit Enrollment Page	W3EB_LE_ENROLL	<u>Benefits Enrollment Page</u>	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.

<i>Page Name</i>	<i>Definition Name</i>	<i>Fluid Page Name</i>	<i>Fluid Definition Name</i>	<i>Usage</i>
Benefits Election Review Page	W3EB_LE_CONFIRM	<u>Benefits Statement Page</u>	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	<u>Summary Page</u>	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

Note: Classic pages used in this feature have been replaced by equivalent pages in Fluid.

Classic Page Name	Classic Definition Name	Fluid Page Name	Fluid Definition Name	Usage
Welcome Page	W3EB_LE_WELCOME	<u>Welcome to</u> <u><Transaction Name></u> <u>Event Page</u>	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 (<u>Marital Status or Divorce Status Page</u>)	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 eBenefits)	HR_ATT_DD_HDR	Upload a proof document for the life event, or enter a note relevant to the event.
Benefits Summary Page	W3EB_GRID	<u>Benefits Statement Page</u>	BEN_SUMM_GRID_FL	Review your current benefits.
Name Change Page	HR_EE_NAME	Personal Information - “Name (Summary) Page” (PeopleSoft 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 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 eProfile))	HR_EE_CONTACTS_FL	Enter valid phone numbers.
Emergency Contacts Page	HR_EMERGENCY_CNTCT	Personal Information - “Emergency Contacts (Summary) Page” (PeopleSoft eProfile))	HR_EMERG_CNTCT_FL	Enter emergency contact information.

Classic Page Name	Classic Definition Name	Fluid Page Name	Fluid Definition Name	Usage
Add/Review Dependent/Beneficiary Page	W3EB_DEPBEN_RVW	<u>Dependent/Beneficiary Info Page</u>	W3EB_DEPBNSMRY_FL	Update dependent/beneficiary information.
W-4 Withholding Certificate Page	PY_IC_W4_DATA_2020	Pay and Compensation - "Tax Withholding Page" (PeopleSoft ePay)	PY_IC_W4_FL	Review and change W-4 tax information.
Direct Deposit Page	PY_IC_DD_LIST	<u>Pay and Compensation - Direct Deposit Page</u>	PY_IC_DIR_DEP_FL	Review and change direct deposit information.
Benefit Enrollment Page	W3EB_LE_ENROLL	<u>Benefits Enrollment Page</u>	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.
Benefits Election Review Page	W3EB_LE_CONFIRM	<u>Benefits Statement Page</u>	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.

<i>Classic Page Name</i>	<i>Classic Definition Name</i>	<i>Fluid Page Name</i>	<i>Fluid Definition Name</i>	<i>Usage</i>
Event Completion and Exit Page	W3EB_LE_PRINT	<u>Summary Page</u>	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 Homepages” (Application Fundamentals)

Video: [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.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Benefit Details Tile</u>	HC_EBEN_SS_NAVCOLL_FL (cref for the tile) W3EB_ENR_TILE_FLU (page for dynamic data)	Access benefits-related self-service transactions.
<u>Life Events Page</u>	W3EB_SEL_EVNT_FLU	Initiate processing for a life event that affects benefits.
<u>The Activity Guide Composer Framework for Life Events</u> (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.

Page Name	Definition Name	Usage
<u>Welcome to <Transaction Name> Event Page</u>	AGC_INFO_FL	Read the instructions on the Welcome page to initiate your life event.
<u>Marital Status or Divorce Status Page</u>	HR_EE_MARITAL_FL	(Marriage and Divorce events) Enter the new marital status and as of date.
<u>Birth Date or Adoption Date Page</u>	W3EB_BR_ADPT_FL	(Birth and Adoption events) Enter the date of child birth or the date of adoption and submit.
<u>Life Event Document Upload Page</u>	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
<u>Benefits Summary Page</u>	BEN_SUMM_GRID_FL	Review current benefit enrollments.
Personal Information - “Name (Summary) Page” (PeopleSoft 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 eProfile)	NAME_EDIT_SCF	(Marriage and Divorce events) Enter name change information.
Personal Information - Home and mailing Addresses Page (see “Addresses (Summary) Page” (PeopleSoft eProfile))	HR_EE_ADDR_FL	(Marriage and Divorce events) View your home address and mailing address, or initiate updates to an address.
“<Type> Address (Detail) Page” (PeopleSoft eProfile)	ADDRESS_DFT_SCF	(Marriage and Divorce events) Update address information.
Personal Information - Contact Information page (see “Contact Details Page” (PeopleSoft 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 eProfile)	HR_CNCT_PHONE_SCF	(Marriage and Divorce events) Add, update, or delete a phone number.

Page Name	Definition Name	Usage
“Email Address Page” (PeopleSoft eProfile)	HR_EMAIL_ADDRS_SCF	(Marriage and Divorce events) Add, update, or delete an email address.
“Instant Message Page” (PeopleSoft eProfile)	HR_IM_CHAT_SCF	(Marriage and Divorce events) Add, update, or delete an instant messaging ID.
Personal Information - “Emergency Contacts (Summary) Page” (PeopleSoft eProfile)	HR_EMERG_CNTCT_FL	(Marriage and Divorce events) View a list of your emergency contacts.
“Emergency Contact (Detail) Page” (PeopleSoft eProfile)	HR_EMERG_CNTCT_SCF	(Marriage and Divorce events) Add, update, or delete an emergency contact.
<u>Dependent and Beneficiary Coverage Summary Page</u>	W3EB_DEPBEN_SUM	(Birth and Adoption events) Review dependent/beneficiary summary coverage information.
<u>Dependent/Beneficiary Info Page</u>	W3EB_DEPBNSMRY_FL	Review a summary of dependent/beneficiary information or add new dependents or beneficiaries.
<u>Add Individual Dependent/Beneficiary Information Page</u>	W3EB_DEPBEN_DTL_FL	Review and update detailed dependent and beneficiary personal information.
Pay and Compensation - “Tax Withholding Page” (PeopleSoft 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 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 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.
<u>Pay and Compensation - Direct Deposit Page</u>	PY_IC_DIR_DEP_FL	Review and update direct deposit information.

Page Name	Definition Name	Usage
<u>Benefits Enrollment Page</u>	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.
<u>Benefits Statement Page</u>	BAS_STMT_LIST_FL	View a list of benefits enrollment previews, submitted enrollments and confirmation statements.
<u>Summary Page</u>	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” (Enterprise Components) documentation.

This example illustrates the layout of the Life Events pages for a large form factor device.

The screenshot displays a web application window titled "Marriage Event". The window has a dark header bar with an "Exit" button on the left and a menu icon on the right. Below the header, there are "Cancel" and "Next >" buttons. The main content area is divided into two sections: a sidebar on the left and a main panel on the right.

Sidebar Progress List:

- Welcome to Marital Event** (Complete)
- Marital Status** (Not Started)
- Document Upload** (Not Started)
- Benefits Summary** (Not Started)
- Personal Information** (Not Started)
- Dependent/Beneficiary Info** (Not Started)
- Pay and Compensation** (Not Started)
- Direct Deposit** (Not Started)
- Benefit Enrollment** (Not Started)
- Benefits Statements** (Not Started)
- Summary** (Not Started)

Main Panel Content:

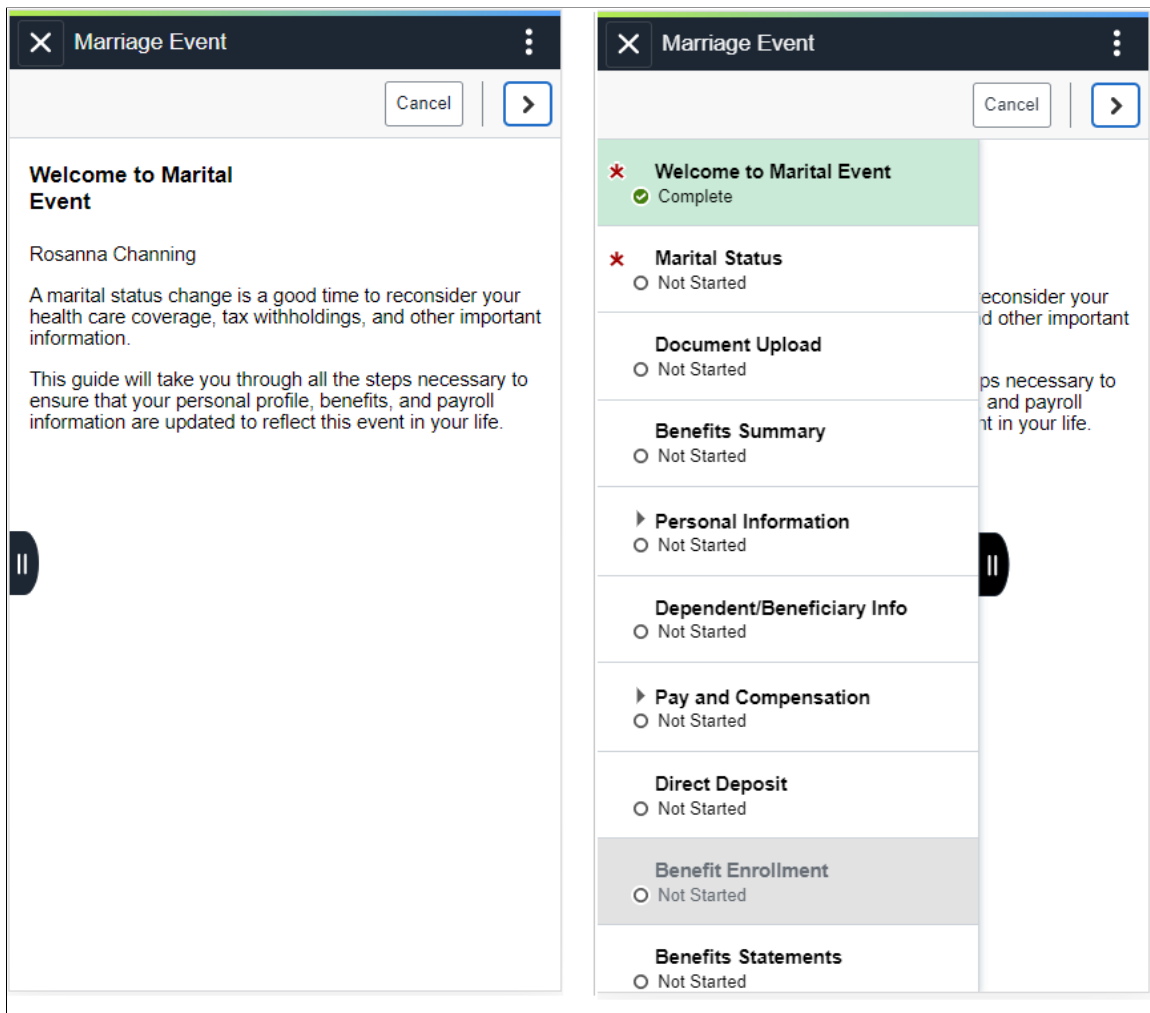
Welcome to Marital Event

Rosanna Channing

A marital status change is a good time to reconsider your health care coverage, tax withholdings, and other important information.

This guide will take you through all the steps necessary to ensure that your personal profile, benefits, and payroll information are updated to reflect this event in your life.

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.

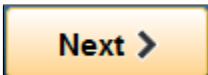
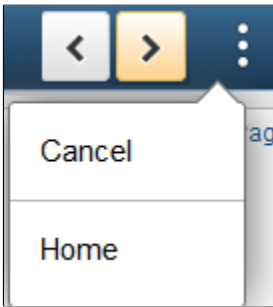


Note: Throughout this topic, the page illustrations show the page sections of the Life Events process without the context of the Activity Guide Composer step list. Even though the Activity Guide Composer framework is not illustrated, remember that all steps appear within that framework.

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.

<i>Field or Control</i>	<i>Description</i>
 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 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.

Field or Control	Description
<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” (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 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: • <i>Not Started</i>: These are unvisited steps. • <i>Visited</i>: When you first reach a step, the status changes to this. • <i>Complete</i>: In some instances, the system will automatically mark the step as <i>Complete</i> 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 <i>Visited</i>. • <i>In Progress</i>: 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” (Enterprise Components), “Activity Guide Composer - Select Steps Page” (Enterprise Components), and “Activity Guide Composer - Organize and Configure Steps Page” (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.

<i>Field or Control</i>	<i>Description</i>
<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, <i>Pay and Compensation - Direct Deposit</i> indicates that the step title is <i>Pay and Compensation</i> and the substep title is <i>Direct Deposit</i>.

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.

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.

This example illustrates the Welcome to <Transaction Name> Event page.

Welcome to Marital Event

Betty Locherty

A marital status change is a good time to reconsider your health care coverage, tax withholdings, and other important information.

This guide will take you through all the steps necessary to ensure that your personal profile, benefits, and payroll information are updated to reflect this event in your life.

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.

This example illustrates the Marital Status page.

Marital Status

Current Status

Married

*New Status

*As Of

06/01/2020

Save

Note: The Marital Status and Divorce Status pages display the same information. The Marital Status page is depicted in the previous example.

Field or Control	Description
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.

This example illustrates the Birth Date page.

Birth Date

Submit

A birth event may require a change to your benefit enrollment. You'll have an opportunity to have the system prepare your new benefit options during the Benefit Enrollment step. Once your new options are prepared, you may change your benefit enrollment.

Date of Birth 

This example illustrates the Adoption Date page.

Adoption Date

Submit

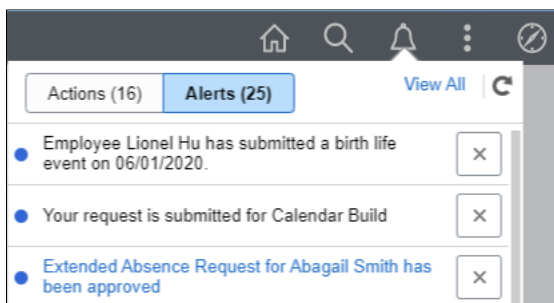
Select the **Submit** button to notify the Benefits department of this change.
Required Documentation: You are required to send legal documentation to the Benefits Department showing the date your new dependent was placed in your home for adoption.
 After the required documentation is received, the Benefits department will notify you when your enrollment is open. Then you can add your new dependent(s) to your benefit plans.

Date child was placed in your home for adoption 

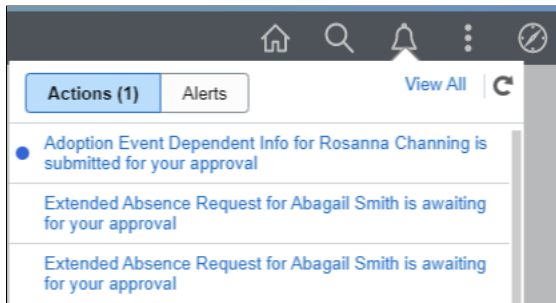
Enter the event date, such as the birth date of your child or the date the child was placed in your home for adoption, in the date field and click the **Submit** button.

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.

This example illustrates the alert displayed when the Benefits Administrator clicks the **Notification** icon.



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:

- [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.

Note: This page has been replaced by the [Benefits Summary Page](#) in Fluid.

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.

This example illustrates the Dependent and Beneficiary Coverage Summary page.

Dependent and Beneficiary Coverage Summary

Bee Locherty

To view your benefits as of another date, enter the date and select Go.

Dep/Ben Details			
Dependent/Beneficiary Name	Relationship	Type of Benefit	Description
Erik Mathers	Spouse		
		Medical	Medical HMO Plan 2
		Dental	Dental DMO
		Life	Basic Life Plan
		Supplemental Life	Suppl Group Life 1x
		AD and D	Flat 25K AD&D

Field or Control	Description
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.

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](#).

This example illustrates the Add Individual Dependent/Beneficiary Information page.

Cancel

Add Individual Dependent/Beneficiary Information

Save

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Jun 1, 2020.

Name

Add Name

Personal Information

Date of Birth

*Gender

*Relationship to Employee

Dependent

Beneficiary

*Marital Status Single As of

*Student No As of

*Disabled No As of

*Smoker Non Smoker As of

Address

Address	Address Type	Same as mine
1430 North West Blvd Apt B215 Guttenberg, NJ 07093	Home	Same as mine >

National ID

No data exists

Add National ID

Phone

No data exists

Add Phone

Email

No data exists

Add Email

Use this page to enter personal details, status information, and contact information for a dependent or beneficiary.

Note: The benefits administrator can configure the values in the **Relationship to Employee** field using the [Life Event Rules Page](#).

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.

This example illustrates the Pay and Compensation - Direct Deposit page.

Direct Deposit

Accounts




Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent	
1	Piggy Bank	Direct Deposit	121042882	XXXXXX2882	Savings	5.00%	>
2	Mortgage	Direct Deposit	121042882	XXXXXX2889	Checking	\$1000.00	>
3	Spending Money	Direct Deposit	107002192	XXXXXX2192	Checking	10.00%	>
Last	Travel Funds	Direct Deposit	021200025	XXXXXX0025	Savings	Remaining Balance	>

Reorder

Print Option

Send a paper copy of the direct deposit pay statement to my home. ☒ Yes ☐

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.

This example illustrates the Summary page.

Summary

Complete

Congratulations! You have completed your Marriage Event!

You may need to update the following documentation if you are changing your name:

Drivers License, Social Security, Passport, Bank Accounts, Credit Cards, Voter Registration Card.

If you are moving, you may want to update address with the Post Office.

Select the **Complete** pushbutton to end this event.

Steps

13 rows

Step	Status	Date Completed	Required	Go to Step
Welcome to Marital Event	Complete	06/09/2020	Yes	Go to Step
Marital Status	Complete	06/09/2020	Yes	Go to Step
Document Upload	Visited		No	Go to Step
Benefits Summary	Visited		No	Go to Step
Name	Not Started		No	Go to Step
Home and mailing Address	Not Started		No	Go to Step
Contact Information	Not Started		No	Go to Step
Emergency Contact	Not Started		No	Go to Step
Dependent/Beneficiary Info	Visited		No	Go to Step
Tax Withholding	Not Started		No	Go to Step
Direct Deposit	Not Started		No	Go to Step
Benefit Enrollment	Not Started		No	Go to Step
Benefits Statements	Not Started		No	Go to Step

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.

Field or Control	Description
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.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Life Event Document Upload Page	HR_ATT_CNFG	Define attachment types as configuration ID.

Life Event Document Upload Page

Use the Life Event 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 > Life Event Document Upload

This example illustrates the Document Upload page.

Marriage Event

Qualifying Period 12/3/2020-1/3/2021
Betty Locherty

Cancel Previous Next Save

Document Upload

Instructions
You are required to submit the document(s) listed here. Select the Add Attachment button, enter a description of your document and upload the document.

Document List

Document	Upload Requirement	Approval Required
Marriage Certificate	Required	✓
Bank Statement	Require at least one	
Prior Year Tax Return Copy	Require at least one	
Utility Bill Copy	Require at least one	
Social Security Card Copy	Required	

Document

Type: Miscellaneous Documents
Category: Bank Statement

Add Attachment Add Note

View Document

View All No

View Attachments: Type - Miscellaneous Documents, Category - Bank Statement

Document	Description	Type	Attached By	Attached	Status
Bank_Statement.pdf	Bank Statement	Attachment	Betty Locherty	12/04/20 08:48:34 AM	Active

1 row

Field or Control	Description
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. 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.

Field or Control	Description
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.

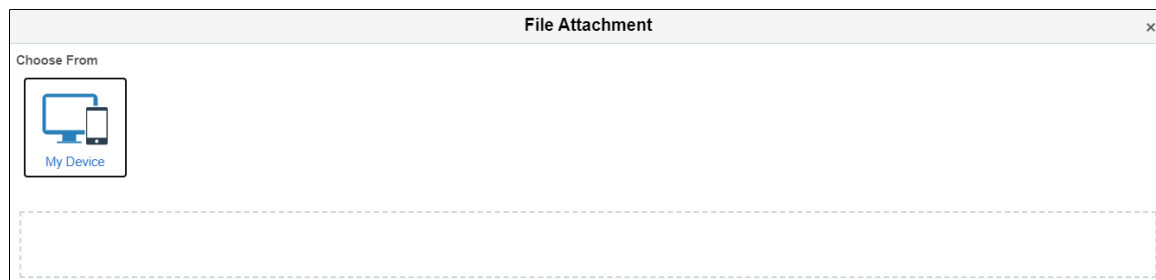
Note: The system marks the Upload Document step as complete only when all the required documents are uploaded and all the documents that require approval are approved.

Document

Field or Control	Description
Type	You can select the category to which your document belongs. Options are displayed based on the configuration done at the definition level.

Field or Control	Description
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.

This example illustrates the File Attachment modal.



Field or Control	Description
Add Note	Use this button to open the Note modal window and add additional information regarding the attached file.

This example illustrates the Note modal.

Cancel

Note

Done

*Description

*Note Text

8095 characters remaining

Attached By

Betty Locherty

Attached

11/19/2020 09:20:56 PM

Last Updated

11/19/2020 09:20:56 PM

Status

Active

View Document

Field or Control	Description
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.

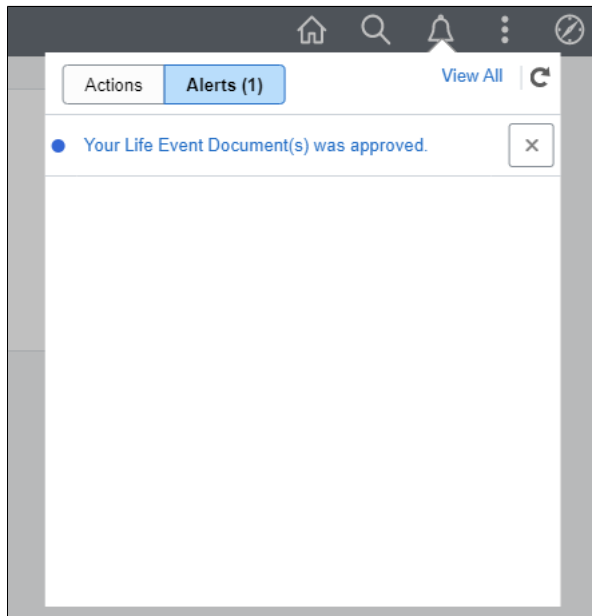
Based on the value in the ‘View All’ field, the documents are listed with details like description, Type, Attached By, Attached date, and Status of the approval.

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

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.

This example illustrates the Transaction Details page.

Transaction Details								Close
Instructions Select a document to review.								
View Attachments								
Document	Description	Document Type	Category	Type	Attached By	Status	5 rows	
Marriage_Certificate.pdf	Marriage_Certificate.pdf	Marriage Certificate	Marriage Certificate	Attachment	Betty Locherty	Active	>	
Bank_Statement.pdf	Bank Statement	Miscellaneous Documents	Bank Statement	Attachment	Betty Locherty	Active	>	
Social_Security_Card_Copy.pdf	Social_Security_Card_Copy.pdf	Social Security Card Copy	Social Security Card Copy	Attachment	Betty Locherty	Active	>	
Utility_Bill.pdf	Utility_Bill.pdf	Miscellaneous Documents	Utility Bill Copy	Attachment	Betty Locherty	Active	>	
Prior_Year_Tax_Return_Copy.pdf	Prior_Year_Tax_Return_Copy.pdf	Miscellaneous Documents	Prior Year Tax Return Copy	Attachment	Betty Locherty	Active	>	

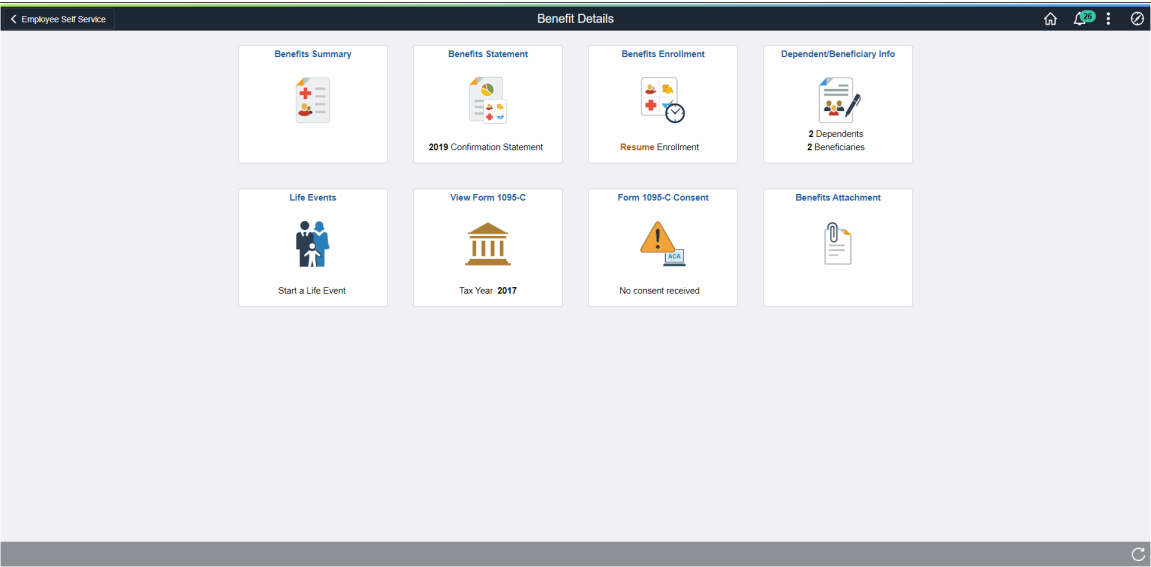
Benefits Attachment Page

As an employee, you can use the Benefits Attachment page to review the uploaded documents and status.

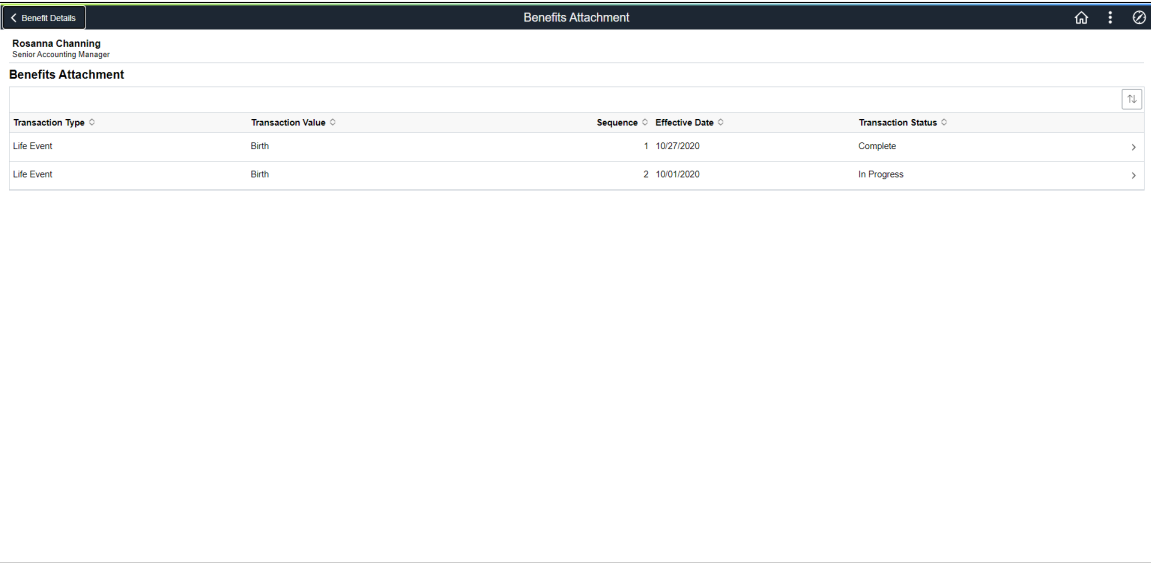
Navigation:

Open the Benefits Attachment tile from Benefit Details Dashboard or Benefits Details Navigation collection.

This example illustrates the Benefit Details Dashboard with Benefit Attachment Tile



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.

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.

This approval page has been replaced by Fluid Approvals. For more information, see [Approving Life Event Documents Using Fluid Approvals](#).

Page Used to Approve Life Event Documents

Page Name	Definition Name	Usage
Approve Life Event Document Page	W3EB_APPR_SUMMARY	Approve or reject life event documents uploaded by employees.

Approve Life Event Document Page

Use the Approve Life Event Document page (W3EB_APPR_SUMMARY) to approve required life event documents uploaded by employees.

Navigation:

Benefits > Approve Life Event Document > Approve Life Event Document

This page enables the Benefits Administrator to approve required life event documents uploaded by employees.

Approve Document Upload

Document Filing(s) - Needs Approval ? Personalize | Find | First 1 of 1 Last

Select	Name	Employee ID	Life Event Type	Description	Document
☐	Marc Kessler	KU0068	A	Adoption	Adoption Certificate

Approval ?

Select All Deselect All Approve Deny PushBack

Document Filing(s) - Needs Approval

Field or Control	Description
Select	Select the documents to be processed from the list.
Name	This field displays the name of the employee.

Field or Control	Description
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

Field or Control	Description
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” (Application Fundamentals)

Pages Used to Approve Life Event Documents Using Fluid Approvals

Page Name	Definition Name	Usage
<u>Pending Approvals — Benefits Document Filing Page</u>	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.

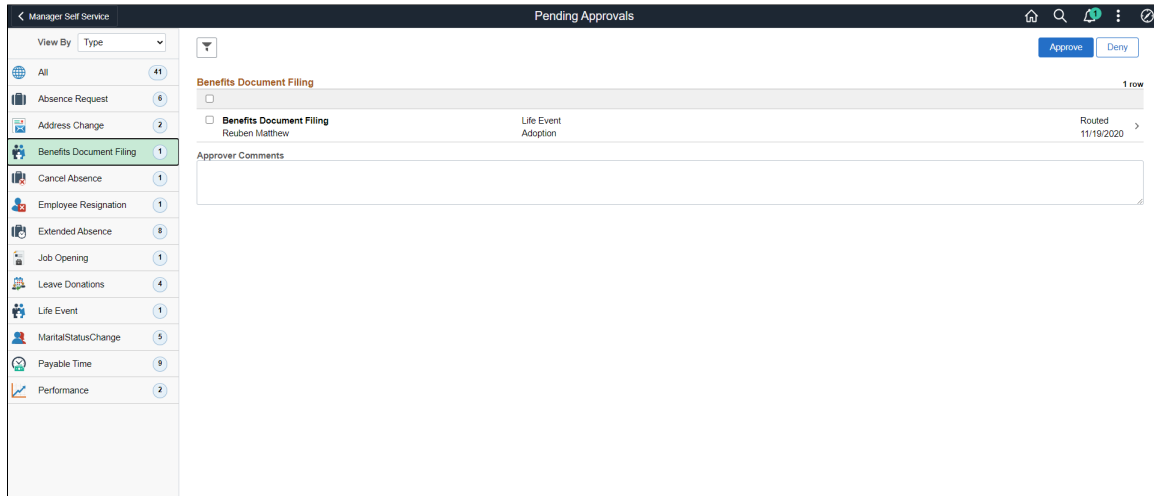
Navigation:

On the Workforce Administrator home page, click the Approvals tile to access the Pending Approvals page. From the left panel, click Benefits Document Filing.

You can also access the Benefits Document Filing page under Benefits Approvals by clicking the Benefits WorkCenter tile on the Workforce Administrator home page.

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.

This example illustrates the Pending Approvals- Benefits Document Filing page.

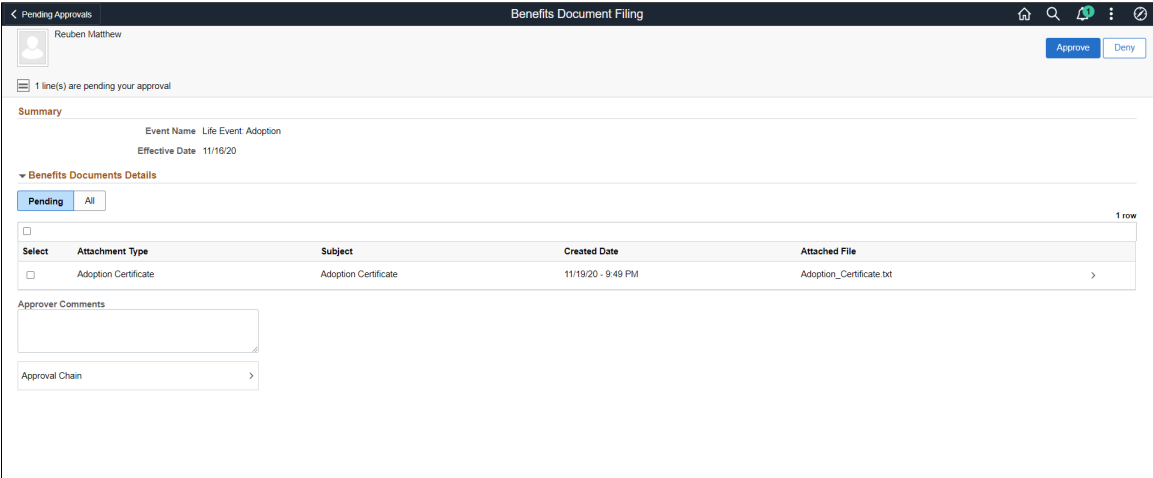


The approval options on this page are common to all fluid approval transactions, as described in the documentation for the “Using PeopleSoft Fluid User Interface Self-Service Approval Transactions” (Application Fundamentals).

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.

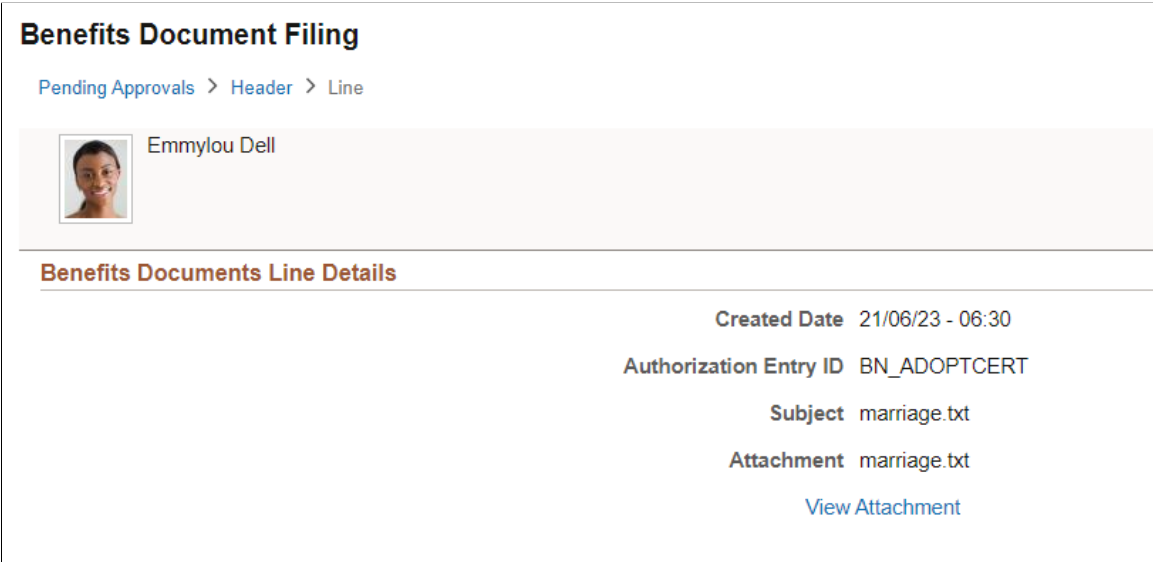
This example illustrates the Benefits Document Filing Page.



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.

If you access the Benefits Document Filing page from the Benefits WorkCenter, the benefits administrator can navigate between the drill-down levels using breadcrumbs. The *Pending Approvals* level displays all the approvals that are pending. The *Header* level displays the list of documents that are pending approval for the selected employee. The *Line* level displays the details of the selected document.

This example illustrates the breadcrumbs available in the Benefits Documents Page when accessed from Benefits WorkCenter.



Field or Control	Description
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.

<i>Field or Control</i>	<i>Description</i>
Approval 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:

- *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:

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.

This example illustrates the fields and controls on the Manage Delegation page.

Manage Delegation

Betty Locherty

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

[Learn More about Delegation](#)

Select *Create Delegation Request* to choose transactions to delegate and proxies to act on your behalf.

[Create Delegation Request](#)

Select *Review My Proxies* to review the list of transactions that you have delegated and the proxy for each transaction.

[Review My Proxies](#)

Entering Dates for the Delegation Request

Use the Enter Dates page to select the date range for delegation.

This example illustrates the fields and controls on the Create Delegation Request — Enter Dates page.

Create Delegation Request

Enter Dates

Betty Locherty

Director-Finance

Enter the dates for your delegation request. Enter a *From Date* that is today or later. Enter a *To Date* that is the same as or later than your *From Date*. For open-ended delegation requests, leave the *To Date* blank.

Delegation Dates

From Date 

To Date 

[Next](#) [Cancel](#)

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.

This example illustrates the fields and controls on the Create Delegation Request — Select Transactions page.

Create Delegation Request

Select Transactions

Betty Locherty

Director-Finance

Select the transactions that you want to delegate to a proxy. You can select one or many transactions.

Delegate Transactions	
	Transaction
☐	Approve Job Offer
☐	Approve Job Opening
☒	Approve Life Event Documents
☐	Compensation Approvals
☐	Confirm Compensation Proposals
☐	Employee Absence Balance
☐	Employee Absence History
☐	Employee Absence Request
☐	Employee Progression Chart

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.

This example illustrates the fields and controls on the Create Delegation Request — Select Proxy by Hierarchy page.

Create Delegation Request

Select Proxy by Hierarchy

Betty Locherty

Director-Finance

This page displays persons within your hierarchy that you can select as proxies. Select the radio button next to the name to select that person as a proxy. You can also select the [Search by Name](#) hyperlink to search for proxies outside your hierarchy.

[Search by Name](#)

Choose Delegate

	Name	Empl ID	Organizational Relationship	Job Title	Department	Supervisor Name
☐	Beatrice Test	K0G004	Employee	Analyst-Business Development	Finance and Administration	Betty Locherty
☒	Calvin Roth	KU0008	Employee	Director-Information Systems	Information Systems	Jean Parsons
☐	Cynthia Adams	KU0101	Employee	Corporate Controller	Corporate Accounting	Betty Locherty
☐	Diane Palmer	K0MTX005	Employee	Assistant-Administrative	Corporate Finance	Betty Locherty
☐	Ginger Buckalew	K0G005	Employee	Assistant-Nursing	Finance and Administration	Betty Locherty
☐	Jean Parsons	KU0003	Employee	Senior Vice President Finance	Finance and Administration	Douglas Lewis
☐	Jill Chancellor	KUL702	Employee	Manager-Payroll	Payroll	Betty Locherty

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.

This example illustrates the fields and controls on the Create Delegation Request - Delegation Detail page.

Create Delegation Request

Delegation Detail

Betty Locherty

Director-Finance

Select the *Notify Delegator* checkbox to receive all the notifications that your proxy receives when acting on your behalf.

Proxy Diane Palmer

From Date 08/16/2013

To Date 08/19/2013

Transactions

Approve Life Event Documents

☒ Notify Delegator

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.

This example illustrates the fields and controls on the My Proxies page.

My Proxies

Betty Locherty

Director-Finance

This page allows you to view your proxies and the request status for each delegation request. Select a particular status and select *Refresh* to show the matching requests. Select the information icon to view request details. To revoke requests, select the request, then select *Revoke*.

Show Requests by Status

Choose Delegate								
	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
☐	Approve Promotion	Adland Chu	Clerk-Payroll Sr	03/15/2006		Submitted	Inactive	i
☒	Approve Life Event Documents	Cynthia Adams	Corporate Controller	08/16/2013	08/31/2013	Revoked	Inactive	i

[Select All](#)
[Deselect All](#)

[Return to Manage Delegation](#)

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.

This example illustrates the fields and controls on the My Delegated Authorities page.

My Delegated Authorities

Rosanna Channing

Senior Manager-Accounting

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

Show Requests by Status: Submitted Refresh

Choose Delegate								
	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
☐	Approve Life Event Documents	Betty Locherty	Director-Finance	08/16/2013	08/31/2013	Submitted	Inactive	i

[Select All](#)
[Deselect All](#)
Accept
Reject

[Return to Manage Delegation](#)

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.

This example illustrates the fields and controls on the Select Role page.

Rosanna Channing

You have been delegated authority to process transactions for another employee(s). If you would like to process transactions for an employee other than yourself, select that employee, otherwise select 'Process my own transaction'.

Choose Delegate				
	Name	Job Title	Department	Supervisor Name
☒	Process my own transaction			
☐	Betty Locherty	Director-Finance	Corporate Finance	Jean Parsons

Continue

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.

This example illustrates the fields and controls on the Maintain Delegation Authority page.

Maintain Delegation Authority

User ID PS Report List Process Monitor Process Request

Run Control ID 001

As Of Date 08/16/2013

Save Return to Search Notify Add Update/Display

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.

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

This page enables the Benefits Administrator to manage Benefits Instances in progress.

Filters

Field or Control	Description
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.

<i>Field or Control</i>	<i>Description</i>
Filter	Click to filter benefits instances based on the specified criteria.
Reset	Reset the fields to create a new filter.

Activity Guide Instances

<i>Field or Control</i>	<i>Description</i>
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.

Using the PeopleSoft Fluid User Interface to Manage Benefits Administration

Using the PeopleSoft Fluid User Interface to Manage Benefits as an Administrator

This topic lists the pages that Benefits administrator can access from a single location in the PeopleSoft Fluid User Interface to access Benefits configuration and administrative tasks.

This section discusses on the Manage Benefits dashboard for benefits administrator.

Pages Used to Manage Benefits as an Administrator Using the PeopleSoft Fluid User Interface

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Manage Benefits Tile</u>	HC_BEN_DASHBRD_FL_GBL_LINK	Access the Manage Benefits dashboard where you can access a variety of configuration and administrative components, as well as analytics information. This includes tiles to access the Benefits WorkCenter and analytics on Benefits Utilization, Life Events Insights, Open Enrollment Insights, and Ben Admin Processing Insights.
<u>Manage Benefits Home Page</u>	HC_BEN_DASHBRD_FL_GBL_LINK	Access Benefits administrative and analytics tiles and pages.

Manage Benefits Tile

Use the Manage Benefits tile (HC_BEN_DASHBRD_FL_GBL_LINK) to access the Manage Benefits dashboard where benefits administrators can access a variety of configuration and administrative components for Benefits. The Manage Benefits dashboard includes tiles to access the Benefits WorkCenter and analytics to view Benefits Utilization, Open Enrollment Insights, Life Events Insights and Ben Admin Processing Insights.

Navigation:

The Manage Benefits 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.

Add the *Fluid Dashboard-Manage Benefit* role for the user to access the Manage Benefits tile.

This example illustrates the fields and controls on the Manage Benefits tile.



Click the Manage Benefits tile to access the [Manage Benefits Home Page](#).

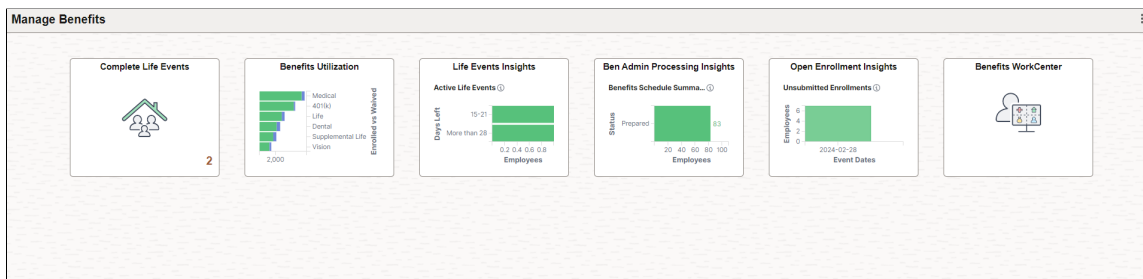
Manage Benefits Home Page

Use the Manage Benefits home page (HC_BEN_DASHBRD_FL) to access a collection of frequently used benefits-related administrative components and analytics information.

Navigation:

Click the [Manage Benefits Tile](#) from the Workforce Administrator homepage.

This example illustrates the fields and controls on the Manage Benefits dashboard.



The Manage Benefits dashboard includes below tiles:

- Complete Life Events
- Benefits WorkCenter
- Benefits Utilization
- Life Events Insights
- Ben Admin Processing Insights
- Open Enrollment Insights

Use the links in the table to access the complete documentation for each transaction.

Tile Name	Usage
Complete Life Events	Access the Complete Life Events page to view the list of employees with In-Progress Life Event. The administrator can select an employee to access the Summary step of the Life Event and complete it. This enables the employee to start a new Life Event. Note: Only Fluid Life Event instances created after the AG composer template setup are displayed on the AG Composer Tile.
<u>Using the Fluid Benefits WorkCenter</u>	Access the frequently used administrative work items related to the employee's benefits. Note: Although the Benefits WorkCenter tile appears under Manage Benefits tile, it can be added on Workforce Administrator home page or any other home page as well.
<u>Viewing Benefits Utilization Insights</u>	View and analyze the benefits utilization data analytics.
<u>Viewing Life Events Insights</u>	View and analyze the life events data analytics.
<u>Viewing Ben Admin Processing Insights</u>	View and analyze the benefits schedule summary.
<u>Viewing Open Enrollment Insights</u>	View and analyze the open enrollment summary.

Using the Fluid Benefits WorkCenter

The Fluid Benefits WorkCenter can be configured for specific roles like the Benefits Administrators, Benefits Specialist, and ACA Administrator.

This topic discusses how to use the Fluid Benefits WorkCenter to manage employee's 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

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” (Application Fundamentals).

The following video provides an overview of Benefits WorkCenter:

Video: [PeopleSoft Benefits/Time and Labor Fluid WorkCenters](#)

Related Links

“Understanding PeopleSoft Fluid WorkCenters” (Application Fundamentals)

Pages Used in the Fluid Benefits WorkCenter

Page Name	Definition Name	Usage
Benefits WorkCenter Tile	HC_BEN_WC_APP_FL	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 • Dependents Not Qualified 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.

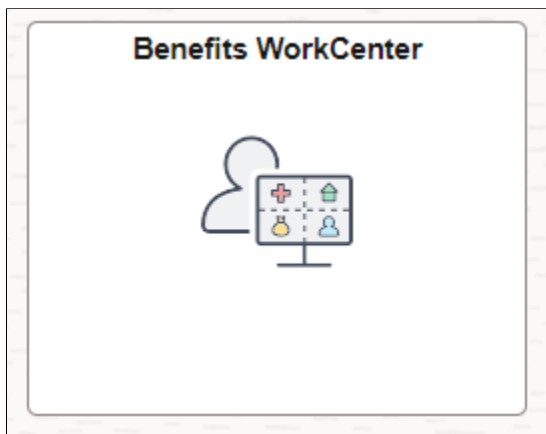
Benefits WorkCenter Tile

Use the Benefits WorkCenter tile (HC_BEN_WC_APP_FL) to access and manage the employees’ benefits information.

Navigation:

Workforce Administrator > Manage Benefits > Benefits WorkCenter

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](#).

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.

Benefits WorkCenter

Scope

My Scope

My Work

Audit Exceptions

Dependents Not Qualified

No SSN Employees - Health

284

No SSN Dependents - Health

445

Employee Under Age 16

3

Dual Health Plan - Employee

5

Employees with Over-Age ...

12

Enrollment Exceptions

Preparation and Election Error

ACA Exceptions

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
TQ803		0	Allan Bishoff	Vision	4	01	Sibling	22/09/1955	Single	N	No	TQABU	TQ10200	TQA	USA
B-COB118		0	Alex cobrter1	Medical	4	02	Friend	01/07/1926	Single	N	No	BN1BU	B005	BN1	USA
B-BN303		0	Margaret Curren	Medical	4	01	Parent	12/04/1949	Married	N	No	BN1BU	B009	BN1	USA
B-COB118		0	Alex cobrter1	Dental	4	02	Friend	01/07/1926	Single	N	No	BN1BU	B005	BN1	USA
TQ604		0	Jessica Morris	Medical	3	01	Child	30/03/1967	Single	N	Yes	TQABU	TQ11000	TQA	USA
TQ803		0	Allan Bishoff	Vision	4	02	Sibling	08/11/1949	Single	N	No	TQABU	TQ10200	TQA	USA
TQ803		0	Allan Bishoff	Dental	4	01	Sibling	22/09/1955	Single	N	No	TQABU	TQ10200	TQA	USA

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 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” (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.
- **My Insights:** For more information, see Understanding the My Insights Group Box.
- **My Approvals:** For more information, see Understanding the My Approvals 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.

Field or Control	Description
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” (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: • <i>Personalize:</i> Select this option to personalize the WorkCenter layout. For more information, see “Personalize Page (Fluid)” (Application Fundamentals). • <i>Maintain Scope Detail:</i> Select this option to modify the current scope. • <i>Configure Scope:</i> Select this option to create a new scope. For more information, see “Configure Scope Page” (Application Fundamentals).

Right Panel

The transaction panel on the right is where the selected transaction result or component (work item) is displayed.

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)” (Application Fundamentals).

You can also filter and personalize the output based on your requirements. Use the “Refine Filter Criteria Page” (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” (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” (Application Fundamentals).

You can download grid data to .xls file.

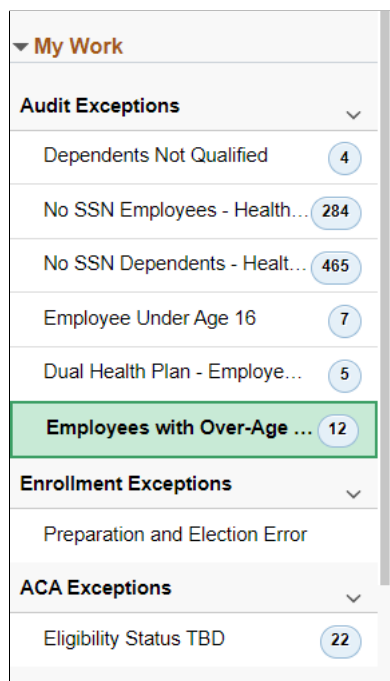
Understanding the My Work Group Box

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.

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.

Audit Exceptions

The PeopleSoft-delivered Audit Exceptions link provides reports of exceptions similar to what is provided in BEN733.SQR. These include:

- Dependents Not Qualified

- 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.

Dependents Not Qualified Page

Use the Dependents Not Qualified page to view the employees having non qualified dependents.

This example illustrates the fields and controls on the Non Qualified Dependents page.

Dependents Not Qualified				
4 rows				
Employee ID	Actions	Employee Name	Dependent ID	Dependent Name
BOE001		Eden Rodriguez	02	Liza Rodriguez
KLU0001		Douglas Lewis	02	Nely Lewis
KLU0002		Charles Baran	01	Laura Baran
MDU_BOE013		Isla Addison	01	Christian Cameron

Field or Control	Description
Empl ID	Select the Empl ID link to access the Dependent/Beneficiary page, to modify the dependent details.
Actions	Select Actions to access the related Actions menu to send the employee notifications directly from the exception report.

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.

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
PU005		EGUBU	10000	PSU

Field or Control	Description
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.

This example illustrates the fields and controls on the No SSN Dependents–Health Benefits Page.

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		Wolfe 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
B-BARET107		Single Student PPACA	09	Dep age 20 Student Test case 3B	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.

This example illustrates the fields and controls on the Employee Under Age 16 Page.

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	TYT	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.

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	BUHDPH	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 Human Resources Manage Base Benefits).

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.

This example illustrates the fields and controls on the Preparation and Election Error Page.

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_Partnc_Plan requires proof of insurability (the Proof-Required-Indicator on Bas_Partnc_Optn is 'Yes') but the Proof-Received-Indicator is still 'No'. (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		
MP10236		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		
MP10235		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		
MP10234		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		
MP10233		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: Company; MSGData2: BAS-Group-Id)	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”.

This example illustrates the fields and controls on the Eligibility Status TBD Page.

Emp ID	Actions	Name	Effective Date	Affordable Care Act Common ID	Non-Assessment Period	Calculation Method
KU0140		Ronnie Carmichael	02/08/2014	KU1	Y	Look Back
KU0141		Kai MacKenzie	02/08/2014	KU1	Y	Look Back
KU0142		Liam Gray	02/08/2014	KU1	Y	Look Back
KU0176		John Russak	08/01/2015	KU1	N	Look Back
KU0143		Grayson Mann	01/01/2014	KU1	N	Look Back
KU0327		Mary Brown	01/01/2014	KU1	N	Look Back
KU0329		Francis Brown	01/01/2014	KU1	N	Look Back
KU0332		Florante Ada	01/01/2014	KU1	N	Look Back
KU0334		Richard Hasson	01/01/2014	KU1	N	Look Back
KU0336		Sam Puletsi	01/01/2014	KU1	N	Look Back
KU0314		Brendan Sullivan	08/01/2015	KU1	N	Look Back
KU0326		Tracy Brown	01/01/2014	KU1	N	Look Back
KU0328		April Brown	01/01/2014	KU1	N	Look Back
KU0330		Baily Brown	01/01/2014	KU1	N	Look Back
KU0335		Lilian Pula	01/01/2014	KU1	N	Look Back
KU0335		Lilian Pula	01/01/2014	KU1	N	Look Back
KU0170		Cindy Bryson	02/08/2014	KU1	Y	Monthly
KU0175		Janice Worthington	08/01/2015	KU1	N	Look Back
KU0331		Branda Abad	01/01/2014	KU1	N	Look Back

Understanding the My Insights Group Box

The My Insights group box provides access to analytics for Benefits Utilization, Open Enrollment Insights, Life Events Insights, and Ben Admin Processing Insights.

This example illustrates the My Insights Group Box.

My Insights
Benefits Insights
Ben Admin Processing Insights
Benefits Utilization Insights
Life Events Insights
Open Enrollment Insights

System administrators can manage links and configuration options for the My Insights Group Box on the “Configure Pagelets – My Insights Page” (Enterprise Components).

Related Links

[Benefits Admin Processing Insights Dashboard](#)

[Benefits Utilization Dashboard](#)

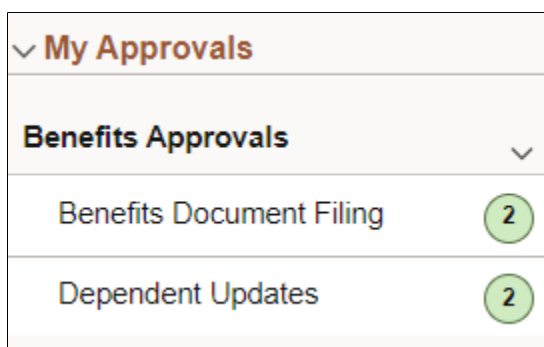
[Life Events Insights Dashboard](#)

[Open Enrollment Insights Dashboard](#)

Understanding the My Approvals Group Box

The My Approvals group box provides access to pending approvals for life events and dependent updates.

This example illustrates the My Approvals Group Box.



System administrators can manage links and configuration options for the My Approvals Group Box on the “Configure Pagelets – My Approvals Page” (Enterprise Components).

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.

This example illustrates the Links Group Box.

▼ Links
Employee/Dependent Information ▼
Enroll in Benefits ▼
Enrollment Administration ▼
FSA Administration ▼
COBRA Administration ▼
Benefits Plan Setup ▼
ACA Setup ▼
Plan Comparison ▼

System administrators can manage links and configuration options for the Links Group Box on the “Configure Pagelets - Links Page” (Enterprise Components).

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

This example illustrates the Queries Group Box.

▼ Queries	
Query Manager	
ACA	▼
ACA Sample Extract 1	
ACA Sample Extract 2	
ACA Sample Extract 3	
ACA Sample Safe Harbor Query	
Health Benefits	▼
Health Benefits Counts	

Administrators can manage links and configuration options for the Queries Group Box on the “Configure Pagelets – Queries Page” (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.

This example illustrates the Reports/Processes Group Box.

▼ Reports/Processes	
Benefit Reports	▼
Benefits Event Processing	▼
FSA Processing	▼
COBRA Processing	▼
Interface with Provider	▼
ACA Annual Processing	▼

Administrators can manage links and configuration options for the Reports/Processes group box on the “Configure Pagelets – Reports/Processes Page” (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

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.

Note: To access the Benefit Details Tile Dashboard, add the role *Fluid Dashboard - Benefit Dtls* for the user.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

Pages Used to Work With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface

<i>Page/Tile Name</i>	<i>Definition Name</i>	<i>Usage</i>
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.
Life Events Page	W3EB_SEL_EVNT_FLU	Initiate processing for a life event that affects benefits.
Dependent/Beneficiary 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.

Page/Tile Name	Definition Name	Usage
<u>Benefits Enrollment Tile</u>	HC_BNE_SEL_EVENT_DB_FL	Access the Benefits Enrollment pages.
Benefits Enrollment pages: <u>Benefits Enrollment Event Selection Page</u> <u>Benefits Enrollment Page</u>	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.
<u>Benefits Statements Tile</u>	HC_BAS_STATMNTS_DB_FL	Access the Benefits Statements page.
<u>Benefits Statement Page</u>	BAS_STATMNTS_FL	View a list of benefits enrollment preview and confirmation statements.
Affordable Care Act: <u>View Form 1095-C Tile</u>	HC_ACA_EE_YE_FORM_DB_FL	Access the View Form 1095-C page.
Affordable Care Act: <u>View Form 1095-C Page</u>	ACA_EE_YE_FORM_FL	View the Form 1095-C generated each year and submitted to the IRS.
Affordable Care Act: <u>Form 1095-C Consent Tile</u>	HC_ACA_SS_CONSENT_DB_FL	Access the Form 1095-C Consent page.
Affordable Care Act: <u>Form 1095-C Consent Page</u>	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.
<u>Benefits Attachment Tile</u>	BEN_ATTACH_EVNT_FL	Use the Benefits Attachment tile to access Benefits Attachment page.
<u>Benefits Attachment Page</u>	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 benefits self service transactions.

Navigation:

The Benefit Details tile is delivered as part of the “Employee Self Service Homepage” (Application Fundamentals), but the location can change if you change the delivered home pages or if employees personalize their home pages.

This example illustrates the Benefit Details tile.



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.

Select the **Benefit Details** tile to access the **Benefit Details** tile dashboard or navigation collection. To view the Benefits Details tile dashboard, add the role *Fluid Dashboard - Benefit Dtls* to the user.

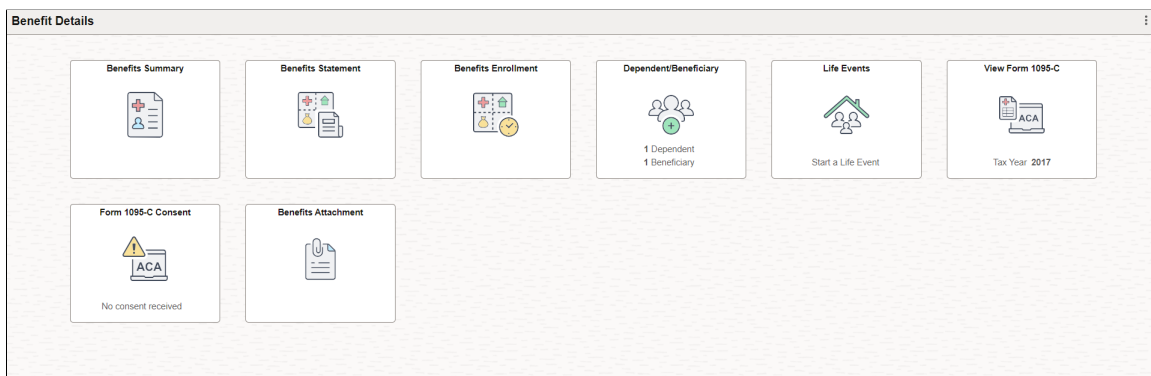
Benefit Details Tile Dashboard

Use the Benefit Details Tile dashboard to access the interactive tiles for benefits self service transactions.

Navigation:

On the delivered Employee Self Service dashboard, select the Benefit Details tile.

This example illustrates the Benefit Details tile dashboard.



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.

Video: [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:

Employee Self Service > Benefit Details

This example illustrates the Benefits Summary tile.



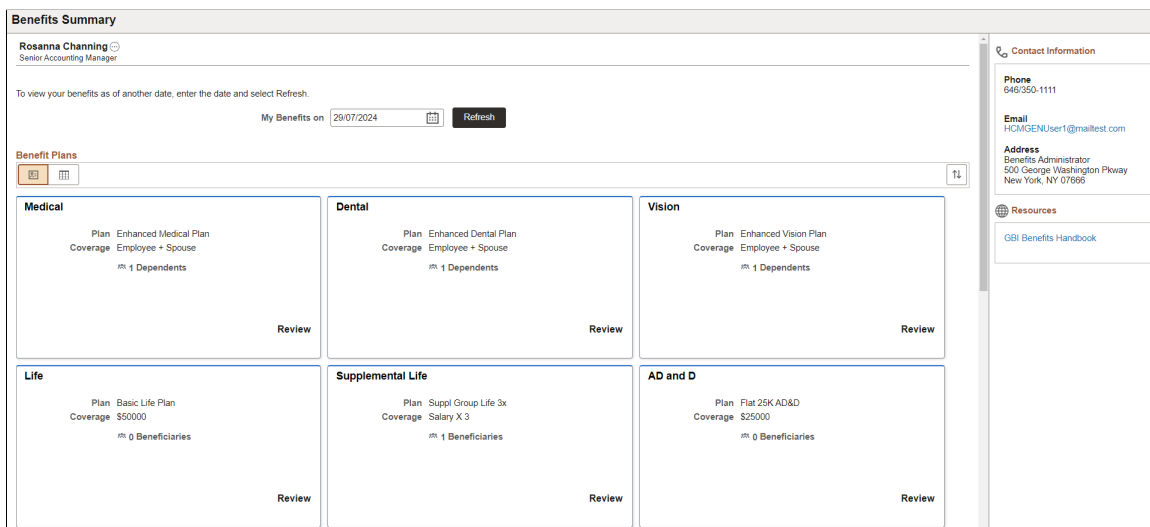
Benefits Summary Page

Use the Benefits Summary page (BEN_SUMM_GRID_FL) to view summary information about benefits.

Navigation:

On the Benefit Details Tile Dashboard, select the Benefits Summary tile.

This example illustrates the Benefits Summary page, in card view.



This example illustrates the Benefits Summary page, in grid view.

Benefits Summary

Rosanna Channing

Senior Accounting Manager

To view your benefits as of another date, enter the date and select Refresh.

My Benefits on

29/07/2024

Refresh

Benefit Plans

Enrollment Type ¹	Plan ¹	Coverage / Participation ¹	Dependents or Beneficiaries ¹	Actions
Medical	Enhanced Medical Plan	Employee + Spouse	1 Dependents	Review
Dental	Enhanced Dental Plan	Employee + Spouse	1 Dependents	Review
Vision	Enhanced Vision Plan	Employee + Spouse	1 Dependents	Review
Life	Basic Life Plan	\$50000	0 Beneficiaries	Review
Supplemental Life	Suppl Group Life 3x	Salary X 3	1 Beneficiaries	Review

Contact Information

Phone

646/350-1111

Email

HCMGENUser1@mailtest.com

Address

Benefits Administrator
500 George Washington Pkway
New York, NY 07666

Resources

[GBI Benefits Handbook](#)

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.

Benefits Summary

Betty Locherty

Finance Director

To view your benefits as of another date, enter the date and select Refresh.

My Benefits on

03/20/2020

Refresh

Benefit Plans

Medical

Plan

Medical HMO Plan 2

Coverage

Employee + Spouse

1 Dependents

Review

Benefits Summary

Betty Locherty

Finance Director

Contact Information

Phone

646/350-1111

Email

HCMGENUser1@ap6023fems.us.or

Address

Benefits Administrator
500 George Washington Pkway
New York, NY 07666

Resources

[GBI Benefits Handbook](#)

Benefit Plans

Medical

Coverage

Note: To configure the display of the Contact and Resources panel, see “Enrollment Contact Assignment Page” (PeopleSoft Human Resources Manage Base Benefits).

Field or Control	Description
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.

Field or Control	Description
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](#).

Benefits Summary Access During OnBoarding and PreBoarding

The OnBoarding and PreBoarding users can access the Benefits Summary step as part of their OnBoarding process. If the organization adds this step to the OnBoarding template, then this page will be available to both the PreBoarding and OnBoarding users. To access the page, navigate to **Employee Self Service > OnBoarding > OnBoarding Activities** and launch the activity guide. Select the **Benefits Summary** step under **Benefits**. For more information on PreBoarding, see “Understanding OnBoarding and the PreBoarding and OnBoarding Phases” (PeopleSoft Human Resources Administer Workforce).

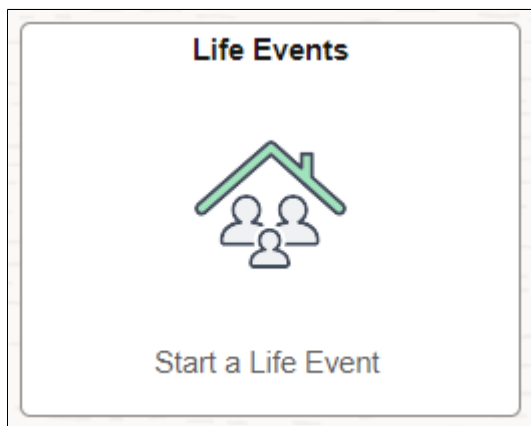
Life Events Tile

Use the Life Events tile to access the Life Events page.

Navigation:

Employee Self Service > Benefit Details

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

Video: [PeopleSoft Fluid Life Events](#) .

Navigation:

Employee Self Service > Benefit Details > Life Events

This example illustrates the Life Events page.

Life Events

Rosanna Channing ☺
Senior Accounting Manager

* Indicates required field

There are some events that involve you as the Employee or your family members.
Review the choices and select the appropriate Event. Then enter the date of your event.

Employee

☐ I got married

☐ I had a baby

☐ I adopted or gained legal custody/guardianship of a child

☐ I got divorced/legally separated

*As Of DD/MM/YYYY

Start Life Event

This page lists the life event options that are available to the employee.

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 **Start 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 eBenefits)
- “Processing the Child Birth Event” (PeopleSoft eBenefits)
- “Processing the Adoption Event” (PeopleSoft eBenefits)
- “Processing the Divorce Event” (PeopleSoft eBenefits)

Related Links

“Delegating Life Events Document Approval Using Fluid Delegations” (PeopleSoft Human Resources Manage Base Benefits)

Dependent/Beneficiary Tile

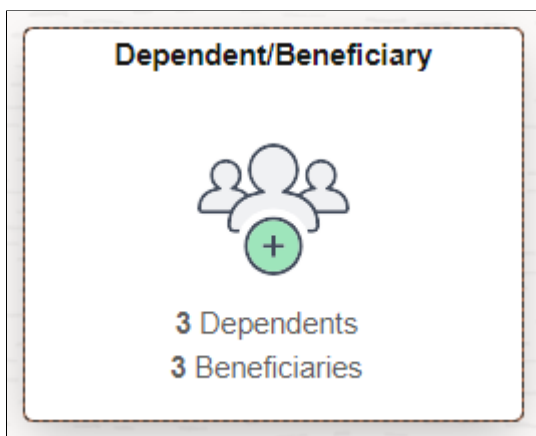
Use the Dependent/Beneficiary tile to access the Dependent/Beneficiary Info page.

Navigation:

Employee Self Service > Benefit Details

The Dependent/Beneficiary tile is available on the Benefit Details Tile Dashboard.

This example illustrates the Dependent/Beneficiary Info Tile.



Dependent/Beneficiary Info Page

Use the Dependent/Beneficiary Info page (W3EB_DEPBNSMRY_FL) to add and update information about dependents and beneficiaries.

Navigation:

Employee Self Service > Benefit Details > Dependent/Beneficiary

This example illustrates the Dependent/Beneficiary Info page.

Dependent/Beneficiary Info			
Rosanna Channing  Senior Accounting Manager			
Add Individual			
Name	Relationship	Beneficiary	Dependent
Robert Channing	Spouse	✓	✓
Jason Channing	Child	✓	✓

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 benefits administrator has set up the dependent workflow, then she can select to receive an email notification when the employee modifies the Dependent/Beneficiary Info page.

The following example illustrates the Update Individual Dependent/Beneficiary Information page (1 of 2).

Update Individual Dependent/Beneficiary Information

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on 29/7/2024.

* Indicates required field

Name
Robert Channing

Personal Information

Date of Birth: 01/10/1967

*Gender: Male

*Relationship to Employee: Spouse

Dependent: Yes

Beneficiary: Yes

*Marital Status: Married

*Student: No

*Disabled: No

*Smoker: Non Smoker

Address

Address	Address Type	Same Address as mine
1430 North West Blvd Apt B215 Guttenberg, NJ 07093	Home	Same as mine

The following example illustrates the Individual Dependent/Beneficiary Information page (2 of 2).

National ID

+

Country	National ID Type	National ID	Primary
United States	Social Security Number	134-44-5654	✓

Phone

No Phone exists.

Add Phone

Email

No Email exists

Add Email

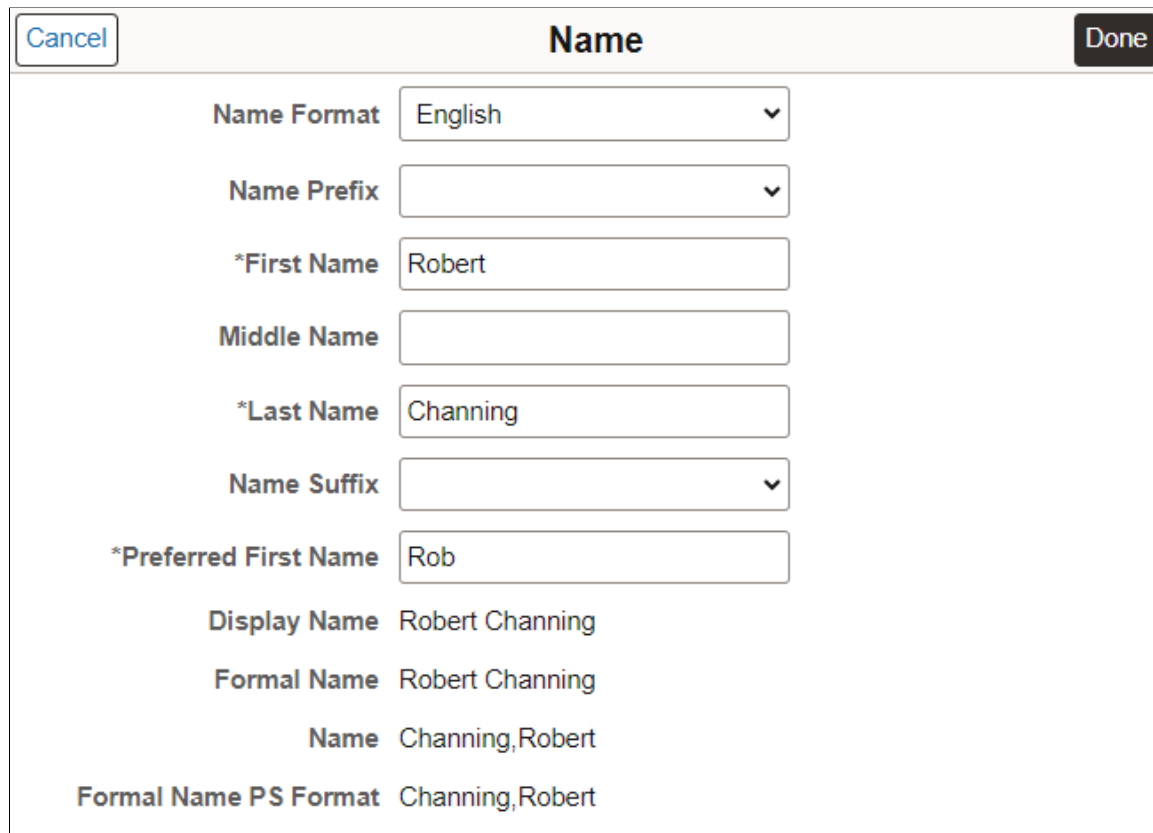
Note: The Benefits Administrator can configure the display of the **Add Individual** button in the Dependent/Beneficiary Info page. You can access the page from various navigations such as the Dependent/Beneficiary tile or through Life Event or using the Benefits Enrollment page. By using the Page and Field Configurator for the page component (W3EB_DEPBNSMRY_FL), you can hide the **Add Individual** button from this page based on the navigation. By default, this setting is disabled. Once enabled, the button is hidden from the page for the selected navigation. Similarly, for the Add or Update Individual Dependent/Beneficiary Information page (W3EB_DEPBEN_DTL_FL), the administrator can choose to disable the entry for fields such as Date of Birth, Gender, Marital Status, and Relationship to Employee based on the navigation to the page. To know more on how to use the Page and Field Configurator, see “Page and Field Configurator: Page Configuration Page - Standard” (Enterprise Components).

The Benefits Administrator can configure the relationship types that can be added or updated by the employee as part of a life event. For more information, see [Life Event Rules Page](#).

Name Modal Window

Select  for the name under **Name** section to modify the name of a dependent/beneficiary. The Display Name displays the individual's first name and last name.

This example illustrates the **Name** modal window.



The screenshot shows the 'Name' modal window with a 'Cancel' button on the top left and a 'Done' button on the top right. The window contains the following fields and labels:

- Name Format**: English (dropdown)
- Name Prefix**: (dropdown)
- *First Name**: Robert
- Middle Name**: (empty)
- *Last Name**: Channing
- Name Suffix**: (dropdown)
- *Preferred First Name**: Rob
- Display Name**: Robert Channing
- Formal Name**: Robert Channing
- Name**: Channing,Robert
- Formal Name PS Format**: Channing,Robert

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.

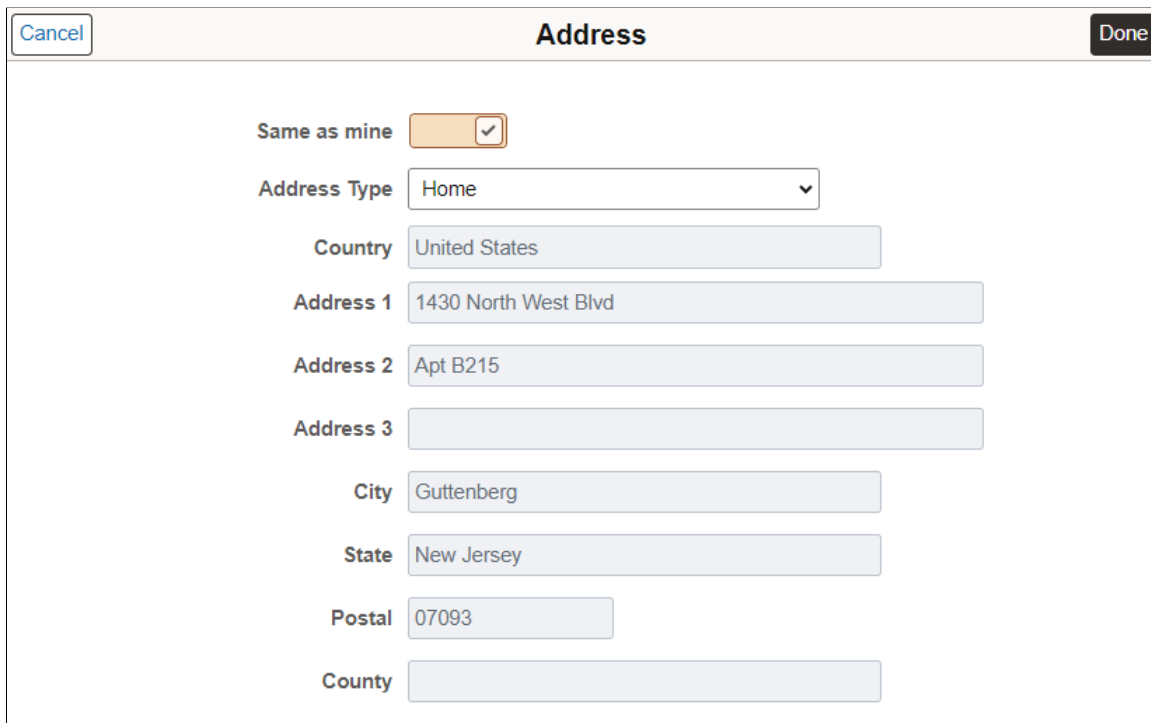
If the employee's Personal Information has no home address, then no address is displayed on the grid. You can select the Add Address row to open the **Address** modal window and add an address.

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.

This example illustrates the Address modal window.



The Address modal window is displayed with a title bar containing 'Cancel' and 'Done' buttons. The main content area contains the following fields:

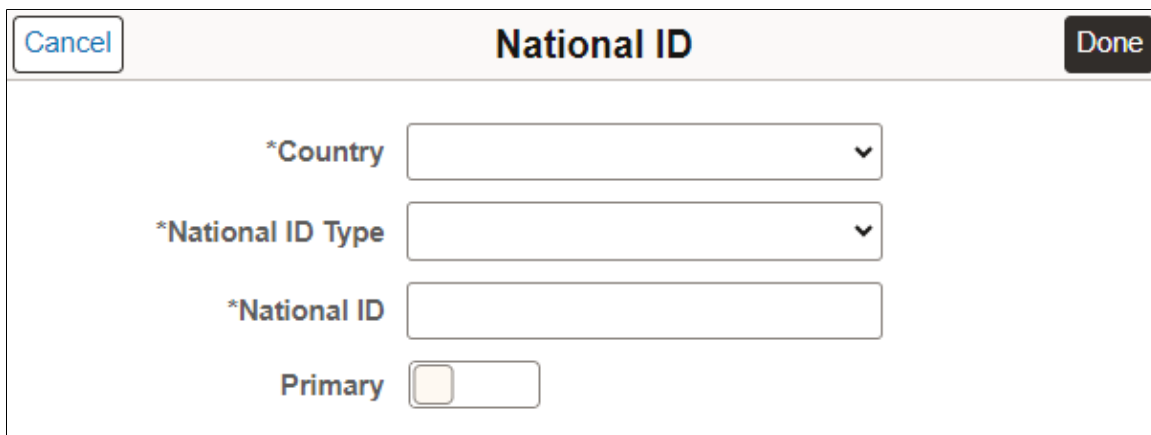
- Same as mine**: A checkbox that is checked.
- Address Type**: A dropdown menu with 'Home' selected.
- Country**: A text input field containing 'United States'.
- Address 1**: A text input field containing '1430 North West Blvd'.
- Address 2**: A text input field containing 'Apt B215'.
- Address 3**: An empty text input field.
- City**: A text input field containing 'Guttenberg'.
- State**: A text input field containing 'New Jersey'.
- Postal**: A text input field containing '07093'.
- County**: An empty text input field.

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.

This example illustrates the National ID modal window.



The National ID modal window is displayed with a title bar containing 'Cancel' and 'Done' buttons. The main content area contains the following fields:

- *Country**: A dropdown menu.
- *National ID Type**: A dropdown menu.
- *National ID**: A text input field.
- Primary**: A checkbox.

Field or Control	Description
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.
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.

Note: System displays an error message if the dependent's National ID is a duplicate of the employee's or his other dependents.

A warning message is displayed if the dependent's National ID is a duplicate of another employee's or dependent in the system.

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.

This example illustrates the Phone Number modal window for the tablet.

Cancel

Phone Number

Done

Same as mine ☐

Type

Number

Extension

Preferred ☒

Field or Control	Description
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.
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.

This example illustrates the Email Address modal window for the tablet.

Cancel

Email Address

Done

*Email Type

*Email Address

Delete

Dependent Data Document Upload and Approval

In some scenarios, when a dependent is added or modified, employees need to upload supporting documents and sometimes these documents need approval.

To upload the required document while adding or modifying a dependent, perform the following:

1. Access the Dependent/Beneficiary Info page.
2. Select the required dependent for whom the details to be added or modified. This opens the Update Individual Dependent/Beneficiary Information page.
3. Modify the required details and click Save. A warning message for attaching the required supporting documents for the changes made is displayed.
4. Click Ok. This navigates you to Dependent/Beneficiary Info page, where employee can see the status of Attachments field as Incomplete.

This example illustrates the Dependent/Beneficiary Info page with missing attachment.

Dependent/Beneficiary Info				
Rosanna Channing  Senior Accounting Manager				
Add Individual				
Name	Relationship	Beneficiary	Dependent	Attachment
Robert Channing	Spouse	✓	✓	 Incomplete >
Jason Channing	Child	✓	✓	>
Christopher Channing	Child	✓	✓	>

5. Click the Incomplete link. This opens the [Benefits Attachment Page](#), where you can add the required documents.
6. Click Done. A warning message asking for approval is displayed.
7. Click Ok. This navigates you to Dependent/Beneficiary Info page where the Incomplete link is changed to View as shown.

This example illustrates the Dependent/Beneficiary Info page.

Dependent/Beneficiary Info				
Rosanna Channing  Senior Accounting Manager				
Add Individual				
Name	Relationship	Beneficiary	Dependent	Attachment
Robert Channing	Spouse	✓	✓	>
Jason Channing	Child	✓	✓	>
Maria Thomas	Other Child	✓	✓	 View >

For details on approving the document, see “Approving Dependent Documents using Fluid Approval” (PeopleSoft Human Resources Manage Base Benefits).

Dependent/Beneficiary Info Access During OnBoarding and PreBoarding

The OnBoarding and PreBoarding users can access the Dependent/Beneficiary Info step as part of their OnBoarding process. If the organization adds this step to the OnBoarding template, then this page will be available to both the PreBoarding and OnBoarding users. To access the page, navigate to **Employee Self Service > OnBoarding > OnBoarding Activities** and launch the activity guide. Select the **Dependent/**

Beneficiary Info step under **Benefits**. For more information on PreBoarding, see “Understanding OnBoarding and the PreBoarding and OnBoarding Phases” (PeopleSoft Human Resources Administer Workforce).

Benefits Enrollment Tile

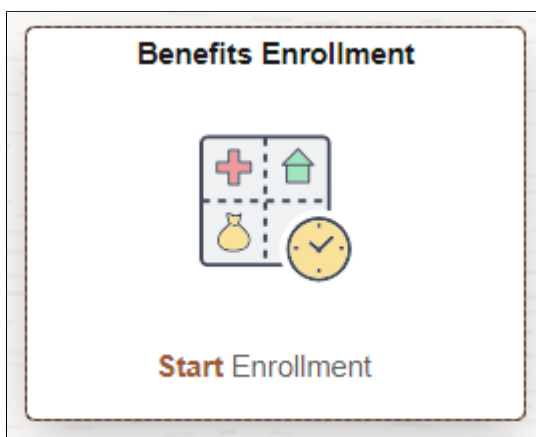
Use the Benefits Enrollment tile to access the Benefits Enrollment pages.

Navigation:

Employee Self Service > Benefit Details

The Benefits Enrollment tile is available on the Benefit Details Tile Dashboard.

This example illustrates the Benefits Enrollment tile.



For more information, see [Benefits Enrollment Page](#).

Benefits Statements Tile

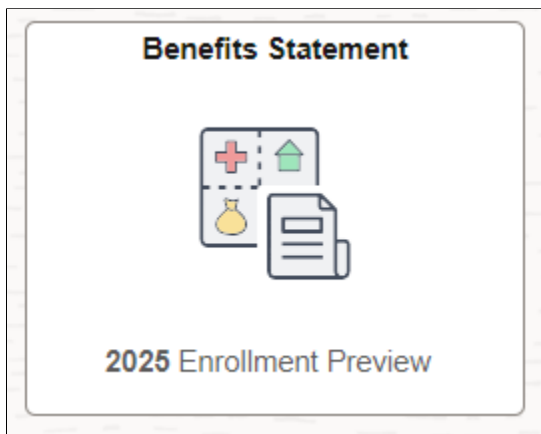
Use the Benefits Statements tile to access the [Benefits Statement Page](#).

Navigation:

Employee Self Service > Benefit Details

The Benefits Statements tile is available on the Benefit Details Tile dashboard.

This example illustrates the Benefits Statements tile.



The Benefits Statements tile displays live data regarding the latest statement available. For more information on Benefits Statement, see [Benefits Statement Page](#).

Benefits Attachment Tile

Use the Benefits Attachment tile to access the Benefits Attachment page.

Navigation:

Employee Self Service > Benefit Details

The Benefits Attachment tile is available on the Benefit Details Tile Dashboard.

This example illustrates the Benefits Attachment tile.



The Benefits Attachment tile displays the following statuses:

- Pending Approval: This status is displayed when the required documents are attached but approval is pending.
- Incomplete: This status is displayed when the required documents are missing for a qualified dependent.

No statuses are displayed when the required documents are uploaded and approved.

Benefits Attachment Page

Use the Benefits Attachment page to upload required documents when a dependent is added or updated. In some scenarios, the uploaded documents need to be approved by the administrator for qualifying the dependents.

Navigation:

Select the Benefits Attachment tile to access the Benefits Attachment page.

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

Event Date	Event Type	Event Value	Event Status
12/14/2021	Dependent	Maria Thomas	Complete

Field or Control	Description
Event Date	Date on which the dependents are added or dependent details are modified.
Event Type	Type of the event.
Event Value	Displays the dependent name. The name displays the individual's first name and last name.
Event Status	Status of the event. Different statuses are: In Progress: This status is displayed when the documents are attached and approval is pending or in case if the required documents are missing. Complete: This status is displayed when the required documents are uploaded and approved.

The following example illustrates the Dependent Attachments page for an individual dependent.

Cancel Done

Event Value Dep OtherChild

Instructions

You are required to submit the document(s) listed here. Select the Add Attachment button, enter a description of your document and upload the document.

[View Approval](#)

Document List

Document	Upload	Approval
Adoption Certificate	Required	Required
	Uploaded	Approved

Add Document

Add Attachment Add Note

Document Name	Description	Attached By	Attached	Status
AC.pdf	AC.pdf	Isla Addison	11/25/21 09:52:56 PM	Approved

1 row

Instructions

This section provides instructions to the employees for uploading the required documents. Approval is required for some document uploads. Employee can view the approval history by clicking the View Approval link.

Document List

Field or Control	Description
Document	Name of the document.
Upload	Status of the document upload such as Uploaded or Attachment Missing.
Approval	Indicates whether the approval is required for the uploaded documents. If the documents are approved by the benefits administrator, Approved status is displayed. If approval is pending, Pending Approval status is displayed.

Add Document

Field or Control	Description
Add Attachment	Select this button to add the required documents.
Add Note	Select this button to enter any additional remarks. This button is available only when the documents are uploaded and approved.
Document Name	Name of the document.
Description	Meaningful description for the document.
Attached By	Name of the employee who attached the document.
Attached	Date and time on which the documents are uploaded.
Status	Indicates whether the uploaded documents are approved or not.

View Form 1095-C Tile

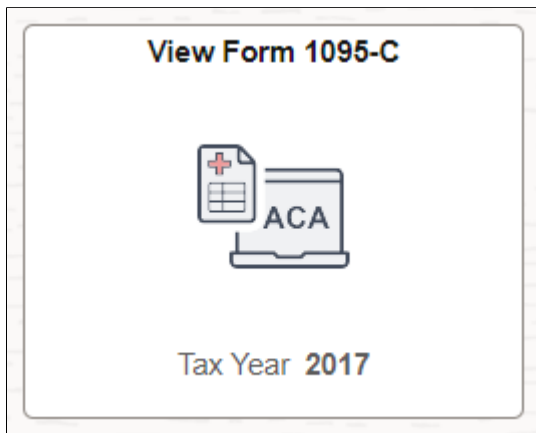
Use the View Form 1095-C tile to access the View Form 1095-C page.

Navigation:

Employee Self Service > Benefit Details

The View Form 1095-C tile is available on the Benefit Details Tile Dashboard.

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:

Employee Self Service > Benefit Details > View Form 1095-C

This example illustrates the View Form 1095-C page.

View Form 1095-C			
Betty Locherty  Finance Director			
Year / Employer	IRS Instructions	Issue Date / Sequence	Tax Form
2017 Global Business Institute	Instructions	08/03/2018 3	1095-C Original
2016 Global Business Institute	Instructions	02/03/2017 0	1095-C Original
2015 Global Business Institute	Instructions	12/09/2016 0	1095-C Original

Field or Control	Description
IRS Instructions	Click this link to open the filing instructions of the Form 1095-C for the corresponding year.

Field or Control	Description
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.

Note: Starting tax year 2022, the self service PDF version of Form 1095-C and the IRS Instructions are accessible and can be read by a screen reader, for example, JAWS.

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.

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.

Part I		Part II		Part III											
APPLICABLE LARGE EMPLOYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		Employee Offer of Coverage		Covered Individuals											
Global Business Institute 500 George Washington Pkwy New York NY 07666 646/350-2222		Plan Start Mo. (Enter 2-digit no.): 00	14 Offer of Coverage (enter required code) All 12 Months: Jan 1E , Feb 1E , Mar 1E , Apr 1E , May 1E , June 1E , July 1E , Aug 1E , Sept 1E , Oct 1E , Nov 1E , Dec 1E	15 Employee Required Contribution (see instructions) Jan \$ 19.00 , Feb \$ 19.00 , Mar \$ 19.00 , Apr \$ 19.00 , May \$ 19.00 , June \$ 19.00 , July \$ 19.00 , Aug \$ 19.00 , Sept \$ 19.00 , Oct \$ 19.00 , Nov \$ 19.00 , Dec \$ 19.00	16 Section 4980H Safe Harbor and Other Relief (enter code, if applicable) Jan 2C , Feb 2C , Mar 2C , Apr 2C , May 2C , June 2C , July 2C , Aug 2C , Sept 2C , Oct 2C , Nov 2C , Dec 2C										
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) 99-4123456		EMPLOYEE'S social security number (SSN) XXX-XX-3591		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
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L1095CALT18 Form **1095C** (2016)

Form 1095-C Consent Tile

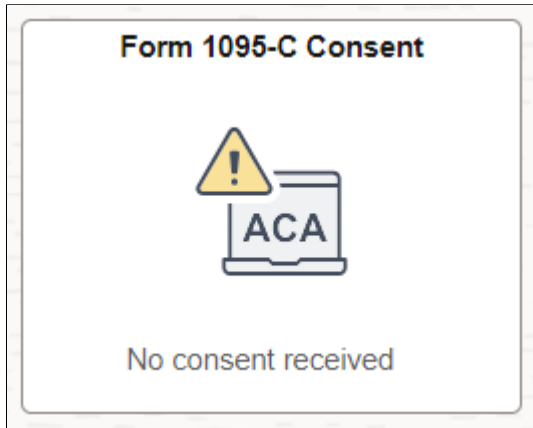
Use the Form 1095-C Consent tile to access the Form 1095-C Consent page.

Navigation:

Employee Self Service > Benefit Details

The Form 1095-C Consent tile is available on the Benefit Details Tile Dashboard.

This example illustrates the Form 1095-C Consent tile.



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:

Employee Self Service > Benefit Details > Form 1095-C Consent

This example illustrates the Form 1095-C Consent page.

Form 1095-C Consent	
Betty Locherty Finance Director	
You currently receive Form 1095-C paper statements by mail	
You must complete this Consent Form to receive an electronic copy of Form 1095-C. If you do not submit a Consent Form, the Benefits Department will process your Form 1095-C based on the most recent information you have provided. Once you submit the Consent Form, it will remain valid until you submit a Withdrawal of Consent Form, unless your employment is terminated or your employer stops providing electronic access to forms. If you have any questions, please contact your Benefits Administrator.	
☐ I consent to receive Form 1095-C electronically	
Submit	

This example illustrates the Form 1095-C Consent - Withdraw page.

Form 1095-C Consent	
Rosanna Channing Senior Accounting Manager	
You currently receive Form 1095-C statements electronically	
You have consented to receive an electronic Form 1095-C. If you prefer to receive a paper Form 1095-C, you must submit a Withdrawal of Consent Form. After you submit the Withdrawal of Consent Form, it is valid until you submit a new Consent Form. If you have any questions, please contact your Benefits Administrator.	
☐ I withdraw my consent to receive Form 1095-C electronically	
Submit	

Form 1095-C Consent Access During OnBoarding and PreBoarding

The OnBoarding and PreBoarding users can access the Form 1095-C Consent step as part of their OnBoarding process. If the organization adds this step to the OnBoarding template, then this page will be available to both the PreBoarding and OnBoarding users. To access the page, navigate to **Employee Self Service > OnBoarding > OnBoarding Activities** and launch the activity guide. Select the **Form 1095-C Consent** step under **Benefits**. For more information on PreBoarding, see “Understanding OnBoarding and the PreBoarding and OnBoarding Phases” (PeopleSoft Human Resources Administer Workforce).

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

Note: The navigation collection has been replaced by the Benefits Details tile dashboard.

- 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 more information on the Benefit Details tile dashboard, refer to [Working With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface](#).

Note: To access the Benefit Details Tile Dashboard, add the role *Fluid Dashboard - Benefit Dtls* for the user.

The Benefits fluid pages appear in a framework that includes the following:

- 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” (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 Homepages” (Application Fundamentals)

Pages Used to Work with Benefits Details Navigation Collection Using The PeopleSoft Fluid User Interface

<i>Page/Tile Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Benefit Details Tile</u>	HC_EBEN_SS_NAVCOLL_FL (cref for the tile) W3EB_ENR_TILE_FLU (page for dynamic data)	Access the benefit details navigation collection.
<u>Benefit Details Navigation Collection</u>	BEN_SUMM_GRID_FL	Access benefits self service transactions.
<u>Benefits Summary Page</u>	BEN_SUMM_GRID_FL	View information about current benefits.
<u>Life Events Page</u>	W3EB_SEL_EVNT_FLU	Initiate processing for a life event that affects benefits.
<u>Dependent/Beneficiary Info Page</u>	W3EB_DEPBNSMRY_FL	Update information about dependents and beneficiaries.
Benefits Enrollment pages: <u>Benefits Enrollment Event Selection Page</u> <u>Benefits Enrollment Page</u>	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.
<u>Benefits Statement Page</u>	BAS_STMT_LIST_FL	View a list of benefits enrollment preview and confirmation statements.
Affordable Care Act: <u>View Form 1095-C Page</u>	ACA_EE_YE_FORM_FL	View the Form 1095-C generated each year and submitted to the IRS.
Affordable Care Act: <u>Form 1095-C Consent Page</u>	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.
<u>Benefits Attachment Page</u>	BEN_ATTACH_EVNT_FL	Access the Benefits Attachment page to review the uploaded documents and its status.

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 Homepage” (Application Fundamentals), but the location can change if you change the delivered home pages or if employees personalize their home pages.

This example illustrates the Benefit Details tile.



Click the **Benefit Details** tile to access the [Benefit Details Navigation Collection](#).

During open enrollment period, the tile displays the open enrollment’s end date.

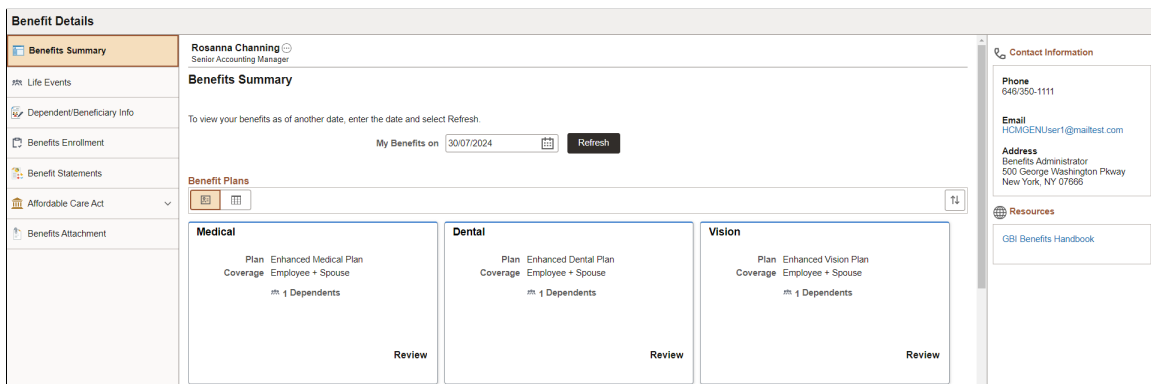
Benefit Details Navigation Collection

Use the Benefit Details Navigation Collection to access the benefits self service transactions.

Navigation:

Employee Self Service > Benefit Details

This example illustrates the Benefit Details Navigation Collection (Card view).



This example illustrates the Benefit Details Navigation Collection (Grid view).

Benefit Details

Benefits Summary

Rosanna Channing
Senior Accounting Manager

To view your benefits as of another date, enter the date and select Refresh.

My Benefits on: 30/07/2024

Benefit Plans

Enrollment Type ¹	Plan ¹	Coverage / Participation ¹	Dependents or Beneficiaries ¹	Actions
Medical	Enhanced Medical Plan	Employee + Spouse	1 Dependents	Review
Dental	Enhanced Dental Plan	Employee + Spouse	1 Dependents	Review
Vision	Enhanced Vision Plan	Employee + Spouse	1 Dependents	Review
Life	Basic Life Plan	\$50000	0 Beneficiaries	Review
Supplemental Life	Suppl Group Life 3x	Salary X 3	1 Beneficiaries	Review

Contact Information

Phone: 646/350-1111

Email: HCMGENUser1@mailtest.com

Address: Benefits Administrator
500 George Washington Pkway
New York, NY 07699

Resources

[GBI Benefits Handbook](#)

Benefits Summary Page

Use the Benefits Summary page (BEN_SUMM_GRID_FL) to view summary information about benefits.

Navigation:

Employee Self Service > Benefit Details > Benefits Summary

This example illustrates the Benefits Summary page in card view.

Benefit Details

Benefits Summary

Rosanna Channing
Senior Accounting Manager

To view your benefits as of another date, enter the date and select Refresh.

My Benefits on: 30/07/2024

Benefit Plans

Medical

Plan: Enhanced Medical Plan
Coverage: Employee + Spouse
1 Dependents

Dental

Plan: Enhanced Dental Plan
Coverage: Employee + Spouse
1 Dependents

Vision

Plan: Enhanced Vision Plan
Coverage: Employee + Spouse
1 Dependents

Contact Information

Phone: 646/350-1111

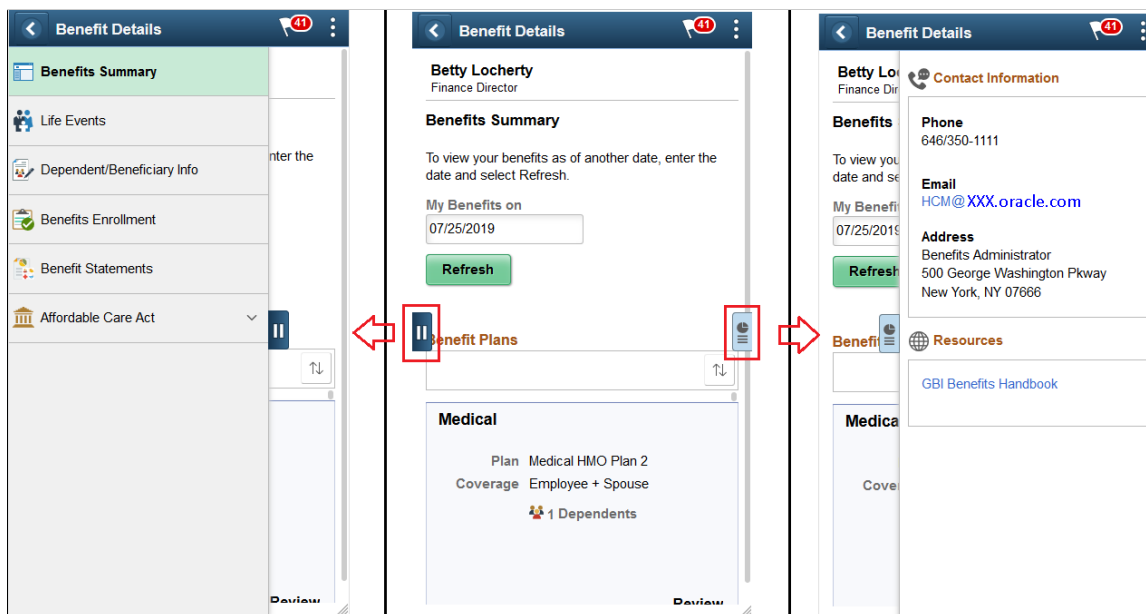
Email: HCMGENUser1@mailtest.com

Address: Benefits Administrator
500 George Washington Pkway
New York, NY 07699

Resources

[GBI Benefits Handbook](#)

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.



To know more on Benefits Summary, see [Benefits Summary Page](#).

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](#).

Benefits Summary Access During OnBoarding and PreBoarding

The OnBoarding and PreBoarding users can access the Benefits Summary step as part of their OnBoarding process. If the organization adds this step to the OnBoarding template, then this page will be available to both the PreBoarding and OnBoarding users. To access the page, navigate to **Employee Self Service > OnBoarding > OnBoarding Activities** and launch the activity guide. Select the **Benefits Summary** step under **Benefits**. For more information on PreBoarding, see “Understanding OnBoarding and the PreBoarding and OnBoarding Phases” (PeopleSoft Human Resources Administer Workforce).

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.

The following video provides a demonstration of the Fluid Benefits Enrollment process:

Video: [PeopleSoft Fluid Benefits Enrollment](#)

Pages Used to Manage Benefits as an Employee

Page Name	Definition Name	Usage
Benefits Enrollment Event Selection Page	BNE_SEL_EVENT_FL	View all currently active benefits-related enrollment events.
Benefits Enrollment Page	BNE_CARD_SUMM_FL	View enrollment summary information and the benefit plans you are eligible to elect from.

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.

This example illustrates the fields and controls on the Benefits Enrollment Event Selection page with an Open Enrollment event.

Benefits Enrollment
Rosanna Channing
 Senior Accounting Manager
After your initial enrollment, the only time you may change your benefit choices is during open enrollment or a qualified family status change. The information icon provides you with additional information about your enrollment. The Start or Resume button next to an event means it is currently open for enrollment. Use the Start button to begin or the Resume button to continue your enrollment. Note: Some events may be temporarily closed until you have completed enrollment for a prior event.

Contact Information
Phone
 646/350-1111
Email
HCMGENUser1@mailtest.com
Address
 Benefits Administrator
 500 George Washington Pkwy
 New York, NY 07666

Your Benefit Events

Event Description 	Event Date 	Event Status 	Job Title 	
Open Enrollment 	01/01/2024	Open	Senior Accounting Manager	Resume
Family Status Change 	04/04/2024	Closed	Senior Accounting Manager	

Note: To configure the display of the Contact and Resources panel in the Benefits Enrollment Event Selection page, see “Enrollment Contact Assignment Page” (PeopleSoft Human Resources Manage Base Benefits).

Field or Control	Description
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.

Field or Control	Description
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 event's enrollment 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.

Benefits Enrollment Page

Use the Benefits Enrollment page (BNE_CARD_SUMM_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.

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.

The screenshot displays the 'Benefits Open Enrollment' page for Rosanna Channing. The page is titled 'Benefits Open Enrollment' and shows the enrollment period from 2/10/2023 to 4/30/2024. The left sidebar contains a navigation menu with options: Welcome, Acknowledgement, Personal Information, Dependent/Beneficiary Info, Benefits Enrollment (selected), Benefits Statements, Benefit Survey, and Summary. The main content area is divided into two sections: 'Benefits Enrollment' and 'Benefit Plans'. The 'Benefits Enrollment' section shows the enrollment summary, including the current pay period cost of \$-24.56, full cost of \$322.77, and a pie chart showing the breakdown of costs into LTD, Medical, and Supp Life. The 'Benefit Plans' section shows three plans: Wellness Credit, Medical, and Dental, each with a 'Review' button. The right sidebar contains contact information for the Benefits Administrator, including phone, email, and address, as well as a link to the GBI Benefits Handbook.

Note: To configure the display of the Contact and Resources panel in the Benefits Open Enrollment page, see “Enrollment Contact Assignment Page” (PeopleSoft Human Resources Manage Base Benefits).

Benefits Enrollment Access During OnBoarding and PreBoarding

The OnBoarding and PreBoarding users can access the Benefits Enrollment step (BNE_OBD_ENROLL_FL) as part of their OnBoarding process if the organization has configured the users and the step as part of the OnBoarding Activity Guide setup.

To access the page, navigate to **Employee Self Service > OnBoarding > OnBoarding Activities** and launch the activity guide. Select the **Benefits Enrollment** step under **Benefits**. On selecting the **Start My Enrollment** button, the user is taken to the Benefits Enrollment page. The **Start My Enrollment** button is displayed when the hire or rehire event is not open for processing. If the event is already open, the Benefits Enrollment page is displayed.

For more information on PreBoarding, see “Understanding OnBoarding and the PreBoarding and OnBoarding Phases” (PeopleSoft Human Resources Administer Workforce), “Setting Up PreBoarding and OnBoarding Activity Guides” (PeopleSoft Human Resources Administer Workforce).

This example illustrates the Benefits Enrollment step for PreBoarding user.

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 **Preview Statement** button to generate and view a preview of the enrollment statement.

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** button.

The cost(s) displayed in Enrollment Summary section are based on the Benefits Program Table configurations.

<i>Enrollment Summary section fields</i>	<i>Benefits Program Table configurations</i>
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 eBenefits).

<i>Field or Control</i>	<i>Description</i>
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).
Preview Statement	Select 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. To configure the location where the Preview Statement button is displayed, see Benefits Installation Page.

This example illustrates the Review Enrollment page.

Review Enrollment

Statement Type: Enrollment Preview

Description: Open Enrollment 2021

Print View

Enrollment Effective Date: 01/01/2021

Statement Issue Date: 06/04/2020 7:41AM

This statement records your Open Enrollment 2021 benefit selections and pay period costs, dependent information, and beneficiary information at the time your enrollment is submitted. If an error has been made in recording your elections, please correct your elections before the event is closed. For further question, contact your benefits administrator. Please keep the statement for your records until you receive a confirmation statement.

Statement Sections

Expand All

Personal Information

This is your personal information currently on file. It is important that the data shown is complete and correct. If this information is not correct, update the information through the Personal Information or contact your Benefits Administrator.

Contact Information

Name: Rosanna Channing

Mailing Address: 1430 North West Blvd Apt B215, Guttenberg, NJ 07093

Email Address: Rosanna.Channing@oraclesample.com

Eligibility Information

Home Address: 1430 North West Blvd Apt B215, Guttenberg, NJ 07093

Gender: Female

Marital Status: Married

Birth Date: 01/04/1967

Service Date: 06/29/1986

Cost Summary

Election Summary

Dependents and Beneficiaries

Dependent Enrollments

Beneficiary Designations

Investment Allocations

424

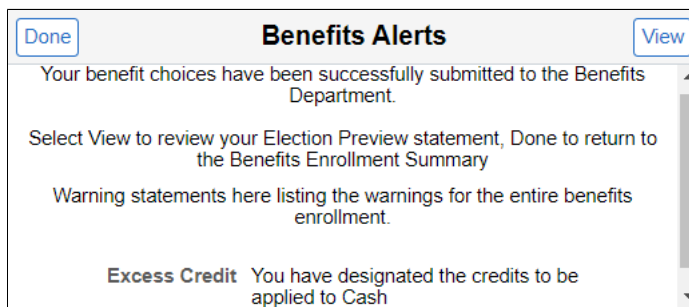
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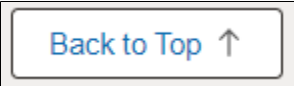
This example illustrates the Election Preview Statement in the PDF format.

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				
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	

Field or Control	Description
Submit	Select to submit your benefit plan choices to the system, after making changes to your enrollment plans. To configure the location of the Submit button, see Benefits Installation Page. A Benefits Alerts pop-up window opens to confirm your submission. Select View button on the pop-up window to 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. Select Done, to complete your enrollment process.

This example illustrates the Benefits Alerts pop-up window.



Field or Control	Description
Contact Information and Resources	The right panel displays the contact details of the Benefits Administrator, as well as links to additional resources. To configure the display of the Contact and Resources panel in the Benefits Open Enrollment page, see “Enrollment Contact Assignment Page” (PeopleSoft Human Resources Manage Base Benefits).
	Select to go to the top of the page. The Back to Top button appears at the bottom of the page when the user starts to scroll from the top of the page. To configure the display of the button, see Benefits Installation Page .

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.

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.

Benefit Plans

Wellness Credit Current No Coverage New Wellness Credit Status Changed Pay Period Cost \$-150.00 Review	Medical Current Enhanced Medical Plan New Enhanced Medical Plan Status Changed 2 Dependents Pay Period Cost \$245.00 Review	Dental Current Enhanced Dental Plan New Enhanced Dental Plan Status Pending Review 2 Dependents Pay Period Cost \$13.88 Review
Vision Current Enhanced Vision Plan New Enhanced Vision Plan Status Pending Review 2 Dependents Pay Period Cost \$11.50 Review	Life Current Basic Life Plan \$50,000 New Basic Life Plan \$50,000 Status Pending Review 0 Beneficiaries Pay Period Cost \$0.00 Review	Supplemental Life Current Suppl Group Life 3x Salary X 3 New Suppl Group Life 3x \$282,000 Status Pending Review 1 Beneficiaries Pay Period Cost \$62.04 Review
AD and D Current Flat 25K AD&D \$25,000 New Flat 25K AD&D \$25,000 Status Pending Review 0 Beneficiaries	Dependent AD and D Current Waive New Waive Status Pending Review	Dependent Life Current Waive New Waive Status Pending Review

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

Field or Control	Description
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.

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
<u>Benefits Enrollment Page</u>	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: <u>Medical Page</u> 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: <u>Life Page</u> <u>Supplemental Life Page</u> 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.

Page Name	Definition Name	Usage
3x Disability Plans: <u>Short-Term Disability Page</u> Long-Term Disability Page	BNE_PLAN_3X_FL	Enroll in short-term or long-term disability plans.
4x Savings Plans: <u>401(k) Page</u> 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: <u>Sick Page</u> Vacation Page Personal Page Family and Medical Act Page	BNE_PLAN_5X_FL	Enroll in a leave plan.
6x FSA and HSA Plans: <u>Flex Spending Health – U.S. Page</u> Flex Spending Health – Canada Page Flex Spending Dependent Care Page Retirement Counselling Page <u>Health Savings Account Page</u>	BNE_PLAN_6X_FL	Enroll in FSA and HSA plan benefits.
7x Retirement Plan: <u>PERS (Public Employee Retirement Systems) Page</u>	BNE_PLAN_7X_FL	Enroll in retirement plans.

Page Name	Definition Name	Usage
8x Pension Plans: <u>Standard Pension Page</u> 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: <u>Vacation Buy Page</u> Vacation Sell Page	BNE_PLAN_9X_FL	Enroll in vacation plan benefits.
Ax Simple Plans: <u>Long-Term Care Page</u> Legal Services Page Wellness Credit Page	BNE_PLAN_375AX_FL	Enroll in simple plans.

Note: To configure the display of the Contact and Resources panel in the Benefits Plan pages, see “Enrollment Contact Assignment Page” (PeopleSoft Human Resources Manage Base Benefits).

Dependents and Beneficiaries Enrollment Sections in Benefits 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.

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.

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

Medical

All of our medical choices promote wellness as part of their benefits and are available to protect you and your dependents if you become sick or injured. Enrollment in this benefit may require proof of coverage.

▼ Enroll Your Dependents

Dependents that the employee has registered are listed here. Select the Add/Update Dependent button to view, update or add a new dependent.

Dependents	Relationship
☒ Robert Channing	Spouse

[Add/Update Dependent](#)

▼ Enroll in Your Plan

The Employee + Spouse cost shown for each plan is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage costs for individual plans, select the help icon corresponding to each plan option.

Besides any Before Tax and After Tax credit listed, you will receive an additional \$10.00 credit to help with the cost of this benefit. You will only receive this credit if you enroll in one of the plans offered.

Plan Name	Proof of Coverage	Before Tax Cost	After Tax Cost	Before Tax Credit	After Tax Credit	Pay Period Cost	Compare Plan
Select Waive	Proof Required			\$16.00		\$-16.00	☐
Select Basic Out-Of-Network Medical	i	\$76.00		\$55.00		\$11.00	☐
☒ Enhanced Medical Plan	i	\$148.00		\$55.00		\$83.00	☐
Select Medical HMO Plan 2	i	\$124.00		\$55.00		\$59.00	☐

[Overview of All Plans](#) [Compare](#)

▼ Select Primary Care Provider

Enrollment in this plan requires that you select a primary care provider. You must indicate whether or not you have already established a relationship with this provider, since some providers are not accepting new patients. The primary care provider list link will provide a list of providers, if you are unsure of the provider.

*Your Primary Care Provider ID

I have visited this provider before ☐ No

Use the same provider for all dependents ☐ No

[Primary Care Provider List](#)

Dependents	Primary Care Provider ID	Visited this provider before
Robert Channing		☐ No

Contact Information

Phone: 646/350-2222

Email: HCMBENUser1@mailtest.com

Resources

Aetna U. S. Healthcare General
Blue Cross/ Blue Shield
Kaiser Permanente

Field or Control	Description
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.
Compare Plan check box	Select the check box next to plan names to compare plans. For more information, see Using Plan Comparison In Benefits Enrollment .

Field or Control	Description
Overview of All Plans	Click this to view a summary of all the benefit plans along with the cost for each coverage level.
Compare	Click to view the Benefits Plan Comparison page for the selected plan names.

This example illustrates the fields and controls on the Overview of Medical Plans modal window.

Overview of Medical Plans
×

Here are your available plans with coverage details:

Expand All

▶ Waive

▼ Basic Out-of-Network Medical

This plan is offered in areas where Aetna networks are unavailable. You may choose any doctor or hospital. This plan has a deductible of \$200 per person and \$600 per family. Once the deductible is met, the plan pays 80% of customary charges.

Coverage Level	Your Costs	Tax Class
Employee Only	6.00	Before-Tax
Employee + Spouse	21.00	Before-Tax
Employee + Child(ren)	46.00	Before-Tax
Family	66.00	Before-Tax
Employee + Domestic Partner	61.00	Before-Tax
Family (with Domestic Partner)	101.00	Before-Tax

▶ Enhanced Medical Plan

▶ Medical HMO Plan 2

Field or Control	Description
Select Primary Care Provider section	Select Primary Care Provider section displays only when the “Health Plan Table Page” (PeopleSoft 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” (Application Fundamentals).

Related Links

[Defining Event Rules](#)

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 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

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

Cancel

Life

Done

Life insurance plays an important role in ensuring that your family is financially secure if you were to pass away.

Enroll in Your Plan

Besides any credits listed below, you will receive an additional \$0.35 credit to help with the cost of this benefit. You will only receive this credit if you select one of the following choices.

Plan Name

Select

Waive

Basic Life Plan (\$1,000)

Contact Information

Phone
646.359.3333

Email
HCMBENUser2@ap6023fems.us.oracle.com

Designate Your Beneficiaries

You may designate the individuals as primary or secondary beneficiaries by allocating a percent or a specific dollar amount. Secondary beneficiaries receive benefits only if all primary beneficiaries are deceased. If you select flat dollar amount, then one beneficiary must be designated to receive remaining money from the policy. If you select percents, all percents for primary beneficiaries must total 100. All percents for secondary beneficiaries must total 100.

*Primary Allocation

Flat Amount

*Secondary Allocation

Flat Amount

Beneficiary	Relationship	Current Primary Amount	Current Secondary Amount	New Primary Amount	New Secondary Amount
Mark Isla	Spouse	500		500	0
Ava Isla	Child		900	0	900
Olivia Isla	Child			0	0
Total				500	900

Add Beneficiary

Primary Excess Amount Goes To
Secondary Excess Amount Goes To

Isla, Olivia

Field or Control	Description
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. 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 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.

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.

Cancel
Supplemental Life
Done

Supplemental Life insurance allows you to purchase coverage in addition to what's provided by the basic life plan.

▼ Enroll in Your Plan

Plan Name	Proof of Coverage	Cost (Before Tax)	Cost (After Tax)	Credit (Before Tax)	Credit (After Tax)	Pay Period Cost
Select Waive						\$0.00
Select Suppl Group Life 1x (\$90,000)			\$19.80			\$19.80
Select Suppl Group Life 2x (\$180,000)			\$39.60			\$39.60
Select Suppl Group Life 3x (\$270,000)			\$59.40			\$59.40
Select Suppl Group Life 4x (\$360,000)	Proof Required		\$79.20			\$79.20
Select Suppl Group Life 5x (\$450,000)	Proof Required		\$99.00			\$99.00
Select Suppl Group Life 100K (\$100,000)			\$22.00			\$22.00
✓ New York Life Supplement Life						\$0.22

▼ Coverage Amount

The selected plan requires that you specify a coverage amount. Enter an amount to indicate your desired coverage.

Coverage Amount

Your Per-Pay-Period premium rate for this plan is \$0.2200 per \$1,000 of coverage.
You will be required to provide Evidence of Insurability if you choose a coverage amount of \$200,000 or greater.

Contact Information

Phone
646/350-3333
Email
HCHMBE@XXX.com

Field or Control	Description
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.

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.

▼ Designate Your Beneficiaries

You may designate the individuals as primary or secondary beneficiaries by allocating a percent or a specific dollar amount. Secondary beneficiaries receive benefits only if all primary beneficiaries are deceased. If you select flat dollar amount, then one beneficiary must be designated to receive remaining money from the policy. If you select percents, all percents for primary beneficiaries must total 100. All percents for secondary beneficiaries must total 100.

*Primary Allocation Percent ☒

*Secondary Allocation Percent ☒

Beneficiary	Relationship	Current Primary Percentage	Current Secondary Percentage	New Primary Percentage	New Secondary Percentage
Robert Channing	Spouse	100		100	0
Jason Channing	Child			0	0
Total				100	0

Add Beneficiary

Primary Excess Amount Goes To

Secondary Excess Amount Goes To

Field or Control	Description
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. 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 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.

This example illustrates the fields and controls on the Short-Term Disability Page.

Cancel

Short-Term Disability

Done

Short-Term Disability offers income replacement to provide financial protection for you and your family if you can't work over a temporary period of time due to injury or illness.

▼ Enroll in Your Plan

Plan Name	Cost (Before Tax)	Cost (After Tax)	Credit (Before Tax)	Credit (After Tax)	Pay Period Cost
Select Waive					\$0.00
✓ Short Term Disability - 50%		\$2.25			\$2.25
Select Short Term Disability - 80%		\$3.00			\$3.00

Contact Information

Phone

864.122.4332

Email

betty@gbj.com

401(k) Page

Use the 401(k) page (BNE_PLAN_4X_FL) to enroll in savings 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, 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).

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.

Cancel

401(k)

Done

401(K) plans allow you to prepare for your financial security and build your savings for retirement.

▼ Enroll in Your Plan

Plan Name
Select Waive
Select 401(k) Employer Pct Match
✓ KU401K - Savings Plan

Contact Information

Phone

646/350-1111

Email

HCMGENUser1@mailtest.com

Address

Benefits Administrator
500 George Washington Ploway
New York, NY 07665

▼ Contributions

You can enter your contribution as a percent or flat dollar amount but not both. You can not exceed the before-tax and after-tax plan maximums. If you choose to enter percents, the sum of your before-tax and after-tax percents can not exceed 10 percent.

Before Tax Amount	After Tax Amount
Minimum Before Tax Amount 20.00	Minimum After Tax Amount 10.00
Before Tax Percent	After Tax Percent
8.000	2.000
Minimum Before Tax Percent 1.00 Maximum Before Tax Percent 8.00	Minimum After Tax Percent 2.00 Maximum After Tax Percent 8.00

Field or Control	Description
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.

Note: The benefits administrator can configure the savings plan page to display an informational text on minimum values for *Before Tax Amount*, *After Tax Amount*, *Before Tax Percent*, and *After Tax Percent*. And also, the maximum values for *Before Tax Percent*, and *After Tax Percent*. For more information, see “Employee Limit on Investments Page” (PeopleSoft Human Resources Manage Base Benefits).

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.

▼ Designate Your Beneficiaries

You may designate the individuals as primary or secondary beneficiaries by allocating a percent or a specific dollar amount. Secondary beneficiaries receive benefits only if all primary beneficiaries are deceased.
If you select flat dollar amount, then one beneficiary must be designated to receive remaining money from the policy. If you select percents, all percents for primary beneficiaries must total 100. All percents for secondary beneficiaries must total 100.

*Primary Allocation

*Secondary Allocation

Beneficiary	Relationship	Current Primary Percentage	Current Secondary Percentage	New Primary Percentage	New Secondary Percentage
Robert Channing	Spouse	100		100	0
Jason Channing	Child			0	0
Total				100	0

Primary Excess Amount Goes To

Secondary Excess Amount Goes To

▼ Designate Your Fund Allocations

The sum of your fund allocation must total 100 percentage

Fund Description	Current Percent Allocation	New Percent Allocation
Money Market	25.00	25.00
Asset Allocation Fund	25.00	25.00
Bond Fund	25.00	25.00
Corporate Stock Fund	25.00	25.00
Total Allocation	100.00	

Field or Control	Description
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. 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.

This example illustrates the fields and controls on the Sick page.

Cancel **Sick** Done

Sick leave is provided by the company to cover those short periods of time you cannot work due to a minor illness or injury.

Contact Information

Contact Main:
800 665 0202

Email Main:
jmcclain@gbi.com

Address Main:
Global Business Institute
500 George Washington
Pkway
New York, NY 07666

Enroll in Your Plan

Plan Name
✓ Sick Plan Hours per Month
Select Sick Plan Yearly 1
Select Waive

Flex Spending Health – U.S. Page

Use the Flex Spending Health – U.S. page (BNE_PLAN_6X_FL) to enroll in FSA 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, 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.

This example illustrates the fields and controls on the Flex Spending Health – U.S. page.

Cancel

Flex Spending Health - U.S.

Done

The Health Care Spending Account (HCSA) allows you to use pre-tax dollars to pay for expenses that are not 100 percent covered through your spouse's group health care plans.

Enroll in Your Plan

Important! Your annual pledge for the year 2023 is \$2,500.00 for the enrolled plan: Healthcare FSA. You will have no contribution with this plan if you do not make a choice.

Plan Name

Select

Waive

✓

Healthcare FSA

Contact Information

Phone

646/350-2222

Email

HCMBENUser1@mailtest.com

Contribution Amount

You may enter your total elected annual pledge amount which will be divided and deducted on a per pay period basis. By enrolling in the plan you are certifying that you meet all qualifications to contribute your elected amount and that you are responsible for any penalties incurred based on illegal or excess contributions. You may select the Flexible Spending Account Worksheet to help calculate your annual pledge for this plan year.

Employee Annual Pledge

Minimum Employee Pledge \$100.00

Maximum Employee Pledge \$3,050.00

Annual pledge amount for all Flexible Spending Accounts must not exceed \$7,000.00

Flexible Spending Account Worksheet

Field or Control	Description
Annual Pledge	Enter your annual pledge amount.
Flexible Spending Account Worksheet	Click the button, to open a Flexible Spending Account Worksheet pop up window.

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.

Cancel

Flexible Spending Account Worksheet

Done

Estimate Contribution from

Annual Pledge

▼

Your New Annual Pledge

400.00

Minus Your Year-To-Date Contributions

0.00

Divided by Pay Periods Remaining

12

Estimated Per-Pay-Period Contribution

0.00

Calculate

Field or Control	Description
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.

Field or Control	Description
Calculate button	Click the button view the calculations. If you entered your annual pledge amount, then the calculation returns your Estimated Per-Pay-Period Contribution, and the values for Minus Your Year To Date Contributions, Divided by Pay Periods Remaining. If you entered your estimated per-pay-period contribution, the calculation returns your Your New Annual Pledge, and the values for Multiplied by Pay Periods Remaining and Plus Your Year To Date Contributions.

Health Savings Account Page

Use the Health Savings Account page (BNE_PLAN_6X_FL) to enroll in Health Savings Account (HSA) plan benefits.

Navigation:

- Click the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage. Click the Benefits Enrollment tile in the Benefits Details dashboard. Select the event type to open the activity guide. Click the Benefits Enrollment tab on the left panel, and then under the Benefit Plans section, click the plan type, Health Savings Account.
- 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, Health Savings Account.

This example illustrates the fields and controls on the Health Savings Account page.

Note: The **Contribution Amount** section is hidden when the user selects *Waive*.

Field or Control	Description
Employee Annual Contribution	Enter your annual contribution amount. The entered value is set as default for annual contribution in the Health Savings Account Worksheet window. Note: The system displays an error if the <i>Employee Annual Contribution</i> is not within the limits defined for the plan. The minimum and maximum values for the plan are indicated under the <i>Employee Annual Contribution</i> field.
	Select to view the help text. The icon appears only for employees aged 55 Yrs and above.
Health Savings Account Worksheet	Select to open the Health Savings Account Worksheet modal window and estimate your per pay period contribution or annual contribution for the HSA plan. Note: Based on the payroll system (<i>Payroll Interface</i> or <i>Payroll for North America</i>) of the logged-in user, some fields are auto-populated in the Health Savings Account Worksheet window. These fields are also editable.

This example illustrates the fields and controls on the Health Savings Account Worksheet when user (Payroll for North America) selects Annual Contribution.

Cancel
Health Savings Account Worksheet
Done

You may use this worksheet to estimate your per pay period contribution or annual contribution. Select Calculate to update the estimates.

*Estimate Contribution From

Annual Contribution



Your New Annual Contribution

1,200.00

Minus Your Year To Date Contributions

0.00

Divided by Pay Periods Remaining

12

Estimated Per Pay Period Contribution

100.00

Calculate

This example illustrates the fields and controls on the Health Savings Account Worksheet when user (Payroll for North America) selects Pay Per Period.

Cancel
Health Savings Account Worksheet
Done

You may use this worksheet to estimate your per pay period contribution or annual contribution. Select Calculate to update the estimates.

*Estimate Contribution From Per Pay Period ⓘ

Estimated Per Pay Period Contribution 120.00

Multiplied by Pay Periods Remaining 12

Plus Your Year To Date Contributions 0.00

Your New Annual Contribution 1,440.00

Calculate

Field or Control	Description
Estimate Contribution From	Select the option to determine how to estimate your contribution to the HSA plan. Values are: Annual Contribution and Per Pay Period . If you select <i>Annual Contribution</i> , then the worksheet estimates your amount per pay period. If you select <i>Per Pay Period</i> , then the worksheet estimates your annual contribution.
ⓘ	Select to view the help text.
Your New Annual Contribution or Estimated Pay Per Period Contribution	Enter the amount for Your New Annual Contribution or Estimated Pay Per Period Contribution . The field appears based on the option selected for Estimate Contribution From .
Minus Your Year To Date Contributions or Plus Your Year To Date Contributions	Displays the year to date contribution for users with <i>Payroll for North America</i> as the payroll system. The value is auto populated based on their payroll data. For users with <i>Payroll Interface</i> as the payroll system, this field is editable and the data is not auto populated.
Divided by Pay Periods Remaining or Multiplied by Pay Periods Remaining	Displays the remaining pay periods for users with <i>Payroll for North America</i> as the payroll system. The value is auto populated based on their payroll data. For users with <i>Payroll Interface</i> as the payroll system, this field is editable. If the employer uses Payroll Interface deduction calculation, then this field is auto populated.

Field or Control	Description
Calculate button	Select to calculate and view the estimates of your contribution for the HSA plan. If you entered your annual contribution amount, then the calculation returns your Estimated Per Pay Period Contribution, and 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 Your New Annual Contribution, and the values for Multiplied by Pay Periods Remaining and Plus Your Year To Date Contributions. Note: The system displays an error message if the <i>Your New Annual Contribution</i> or <i>Estimated Pay Per Period Contribution</i> value in the worksheet is not within the defined minimum and maximum limits for the plan.
Cancel	Select to cancel the worksheet calculations.
Done	Select to populate the <i>Estimated Pay Period Cost</i> and <i>Employee Annual Contribution</i> in the Health Savings Account page.

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.

This example illustrates the fields and controls on the PERS page.

The screenshot shows the 'PERS' page with a 'Cancel' button on the top left and a 'Done' button on the top right. Below the title bar, there is a descriptive sentence: 'Public Employee Retirement Systems (PERS) is designed to provide you with income protection in the case of a disability.' To the right, under 'Contact Information', there is a phone number (864.122.4332), an email address (betty@gbi.com), and an address (Global Business Institute, 500 George Washington Pkway, New York, NY 07666).

The main section is titled 'Enroll in Your Plan'. It contains a table with two rows: 'Public Employees Retirement' and 'Waive'. The 'Waive' row is selected with a checkmark. There is a 'Select' button next to the first row.

Standard Pension Page

Use the Standard Pension page (BNE_PLAN_8X_FL) to enroll in pension 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, 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.

This example illustrates the fields and controls on the Standard Pension page.

The screenshot shows the 'Standard Pension' page with a 'Cancel' button on the top left and a 'Done' button on the top right. Below the title bar, there is a descriptive sentence: 'Standard Pension plans help provide financial security for your retirement.' To the right, under 'Contact Information', there is a phone number (646/350-1111), an email address (HC@sp6.com), and an address (Benefits Administrator, 500 George Washington Pkway, New York, NY 07666).

The main section is titled 'Enroll in Your Plan'. It contains a table with three rows: 'Pension 1', 'Standard Pension', and 'Waive'. The 'Pension 1' row is selected with a checkmark. There are 'Select' buttons next to the other two rows.

Below this, there is a 'Voluntary Contribution' section with two input fields: 'Voluntary Amount' and 'Voluntary Percent'.

Next is the 'Designate Your Beneficiaries' section. It includes a descriptive sentence and two dropdown menus for 'Primary Allocation' and 'Secondary Allocation', both set to 'Percent'.

Below these are three rows of beneficiary information:

Beneficiary	Relationship	Current Primary Percentage	Current Secondary Percentage	New Primary Percentage	New Secondary Percentage
Michelle Rodriguez	Spouse			0	0
Liza Rodriguez	Child			0	0
Carolina Rodriguez	Child			0	0
Total				0	0

At the bottom, there is an 'Add Beneficiary' button and two dropdown menus for 'Primary Excess Amount Goes To' and 'Secondary Excess Amount Goes To'.

Field or Control	Description
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. 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.

This example illustrates the fields and controls on the Vacation Buy page.

CancelVacation BuyDone

The Vacation Buy plan allows you to purchase vacation days based upon your years of service.

▼ Enroll in Your Plan

Plan Name	
Select	No, I do not want to enroll
✓	Vacation Buy

▼ Vacation Hours

Hours to Buy

*You must buy hours in increments of 8.00
between 8.00 and 34.00 hours*

Contact Information

Phone

646/350-1111

Email

HC@ap6023f.com

Address

Benefits Administrator
500 George Washington
Pkway
New York, NY 07666

This example illustrates the fields and controls on the Vacation Buy page as seen on a smartphone.

Cancel

Vacation Buy

Done

The Vacation Buy plan allows you to purchase vacation days based upon your years of service.

Review each section

▼ **Enroll in Your Plan**

Waive

Pay Annual Cost \$0.00

Select

Vacation Buy

Pay Annual Cost \$0.00

✓

▼ **Vacation Hours**

Hours to Buy

8.00

You must buy hours in increments of 8.00 between 8.00 and 23.00 hours

 **Contact Information**

Phone

646/350-1111

Field or Control	Description
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.

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.

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
<u>Benefits Summary Page</u>	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: <u>Medical Page</u>	BEN_SUMM_DTL_FL	Review and modify health (medical/dental/vision) plan-type benefits for employee and domestic partner.
2x Life Plans: <u>Life Page</u> <u>Supplemental Life Page</u>		Review and modify life plan-type benefits for employee and dependents.
3x Disability Plans: <u>Short-Term Disability Page</u>		Review short-term or long-term disability plans.

Page Name	Definition Name	Usage
4x Savings Plans: 401(k) Page		Review and modify the benefits savings plans.
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 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 or card for Medical.

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

Medical

My Benefits on

1) 08/21/2019 - Current Enrollment

Resources

Kaiser Permanente

This is Current Enrollment. You have Future Enrollment.

All of our medical choices promote wellness as part of their benefits and are available to protect your and your dependents if you become sick or injured.

Enrolled Plan Medical HMO Plan 2
Plan Provider Kaiser Permanente
Coverage Employee + Spouse
Group Number M55555
Customer Service 555/782-1111

Covered Dependents

Dependents that are covered by this plan are listed here. Select the dependent to view or modify.

Covered Dependents	Relationship
Erik Mathers	Spouse

Primary Care Provider

Your Primary Care Provider ID HH2321

[Primary Care Provider List](#)

I have visited this provider before Yes

Use the same provider for all dependents Yes

Dependent	Primary Care Provider ID	Visited this Provider before
Erik Mathers	HH2321	Yes

Latest Deductions

Payroll deductions for the latest pay period for this benefit.

Plan Description	Employer Paid	Employee Contribution	Employer-Employee Contribution	Pay Period End Date
Medical HMO Plan 2	57.23	57.23		03/23/2019

Field or Control	Description
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.

Field or Control	Description
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. 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 Human Resources Manage Base Benefits), in the ‘Self Service Plan Description’ field.

This example illustrates the fields and controls on the Update Individual Dependent/Beneficiary Information modal window.

Cancel
Update Individual Dependent/Beneficiary Information
Save

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Aug 4, 2019.

Name

Erik Mathers >

Personal Information

Date of Birth 10/12/1951

*Gender Male

*Relationship to Employee Spouse

Dependent Yes

Beneficiary Yes

*Marital Status Married

*Student No

*Disabled No

*Smoker Non Smoker

Address

Address	Address Type	Same as mine
343, Hill stone road Buffalo, NY 74940	Home	Same as mine >

National ID

No data exists

Add National ID

Phone

No data exists

Life Page

Use the Life page (BEN_SUMM_DTL_FL) to review and modify 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 Life.

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

Life

My Benefits on 08/27/2019
This is Current Enrollment

Life insurance plays an important role in ensuring that your family is financially secure if you were to pass away

Enrolled Plan Basic Life Plan ⓘ

Plan Provider Metropolitan Life

Coverage \$50000

Contact Information

Phone
646/350-1111

Email
hcmuser@us.oracle.co

Address
Benefits Administrator
500 George Washington
Pkway
New York, NY 07666

Your Beneficiary Designation

Beneficiaries designated for this plan are listed here. Select the beneficiary to view or modify. To change your beneficiary allocations, select the Update Beneficiary Designation button.

Primary Allocation Percent

Secondary Allocation Percent

Beneficiary	Relationship	Current Primary Percentage	Current Secondary Percentage
Erik Mathers	Spouse	100	>
Total		100	0

Add Beneficiary

Update Beneficiary Designation

Latest Deductions

Payroll deductions for the latest pay period for this benefit.

Plan Description	Employer Paid	Employee Contribution	Employer-Employee Contribution	Pay Period End Date
Basic Life Plan	46.15	0.00		03/23/2019

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 Human Resources Manage Base Benefits).

Field or Control	Description
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.

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Field or Control	Description
	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 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.

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.

Supplemental Life

My Benefits on 08/27/2019
This is Current Enrollment

Supplemental Life insurance allows you to purchase coverage in addition to what's provided by the basic life plan.

Enrolled Plan

Suppl Group Life 1x

Plan Provider

Prudential

Coverage

Salary X 1

Your Beneficiary Designation

Beneficiaries designated for this plan are listed here. Select the beneficiary to view or modify. To change your beneficiary allocations, select the Update Beneficiary Designation button.

Primary Allocation

Percent

Secondary Allocation

Percent

Beneficiary	Relationship	Current Primary Percentage	Current Secondary Percentage
Erik Mathers	Spouse	100	>
Total		100	0

Add Beneficiary

Update Beneficiary Designation

Latest Deductions

Payroll deductions for the latest pay period for this benefit.

Plan Description	Employer Paid	Employee Contribution	Employer-Employee Contribution	Pay Period End Date
Suppl Group Life 1x	69.23	145.38		03/23/2019

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 Human Resources Manage Base Benefits).

Field or Control	Description
	For more information about the enrolled plan, click the Information icon next to the Enrolled Plan name.
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.

This example illustrates the fields and controls on the Short-Term Disability Page.

Short-Term Disability

My Benefits on 08/27/2019
This is Current Enrollment

Short-Term Disability offers income replacement to provide financial protection for you and your family if you can't work over a temporary period of time due to injury or illness.

Enrolled Plan Short Term Disability - 80% ⓘ

Coverage 80% of Salary

Latest Deductions

Payroll deductions for the latest pay period for this benefit.

Plan Description	Employer Paid	Employee Contribution	Employer-Employee Contribution	Pay Period End Date
Short Term Disability - 80%	5.77	2.31		03/23/2019

Contact Information

Phone
646/350-1111

Email
hcmuser@us.oracle.co

Address
Benefits Administrator
500 George Washington
Pkway
New York, NY 07666

401(k) Page

Use the 401(k) page (BEN_SUMM_DTL_FL) to enroll in savings plan benefits.

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 Human Resources Manage Base Benefits).

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.

401(k)

My Benefits on 08/27/2019
This is Current Enrollment

401(K) plans allow you to prepare for your financial security and build your savings for retirement

Enrolled Plan 401(k) Employer Pct Match ⓘ

Plan Provider Fidelity Investments

Contributions

Before Tax \$200

After Tax \$0

Update Contributions

Your Beneficiary Designation

Beneficiaries designated for this plan are listed here. Select the beneficiary to view or modify. To change your beneficiary allocations, select the Update Beneficiary Designation button.

Primary Allocation Percent

Secondary Allocation Percent

Beneficiary	Relationship	Current Primary Percentage	Current Secondary Percentage
Erik Mathers	Spouse		>
Total		0	0

Add Beneficiary

Update Beneficiary Designation

Contact Information

Phone
646/350-1111

Email
hcmuser@us.oracle.co

Address
Benefits Administrator
500 George Washington
Pkway
New York, NY 07666

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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.

401(k)

Beneficiary	Relationship	Current Primary Percentage	Current Secondary Percentage
Erik Mathers	Spouse		
Total		0	0

Add Beneficiary
Update Beneficiary Designation

Your Fund Allocations

Fund Description	Current Percent Allocation
Money Market	25.00
Asset Allocation Fund	25.00
Bond Fund	25.00
Corporate Stock Fund	25.00

Update Funds
Total Allocation 100.00

Latest Deductions

Payroll deductions for the latest pay period for this benefit.

Plan Description	Employer Paid	Employee Contribution	Employer-Employee Contribution	Pay Period End Date
401(k) Employer Pct Match	200.00	200.00		03/23/2019

Field or Control	Description
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.
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.

This example illustrates the fields and controls on the Sick page.

The screenshot shows the 'Sick' page with a title bar and a close button. The main content area includes a 'My Benefits on' section with the date 08/27/2019 and a note 'This is Current Enrollment'. Below this is a description of sick leave. The 'Enrolled Plan' is 'GBI Sick Leave Plan' with an information icon. The 'Coverage' is 'Enrolled'. A 'Latest Deductions' section states 'There has not been any deduction from payroll yet.' On the right, a 'Contact Information' sidebar lists phone, email, and address details.

Sick	
My Benefits on 08/27/2019 <i>This is Current Enrollment</i> Sick leave is provided by the company to cover those short periods of time you cannot work due to a minor illness or injury. Enrolled Plan GBI Sick Leave Plan ⓘ Coverage Enrolled Latest Deductions There has not been any deduction from payroll yet.	Contact Information Phone 646/350-1111 Email hcmuser@us.oracle.co Address Benefits Administrator 500 George Washington Pkway New York, NY 07666

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.

This example illustrates the fields and controls on the Flex Spending Health – U.S. page.

The screenshot shows the 'Flex Spending Health - U.S.' page with a title bar and a close button. The main content area includes a 'My Benefits on' section with the date 08/05/2019 and a note 'This is Current Enrollment'. Below this is a description of the Health Care Spending Account. The 'Enrolled Plan' is 'FSA Plan 1' with an information icon. The 'Annual Pledge' is '2000.00'. A link for 'FSA Summary' is provided. On the right, a 'Contact Information' sidebar lists phone, email, and address details.

Flex Spending Health - U.S.	
My Benefits on 08/05/2019 <i>This is Current Enrollment</i> The Health Care Spending Account allows you to use pre-tax dollars to pay for expenses that are not 100 percent covered through your spouse's group health care plans. Enrolled Plan FSA Plan 1 ⓘ Annual Pledge 2000.00 FSA Summary	Contact Information Phone 646/350-1111 Email hcmuser@us.oracle.co Address Benefits Administrator 500 George Washington Pkway New York, NY 07666

This example illustrates the fields and controls on the Flex Spending Health – U.S. Page as seen on a smartphone.

Flex Spending Health - U.S.
×

My Benefits on 08/05/2019

This is Current Enrollment

The Health Care Spending Account allows you to use pre-tax dollars to pay for expenses that are not 100 percent covered through your spouse's group health care plans.

Enrolled Plan FSA Plan 1

Annual Pledge 2000.00

[FSA Summary](#)

 **Contact Information**

Phone
646/350-1111

Email
HCMGENUser1@ap6023fems.us.oracle.com

Address
Benefits Administrator
500 George Washington Pkway
New York, NY 07666

<i>Field or Control</i>	<i>Description</i>
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.

Note: For more information on how to set up FSA plans, refer “Setting Up FSA Plans” (PeopleSoft Human Resources Manage Base Benefits).

This example illustrates the fields and controls on the Flexible Spending Account Summary – Claim History tab.

Flexible Spending Account Summary

Flexible Spending overview.

Account Overview

Annual Pledge	Carryover from Prior Year	Total Claims approved for Payment	Amount Available
\$2000.00	\$0.00	\$550.00	\$1450.00

Claim Activity

Amount of claims submitted year-to-date \$550.00
Total claims approved for payment year-to-date \$550.00
Total of all claims paid year-to-date \$550.00
Claims that are approved but not yet paid \$0.00
Total claims whose approval is still pending \$0.00
Total claims that were rejected \$350.00

Claim Summary Chart

Claim Summary

Total Claims Paid

Total Amount Available

Total Claims Approved

Total Claims Pending Approval

Claim History

Payment History

Claim History

Your claims are shown in the claim history grid. Select a claim to see the details of each claim.

Service Start Date	Claim ID	Claim Description	Claim Amount
02/19/2019	30201051	Medical	\$350.00

This example illustrates the fields and controls on the Flexible Spending Account Summary – Payment History tab.

Flexible Spending Account Summary

Flexible Spending overview.

Account Overview

Annual Pledge	Carryover from Prior Year	Total Claims approved for Payment	Amount Available
\$2000.00	\$0.00	\$550.00	\$1450.00

Claim Activity

Amount of claims submitted year-to-date \$550.00
Total claims approved for payment year-to-date \$550.00
Total of all claims paid year-to-date \$550.00
Claims that are approved but not yet paid \$0.00
Total claims whose approval is still pending \$0.00
Total claims that were rejected \$350.00

Claim Summary Chart

Claim Summary

Total Claims Paid	28%
Total Amount Available	73%
Total Claims Approved	
Total Claims Pending Approval	

Claim History

Payment History

Payment History

The checks issued to pay your claims are shown in the payment history grid. Select a check to see the details of each payment.

Check Date	Check Number	Status	Check Amount
05/31/2019	1026	Pay This Run	\$550.00

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.

This example illustrates the fields and controls on the PERS page.

PERS

My Benefits on 08/05/2019
This is Current Enrollment

Public Employee Retirement Systems (PERS) is designed to provide you with income protection in the case of a disability

Enrolled Plan Public Employees Retirement ⓘ

Contribution 5% of Earnings

Customer Service 555/222-1111 Extension 8888

Contact Information

Phone
646/350-1111

Email
hcmuser@us.oracle.co

Address
Benefits Administrator
500 George Washington
Pkway
New York, NY 07666

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.

This example illustrates the fields and controls on the Standard Pension page.

Standard Pension

My Benefits on 11/27/2019
This is Current Enrollment

Standard Pension plans help provide financial security for your retirement

Enrolled Plan Pension 1 ⓘ

Contribution Employer Funded

Customer Service 555/222-1111 Extension 8888

Your Beneficiary Designation

Beneficiaries designated for this plan are listed here. Select the beneficiary to view or modify. To change your beneficiary allocations, select the Update Beneficiary Designation button.

Beneficiary	Relationship	Current Primary Percentage	Current Secondary Percentage
Robert Channing	Spouse	100	
Jason Channing	Child		
Total		100	0

Add Beneficiary **Update Beneficiary Designation**

Latest Deductions

There has not been any deduction from payroll yet.

Contact Information

Phone
646/350-1111

Email
HCMGENUser1@ap6023

Address
Benefits Administrator
500 George Washington
Pkway
New York, NY 07666

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 Human Resources Manage Base Benefits).

Field or Control	Description
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.

This example illustrates the fields and controls on the Vacation Buy page.

Vacation Buy

My Benefits on 08/05/2019
This is Current Enrollment

The Vacation Buy plan allows you to purchase vacation days based upon your years of service.

Enrolled Plan EM Vacation Buy ⓘ

Coverage 16 Hours Bought

Customer Service 555/222-1111 Extension 8888

Contact Information

Phone
646/350-1111

Email
hcmuser@us.oracle.co

Address
Benefits Administrator
500 George Washington
Pkway
New York, NY 07666

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.

This example illustrates the fields and controls on the Wellness Credit page.

Wellness Credit

My Benefits on 08/05/2019

This is Current Enrollment

By participating in our wellness product, we will provide additional funding for your benefits.

Enrolled Plan

BenData: US Wellness Credit

Coverage

Participating

Contact Information

Phone

646/350-1111

Email

HCMGENUser1@ap6023f

Address

Benefits Administrator
500 George Washington
Pkway
New York, NY 07666

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.

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 Plans	BEN_SUMM_DTL_FL	Review information on the employee’s benefit plan pages.
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 summary for employees.

Navigation:

- **Workforce Administrator > Manage Benefits > Benefits WorkCenter > Links > Employee/Dependent Information > Review Benefits Summary**
- **Benefits > Review Employee Benefits > Benefits Summary**

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

Benefits WorkCenter

Links

Employee/Dependent Information

- Update Dependent/Beneficiary
- Update ABBR
- Maintain Certification
- Review Benefits Attachment
- Review Benefits Summary**
- Maintain Primary Job Flag

Enroll in Benefits

- Assign to Benefit Program
- Simple Benefits
- Health Plan Enrollment
- Life and AD/D Plan Enrollment
- Disability Plan Enrollment
- Savings Plan
- Benefits Leave Plans
- Spending Accounts
- Spending Account Adjustment
- Retirement Plans
- USA Pension Plans
- CAN Pension Plans
- Vacation Benefits

Enrollment Administration

- FSA Administration
- COBRA Administration

Rosanna Channing
Senior Accounting Manager
[Return to Select Employee](#)

Person ID KU0046
Benefit Record Number 0

Benefits Summary | Deduction Summary

To view benefits as of another date, enter the date and select Refresh.

Benefits On: 29/07/2024

Primary Empl Record: 0

Benefits System: Benefits Administration
Benefit Program: KU1 GBI US Fulltime Benefit Pgm
Benefits Status: Active

Benefit Plans

Medical

Plan: Enhanced Medical Plan
Coverage: Employee + Spouse
Dependents: 1
Coverage Begin: 01/01/2022

Dental

Plan: Enhanced Dental Plan
Coverage: Employee + Spouse
Dependents: 1
Coverage Begin: 01/01/2022

Vision

Plan: Enhanced Vision Plan
Coverage: Employee + Spouse
Dependents: 1
Coverage Begin: 01/01/2022

Life

Plan: Basic Life Plan
Coverage: \$50000
Beneficiaries: 0
Coverage Begin: 01/01/1999

Supplemental Life

Plan: Suppl Group Life 3x
Coverage: Salary X.3
Beneficiaries: 1
Coverage Begin: 01/01/2011

AD and D

Plan: Flat 25K AD&D
Coverage: \$25000
Beneficiaries: 0
Coverage Begin: 01/01/2000

Contact Information

Phone: 646/350-1111
Email: HCMGENUser1@mailtest.com
Address: Benefits Administrator
500 George Washington Pkwy
New York, NY 07659

Resources

[GBI Benefits Handbook](#)

Note: To configure the display of the Contact and Resources panel in the Benefits Summary page, see “Enrollment Contact Assignment Page” (PeopleSoft Human Resources Manage Base Benefits).

Field or Control	Description
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](#)

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:

- **Workforce Administrator > Manage Benefits > Benefits WorkCenter > Links > Employee/Dependent Information > Review Benefits Summary**

Click on the Deduction Summary tab.

- **Benefits > Review Employee Benefits > Benefits Summary**

This example illustrates the fields and controls on the Deduction Summary page.

Benefits WorkCenter

Links

Employee/Dependent Information

Update Dependent/Beneficiary

Update ABBR

Maintain Certification

Review Benefits Attachment

Review Benefits Summary

Maintain Primary Job Flag

Enroll in Benefits

Assign to Benefit Program

Simple Benefits

Health Plan Enrollment

Life and AD/ID Plan Enrollment

Disability Plan Enrollment

Savings Plan

Benefits Leave Plans

Spending Accounts

Spending Account Adjustment

Rosanna Channing

Senior Accounting Manager

Return to Select Employee

Person ID KU0046

Benefit Record Number 0

Benefits Summary

Deduction Summary

Payroll System Payroll for North America

Pay Group KU4 US Monthly

Payroll Status Active

Latest Deductions

Plan Type %	Benefit Plan %	Dedn Code %	Description %	Class %	Coverage Base %	Last Deduction %	Pay Period End %
10	KUMED	KUMED9	Medical	Before-Tax		125.03	30/04/2024
				Nontaxable Benefit		171.97	30/04/2024
11	KUDEN2	KUDEN9	Dental	Before-Tax		12.25	30/04/2024
				Nontaxable Benefit		5.00	30/04/2024
14	KUVIS2	KUVIS9	Vision	Before-Tax		9.50	30/04/2024
				Nontaxable Benefit		4.00	30/04/2024
20	KUJBLIF	KUJBLIF	Basic Life	Nontaxable Benefit	50000.00	21.00	30/04/2024
21	KUJSL3X	KUJSL9X	Suppl Life	After-Tax	282000.00	118.44	30/04/2024
				Nontaxable Benefit	282000.00	2.82	30/04/2024

Contact Information

Phone

648/350-1111

Email

HCM/GEN/ser1@mailtest.com

Address

Benefits Administrator

500 George Washington Pkwy

New York, NY 07666

Resources

GBI Benefits Handbook

Note: To configure the display of the Contact and Resources panel in the Deduction Summary page, see “Enrollment Contact Assignment Page” (PeopleSoft Human Resources Manage Base Benefits).

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.

Pages Used to Set Up and Manage Fluid Benefits Statements as an Administrator

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Benefits Statement Template Page</u>	BAS_STM_TMPL	Set up templates to configure benefits statement.
<u>Benefits Statement Options Page</u>	BAS_STMT_OPTIONS	Set up report templates for benefits statements.
<u>Online Confirmation Statements Page</u>	RUNCTL_BAS_STMT	Run the process to generate confirmation statements for both online viewing and printing.
<u>Review Employee Statements Page</u>	BAS_STMT_LIST_FL	Review fluid benefits statements of employees.

Benefits Statement Template Page

Use the Benefits Statement Template Page (BAS_STM_TMPL) to set up the template to configure the display of sections and fields in the Benefits Statement.

Navigation:

You can access the Benefits Statement Template Page using these navigations:

- **Set Up HCM > Product Related > Base Benefits > Benefits Statement Template**
- **Workforce Administrator > Manage Benefits > Benefits WorkCenter > Links > Enrollment Administration > Benefits Statement Template**

This example illustrates the fields and controls on the Benefits Statement Template page (page 1 of 3).

Benefits Statement Template

Statement Template ID KUST

Statement Control
1 of 1
View All

*Effective Date 01/01/2022
+ -

*Description Statement Template

Personal Information

*Section Option Always Display

Personal Information Fields

Cost Summary

*Section Option Always Display

Cost Summary Fields

This example illustrates the fields and controls on the Benefits Statement Template page (page 2 of 3).

Election Summary

*Section Option Always Display

Election Summary Fields

Election Data for all plan types will be displayed on statements by default. In order to restrict specific plan types, select Specify Exceptions check box, add plan types in the Plan Type Exceptions grid and modify display options.

☒ Specify Exceptions

Plan Type Exceptions

	Plan Type	Plan Description	Display Options		
1	51	Vacation	Hide only if no choice	+	-

Dependents and Beneficiaries

*Section Option Always Display

Dependents and Beneficiaries Fields

Section Fields	Display Field
Relationship	☒
Marital Status	☒
Date of Birth	☒
Dependent	☒
Beneficiary	☒

This example illustrates the fields and controls on the Benefits Statement Template page (page 3 of 3).

The screenshot shows a form with three sections, each with a 'Section Option' dropdown and a list of fields to be displayed:

- Dependent Enrollments**: *Section Option: Always Display (dropdown). Dependent Enrollments Fields.
- Beneficiary Designations**: *Section Option: Always Display (dropdown). Beneficiary Designations Field.
- Investment Allocations**: *Section Option: Always Display (dropdown).

The Benefits administrator can configure the display for below sections:

- Personal Information
- Cost Summary
- Election Summary
- Dependents and Beneficiaries
- Dependent Enrollments
- Beneficiary Designations
- Investment Allocations

Field or Control	Description
Section Option	Select to define the display of the section in the Benefits Statement. Available options for the Personal Information, Cost Summary, and Election Summary sections are <i>Always Display</i> and <i>Never Display</i>. The Dependents and Beneficiaries, Dependent Enrollments, Beneficiary Designations, and Investment Allocations sections have an additional option. If the administrator selects <i>Always Display</i>, then a collapsible fields section is displayed under Section Option. Click the arrow to expand the section. The administrator can now select the required section fields to display in the Benefits statements (both online and PDF). If the administrator selects <i>Never Display</i>, then the section is not displayed in the benefits statement.

Field or Control	Description
Personal Information	If the benefits administrator enables the Personal Information section, then the benefits statement displays the section with the email address, gender, birth date, and marital status of the employee.
Cost Summary	If the benefits administrator enables the Cost Summary section, then the benefits statement displays the section with the employee's cost per pay period or the annual cost (based on cost frequency selection in the Benefit Program Table), full cost, credits, taxes, and pie chart details for the benefit enrollments.
Election Summary	If the benefits administrator enables the Election Summary section, then the benefits statement displays the section with the employee's election data for all the plan types. To control the display of plan types, use the Plan Type Exceptions table. Use the Display Options to define the conditional display for the selected plan types. Available display options are <i>Hide only if no choice</i> , <i>Hide only if Waived</i> , and <i>Hide Plan Type</i> .
Dependents and Beneficiaries	If the benefits administrator enables the Dependents and Beneficiaries section, then the benefits statement displays the section with the name, relationship, marital status, and date of birth of the employee's dependents and beneficiaries. Select the <i>Display only if Enrolled</i> option to display the section only if the employee has at least one dependent or beneficiary enrolled.
Dependent Enrollments	If the benefits administrator enables the Dependent Enrollments section, then the benefits statement displays the section with the relationship and proof of coverage for the dependent's enrolled plans. Select the <i>Display only if Enrolled</i> option to display the section only if the employee has at least one dependent enrolled.
Beneficiary Designations	If the benefits administrator enables the Beneficiary Designations section, then the benefits statement displays the section with the primary and secondary percent, primary and secondary amount for the beneficiary's enrolled plans. Select the <i>Display only if Designated</i> option to display the section only if the employee has at least one beneficiary designated.
Investment Allocations	If the benefits administrator enables the Investment Allocations section, then the benefits statement displays the section with the percent of employee's investment in various plans. Select the <i>Display only if Allocated</i> option to display the section only if the employee has at least one investment allocation.

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:

You can access the Benefits Statement Options page using these navigations:

- **Set Up HCM > Product Related > Base Benefits > Benefits Statement Options**
- **Workforce Administrator > Manage Benefits > Benefits WorkCenter > Links > Enrollment Administration > Benefits Statement Options**

This example illustrates the fields and controls on the Benefits Statement Options page for Enrollment Preview.

Benefits Statement Options

Statement Type Enrollment Preview
Schedule ID

Statement Control

Q

|

◀

◀

1 of 2

▶

▶

View All

*Effective Date01/01/2022

+

-

*Report Name for ViewingBENERSTMTVW

Q

Review Enrollment Online

Statement Template IDKUST

Q

Statement Template

Self Service Configuration

☒ Available in Self Service

This example illustrates the fields and controls on the Benefits Statement Options page for Submitted Enrollment.

Benefits Statement Options

Statement Type Submitted Enrollment
Schedule ID

Statement Control

☒ Available in Self Service
☐ Email Notification

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.

Benefits Statement Options

Statement Type Confirmation Statement
Schedule ID

Statement Control

☒ Available in Self Service
☐ Email Notification

Field or Control	Description
Statement Type	The available Statement Types are <i>Enrollment Preview</i> , <i>Submitted Enrollment</i> and <i>Confirmation Statement</i> .
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 compiled into a single file.
Statement Template ID	Select the template ID to format the selected statement type. Note: If the template ID is not provided, then all the sections are displayed in the benefits statement. To know more on how to define the benefits statement template, refer Benefits Statement Template Page.
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

This example illustrates the fields and controls on the Maintain Text Catalog Page.

Maintain Text Catalog

Benefits Administration

Sub ID
STMT

Text ID
EMAIL_BODY_BOTH

Usage
Email Body

Description
Email body when confirmation statement is both online and print.
Parameters are 1 - EmplID, 2 - Empl Name, 3 - Link to EE Self
103 characters remaining

Text Entries

1 of 1
View All

Effective Date
01/01/1900

Context Keys and Text

Statement Type

Event Classification

<p>This email is to confirm that the Benefits Department has confirmed your benefits enrollment. Your Benefits Confirmation Statement has been posted on the Employee Self Service website. A copy of the statement has also been sent to your mailing address.</p>

View/Edit as HTML

[View all effective dates and context keys for this Text ID](#)

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.

<i>Sub ID</i>	<i>Text ID</i>	<i>Usage</i>	<i>Description</i>
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.

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:

Workforce Administrator > Manage Benefits > Benefits WorkCenter > Reports/Processes > Benefits Event Processing > Run Online Confirmation Statement

This example illustrates the fields and controls on the Online Confirmation Statements page.

Online Confirmation Statements

Run Control ID 001
Report Manager
Process Monitor
Run

Schedule ID B34
(Leave blank for all schedules)

Statement Process Selection

☐ Online Only
☒ Online and Print
☐ Reprint Only

☒ Draft

Statement Language

☐ Recipient's Language
☒ Specified Language

Language English

Process Status to Include

☐ Election Error
☐ Finalized - Enrolled

Participants Selection

☐ Include All Employees

	Empl ID	First Name	Last Name	Ben Record	Event ID		
1				0	0	+	-

Field or Control	Description
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: <i>Online Only</i>: Select this option to generate statements for online viewing only. No hard copy statement is generated. <i>Online and Print</i>: Select this option to generate statements for online viewing and a bulk PDF file for hard copy printing. <i>Reprint Only</i>: Select this option to only generate a bulk PDF file for hard copy printing. <i>Draft</i> 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 <i>Online and Print</i> or <i>Print Only</i> is selected.

Field or Control	Description
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:

Workforce Administrator > Manage Benefits > Benefits WorkCenter > Links > Enrollment Administration > Review Employee Statements

The Review Employee Statements page displays a search page that allows the benefits administrator to search for employees based on different options such as employee ID, employee record, name and last name. Select **Search**, to view the search results in the **Select Employees** grid. For employees with more than one job titles, the grid displays all the available job titles.

This example illustrates the search page to select the employee and review the benefits statements.

Benefits WorkCenter

My Insights

- Benefits Insights
 - Ben Admin Processing Insights
 - Benefits Utilization Insights
 - Life Events Insights
 - Open Enrollment Insights
- Links
 - Employee/Dependent Information
 - Enroll in Benefits
 - Enrollment Administration
 - Assign to Benefit Program
 - Review Employee Statements**
 - Employee Event Details
 - Benefits Eligibility Results
 - Manage Benefits Instance
 - Open Enrollment Definition
 - Event Rules

Search Options

Employee ID (begins with)

Empl Record =

Name (begins with)

Last Name (begins with)

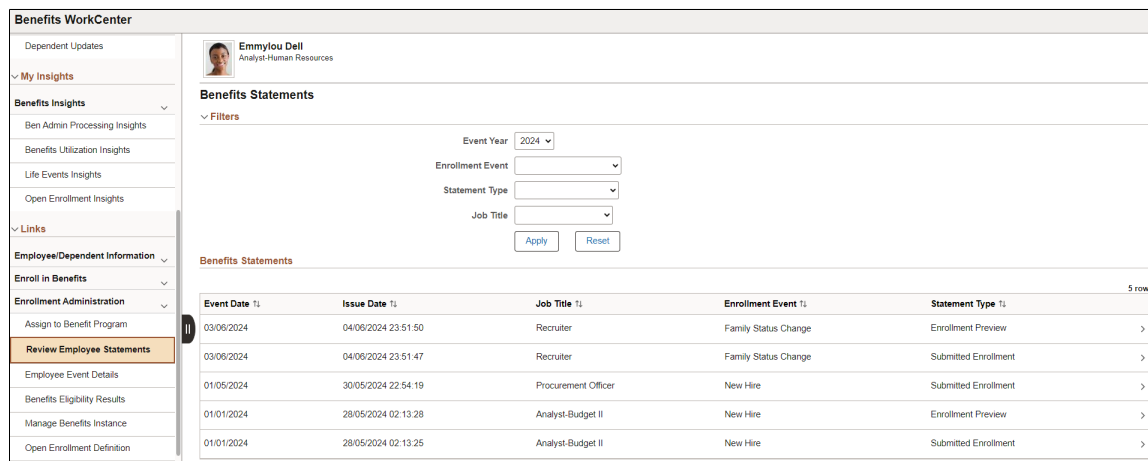
Select Employees 3 rows

	KU0114 - 0 Emmylou Dell Job Title Analyst-Human Resources	>
	KU0114 - 1 Emmylou Dell Job Title Manager-Pensions	>
	KU0114 - 2 Emmylou Dell Job Title Administrator-Human Resources	>



Select  to go to the **Benefits Statement** page and review the benefits statements for the selected employee record.

This example illustrates the fields and controls on the Review Employee Statements page.



Benefits WorkCenter

Dependent Updates

My Insights

Benefits Insights

- Ben Admin Processing Insights
- Benefits Utilization Insights
- Life Events Insights
- Open Enrollment Insights

Links

Employee/Dependent Information

Enroll in Benefits

Enrollment Administration

- Assign to Benefit Program
- Review Employee Statements**
- Employee Event Details
- Benefits Eligibility Results
- Manage Benefits Instance
- Open Enrollment Definition

Benefits Statements

Filters

Event Year: 2024

Enrollment Event:

Statement Type:

Job Title:

Apply Reset

Benefits Statements

Event Date %1	Issue Date %1	Job Title %1	Enrollment Event %1	Statement Type %1
03/06/2024	04/09/2024 23:51:50	Recruiter	Family Status Change	Enrollment Preview
03/06/2024	04/09/2024 23:51:47	Recruiter	Family Status Change	Submitted Enrollment
01/05/2024	30/05/2024 22:54:19	Procurement Officer	New Hire	Submitted Enrollment
01/01/2024	28/05/2024 02:13:28	Analyst-Budget II	New Hire	Enrollment Preview
01/01/2024	28/05/2024 02:13:25	Analyst-Budget II	New Hire	Submitted Enrollment

The Benefits Statements page displays various filters that allows you to narrow your search. Select

applicable filters and select **Apply** to view the results in the **Benefits Statements** grid. Select  to view the Benefits Statement details.

Field or Control	Description
Event Year	Select the year of the event. The drop down lists all the years for which the statement is available. The default value is blank.
Enrollment Event	Select the benefits enrollment event. The drop down lists all the enrollment events for which the statement is available. The default value is blank.
Statement Type	Select the type of the statement to view. The available statement types are <i>Enrollment Preview</i> , <i>Submitted Enrollment</i> and <i>Confirmation Statement</i> . The default value is blank.
Job Title	Select the job title to view the corresponding benefit statements. This field is displayed only when the employee has more than one job record and has benefits statement for atleast one job record. The default value is blank.
Apply	Select to view the statements corresponding to the selected filter criteria. The results in the Benefits Statements grid are updated only if the user selects a filter criteria.
Reset	Select to reset the value in the filters with their default values.

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.

This example illustrates the fields and controls on the Benefits Statement – Confirmation Statement.

Benefits Statement

x

Statement Type Confirmation Statement

Description Open Enrollment 2019

Enrollment Effective Date 01/01/2019

Statement Issue Date 02/20/2019

Print View

This statement confirms your Open Enrollment 2019 benefit selections and pay period costs, dependent information, and beneficiary information. If an error has been made in recording your elections, please contact your benefits administrator. These coverages will remain in effect until the next Benefits Open Enrollment or you experience a change in family status or employment situation. Please keep the statement for your records.

Statement Sections

Expand All

Personal Information

This is your personal information currently on file. It is important that the data shown is complete and correct. If this information is not correct, update the information through the Personal Information or contact your Benefits Administrator.

Contact Information

Name Rosanna Channing

Mailing Address 1430 North West Blvd Apt B215, Guttenberg, NJ 07093

Email Address Rosanna.Channing@oraclesample.com

Eligibility Information

Home Address 1430 North West Blvd Apt B215, Guttenberg, NJ 07093

Gender Female

Marital Status Married

Birth Date 01/04/1967

Service Date 08/29/1986

Cost Summary

Election Summary

Dependents and Beneficiaries

Dependent Enrollments

Beneficiary Designations

Investment Allocations

This example illustrates the fields and controls on the Benefits Statement – Print view of the Confirmation Statement.

Global Business Institute GBI US Fulltime Benefit Pgm	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 Benefits Utilization Insights

This topic discusses how the benefits administrators can use the Benefits Insights dashboards to view and analyze benefits utilization data for their workforce.

The Benefits Utilization dashboard is built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine. The benefits data that is visible on the dashboard comes from the Benefits Search indexes.

These videos provide an overview of the PeopleSoft Insights feature:

Video: [Insights with PeopleSoft](#)

Video: [PeopleSoft HCM Insights](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 34: HCM Insights](#)

This topic provides an overview of how to set up the Insights Dashboard for Benefits Utilization analytics and discusses the PeopleSoft Insights Dashboard for Benefits Utilization.

Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

For information on Insights dashboards, see:

- “Understanding PeopleSoft Insights” (Application Fundamentals)
- *PeopleTools Search Technology*: “Monitoring PeopleSoft Search Framework and OpenSearch” and “Working with Insights Dashboards for PeopleSoft Application Data” documentation

Pages Used to View Benefits Utilization Insights

This table lists the pages used to view the insights visualization for benefits utilization.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Benefits Utilization Tile		Access the Benefits Utilization dashboard.
Benefits Utilization Dashboard	HC_HBN_PLAN_UTILIZATION_FL	Review and analyze benefits data. Based on the user privileges, the administrators can access the dashboard.

Understanding How to Set Up the Insights Dashboard for Benefits Utilization

Before users can access the benefits utilization dashboards, the following steps should be performed:

1. Deploy and run the below search indexes.

(PeopleTools > Search Framework > Administration > Deploy Search Objects)

- HC_BEN_BENEFIT_EE
- HC_BEN_BENEFIT_DEP
- HC_BEN_BENEFIT_HST2

2. Deploy the below dashboards:

- Benefits Utilization Tile
- Benefits Utilization

(PeopleTools > Search Framework > Administration > Deploy Insights Dashboards)

3. Assign the user role *Benefits Analyst* or *Benefits Analytics Admin* to access and view the dashboard.

(PeopleTools > Security > User Profiles > User Profiles > Roles)

For more information about the Deploy Insights Dashboards page, see *PeopleTools Search Technology*: “Working with Insights Dashboards for PeopleSoft Application Data”, Managing a Delivered Dashboard.

Related Links

“Understanding Real Time Indexing in HCM” (Application Fundamentals)

Benefits Utilization Tile

Use the Benefits Utilization tile to access the Insights visualizations for benefits data.

Navigation:

Workforce Administrator > Manage Benefits > Benefits Utilization tile > Benefits Utilization

This example illustrates the Benefits Utilization tile.



Select the Benefits Utilization tile to access the [Benefits Utilization Dashboard](#).

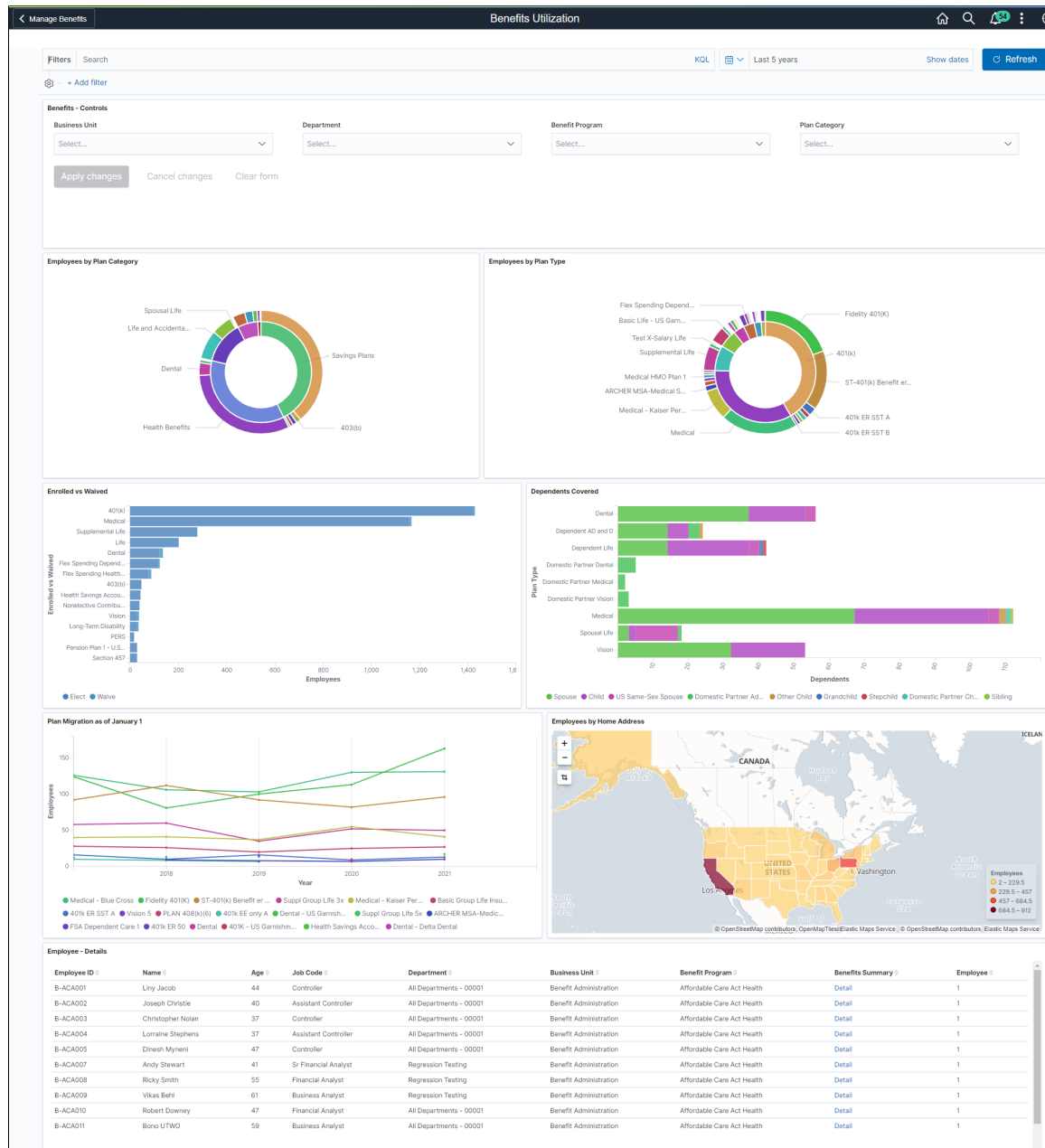
Benefits Utilization Dashboard

Use the Benefits Utilization Dashboard (HC_HBN_PLAN_UTILIZATION_FL) to review and analyze the Insights visualizations related to benefits data. Based on the user privileges, the administrators can access the dashboard.

Navigation:

Click the [Benefits Utilization Tile](#).

This example illustrates the Benefits Utilization Dashboard.



Warning! PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

The Benefits Utilization dashboard provides you with different visualizations to analyze benefits data. When you select filters or chart items, Insights dynamically updates all visualizations using the sources from the index.

Each visualization enables you to inspect the chart, table or map to view the details of that visualization. Pause over a visualization to have the have additional page elements appear, view numbers, or click items to add filters to your visualizations.

For more information on working with PeopleSoft Insights and filters, see *PeopleTools: Search Technology*, “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Benefits – Controls

Additional Filters allow you to filter the analytics based on:

- Business Unit
- Department
- Benefit Program
- Plan Category

Delivered Benefits Utilization Visualizations

The Benefits Utilization Dashboard provides this collection of visualizations:

Visualization	Description
Employees by Plan Category	This visualization shows the benefit plan categories and corresponding plan types based on the employees who opted for it. You can hover over the visualization to see the count and percentage of employees for each benefits plan category and plan type. By default, the inner doughnut shows the top five benefits categories with the highest number of employees. The outer doughnut represents the top ten benefit plan types for each category. You can click on each category or plan type to filter the visualizations. For example, if we click on Savings Plan, the page refreshes, and all the charts are updated to show data based only on the selected category. Note: You can modify the number of items to be displayed in the visualization based on your organization's requirements.
Employee by Plan Type	This double doughnut visualization shows the count and percentage of employees based on their selected plan type. The inner doughnut represents the benefits plan type. The outer doughnut represents the benefit plans corresponding to the plan type. You can hover over the image and view the count and percentage of employees who opted for a specific plan type, or benefits plan. Click on a plan type or a specific benefits plan to filter the visualizations accordingly.

Visualization	Description
Enrolled vs Waived	This visualization shows how many employees are currently enrolled or have currently waived a specific plan. Employees with terminated benefits and employees that have never been enrolled are not included in this count. You can hover over the image and view the count of employees enrolled or waived for a specific plan type. Click on the chart to filter the analytics based on a specific plan type.
Dependents Covered	This visualization shows the current number and type of dependents enrolled for each plan type. You can hover over the image and view the type and count of dependants for each plan type. Click on the chart to filter the analytics based on a specific plan type or dependant type.
Plan Migration as of January 1	This visualization shows how many employees have enrolled for a specific plan each year (as of January 1). By default, the dashboard shows the last five years of data. Note: To create the January 1st data, a derived value is created in the index. The index looks at the enrollment date to determine if the employee had the benefit plan on Jan 1st of that year. If so, a value is placed in the index for that year. The index is based on a rolling five years period. To use a different date than Jan 1st, you can modify the index's derived value calculation. You can hover over the image and view the count of employees for each plan type based on the year. Click on the chart to filter the analytics based on a specific plan type or year.
Benefits – by State	This visualization shows the geographical distribution of the employees on an interactive map. The State provided in the employee's home address is used to populate the visualization. You can hover over the image and view the number of employees residing in each state. Click on the chart to filter the analytics based on a specific state.
Employee Details	Based on the applied filter, the Employee Details section lists out all the employees and their details in tabular form. Click see the Detail link against an Employee ID in the Benefits Summary column to open the Benefits Summary page. For more information, see Benefits Summary Page.

Viewing Open Enrollment Insights

This topic discusses how the benefits administrators and benefits specialists can use the Benefits Insights dashboards to view a summary of the open enrollment data and analyze the enrollment activity associated with their workforce using Insights visualizations.

The Open Enrollment dashboard is built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine. The open enrollment data that is visible on the dashboard comes from the Benefits Search indexes.

These videos provide an overview of the PeopleSoft Insights feature:

Video: [Insights with PeopleSoft](#)

Video: [PeopleSoft HCM Insights](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 34: HCM Insights](#)

This topic provides an overview of how to set up the Insights Dashboard for Open Enrollment analytics and discusses the PeopleSoft Insights Dashboard for Open Enrollment.

Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

For information on Insights dashboards, see:

- “Understanding PeopleSoft Insights” (Application Fundamentals)
- *PeopleTools Search Technology*: “Monitoring PeopleSoft Search Framework and OpenSearch” and “Working with Insights Dashboards for PeopleSoft Application Data” documentation

Pages Used to View Open Enrollment Insights

This section lists the pages used to view the Open Enrollment Insights.

Page Name	Definition Name	Usage
Open Enrollment Insights Tile		Access the Open Enrollment Insights dashboard.
Open Enrollment Insights Dashboard	HC_HBN_OE_INSIGHTS_FL	Review and analyze the open enrollment of employees using Insights visualizations.

User Access

User Role	Access
Benefits Analyst	Provides view access to the Open Enrollment Insights dashboard.
Benefits Analytics Admin	Provides view and edit access to the Open Enrollment Insights dashboard.

Understanding How to Set Up the Insights Dashboard for Open Enrollment

Before users can access the Open Enrollment Insights dashboard, the following steps should be performed:

1. Deploy these benefits indexes:

- HC_BEN_OE_AG
- HC_BEN_OE_APPR
- HC_BEN_OE_ATTACH
- HC_BEN_OE_CURR
- HC_BEN_OE_ENROLL
- HC_BEN_OE_EOI

(**PeopleTools > Search Framework > Administration > Deploy Search Objects**)

2. Build the deployed benefits search indexes.

(**PeopleTools > Search Framework > Administration > Schedule Search Index**)

Note: If any change is made to the Enrollment End Date in the Open Enrollment Definition Page, then the Benefits Administrator should rerun a full Index on *HC_BEN_OE_CURR* and *HC_BEN_OE_ENROLL*.

3. Deploy the Open Enrollment Insights tiles and dashboards.

- Open Enrollment Insights Tile
- Open Enrollment Insights

(**PeopleTools > Search Framework > Administration > Deploy Insights Dashboards**)

Note: The full index must be run before the dashboard can be deployed.

4. Assign the *Benefits Analyst* or *Benefits Analytics Admin* user role to administrator to access and view the Open Enrollment Insights dashboard. *Benefits Analytics Admin* has view and edit access to the dashboard.

(**PeopleTools** > **Security** > **User Profiles** > **User Profiles** > **Roles**)

For more information about the Deploy Insights Dashboards page, see *PeopleTools Search Technology*: “Working with Insights Dashboards for PeopleSoft Application Data”, Managing a Delivered Dashboard.

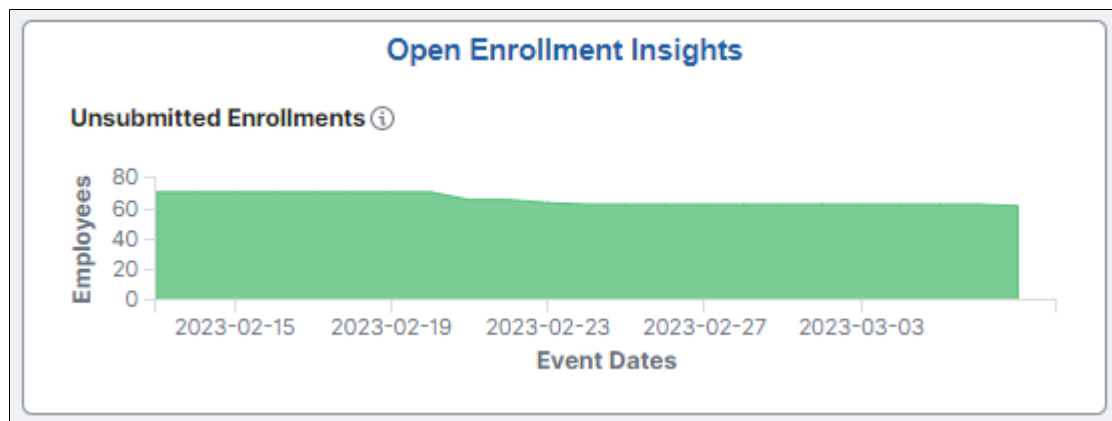
Open Enrollment Insights Tile

Use the Open Enrollment Insights tile to access the Insights visualizations related to open enrollment.

Navigation:

The Open Enrollment Insights tile is delivered as part of the Manage Benefits tile on the Workforce Administrator Home Page. You can add the tile, through personalization, to a system-delivered homepage or a homepage that you create.

This example illustrates the Open Enrollment Insights tile.



Select the Open Enrollment Insights tile to access the [Open Enrollment Insights Dashboard](#).

Related Links

[Using the PeopleSoft Fluid User Interface to Manage Benefits as an Administrator](#)

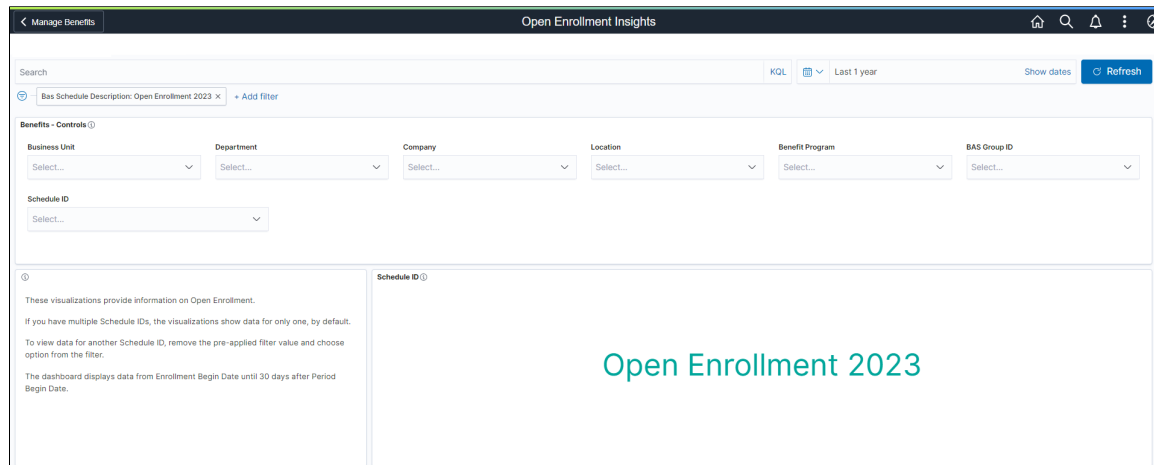
Open Enrollment Insights Dashboard

Use the Open Enrollment Insights dashboard (HC_HBN_OE_INSIGHTS_FL) to review and analyze the open enrollment data of employees using Insights visualizations.

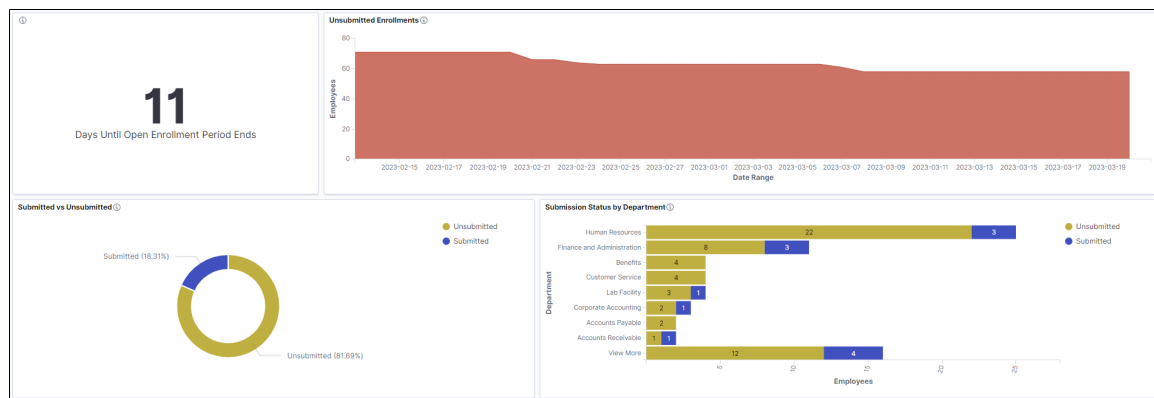
Navigation:

Select the [Open Enrollment Insights Tile](#).

This example illustrates the fields and controls on the Open Enrollment Insights dashboard (1 of 5).



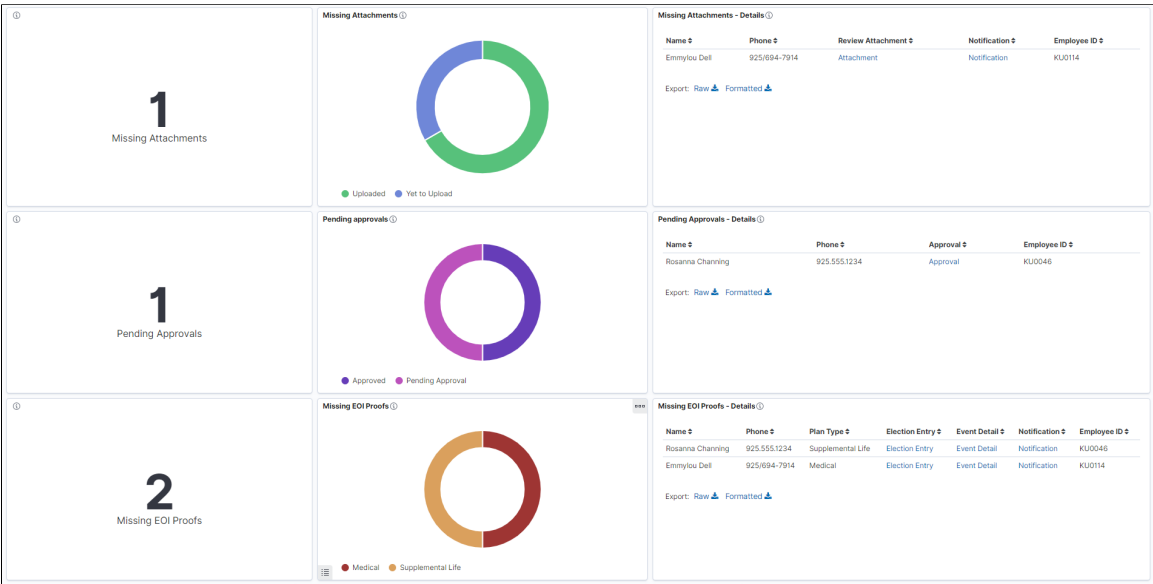
This example illustrates the fields and controls on the Open Enrollment Insights dashboard (2 of 5).



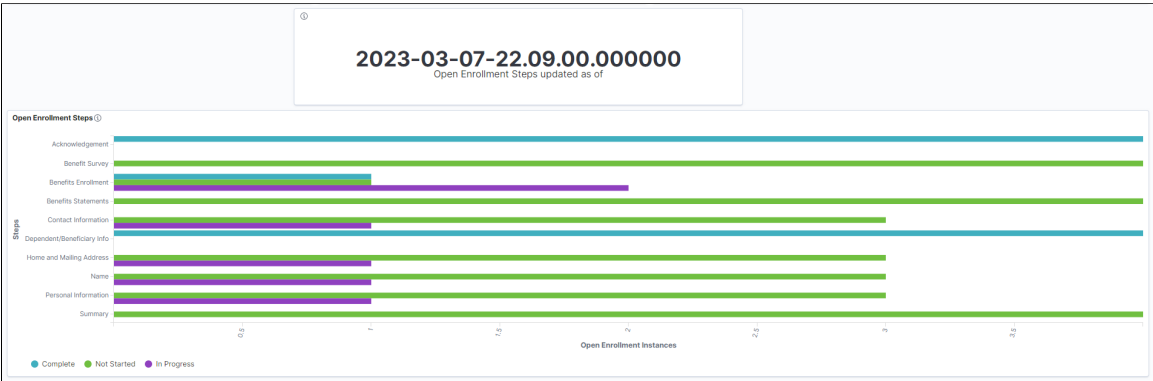
This example illustrates the fields and controls on the Open Enrollment Insights dashboard (3 of 5).

Unsubmitted Enrollments - Details ⓘ							
Harper Ainsley	Regression Testing	Cobra Business Unit	Benefits Fluid OE	ODEM	Notification	BOE004	
Theo Finley	Regression Testing	Cobra Business Unit	Benefits Fluid OE	ODEM	Notification	BOE005	
Elliot Blake	Regression Testing	Cobra Business Unit	Benefits Fluid OE	ODEM	Notification	BOE006	
Douglas Lewis	President	Global Business Institute BU	GBI US Fulltime Benefit Pgm	973 622 1234	ODEM	Notification	KU0001
Charles Baran	Corporate Operations	Global Business Institute BU	GBI US Fulltime Benefit Pgm	925 3732800	ODEM	Notification	KU0002
Jean Parsons	Finance and Administration	Global Business Institute BU	GBI US Fulltime Benefit Pgm	818/728-2450	ODEM	Notification	KU0003
Kenneth Grafton	Sales and Services	Global Business Institute BU	GBI US Fulltime Benefit Pgm	ODEM	Notification	KU0004	
Export: Raw Formatted 📄							
1 2 3 4 5 ... 7 »							

This example illustrates the fields and controls on the Open Enrollment Insights dashboard (4 of 5).



This example illustrates the fields and controls on the Open Enrollment Insights dashboard (5 of 5).



Warning! PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

The Open Enrollment Insights dashboard provides you with different visualizations to analyze the open enrollment data for your employees. When you select filters or chart items, Insights dynamically updates all visualizations using the sources from the index.

Each visualization enables you to inspect the chart, table or map to view the details of that visualization. Pause over a visualization to have the have additional page elements appear, view numbers, or click items to add filters to your visualizations.

Using the interactive visualizations on the dashboard, you can see important statistical data about the open enrollment process. When the dashboard is first opened, a filter is pre-applied to show the Open Enrollment Schedule with the least number of days until open enrollment ends. The data is filtered by enrollment status to provide you with a quick view of the submitted and unsubmitted enrollments. Sorting by Department provides additional information on the enrollment submission status. This dashboard also provides details on open enrollment changes that are pending due to missing attachments, pending approvals, or missing EOI proofs. These visualizations use Real Time Indexing (RTI).

The visualization for open enrollment steps allows you to see a snapshot of the progress and the instances of each step in the open enrollment process. This visualization is not RTI enabled. A timestamp indicates when the data for this visualization was last updated. To view the latest data, the benefits administrator must run the index for this visualization.

For more information on working with PeopleSoft Insights and filters, see *PeopleTools: Search Technology*, “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

The Open Enrollment Insights dashboard delivers the following visualizations:

- Schedule ID
- Days Until Open Enrollment Period Ends
- Unsubmitted Enrollments
- Submitted vs Unsubmitted
- Submission Status by Department
- Unsubmitted Enrollments Details
- Missing Attachments Count
- Missing Attachments
- Missing Attachments Details
- Pending Approvals Count
- Pending Approvals
- Pending Approvals Details
- Missing EOI Proofs Count
- Missing EOI Proofs
- Missing EOI Proofs Details
- Open Enrollment Steps updated as of
- Open Enrollment Steps

Additional Filters

Additional Filters allows you select filters based on below attributes:

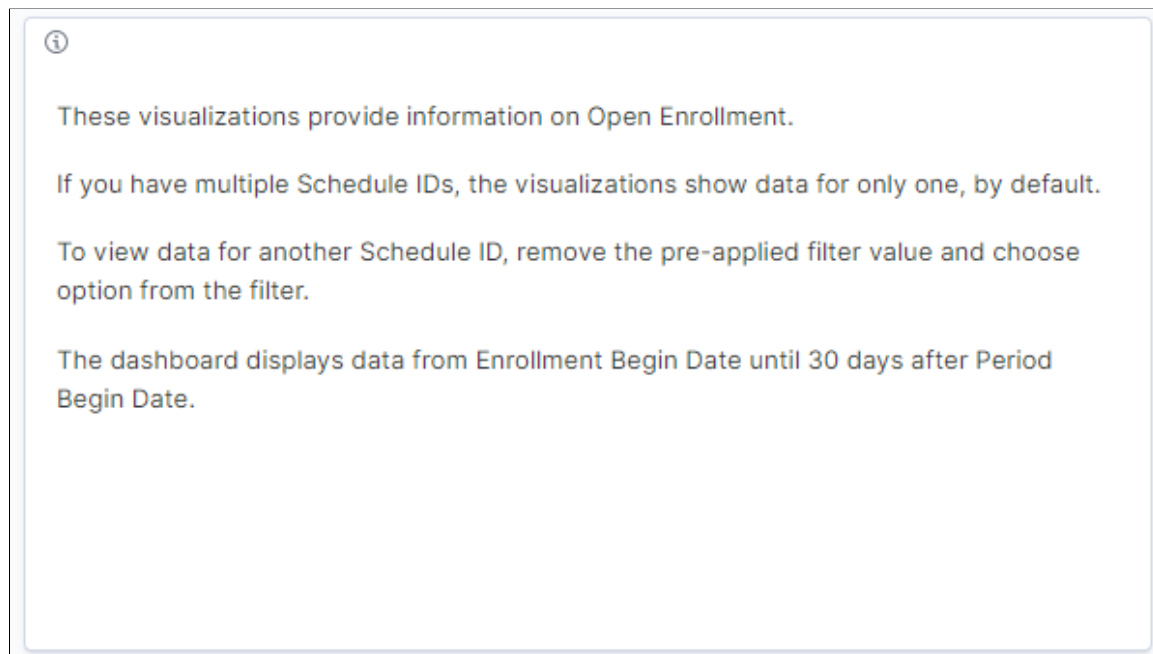
- Business Unit
- Department
- Company
- Location
- Benefit Program

- BAS Group ID
- Schedule ID

Description Box

The Description box provides instructional text that enables you to understand how the data is populated in the dashboard.

This example illustrates the fields and controls on the Description box.

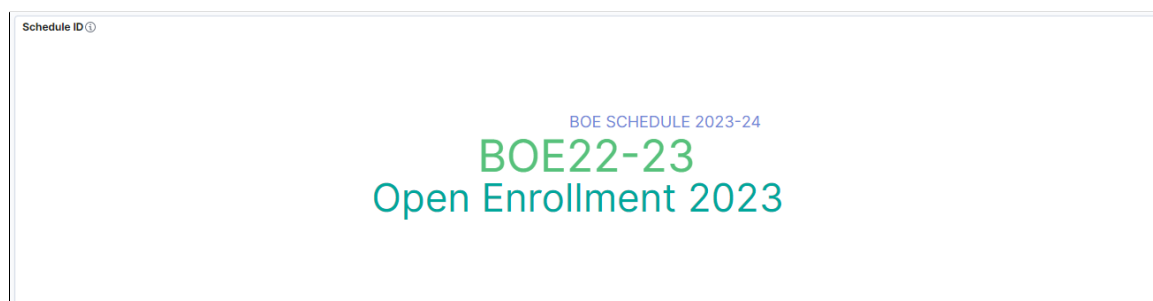


Schedule ID

This tag cloud visualization displays the Schedules ID for which data is displayed in the dashboard. The dashboard displays the Schedule ID with the closest end date by default. If two Schedule IDs have the same closest end date, then alphabetic order is followed.

To view the data for another schedule ID, close the pre-applied filter (default Schedule ID) displayed above the Benefits – Controls section and select the required Schedule ID from the **Schedule ID** filter. The Schedule ID is available only if the current date is within the Enrollment Begin Date and up to 30 days after the Period Begin Date.

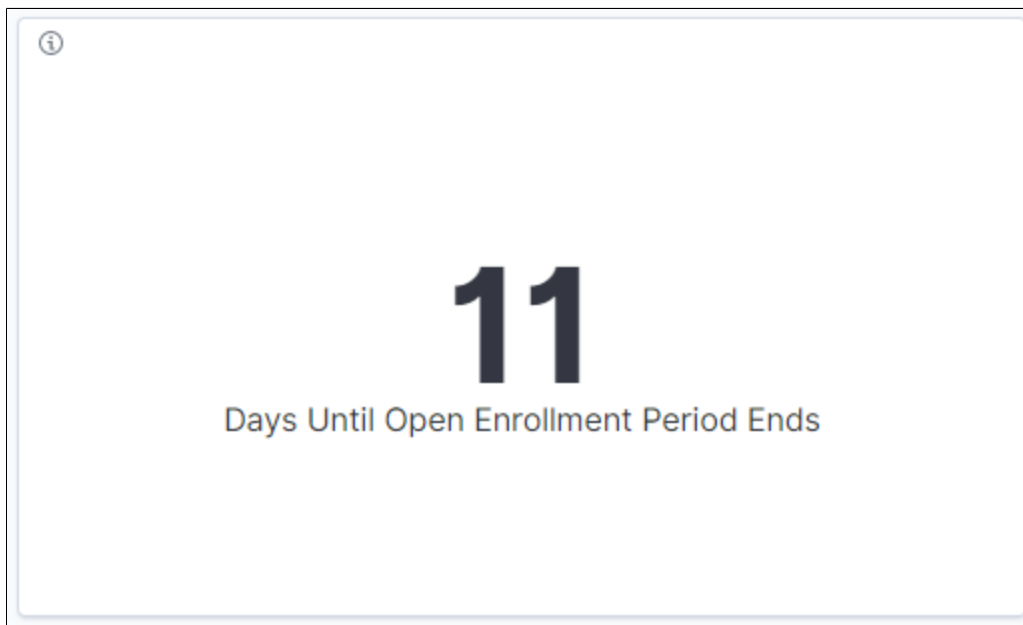
This example illustrates the fields and controls on the Schedule ID visualization.



Days Until Open Enrollment Period Ends

This visualization displays the number of days remaining in the Open Enrollment period. If the current date is past the Enrollment End Date, then this visualization displays zero.

This example illustrates the fields and controls on the Open Enrollment Period Ends visualization.



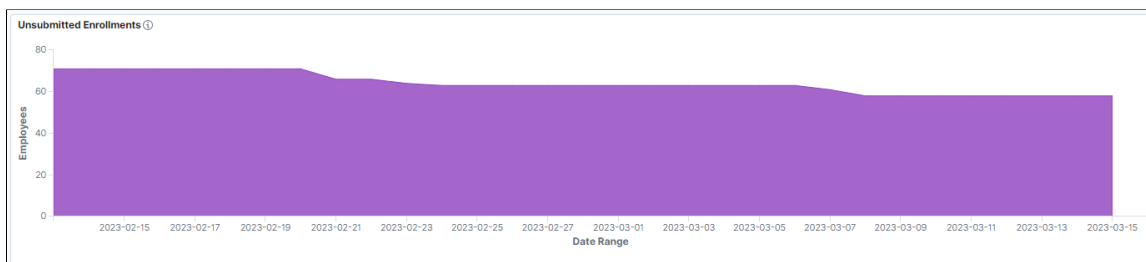
Unsubmitted Enrollments

This area chart visualization displays the employee count by unsubmitted enrollments for date ranging from the Enrollment Begin Date to the current date. Data is available only if the current date is within the Enrollment Begin Date and up to 30 days after the Period Begin Date.

This visualization displays data for the open enrollments with *Open* status and *Prepared* or *Notified* as the process status.

To know more on how to define the date parameters for the open enrollment, see [Open Enrollment Definition Page](#).

This example illustrates the fields and controls on the Unsubmitted Enrollments visualization.

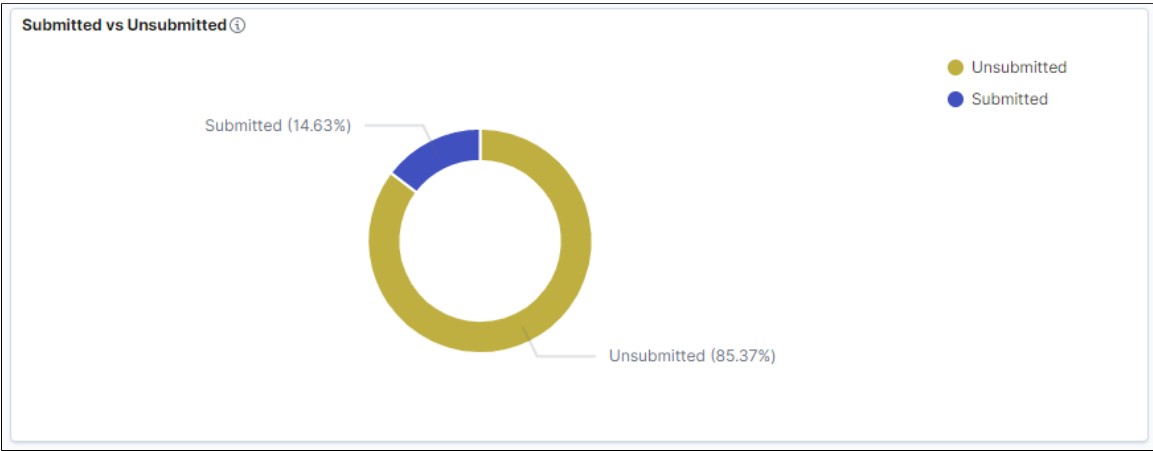


Submitted vs Unsubmitted

This donut visualization displays the breakdown of enrollments by submission status.

For submitted events, the visualization displays data for the following process status: *Entered*, *Finalized-Enrolled*, *Election Error*, *Re-enter*. For unsubmitted events, the visualization displays data for process status that is *Prepared* or *Notified*.

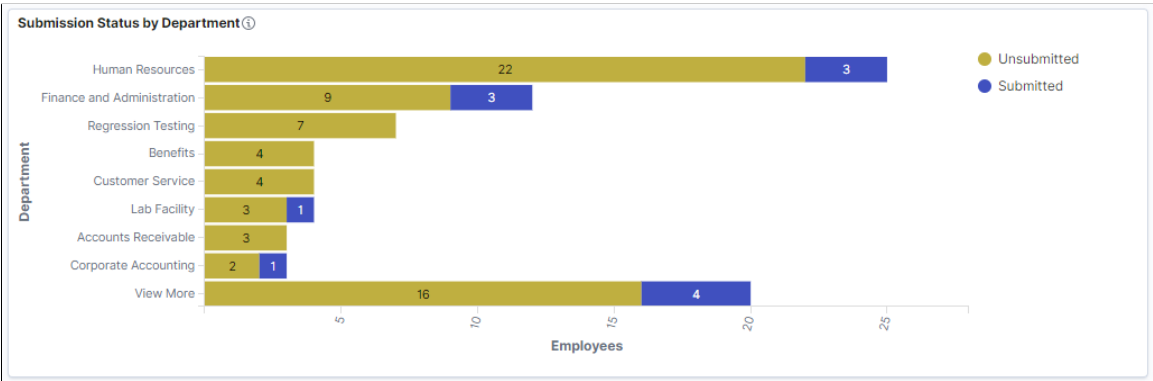
This example illustrates the fields and controls on the Submitted vs Unsubmitted visualization.



Submission Status by Department

This horizontal compound bar chart visualization shows the number of employees with submitted and unsubmitted enrollment status in each department. Select the compound bars to filter by the enrollment status.

This example illustrates the fields and controls on the Submission Status by Department visualization.



Unsubmitted Enrollments Details

This data-grid lists the unsubmitted enrollments in a tabular format along with employee details.

Select the hyperlinks to open the specific pages for the selected employee:

- ODEM: View the On-Demand Event Process page.
- Notification: Notify the employee.

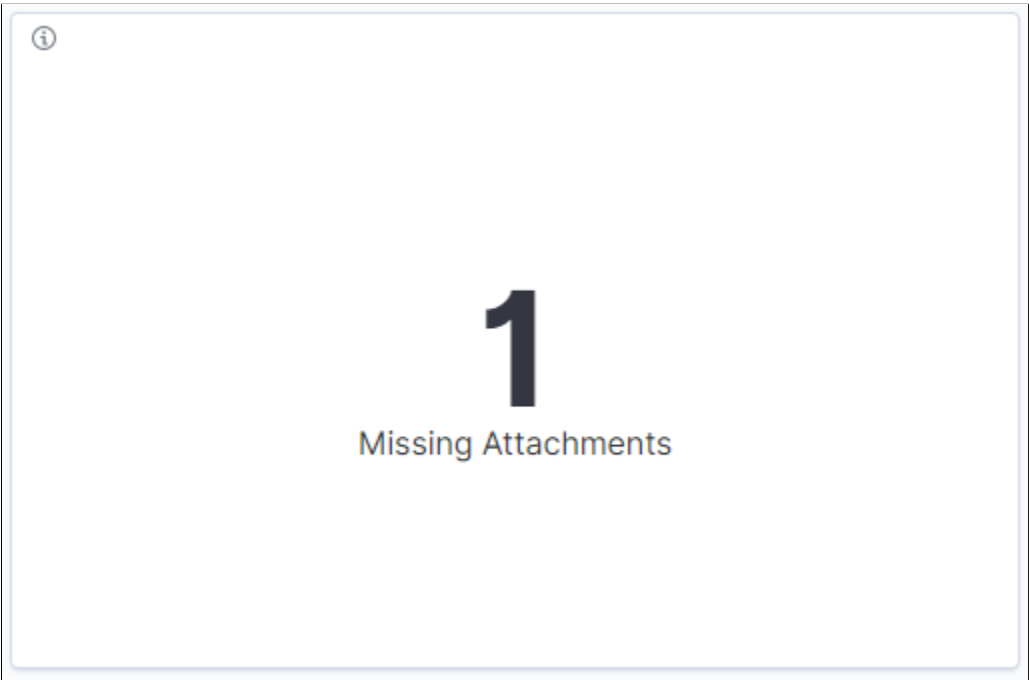
This example illustrates the fields and controls on the Unsubmitted Enrollments by employee.

Unsubmitted Enrollments - Details ⓘ							
Name ⓘ	Department ⓘ	Business Unit ⓘ	Benefit Program ⓘ	Phone ⓘ	ODEM ⓘ	Notification ⓘ	Employee ID ⓘ
Eden Rodriguez	Regression Testing	Cobra Business Unit	Benefits Fluid OE		ODEM	Notification	BOE001
Sofia Nathan	Regression Testing	Cobra Business Unit	Benefits Fluid OE		ODEM	Notification	BOE002
Reuben Matthew	Regression Testing	Cobra Business Unit	Benefits Fluid OE		ODEM	Notification	BOE003
Harper Ainsley	Regression Testing	Cobra Business Unit	Benefits Fluid OE		ODEM	Notification	BOE004
Theo Finley	Regression Testing	Cobra Business Unit	Benefits Fluid OE		ODEM	Notification	BOE005
Eliot Blake	Regression Testing	Cobra Business Unit	Benefits Fluid OE		ODEM	Notification	BOE006
Douglas Lewis	President	Global Business Institute BU	GBI US Fulltime Benefit Pgm	973 622 1234	ODEM	Notification	KU0001
Charles Baran	Corporate Operations	Global Business Institute BU	GBI US Fulltime Benefit Pgm	925 3732800	ODEM	Notification	KU0002
Jean Parsons	Finance and Administration	Global Business Institute BU	GBI US Fulltime Benefit Pgm	818/728-2450	ODEM	Notification	KU0003
Kenneth Grafton	Sales and Services	Global Business Institute BU	GBI US Fulltime Benefit Pgm		ODEM	Notification	KU0004

Missing Attachments Count

This count visualization displays the count of employees with open enrollment who have dependent updates for which document upload is pending.

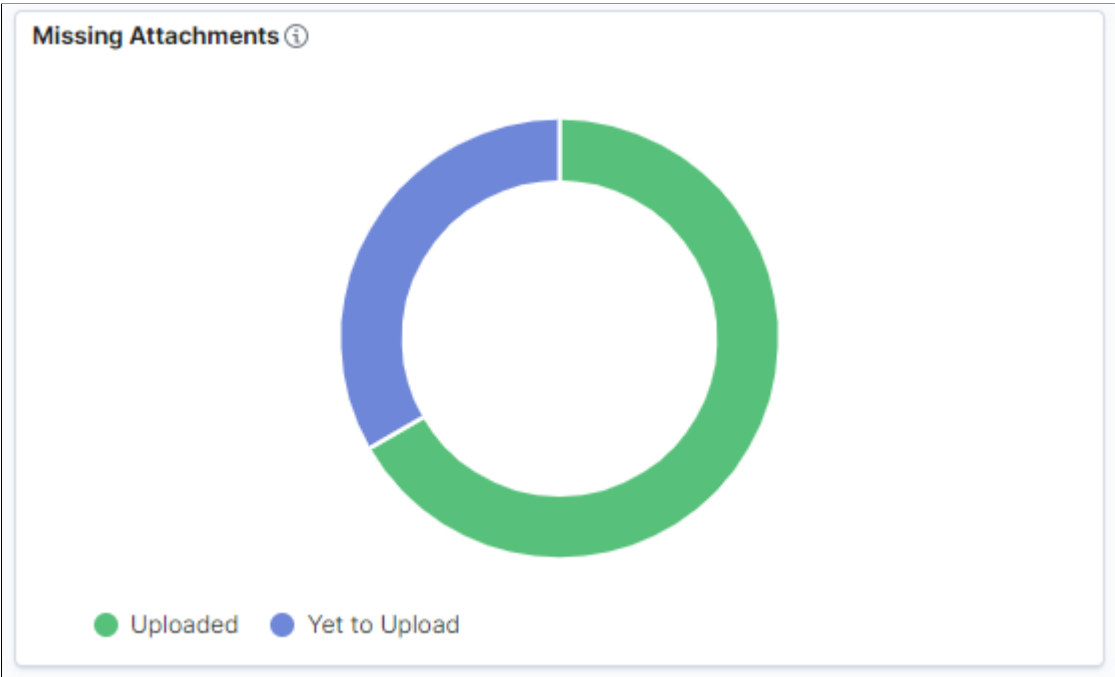
This example illustrates the fields and controls on the Missing Attachments Count visualization.



Missing Attachments

This donut visualization displays the breakdown of enrollments by missing attachments and already uploaded.

This example illustrates the fields and controls on the Missing Attachments visualization.



Missing Attachments Details

This data-grid lists the employees with missing attachments in a tabular format. Select the *Attachment* hyperlink to view the Review Benefits Attachment page for the employee. Select the *Notification* link to send notification message to the selected employee.

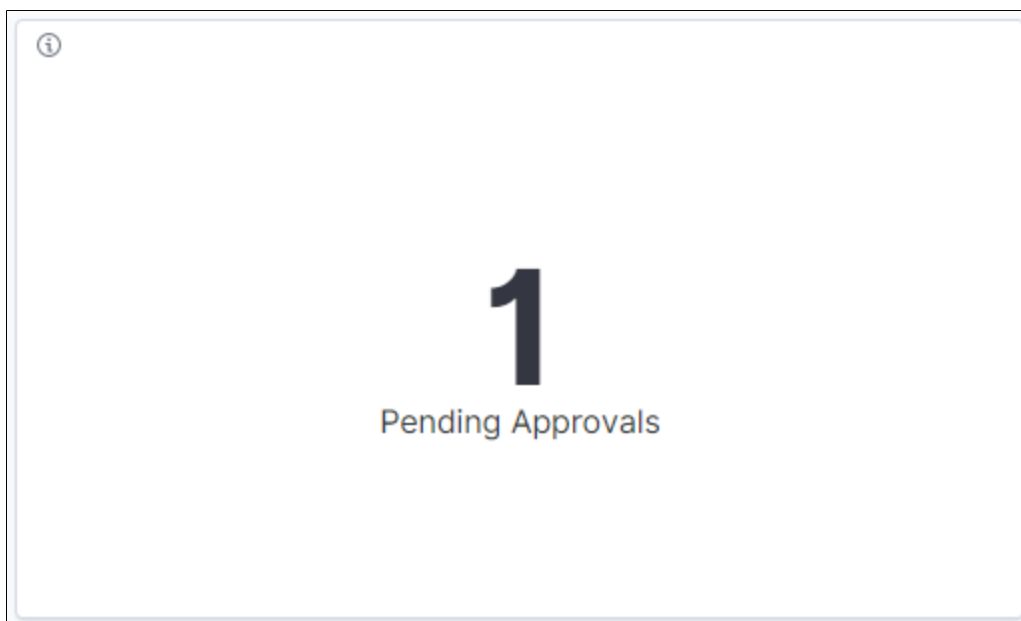
This example illustrates the fields and controls on the Missing Attachments – Details visualization.

Missing Attachments - Details ⓘ				
Name ⌵	Phone ⌵	Review Attachment ⌵	Notification ⌵	Employee ID ⌵
Emmylou Dell	925/694-7914	Attachment	Notification	KU0114
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Pending Approvals Count

This count visualization displays the count of employees with dependent updates for the open enrollment for which document upload and approval is required, and the documents are uploaded but approval is pending.

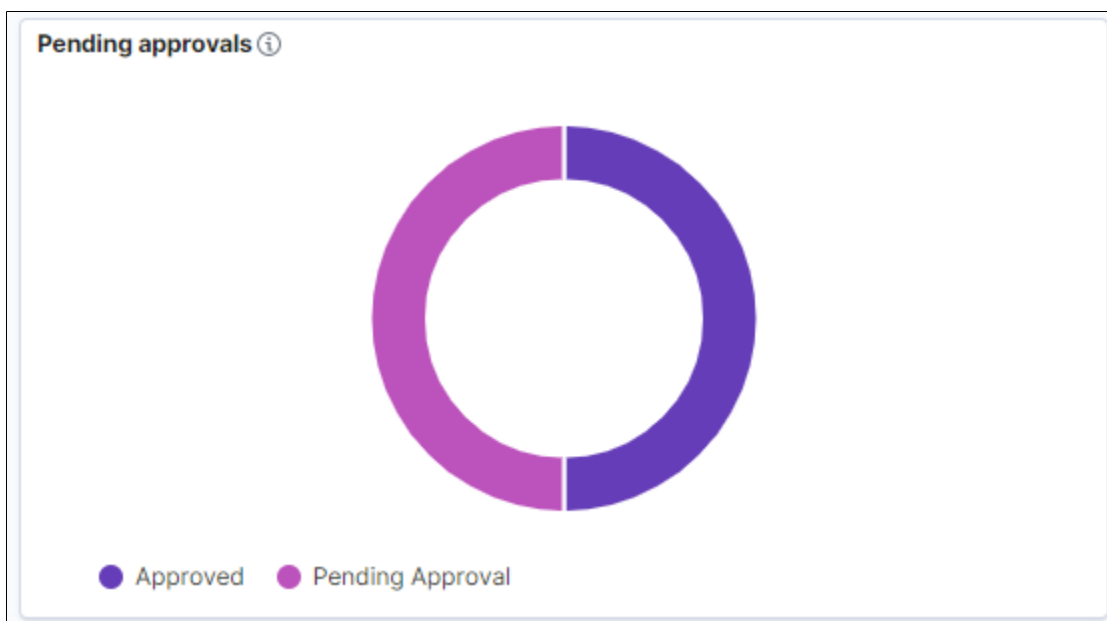
This example illustrates the fields and controls on the Count for Open Enrollment documents needing approval visualization.



Pending Approvals

This donut visualization displays the breakdown of enrollments by pending approvals and documents approved.

This example illustrates the fields and controls on the Pending Approvals visualization.



Pending Approvals Details

This data-grid lists the employees with pending approvals in a tabular format. Select the *Approval* link to go to the Pending Approvals page“Pending Approvals - Dependent Updates Page” (PeopleSoft Human Resources Manage Base Benefits) to approve or deny the documents for the selected employee.

This example illustrates the fields and controls on the Pending Approvals – Details visualization.

Pending Approvals - Details ⓘ

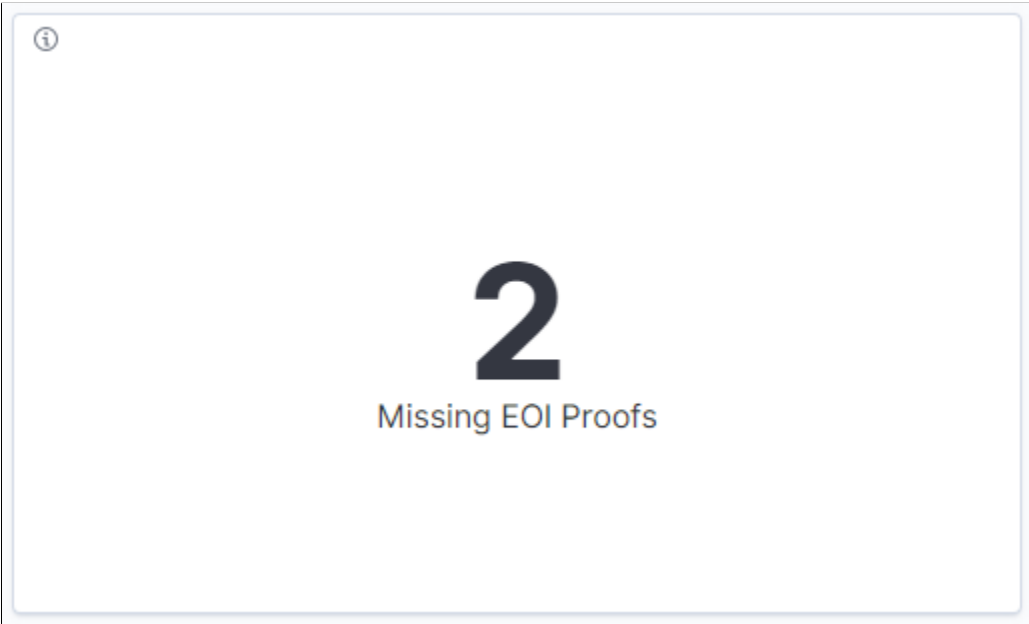
Name ⌵	Phone ⌵	Approval ⌵	Employee ID ⌵
Rosanna Channing	925.555.1234	Approval	KU0046

Export: [Raw](#) ⬇️ [Formatted](#) ⬇️

Missing EOI Proofs Count

This count visualization displays the count of employees whose open enrollment changes are pending due to missing Evidence of Insurability (EOI) proof. If an employee has more than one pending EOI, then the data shows up for each plan type.

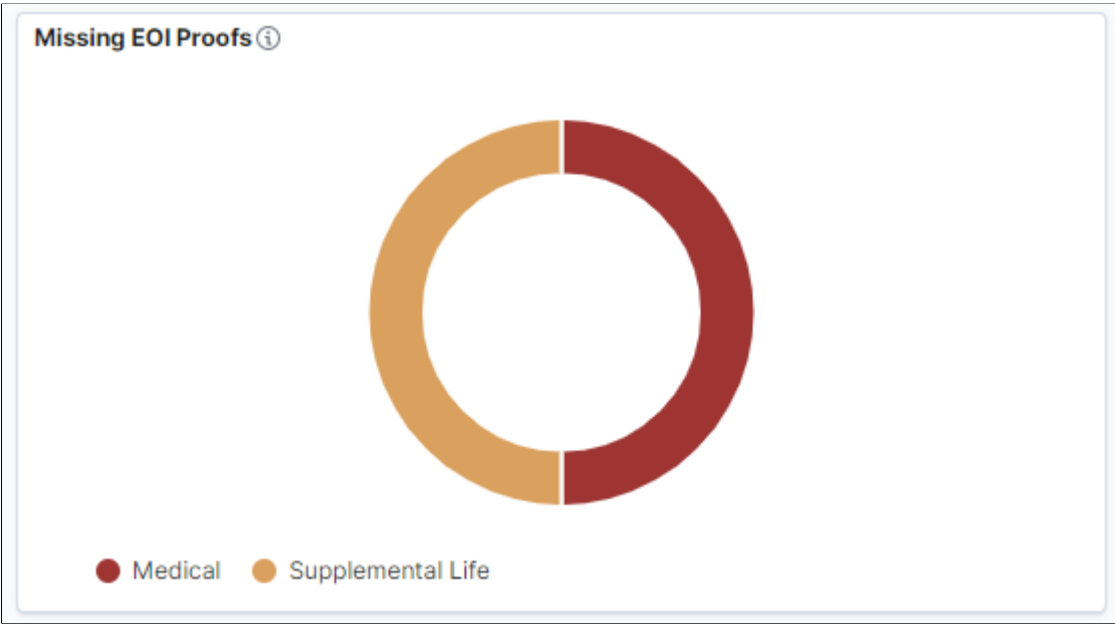
This example illustrates the fields and controls on the Missing EOI Proofs Count visualization.



Missing EOI Proofs

This donut visualization displays the breakdown of missing EOI proofs by employees and plan types. Select the sub-section to filter by plan type.

This example illustrates the fields and controls on the Missing EOI Proofs visualization by plan types.



Missing EOI Proofs Details

This grid lists the employees with missing EOI proofs in a tabular format.

This example illustrates the fields and controls on the EOI Proofs missing – Count visualization.

Missing EOI Proofs - Details ⓘ						
Name ⚙	Phone ⚙	Plan Type ⚙	Election Entry ⚙	Event Detail ⚙	Notification ⚙	Employee ID ⚙
Rosanna Channing	925.555.1234	Supplemental Life	Election Entry	Event Detail	Notification	KU0046
Emmylou Dell	925/694-7914	Medical	Election Entry	Event Detail	Notification	KU0114
Export: Raw 📄 Formatted 📄						

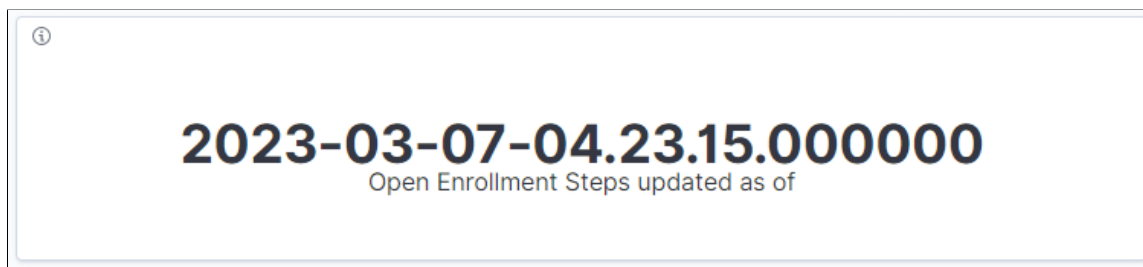
Select the hyperlinks to open the specific pages for the selected employee:

- Election Entry: View the On-Demand Event Process page and specify the election requirements.
- Event Detail: View the Employee Event Detail page.
- Notification: Notify the employee.

Open Enrollment Steps updated as of

This date time visualization displays the timestamp when the data for the **Open Enrollment Steps** visualization was last updated. The data for this visualization is populated based on the *HC_BEN_OE_AG* index run.

This example illustrates the fields and controls on the Open Enrollment Steps updated as of visualization.



Open Enrollment Steps

This horizontal compound bar chart displays the breakdown of the steps in the open enrollment activity guide process and count of open enrollment instances. Select the compound bars to filter by open enrollment status for each step. The open enrollment step status includes *Not Started*, *In Progress*, and *Complete*. This visualization includes all the active open enrollment instances.

Note: This visualization is not RTI enabled. To view the latest data, the benefits administrator must run the *HC_BEN_OE_AG* index. The **Open Enrollment Steps updated as of** visualization displays the timestamp when the data for **Open Enrollment Steps** visualization was last updated.

This example illustrates the fields and controls on the Open Enrollment Steps visualization.



Related Links

[“Understanding Real Time Indexing in HCM” \(Application Fundamentals\)](#)

[Open Enrollment Definition Page](#)

Viewing Life Events Insights

This topic discusses how the benefits administrators can use the Benefits Insights dashboards to view and analyze life events activity for their workforce using Insights visualizations.

The Life Events Insights dashboard is built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine. The life event data that is visible on the dashboard comes from the Benefits Search indexes.

These videos provide an overview of the PeopleSoft Insights feature:

Video: [Insights with PeopleSoft](#)

Video: [PeopleSoft HCM Insights](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 34: HCM Insights](#)

This topic provides an overview of how to set up the Insights Dashboard for Life Events analytics and discusses the PeopleSoft Insights Dashboard for Life Events.

Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

For information on Insights dashboards, see:

- “Understanding PeopleSoft Insights” (Application Fundamentals)
- *PeopleTools Search Technology*: “Monitoring PeopleSoft Search Framework and OpenSearch” and “Working with Insights Dashboards for PeopleSoft Application Data” documentation

Pages Used to View Life Events Insights

Page Name	Definition Name	Usage
Life Events Insights Tile		Access the Life Events Insights dashboard.
Life Events Insights Dashboard	HC_HBN_LE_INSIGHTS_FL	Review and analyze the active life events activity of employees using Insights visualizations.

Understanding How to Set Up the Insights Dashboard for Life Events Insights

Before users can access the Life Event Insights dashboards, the following steps should be performed:

1. Deploy these benefits indexes:

- HC_BEN_LE_DATA
- HC_BEN_ATTACH_DATA
- HC_BEN_APPR_DATA
- HC_BEN_EOI_DATA
- HC_BNE_LIFEEVT_EXPIRE

(PeopleTools > Search Framework > Administration > Deploy Search Objects)

2. Build the deployed benefits search indexes.

(PeopleTools > Search Framework > Administration > Schedule Search Index)

3. Deploy the Life Events Insights tiles and dashboards.

- Life Events Insights Tile
- Life Events Insights

(PeopleTools > Search Framework > Administration > Deploy Insights Dashboards)

Note: The full index must be run before the dashboard can be deployed.

4. Assign the *Benefits Analyst* or *Benefits Analyst Admin* user role to administrators to access and view the Life Events Insights visualizations.

(PeopleTools > Security > User Profiles > User Profiles > Roles)

Related Links

[Using the PeopleSoft Fluid User Interface to Manage Benefits as an Administrator](#)

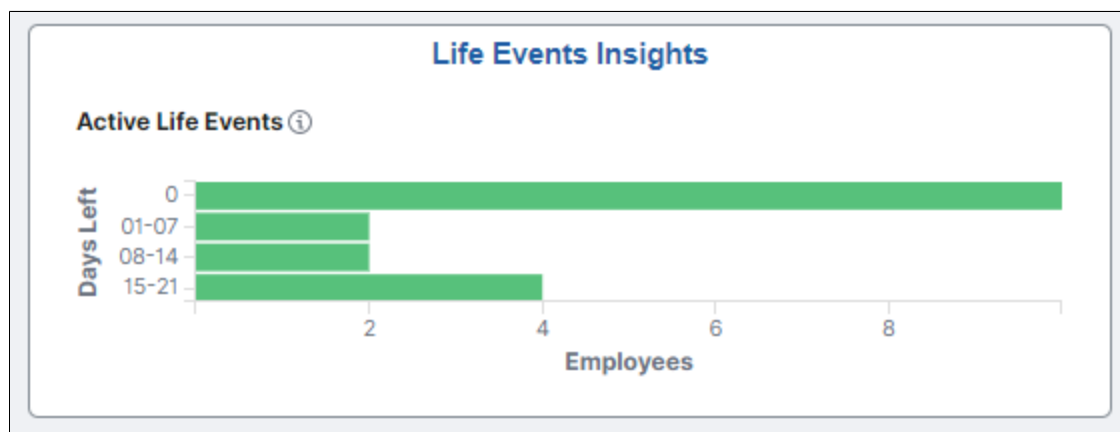
Life Events Insights Tile

Use the Life Events Insights tile to access the Insights visualizations related to life events.

Navigation:

The Life Events Insights tile is delivered as part of the Manage Benefits tile in Workforce Administrator Home Page. You can add the tile, through personalization, to a system-delivered homepage or a homepage that you create.

This example illustrates the Life Events Insights tile.



Select the Life Events Insights tile to access the [Life Events Insights Dashboard](#).

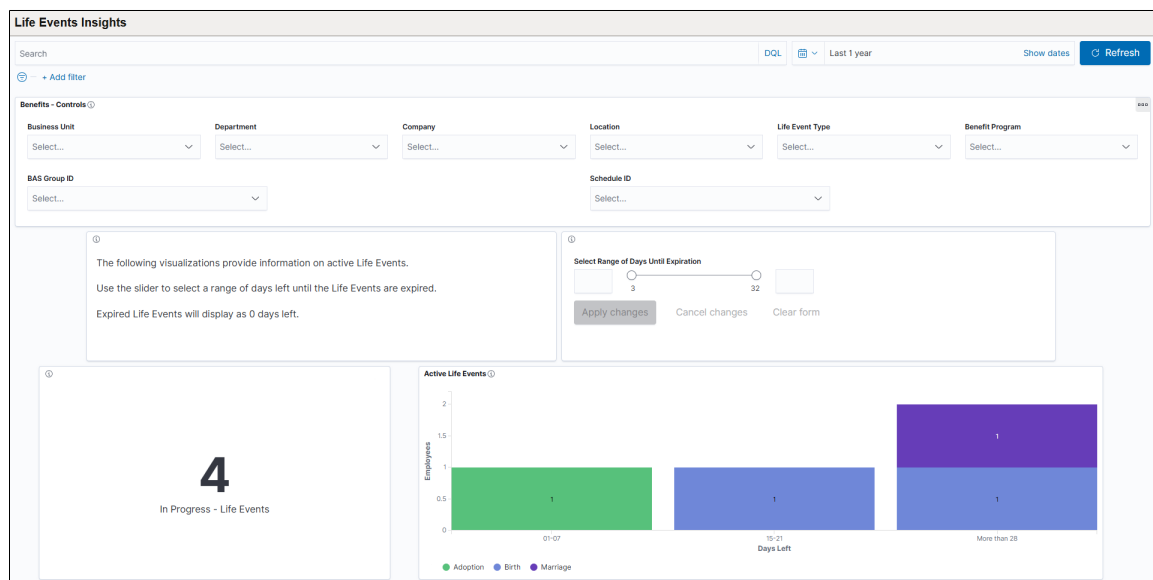
Life Events Insights Dashboard

Use the Life Events Insights dashboard (HC_HBN_LE_INSIGHTS_FL) to review and analyze life events data of employees using Insights visualizations.

Navigation:

Select the Life Events Insights Tile.

This example illustrates the fields and controls on the Life Events Insights dashboard (1 of 5).

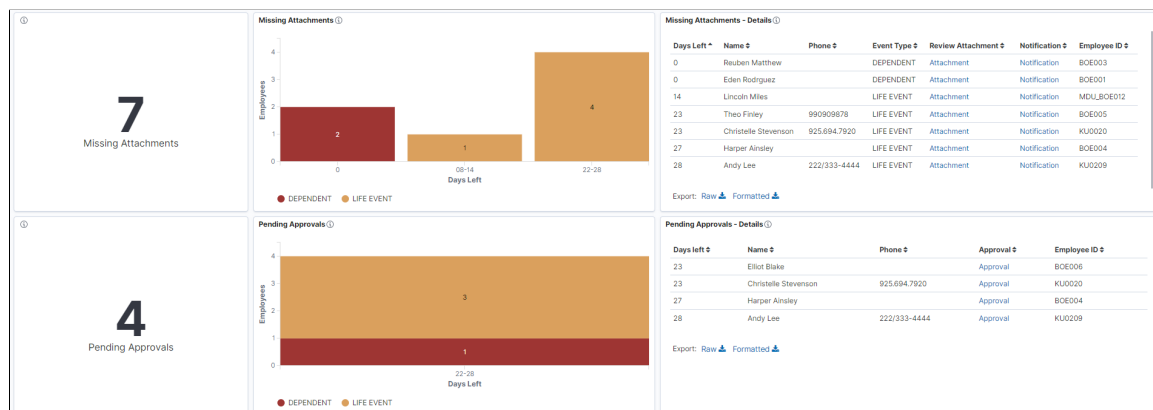


This example illustrates the fields and controls on the Life Events Insights dashboard (Page 2 of 5).

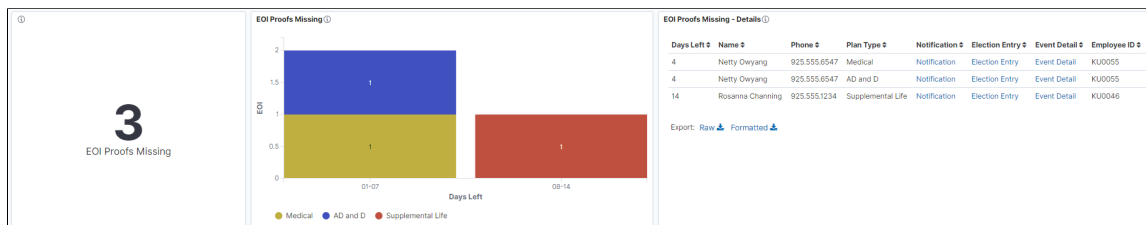
Active Life Events - Details

Days Left	Name	Phone	Department	Actions	Notification	Employee ID
0	Tina Palisco	925/694-7971	Corporate Consolidations	Review Life Events	Notification	KU0071
0	Stanley Lowe	925/694-7954	Human Resources	Review Life Events	Notification	KU0054
0	Reuben Matthew		Regression Testing	Review Life Events	Notification	BOE003
0	Kenneth Grafton		Sales and Services	Review Life Events	Notification	KU0004
0	James Fung	925/694-7935	Human Resources	Review Life Events	Notification	KU0035
0	Derek Holsinger	925/555/6549	Finance and Administration	Review Life Events	Notification	KU0038
0	Calvin Roth	987/333-0980	Finance and Administration	Review Life Events	Notification	KU0008
0	Brenton Francisco	925/555/0098	Accounts Payable	Review Life Events	Notification	KU0048
7	Cynthia Adams	925/694-7901	Corporate Accounting	Review Life Events	Notification	KU0101

This example illustrates the fields and controls on the Life Events Insights dashboard (3 of 5).



This example illustrates the fields and controls on the Life Events Insights dashboard (4 of 5).



This example illustrates the fields and controls on the Life Events Insights dashboard (5 of 5).



Warning! PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

The Life Events Insights dashboard provides you with different visualizations to analyze the life event data for your workforce. When you select filters or chart items, Insights dynamically updates all visualizations using the sources from the index.

Each visualization enables you to inspect the chart, table or map to view the details of that visualization. Pause over a visualization to have the have additional page elements appear, view numbers, or click items to add filters to your visualizations.

Using the interactive visualizations that are available on the dashboard, you can see the details of the active life events of employees and the documents that are missing or pending approval for these events. The dashboard also provides details of life event enrollment changes that are blocked due to missing EOI proofs. You can choose the range of days to view the life events that are nearing expiry. This dashboard also shows the step-wise distribution of each event type.

For more information on working with PeopleSoft Insights and filters, see *PeopleTools: Search Technology*, “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

The Life Events Insights dashboard delivers these visualizations:

- Days left Life Events
- Active Life Events

- Active Life Events – Details
- Employee missing attachment count
- Missing Attachments
- Missing Attachments – Details
- Count for Life Event documents needing approval
- Pending Approvals
- Pending Approvals – Details
- Life Event EOI missing count
- EOI Proofs Missing
- EOI Proofs Missing – Details
- Life Event Types
- Life Events Steps

Additional Filters

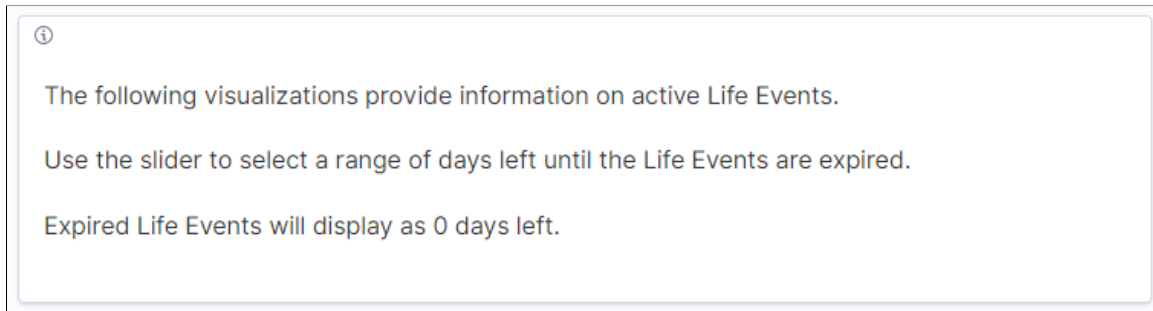
Additional Filters allows you select filters based on below attributes:

- Business Unit
- Department
- Company
- Location
- Life Event Type
- Benefit Program
- BAS Group ID
- Schedule ID

Description Box

The Description box provides instructional text to view the Life Events Insights dashboard.

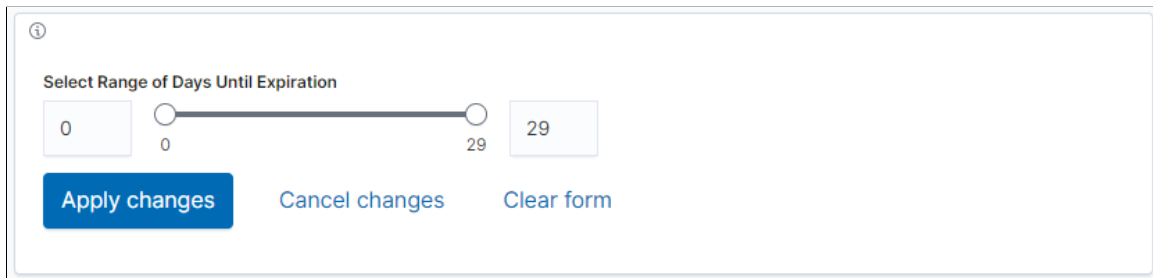
This example illustrates the fields and controls on the Description box.

A description box with a light blue border and a light gray background. It contains three lines of text: "The following visualizations provide information on active Life Events.", "Use the slider to select a range of days left until the Life Events are expired.", and "Expired Life Events will display as 0 days left." There is a small information icon (i) in the top left corner.

Select Range of Days Until Expiration

The date range selector allows the benefits administrator to enter the upper and lower limit of days to view the life events nearing expiry. For example, if the lower and upper limit is 5 and 10 respectively, then the visualizations display the life events that expires in 5 to 10 days.

This example illustrates the fields and controls on the date range selector.

A date range selector UI. It features a title "Select Range of Days Until Expiration" and a slider. The slider has two handles, one at 0 and one at 29. Below the slider are three buttons: "Apply changes" (blue), "Cancel changes" (light blue), and "Clear form" (light blue). There is a small information icon (i) in the top left corner.

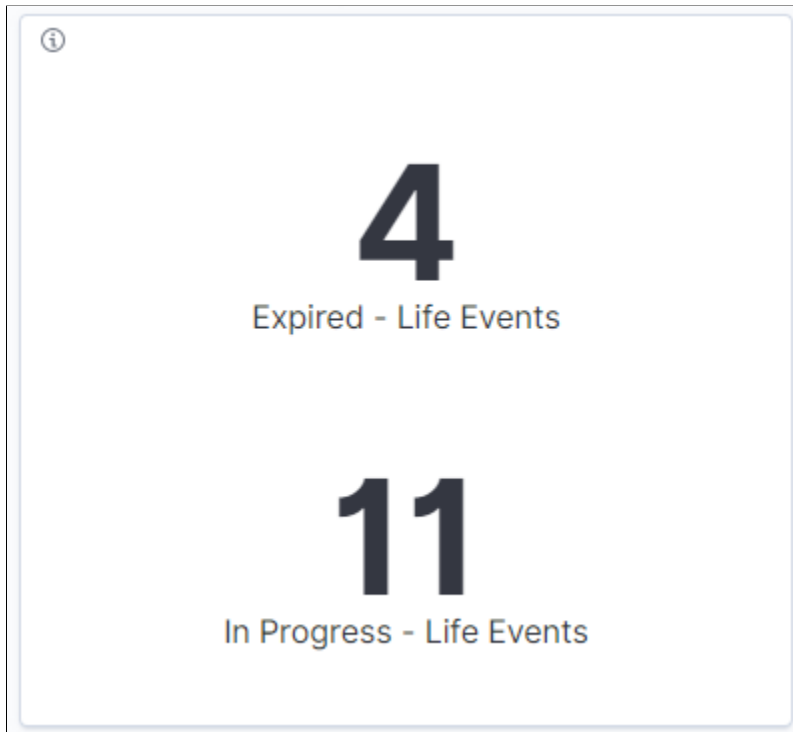
Days left Life Events

This visualization displays the count of the life events within the selected days range. These include life events in the following statuses:

- *In Progress*: The events that are in progress by employee and yet to expire.
- *Expired*: The events that are in progress by employee and crossed the expiration date.

Change in date range selector updates all the visualizations in this dashboard.

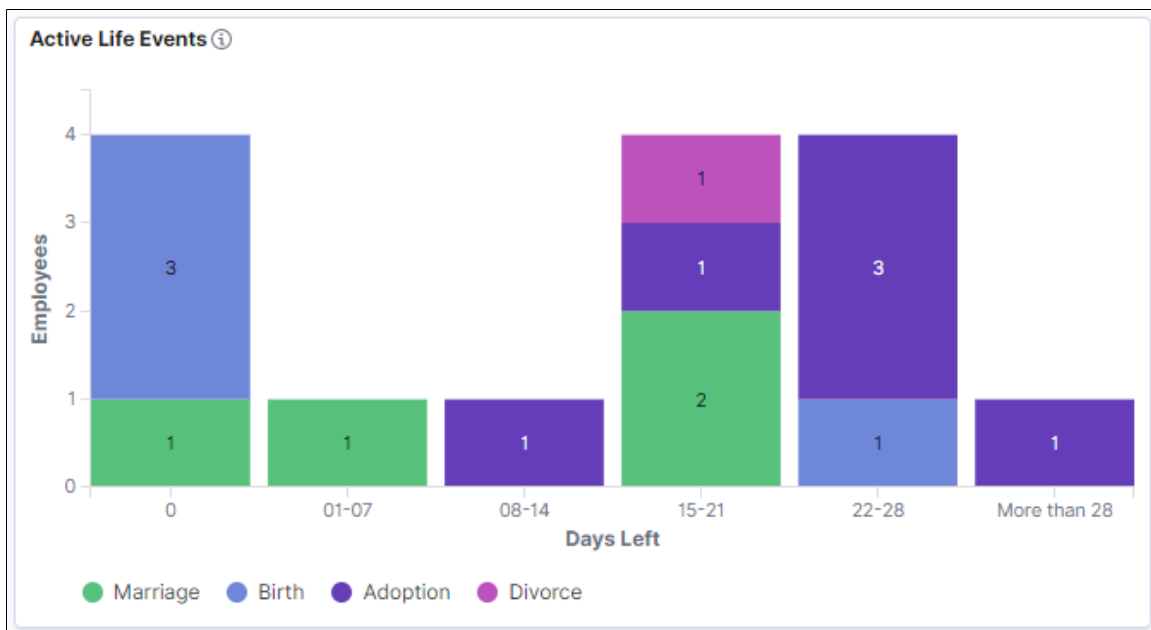
This example illustrates the fields and controls on the Days left Life Events visualization.



Active Life Events

This stacked vertical bar visualization displays the breakdown of active life events distributed by employees and days to expiration. The first bar with zero days indicates the employees with expired life events. Select the sub-bars to filter by life event type.

This example illustrates the fields and controls on the Active Life Events visualization.



Active Life Events – Details

This data-grid lists the active life events in tabular format along with employee details.

Select *Review Life Events* link to open the employee's activity guide for the life event. The benefits administrator can close a life event for the employee by selecting the *Complete* button on the Summary page of the activity guide.

Select *Notification* link to send notification message to the selected employee.

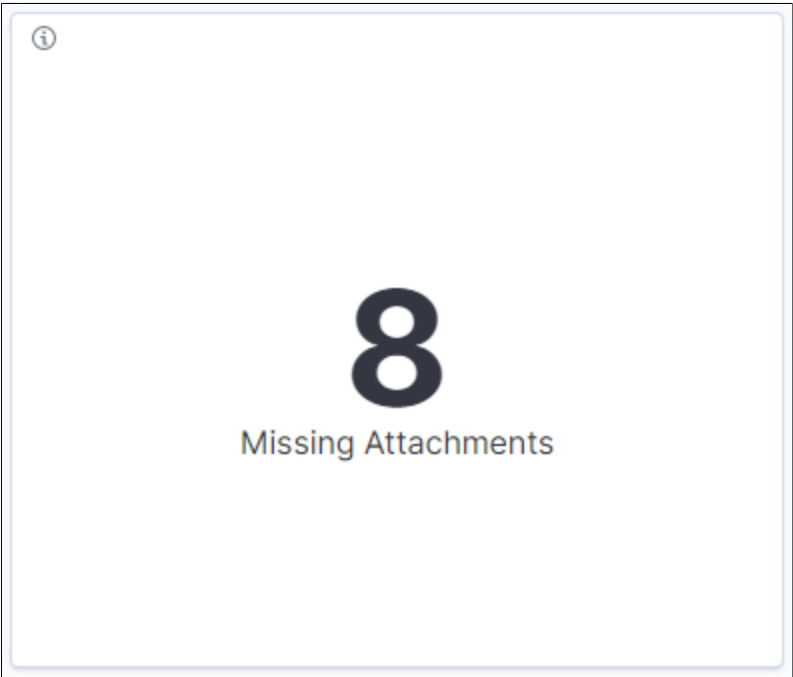
This example illustrates the fields and controls on the Active Life Events – Details visualization.

Active Life Events - Details ⓘ						
Days Left ⓘ	Name ⓘ	Phone ⓘ	Department ⓘ	Actions ⓘ	Notification ⓘ	Employee ID ⓘ
0	Tina Palisco	925/694-7971	Corporate Consolidations	Review Life Events	Notification	KU0071
0	Stanley Lowe	925/694-7954	Human Resources	Review Life Events	Notification	KU0054
0	Reuben Matthew		Regression Testing	Review Life Events	Notification	BOE003
0	Kenneth Grafton		Sales and Services	Review Life Events	Notification	KU0004
0	James Fung	925/694-7935	Human Resources	Review Life Events	Notification	KU0035
0	Derek Holsinger	925.555.6549	Finance and Administration	Review Life Events	Notification	KU0038
0	Calvin Roth	987/333-0980	Finance and Administration	Review Life Events	Notification	KU0008
0	Brenton Francisco	925.555.0098	Accounts Payable	Review Life Events	Notification	KU0048
7	Cynthia Adams	925/694-7901	Corporate Accounting	Review Life Events	Notification	KU0101

Employee missing attachment count

This count visualization displays the count of employees with active life events for which document upload is pending.

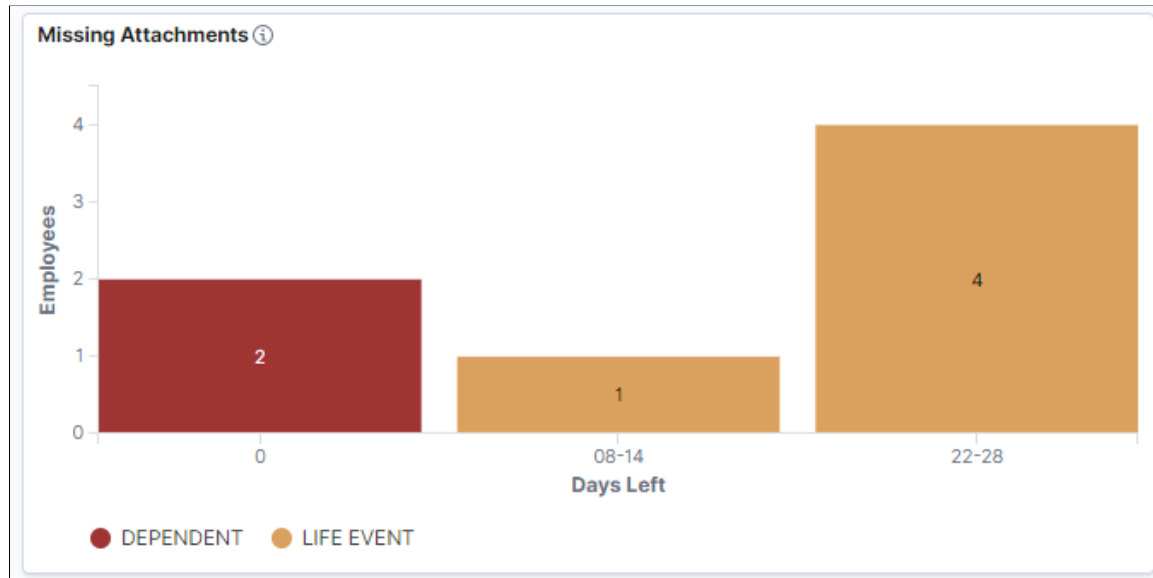
This example illustrates the fields and controls on the Employee missing attachment count visualization.



Missing Attachments

This compound bar chart visualization displays the breakdown of missing documents distributed by employees and days to expiration. Click on the bars to filter by life events or dependent updates for which document upload is required but pending.

This example illustrates the fields and controls on the Missing Attachments visualization.



Missing Attachments – Details

This data-grid lists the documents missing data in tabular format along with employee details. Click the *Notification* link to send notification message to the selected employee. Select the *Attachment* hyperlink to view the Review Benefits Attachment page for the employee.

This example illustrates the fields and controls on the Missing Attachments – Details visualization.

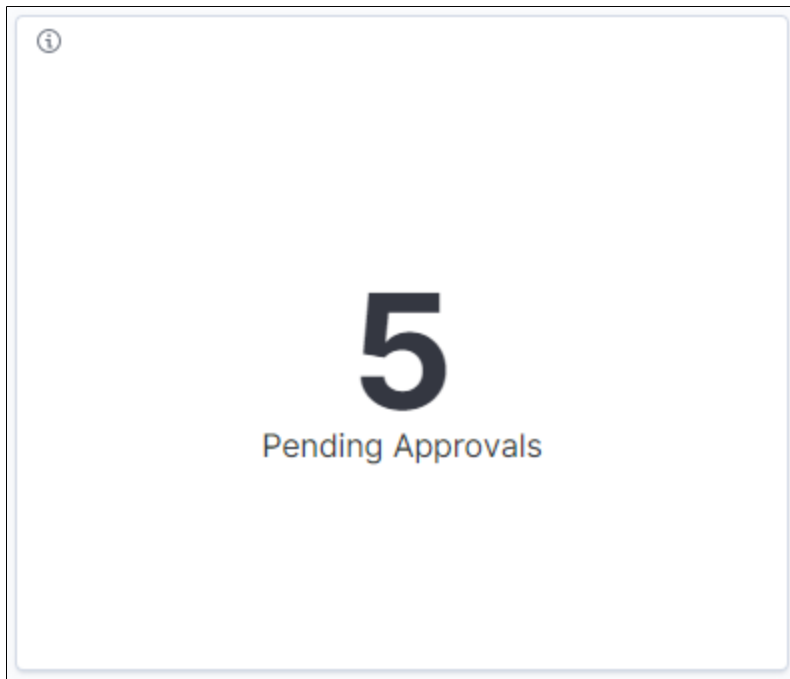
Days Left ^	Name ↕	Phone ↕	Event Type ↕	Review Attachment ↕	Notification ↕	Employee ID ↕
0	Reuben Matthew		DEPENDENT	Attachment	Notification	BOE003
0	Eden Rodriguez		DEPENDENT	Attachment	Notification	BOE001
15	Sofia Nathan		LIFE EVENT	Attachment	Notification	BOE002
15	Lincoln Miles		LIFE EVENT	Attachment	Notification	MDU_BOE012
24	Theo Finley	990909878	LIFE EVENT	Attachment	Notification	BOE005
24	Christelle Stevenson	925.694.7920	LIFE EVENT	Attachment	Notification	KU0020
28	Harper Ainsley		LIFE EVENT	Attachment	Notification	BOE004
29	Andy Lee	222/333-4444	LIFE EVENT	Attachment	Notification	KU0209

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Count for Life Event documents needing approval

This count visualization displays the count of employees with active life events for which document upload and approval is required, and the documents are uploaded but approval is pending.

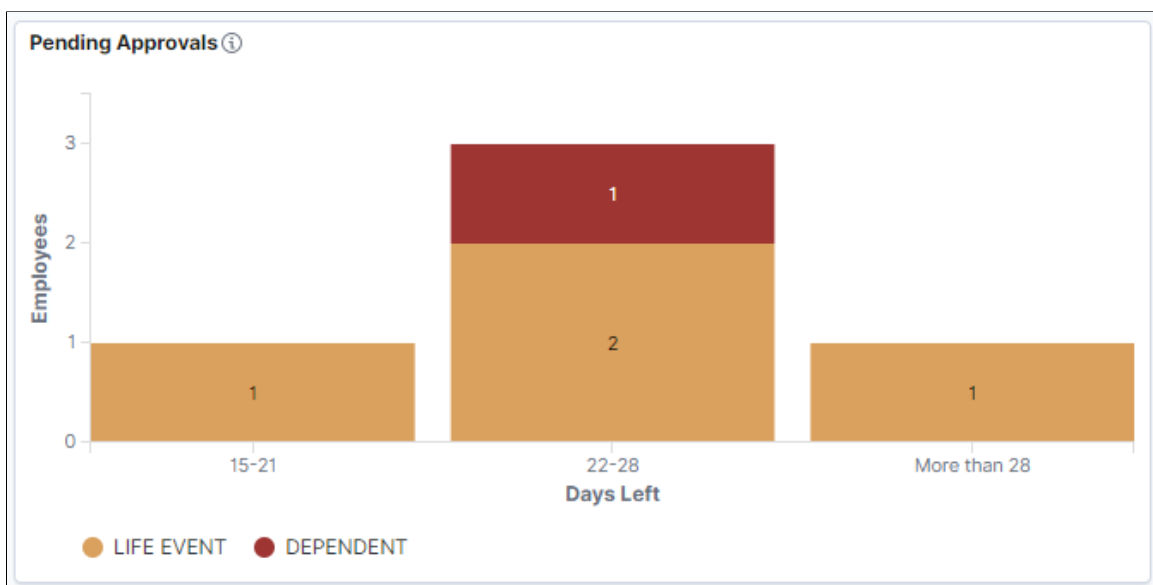
This example illustrates the fields and controls on the Count for Life Event documents needing approval visualization.



Pending Approvals

This compound bar chart visualization displays the breakdown of pending document approvals distributed by employees and days to expiration. Click on compound bars to filter pending approvals by life events and dependent updates. The first bar with zero days indicates the employees with expired life events.

This example illustrates the fields and controls on the Pending Approvals visualization.



Pending Approvals – Details

This grid lists the employees with pending approvals in a tabular format. Click the *Approval* link to approve the documents for the selected employee.

This example illustrates the fields and controls on the Pending Approvals – Details visualization.

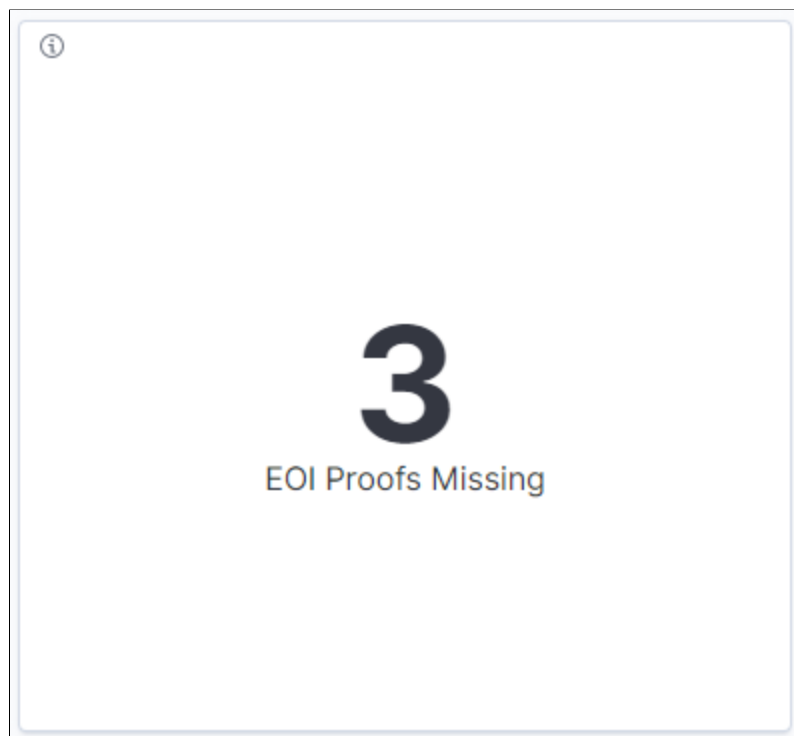
Days left ⚙	Name ⚙	Phone ⚙	Approval ⚙	Employee ID ⚙
16	Sofia Nathan		Approval	BOE002
26	Elliot Blake		Approval	BOE006
26	Christelle Stevenson	925.694.7920	Approval	KU0020
28	Harper Ainsley		Approval	BOE004
31	Andy Lee	222/333-4444	Approval	KU0209

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Life Event EOI missing count

This count visualization displays the count of employees whose Life Event enrollment changes are blocked due to missing EOI proof. The count is duplicated for the employees with pending EOI for more than two plan types.

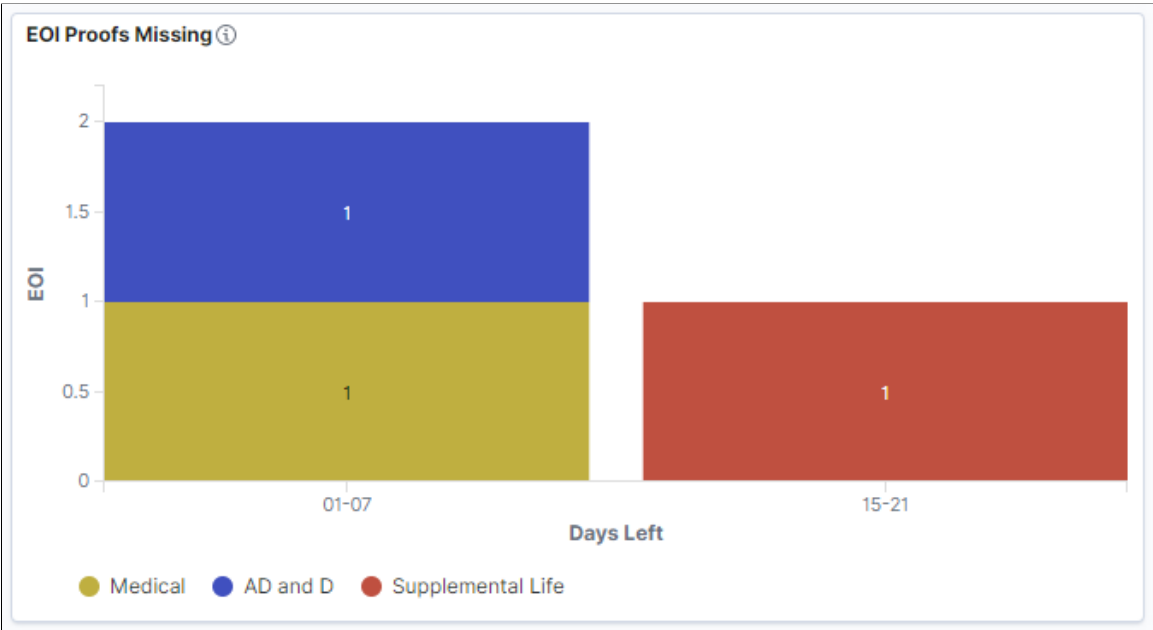
This example illustrates the fields and controls on the Life Event EOI missing visualization.



EOI Proofs Missing

This stacked vertical bar visualization displays the breakdown of missing EOI proof distributed by employees and days to expiration. The first bar with zero days indicates the employees with expired life events. Click on the sub-bars to filter by benefit plan type.

This example illustrates the fields and controls on the EOI Proofs Missing visualization.



EOI Proofs Missing – Details

This grid lists the employees with missing EOI proofs in a tabular format.

This example illustrates the fields and controls on the EOI Proofs Missing – Details visualization.

EOI Proofs Missing - Details ⓘ							
Days Left ⌵	Name ⌵	Phone ⌵	Plan Type ⌵	Notification ⌵	Election Entry ⌵	Event Detail ⌵	Employee ID ⌵
5	Netty Owyang	925.555.6547	Medical	Notification	Election Entry	Event Detail	KU0055
5	Netty Owyang	925.555.6547	AD and D	Notification	Election Entry	Event Detail	KU0055
15	Rosanna Channing	925.555.1234	Supplemental Life	Notification	Election Entry	Event Detail	KU0046
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Click on the hyperlinks to view the specific pages for the selected employee:

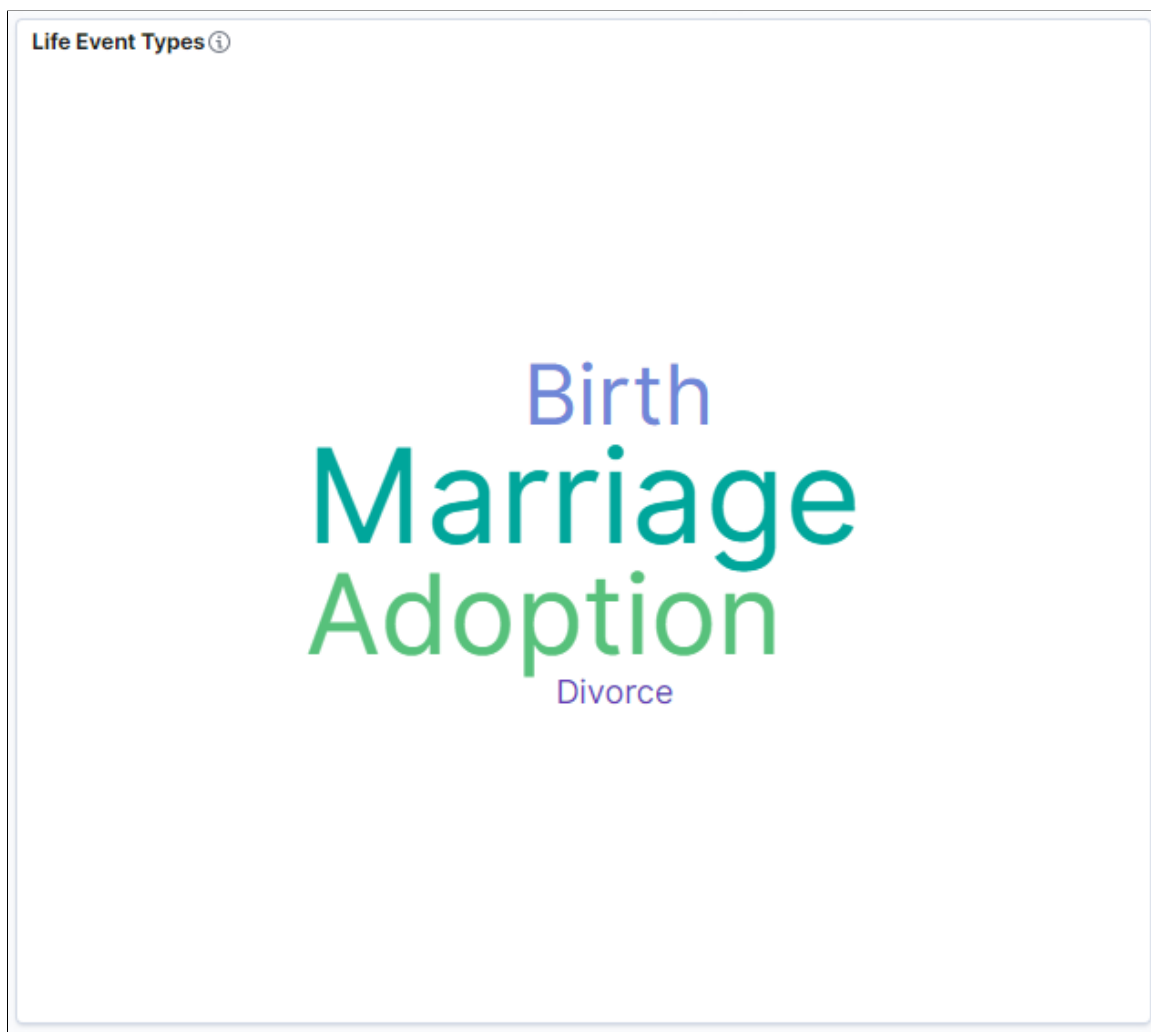
- Notification: Notify the employee.

- Election Entry: View On-Demand Event Process page and specify election requirements.
- Event Detail: View Employee Event Detail page.

Life Event Types

This tag cloud visualization displays the life event types. Larger the font size, higher the number of that life event type. These tag clouds help administrators to easily filter the dashboard by a life event type.

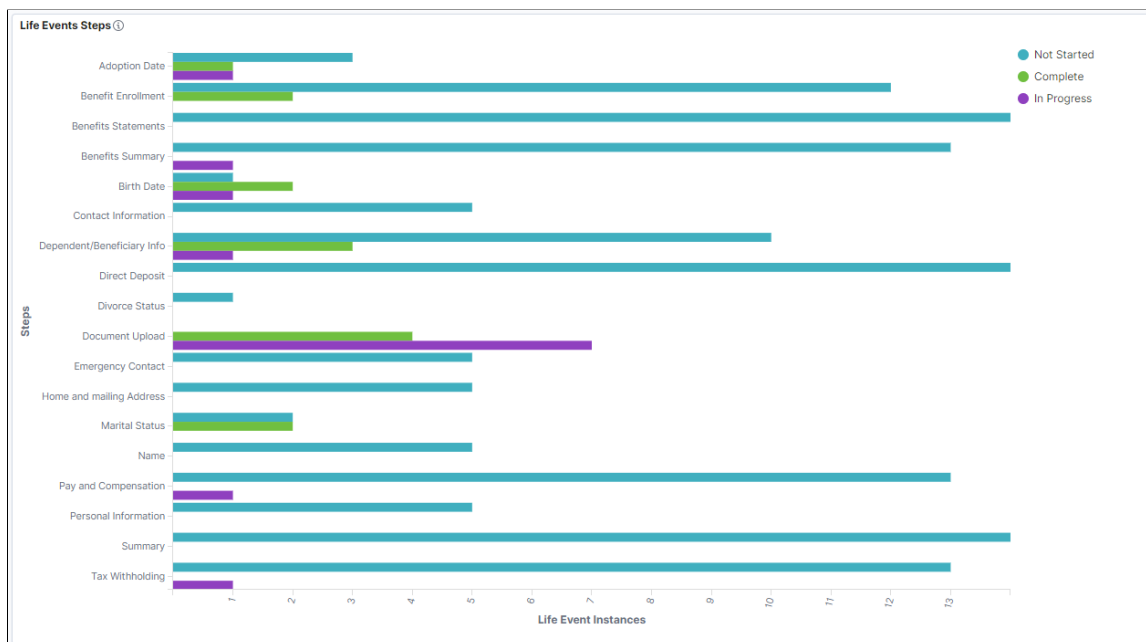
This example illustrates the fields and controls on the Life Event Types visualization.



Life Events Steps

This horizontal compound bar chart displays the breakdown of the steps in the life event activity guide process and count of life event instances. Click on the compound bars to filter by life event status for a step. Life event status includes *Not Started*, *In Progress*, and *Complete*.

This example illustrates the fields and controls on the Life Events Steps visualization.



Related Links

“Understanding Real Time Indexing in HCM” (Application Fundamentals)

Viewing Ben Admin Processing Insights

This topic discusses how the benefits administrators can use the Benefits Insights dashboards to view and analyze the benefits schedule summary and evaluate the progress associated with their workforce using Insights visualizations.

The Benefits Admin Processing Insights dashboard is built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine. The benefits data that is visible on the dashboard comes from the Benefits Search indexes.

These videos provide an overview of the PeopleSoft Insights feature:

Video: [Insights with PeopleSoft](#)

Video: [PeopleSoft HCM Insights](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 34: HCM Insights](#)

This topic provides an overview of how to set up the Insights Dashboard for Ben Admin Processing analytics and discusses the PeopleSoft Insights Dashboard for Ben Admin Processing.

Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

For information on Insights dashboards, see:

- “Understanding PeopleSoft Insights” (Application Fundamentals)
- *PeopleTools Search Technology*: “Monitoring PeopleSoft Search Framework and OpenSearch” and “Working with Insights Dashboards for PeopleSoft Application Data” documentation

Pages Used to View Ben Admin Processing Insights

This table lists the pages used to view the Insights visualization for benefits schedule summary.

Page Name	Definition Name	Usage
Ben Admin Processing Insights Tile		Access Benefits Admin Processing Insights Dashboard.
Benefits Admin Processing Insights Dashboard	CREF is HC_HBN_ADMIN_INSIGHTS_FL	Review benefits schedule summary for employees using Insights visualizations.

User Access

User Role	Access
Fluid Dashboard-Manage Benefit	Access the Manage Benefits tile and dashboard.
Benefits Analyst or Benefits Analytics Admin	Access the Benefits Admin Processing Insights Dashboard.

Understanding How to Set Up the Insights Dashboard for Ben Admin Processing

Before users can access the visualizations for Benefits Admin Processing Insights data, the following steps should be performed:

1. Deploy the *HC_BEN_ADMINERR_DATA* index for Benefits Admin Processing Insights.

(PeopleTools > Search Framework > Administration > Deploy Search Objects)

2. Build the deployed *HC_BEN_ADMINERR_DATA* index.

(PeopleTools > Search Framework > Administration > Schedule Search Index)

3. Deploy Ben Admin Processing Insights tiles and dashboards.

- Benefits Admin Processing Insights Tile
- Benefits Admin Processing Insights

(PeopleTools > Search Framework > Administration > Deploy Insights Dashboards)

Note: The full index must be run before the dashboard can be deployed.

4. Assign the *Benefits Analyst* or *Benefits Analyst Admin* user role to administrators to access the Benefits Admin Processing Insights visualizations.

(PeopleTools > Security > User Profiles > User Profiles > Roles)

Related Links

[Using the PeopleSoft Fluid User Interface to Manage Benefits as an Administrator](#)

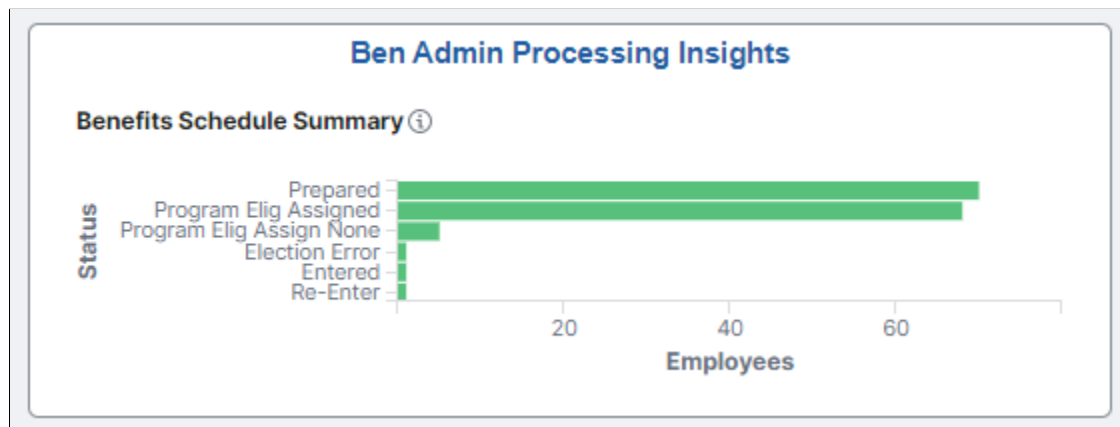
Ben Admin Processing Insights Tile

Use the Ben Admin Processing Insights tile to access the Insights visualizations related to benefits schedule summary.

Navigation:

The Ben Admin Processing Insights tile is delivered as part of Manage Benefits tile in Workforce Administrator Home Page. You can add the tile, through personalization, to a system-delivered homepage or a homepage that you create.

This example illustrates the Ben Admin Processing Insights tile.



Select the Ben Admin Processing Insights tile to access the [Ben Admin Processing Insights dashboard](#).

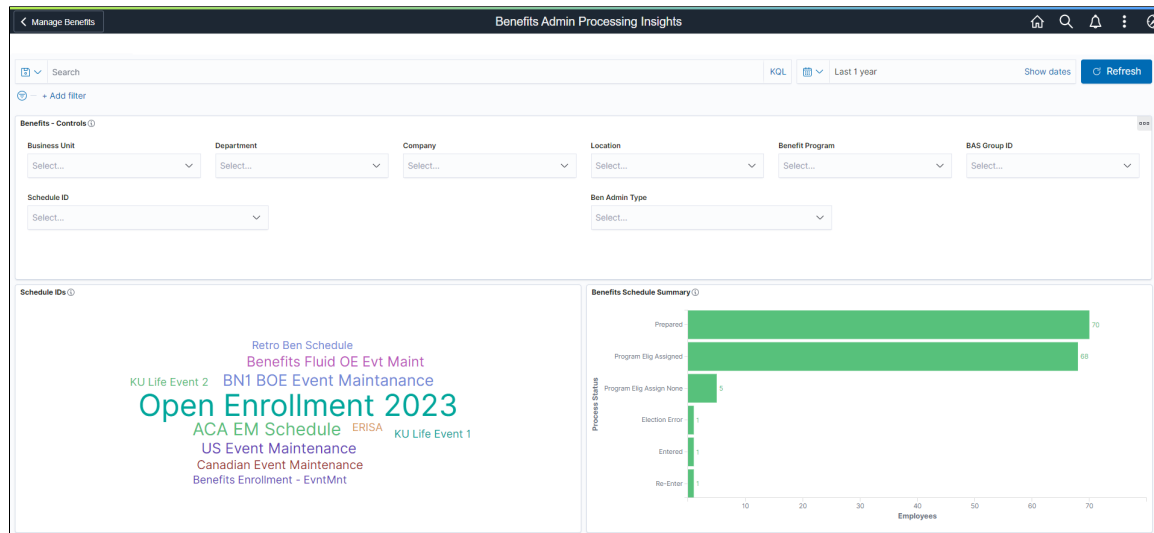
Benefits Admin Processing Insights Dashboard

Use the Benefits Admin Processing Insights dashboard (HC_HBN_ADMIN_INSIGHTS_FL) to review and analyze benefits schedule summary for employees using Insights visualizations. This dashboard helps the benefits administrator to evaluate the progress of enrollment process and perform actions based on the event status.

Navigation:

Select the [Ben Admin Processing Insights Tile](#).

This example illustrates the Benefits Admin Processing Insights Dashboard (Page 1 of 2).



This example illustrates the Benefits Admin Processing Insights Dashboard (Page 2 of 2).

Benefits Schedule Summary - Details

Name	Phone	BAS Group	Schedule ID	Ben Admin Type	Notification	Event Status	ODEM *	Employee ID
ACAEMP POI		Affordable Care Act Grp ID	ACA EM Schedule	Event Maintenance	Notification	Status	ODEM	ACA001
Matthew Hayes		ERISA	ERISA	Event Maintenance	Notification	Status	ODEM	B-89CBR12
James Patterson		ERISA	ERISA	Event Maintenance	Notification	Status	ODEM	B-89CBR13
Jacques Paul		Affordable Care Act Grp ID	ACA EM Schedule	Event Maintenance	Notification	Status	ODEM	B-ACA012
Bruno Cadman		Affordable Care Act Grp ID	ACA EM Schedule	Event Maintenance	Notification	Status	ODEM	B-ACA061
Christopher Collin		Affordable Care Act Grp ID	ACA EM Schedule	Event Maintenance	Notification	Status	ODEM	B-ACA062
Nick Jerry		Affordable Care Act Grp ID	ACA EM Schedule	Event Maintenance	Notification	Status	ODEM	B-ACA063
Nicole Lewis		Affordable Care Act Grp ID	ACA EM Schedule	Event Maintenance	Notification	Status	ODEM	B-ACA064
Janet Flashman		Affordable Care Act Grp ID	ACA EM Schedule	Event Maintenance	Notification	Status	ODEM	B-ACA065
Rachel Carson		Affordable Care Act Grp ID	ACA EM Schedule	Event Maintenance	Notification	Status	ODEM	B-ACA066

Export: Raw Formatted

Warning! PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

The Benefits Admin Processing Insights dashboard provides you with different visualizations to analyze the benefits schedule summary for your employees. When you select filters or chart items, Insights dynamically updates all visualizations using the sources from the index.

Each visualization enables you to inspect the chart, table or map to view the details of that visualization. Pause over a visualization to have the have additional page elements appear, view numbers, or click items to add filters to your visualizations.

The Benefits Admin Processing Insights dashboard delivers these visualizations:

- Schedule IDs
- Benefits Schedule Summary
- Benefits Schedule Summary – Details

Additional Filters

Additional Filters allows you select filters based on below attributes:

- Business Unit

- Department
- Company
- Location
- Benefit Program
- BAS Group ID
- Schedule ID
- Ben Admin Type

For more information on working with PeopleSoft Insights and filters, see *PeopleTools: Search Technology*, “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Delivered Benefits Admin Processing Insights Visualizations

The Benefits Admin Processing Insights dashboard provides the following visualizations:

Visualization	Description
Schedule IDs	This tag cloud visualization displays the schedule IDs. The bigger the font size, the larger the number of employees associated with the schedule ID. These tag clouds help administrators to easily filter the entire dashboard by a specific schedule ID.
Benefits Schedule Summary	This horizontal bar chart visualization displays the breakdown of employees by process status. The process statuses include: <i>Entered, Notified, Prepared, Re-Enter, Election Error, Program Elig Assign Error, Program Elig Assign None, and Finalized – Enrolled</i> . Administrators can filter by process status and view employee details for the filtered process status.
Benefits Schedule Summary – Details	This grid visualization lists the benefits schedule summary data in a tabular format. Administrators can view the employee details for the available schedule IDs. Click on the hyperlinks to view the specific pages for the selected employee: • Notification: Notify the employee. • Status: View the event status. • ODEM: View On-Demand Event Process page.

Related Links

“Understanding Real Time Indexing in HCM” (Application Fundamentals)

Viewing Fluid Benefit Statements as an Employee in Self Service

This topic discusses how employees view fluid benefits statements in Self Service.

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.

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

Benefits Statement

Emmylou Dell

Recruiter

Filters

Event Year

Enrollment Event

Statement Type

Job Title

Apply

Reset

Benefits Statements

Event Date %1	Issue Date %1	Job Title %1	Enrollment Event %1	Statement Type %1	
15/07/2024	21/07/2024 23:48:08	Manager-Pensions	Family Status Change	Submitted Enrollment	>
15/07/2024	21/07/2024 23:40:47	Recruiter	Family Status Change	Submitted Enrollment	>
01/01/2022	21/07/2024 23:19:30	Recruiter	Open Enrollment 2022	Enrollment Preview	>
01/01/2022	21/07/2024 23:19:26	Recruiter	Open Enrollment 2022	Submitted Enrollment	>
01/01/2019	20/02/2019	Recruiter	Open Enrollment 2019	Confirmation Statement	>
01/01/2018	07/12/2018	Recruiter	Open Enrollments 2018	Confirmation Statement	>

Field or Control	Description
Event Year	Select the year of the event. The drop down lists all the years for which the statement is available. The default value is blank.
Enrollment Event	Select the benefits enrollment event. The drop down lists all the enrollment events for which the statement is available. The default value is blank.

Field or Control	Description
Statement Type	Select the type of the statement to view. The available statement types are <i>Enrollment Preview</i> , <i>Submitted Enrollment</i> and <i>Confirmation Statement</i> . The default value is blank.
Job Title	Select the job title to view the corresponding benefit statements. This field is displayed only when the employee has more than one job record and has benefits statement for at least one job record. The default value is blank.
Apply	Select to view the statements corresponding to the selected filter criteria. The results in the Benefits Statements grid are updated only if the user selects a filter criteria.
Reset	Select to reset the value in the filters with their default values.
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.
Enrollment Event	Displays the event description.
Statement Type	Displays the statement type. Available statement types are: <i>Confirmation Statement</i> , <i>Submitted Enrollment</i> and <i>Enrollment Preview</i> .

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.

Statement Type: Enrollment Preview

Description: Open Enrollment 2023

Enrollment Effective Date: 01/01/2023

Statement Issue Date: 27/06/2022 02:50

Print View

This statement records your Open Enrollment 2023 benefit selections and pay period costs, dependent information, and beneficiary information at the time your enrollment is submitted. If an error has been made in recording your elections, please correct your elections before the event is closed. For further question, contact your benefits administrator. Please keep the statement for your records until you receive a confirmation statement.

Statement Sections

Expand All

▶ Election Summary

▼ Dependents and Beneficiaries

The following is a summary of your dependents and beneficiaries that you have enrolled or allocated on a plan.

Name	Relationship	Marital Status	Date of Birth	Dependents	Beneficiaries
Robert Channing	Spouse	Married	01/10/1967	Yes	Yes

▶ Dependent Enrollments

▶ Beneficiary Designations

▼ Investment Allocations

The following is a summary of your investment choices

401(k) Employer Pct Match

Investment	Investment Percentage
Money Market	25.00
Asset Allocation Fund	25.00
Bond Fund	25.00
Corporate Stock Fund	25.00

Profit Sharing Plan

Investment

Investment Percentage

Money Market	25.00
Capital Fund	25.00

This example illustrates the Benefits Statement page – Print view of the Elections Preview.

Global Business Institute GBI US Fulltime Benefit Pgm	ELECTIONS PREVIEW OPEN ENROLLMENT 2023 Event Date: 01/01/2023
Rosanna Channing Senior Accounting Manager	Employee ID: KU0046

This statement records your Open Enrollment 2023 benefit selections and pay period costs, dependent information, and beneficiary information at the time your enrollment is submitted. If an error has been made in recording your elections, please correct your elections before the event is closed. For further question, contact your benefits administrator. Please keep the statement for your records until you receive a confirmation statement.

ELECTION SUMMARY

The following is a summary of your elections. Select the Dependent or Beneficiary hyperlink to view the information associated with each benefit.

Remember: These coverages will remain in effect until the next Benefits Open Enrollment or if you experience a change in family status or employment situation.

Benefit Plan	Proof of Coverage	Coverage	Category Base	Your Cost Per Pay Period
Wellness Credit				
Enhanced Medical Plan		EE+Spouse		\$ 83.00
Enhanced Dental Plan		EE+Spouse		\$ 8.25
Enhanced Vision Plan		EE+Spouse		\$ 9.50
Basic Life Plan			\$ 50,000.00	
Suppl Group Life 4x	Pending Proof		\$ 376,000.00	\$ 157.92
Flat 25K AD&D			\$ 25,000.00	\$ 0.25
Dependent AD and D		Waive		
Dependent Life		Waive		
Supplemental AD and D		Waive		
Spousal Life		No Coverage		
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		
Health Savings Account		No Coverage		
Vacation Buy		No Coverage		
Vacation Sell		No Coverage		

Benefit Plan	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%

DEPENDENTS AND BENEFICIARIES

The following is a summary of your dependents and beneficiaries that you have enrolled or allocated on a plan

Name	Relationship	Marital Status	Date of Birth	Dependent	Beneficiary
Robert Channing	Spouse	Married	10/01/1967	Yes	Yes

DEPENDENT ENROLLMENTS

The following is a summary of your dependent enrollment on each plan

Benefit Option	Name	Relationship	Proof of Coverage

Rosanna Channing
Page 1 of 2
7/27/2022 0:07 AM

Benefits Statement Access During OnBoarding and PreBoarding

The OnBoarding and PreBoarding users can access the Benefits Statement step as part of their OnBoarding process. If the organization adds this step to the OnBoarding template, then this page will be available to both the PreBoarding and OnBoarding users (such as new hires, and rehires). To access this page, navigate to **Employee Self Service > OnBoarding > OnBoarding Activities** and launch the activity guide. Select the **Benefits Statement** step under **Benefits**. For more information on PreBoarding, see “Understanding OnBoarding and the PreBoarding and OnBoarding Phases” (PeopleSoft Human Resources Administer Workforce).

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” (Application Fundamentals)

Page Used to Maintain Text Catalog Entries for Benefits Pages

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Maintain Text Catalog Page</u>	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

This example illustrates the fields and controls on the Maintain Text Catalog page..

Maintain Text Catalog

Benefits Administration

Sub ID
ENR

Text ID
EVENTDESCR

Usage
Page Instructions

Description
Enrollment Event Selection: Detailed description for each event class

185 characters remaining

Text Entries

1 of 1

View All

Effective Date
01/01/1900

+

-

Context Keys and Text

1-4 of 4

View 1

BAS Group ID

+

-

Schedule ID

Company

Benefit Program

Event Classification
FSC

Your recent family status change event allows you to modify your current benefit choices.
You will have 31 days from the event date to update your benefits enrollment and submit your new choices.
The Enrollment Summary will display which benefit options are open for edits.
All of your benefit changes will be effective the date of the

View/Edit as HTML

BAS Group ID

+

-

Schedule ID

Company

Benefit Program

Event Classification
HIR

As a new hire you must enroll in benefits within 31 days from your date of hire.
If you do not enroll it may result in no coverage for yourself and any dependents.
The only time you can change your benefit choices is during Open Enrollment or if you have a qualified family status change.

View/Edit as HTML

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” (Application Fundamentals).

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This example illustrates the Configure Text Catalog page.

Manager Self Service Configure Text Catalog

Configure Text Catalog

Applications

General Key 1 Key 2 Key 3 Key 4 Key 5 Key 6 ||>

Object Owner Identifier	Description	Sub ID	Description	Display Text Id	
HBA	Benefits Administration	ENR	Benefits Enrollment	☐	—
HBA	Benefits Administration	PLAN	Benefit Enrollment by PlanType	☐	—
HBA	Benefits Administration	STMT	Benefits Enrollment Statements	☐	—
HBN	Base Benefits	ELCT	BN_ELECT Application Package	☐	—
HBN	Base Benefits	FLU	Base Benefits Fluid Pages	☐	—
HBN	Base Benefits	SUMM	Base Benefits Summary Fluid	☐	—
HCR	HR Core Objects	NFMT	Name Format	☐	—
HCSC	HCM Shared Component	ALRT		☐	—
HCSC	HCM Shared Component	AWE	Approval Workflow Engine	☐	—
HCSC	HCM Shared Component	GDP	Guided Process	☐	—
HCSC	HCM Shared Component	HCDL	Delegation	☐	—

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” (Application Fundamentals)

Benefits Plan Comparison

Understanding Benefits Plan Comparison

This topic provides an overview of using PeopleSoft Benefits Plan Comparison to compare benefits plans.

PeopleSoft provides you with a delivered Plan Comparison page to enable employees to compare benefit offerings for different benefits plans during benefits enrollment. They can compare different aspects of each plan, such as the cost and plan-specific features.

Employee can choose the plans to compare during benefits enrollment. The Benefits Plan Comparison page displays a side by side comparison of all the eligible plans, from which employee can determine which plan covers their needs with the best price.

The benefits administrator defines the sections and attributes to appear in the plan comparison page, set up the templates using the Comparison Template Activity Guide, and enters the plan comparison data.

Setting Up Benefits Plan Comparison

This topic discusses how to set up Benefits Plan Comparison.

Pages Used to Set Up Benefits Plan Comparison

This table lists the pages used to set up Benefits Plan Comparison.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Comparison Definition Page</u>	BAS_CMP_DEFN	Set up components for plan comparison template.
<u>Comparison Template Page</u>	BAS_CMP_TMPSRCH_FL	Create templates for plan comparison.
<u>Using the Comparison Template Activity Guide</u>		Use steps in comparison template activity guide.
<u>Associating Comparison Template to Benefit Program</u>	BEN_PROG_DEFN2	Set up plan comparison templates for benefit plan types.
<u>Comparison Footnote Table page</u>	BAS_CMP_FOOTNTE	Create footnotes for plan comparison.
<u>Comparison Plan Data page</u>	BAS_CMP_PLNSRCH_FL	Add data for plan comparison.

Comparison Definition Page

Use the Comparison Definition page (BAS_CMP_DEFN) to define the sections and attributes for the benefits plan comparison.

Navigation:

Set Up HCM > Product Related > Automated Benefits > Plan Comparison > Comparison Definition

You can also access Comparison Definition page under Plan Comparison by clicking the Benefits WorkCenter tile on the Workforce Administrator home page.

This example illustrates the fields and controls on the Comparison Definition page for the category Section.

Comparison Definition

Category

Section

Plan Type

Common

Compare Definition ID

PPC

* Indicates required field

Definition Data

*Effective Date

02/01/1900

+

-

*Definition Name

Pay Period Cost

Definition Description

Format

Font

Size

B

I

U

S

x₂

x²

The cost shown is based on the dependents you have enrolled.

Save

Return to Search

Previous in List

Next in List

Add

Update/Display

Correct History

Field or Control	Description
Category	View or select the plan comparison category. Here, we discuss the plan comparison category Section .
Plan Type	View or select the benefits plan type. A benefit plan type Common is system delivered to define categories that are used across multiple plan types.
Compare Definition ID	View or enter the unique code to identify the comparison definition.

Field or Control	Description
Definition Name	Enter the name for the comparison definition. The definition name displays as benefits section label in the plan comparison page.
Definition Description	Enter the description for the comparison definition. The description displays as text under benefits section label in the plan comparison page. This field uses rich text editor.
	Spell check the description.

This example illustrates the fields and controls on the Comparison Definition page for the category Attribute.

Category Attribute

Plan Type Medical

Compare Definition ID PARTN

1 of 1

View All

*Effective Date 01/01/1900

+

-

Definition Data

*Definition Name Coverage

Definition Description

250 characters remaining

Attribute Line Items

Individual

Family

+

-

Field or Control	Description
Category	View or select the plan comparison category. Here, we discuss the plan comparison category Attribute .
Plan Type	View or select the benefits plan type. A benefit plan type Common is system delivered to define categories that are used across multiple plan types.
Compare Definition ID	View or enter the unique code to identify the comparison definition component.

Field or Control	Description
Definition Name	Enter the name for the comparison definition. The definition name displays as attribute label under the benefits section in the plan comparison page.
Definition Description	Enter the description for the comparison definition. The description displays as text under the attributes in the plan comparison page.
	Spell check the description.
Attribute Line Items	Enter the line items for an attribute. This is optional.

Note: If you have added custom translate values for your plan type, then you have to add the same values to the plan comparison fields. The custom plan types will then be available on the Comparison Definition page.

Related Links

[Using the Fluid Benefits WorkCenter](#)

“Defining Benefit Plans” (PeopleSoft Human Resources Manage Base Benefits)

Comparison Template Page

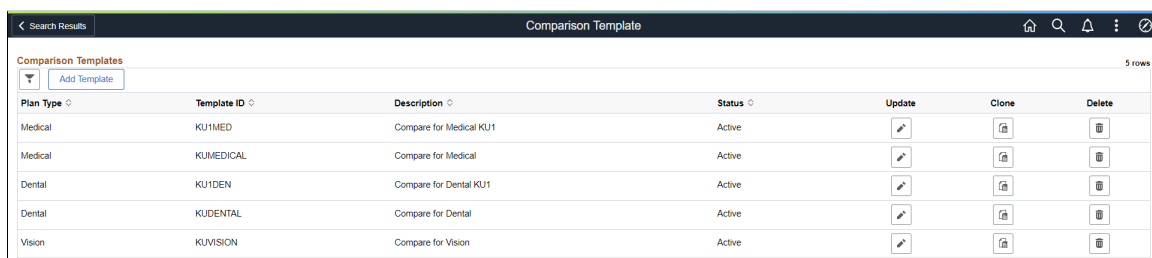
Use the Comparison Template page (BAS_CMP_TMPSRCH_FL) to create and maintain templates for plan comparison.

Navigation:

Set Up HCM > Product Related > Automated Benefits > Plan Comparison > Comparison Template

You can also access Comparison Template page under Plan Comparison by clicking the Benefits WorkCenter tile on the Workforce Administrator home page.

This example illustrates the fields and controls on the Comparison Template page.



Plan Type	Template ID	Description	Status	Update	Clone	Delete
Medical	KU1MED	Compare for Medical KU1	Active			
Medical	KUMEDICAL	Compare for Medical	Active			
Dental	KU1DEN	Compare for Dental KU1	Active			
Dental	KUDENTAL	Compare for Dental	Active			
Vision	KUVISION	Compare for Vision	Active			

Field or Control	Description
	Filter comparison templates based on Plan Type , Template ID , Status , and Template Description .
Add Template	Opens the modal window to enter the key values for template definition. Key values include Plan Type, Template ID, Effective Date, and Template Description. Click Continue in the modal window to launch the activity guide to define the components for the template. For more information on using the template, refer Using the Comparison Template Activity Guide
Plan Type	Displays the type of benefit plan.
Template ID	Displays the identifier of the template.
Description	Displays the description of the template.
Status	Displays the status of the template. Available options are Active , and Inactive .
Update	Click to update an existing template definition or to add a new effective-dated row to the template definition.
Clone	Click to clone an existing template definition to a new template ID.
Delete	Click to delete an existing template definition.

Related Links

[Using the Fluid Benefits WorkCenter](#)

Using the Comparison Template Activity Guide

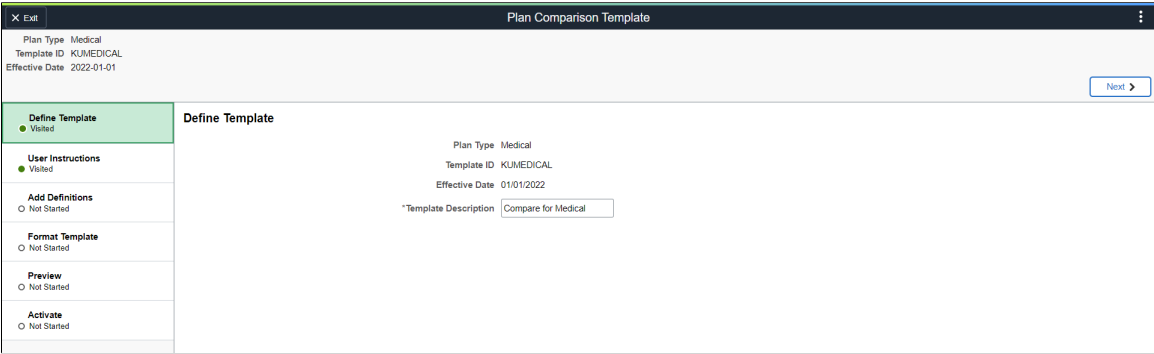
Use the Comparison Template activity guide to create the templates for the benefits plan comparison page.

Navigation:

Set Up HCM > Product Related > Automated Benefits > Plan Comparison > Comparison Template

On the **Comparison Template** page, click the **Add Template** button to access the **Add Template** modal window. Enter the values and click **Continue** to launch the **Plan Comparison Template** activity guide. You can also access the activity guide by clicking **Update** button for the existing template definitions.

This example illustrates the fields and controls on the Activity Guide for Comparison Template.



When the benefits administrator accesses the Plan Comparison Template activity guide, the system displays a series of non-sequential steps in the left panel with the corresponding pages in the right panel. These steps are as defined in the delivered *BENCMPR* Benefits template (this is system data and not to be changed).

All steps are open and the initial status is *Not Started*. Based on the action, the status is updated to *Visited* and *Complete*. Activity guide retains the step statuses. Each step is auto saved when the user moves out of the step.

Define Template step

Use the Plan Comparison Template – Define Template page (BAS_CMP_TMP_DEF_FL) to view the template definition and update description for the template.

This example illustrates the fields and controls on the Activity Guide for Comparison Template.

Define Template

Plan Type

Medical

Template ID

KUMEDICAL

Effective Date

01/01/2022

*Template Description

Compare for Medical

Field or Control	Description
Plan Type	Displays the type of benefit plan.
Template ID	Displays the identifier of the template.
Effective Date	Displays date when the template definition is effective.
Template Description	View or update the description of the template.

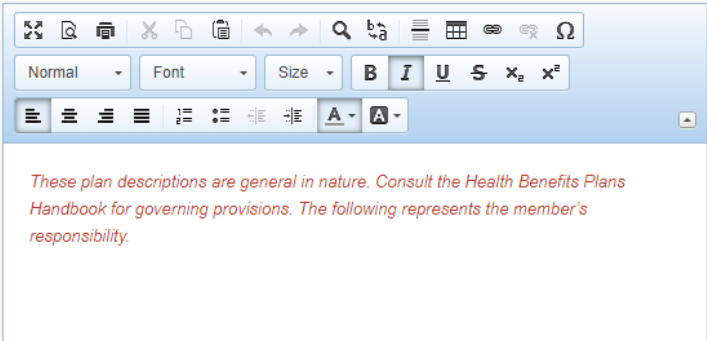
User Instructions step

Use the Plan Comparison Template – User Instructions page (BAS_CMP_TMP_INS) to define header and footer instructions in the plan comparison page.

This example illustrates the fields and controls on the User Instructions page.

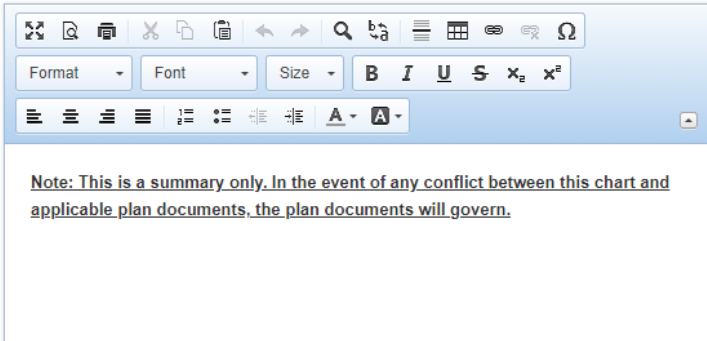
User Instructions

Header Instructions (optional)



These plan descriptions are general in nature. Consult the Health Benefits Plans Handbook for governing provisions. The following represents the member's responsibility.

Footer Instructions (optional)



Note: This is a summary only. In the event of any conflict between this chart and applicable plan documents, the plan documents will govern.

<i>Field or Control</i>	<i>Description</i>
Header Instructions (optional) and Footer Instructions (optional)	Enter instructions for header and footer section in the plan comparison page. This field uses rich text editor. If the rich text field has a character limit, and copying and pasting rich text content from an external source exceeds the maximum character limit of the field, try pasting the content as plain text to remove the underlying text formatting information that's included in the copied content, then reapply formatting as needed.

Add Definitions step

Use the Plan Comparison Template – Add Definitions page (BAS_CMP_TMP_ADDEF) to define sections and attributes for the plan comparison page.

This example illustrates the fields and controls on the Add Definitions page.

Add Definitions

Add Section
Select Section

Section

Pay Period Cost

Coverage Level Cost

Plan Cost and Credit Detail

Copsays

Add Attribute
Select Attribute

Office Visit

Emergency Room

Urgent Care

Field or Control	Description
Add Section	Select to add the section for the template plan type or Common type. After the user selects the plan type and enters compare definition identifier, the system displays the Comparison Definition modal window. For more details, refer Comparison Definition Page.
Select Section	Select to choose from existing sections defined for the template plan type or <i>Common</i> type. User can select multiple sections.
Add Attribute	Select to add the attribute for the template plan type or Common type. After the user selects the plan type and enters compare definition identifier, the system displays the Comparison Definition modal window. For more details, refer Comparison Definition Page.
Select Attribute	Select to choose from existing attributes defined for the template plan type or <i>Common</i> type. User can select multiple attributes.

Field or Control	Description
	Delete a section or attribute. Each section and attribute has delete option.

Format Template step

Use the Plan Comparison Template – Format Template page (BAS_CMP_TMP_FORMAT) to define the sequence of the sections and attributes, and other configurations in the plan comparison page.

This example illustrates the fields and controls on the Format Template page.

Format Templates

Compare Plan Limit (maximum 10)

Order	Section	*Section Default	
5	Pay Period Cost	Expanded v	
Order	Section	*Section Default	
8	Coverage Level Cost	Expanded v	
Order	Section	*Section Default	
9	Plan Cost and Credit Detail	Expanded v	
Order	Section	*Section Default	
10	Copays	Expanded v	

Office Visit 

Emergency Room 

Urgent Care 

Field or Control	Description
Compare Plan Limit	Enter the maximum number of benefit plans to compare. Note: The default value is three. User can enter a value from one to ten.

Field or Control	Description
Order	Enter the order to display sections, attributes, and attribute line items. Values are pre-assigned.
Section	Displays the name of the section.
Section Default	Select the default display of the section when the plan comparison page is first loaded. Values are <i>Collapsed</i> and <i>Expanded</i> . Default selection is <i>Expanded</i> .
Attribute	Displays the name of the attribute.
Attribute Line Items	Displays the name of the attribute line item.
	Delete a section, attribute, or attribute line item. Each section, attribute, and attribute line item has delete option.

Preview step

Use the Plan Comparison Template – Preview page (BNE_COMPARE_FL) to preview the layout of the plan comparison page.

This example illustrates the fields and controls on the Preview page.

Preview

These plan descriptions are general in nature. Consult the Health Benefits Plans Handbook for governing provisions. The following represents the member's responsibility.

[Expand All](#) | [Collapse All](#)

▼ Pay Period Cost

The cost shown is based on the dependents you have enrolled.

▼ Coverage Level Cost

These are all the available Coverage Costs

▼ Plan Cost and Credit Detail

▼ Copays

These are flat amounts you pay, if applicable, for services that are not subject to the deductible.

Office Visit

Emergency Room

Urgent Care

Field or Control	Description
Expand All and Collapse All	Click to expand and collapse the sections.

Activate step

Use the Plan Comparison Template – Activate page (BAS_CMP_TMP_ACT_FL) to activate or deactivate a plan comparison template.

This example illustrates the fields and controls on the Activate page.

Activate

To make changes to the template, return to the appropriate step to update.

If you are satisfy with the template, select the Activate Template button to update the template into Active Status. Active Template is available for entering plan specific compare data.

Activate Template

Field or Control	Description
Activate Template or Deactivate Template	Click to activate or deactivate the template. By default, a template is <i>Inactive</i>. Define at least one section in the Add Definitions step, to activate a template. When a template is active, this page displays Deactivate Template button.

Related Links

“Understanding the Activity Guide Composer” (Enterprise Components)

“Setting Up Activity Guide Categories” (Enterprise Components)

“Managing Activity Guide Templates” (Enterprise Components)

Associating Comparison Template to Benefit Program

Use the Benefit Program Table – Plan Type and Option page (BEN_PROG_DEFN2) to associate the plan comparison template to a benefit program and plan type.

Navigation:

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

Enter a **Template ID** to compare plans in the benefits enrollment page for this plan type.

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

The screenshot displays the 'Benefit Program Table' interface. At the top, there are tabs for 'Benefit Program', 'Plan Type and Option' (which is selected), and 'Cost'. Below the tabs, the 'Benefit Program' is set to 'KU1' and the 'Effective Date' is '01/01/2023'. The main section is titled 'Plan Type' and contains several input fields and controls. On the left, there are fields for 'Plan Type' (value: 10), 'Medical', 'DispPinSeq' (value: 10), 'Event Rules ID' (value: KU1X), 'Medical/Dental/Vision Rules', 'Waive Coverage' (dropdown: Allowed with Proof), 'Dependent Rules ID' (value: PU1DR), and 'Template ID' (value: KUMEDICAL). On the right, there are checkboxes for 'HIPAA Plan' and 'COBRA Plan', both of which are checked. Below these checkboxes is a button labeled 'Load Cross Plan Values'. At the top right of the 'Plan Type' section, there is a search icon, a list of icons, a dropdown showing '3 of 25', and a 'View All' link.

For more details, see “Benefit Program Table – Plan Type and Option Page” (PeopleSoft Human Resources Manage Base Benefits)

Comparison Footnote Table page

Use the Comparison Footnote Table page (BAS_CMP_FOOTNTE) to store footnotes related to a Benefit Program and Plan Type.

Footnote IDs are unique to a Benefit Program and Plan Type combination. These footnotes can be used across all the plans using the same plan comparison template.

Navigation:

Set Up HCM > Product Related > Automated Benefits > Plan Comparison > Comparison Footnote Table

You can also access Comparison Footnote Table page under Plan Comparison by clicking the Benefits WorkCenter tile on the Workforce Administrator home page.

This example illustrates the fields and controls on the Comparison Footnote Table page.

[illegible]

<i>Field or Control</i>	<i>Description</i>
Benefit Program and Plan Type	Displays the benefit program and benefits plan type.
Effective Date	The date the row in the table becomes effective. This date determines when you can view and change information.
Footnote ID	Enter the two character code to identify the footnote.
Description	Enter the description for the footnote. This field uses rich text editor. Footnotes appear at the bottom of the plan comparison page.
	Click to spell check the description.

Related Links

Using the Fluid Benefits WorkCenter

Comparison Plan Data page

Use the Comparison Plan Data page (BAS_CMP_PLNSRCH_FL) to enter data for plan comparison templates.

Plan comparison data is defined for a selected Benefit Program, Plan Type, Benefit Plan and Template ID. The Comparison Plan Data page displays the latest effective dated rows for each plan.

Navigation:

Set Up HCM > Product Related > Automated Benefits > Plan Comparison > Comparison Plan Data

You can also access Comparison Plan Data page under Plan Comparison by clicking the Benefits WorkCenter tile on the Workforce Administrator home page.

This example illustrates the fields and controls on the Comparison Plan Data page.

Benefit Program	Plan Type	Benefit Plan	Template ID	Effective Date	Status	Update	Clone
KU1	Medical	KUHMO1	KUMEDICAL	01/01/2023	Active		
KU1	Medical	KUHMO2	KUMEDICAL	01/01/2023	Active		
KU1	Medical	KUHMO3	KUMEDICAL	01/01/2023	Active		
KU1	Medical	KUMED	KUMEDICAL	01/01/2023	Active		
KU1	Medical	KUMED1	KUMEDICAL	01/01/2023	Active		
KU1	Medical	KUMED2	KUMEDICAL	01/01/2023	Active		

Field or Control	Description
	Filter the plan data.
Add Plan Data	Select to add comparison plan data.
Benefit Program	Displays the benefit program.
Plan Type	Displays the plan type.
Benefit Plan	Displays the benefit plan.
Template ID	Displays the template ID.
Status	Displays the status of the comparison plan data. Available values are <i>Active</i> and <i>Inactive</i> .
Update	Click to update the comparison plan data or add a new effective-dated row for the plan data.
Clone	Click to clone the comparison plan data for a different benefit program and/or benefit plan.
Delete	Click to delete the comparison plan data.

Entering Comparison Plan Data

Use Comparison Plan Data page (BAS_CMP_PLNDATA_FL) to view or update plan comparison data for benefit plans.

Navigation:

Click **Add Plan Data** on the Comparison Plan Data page.

This example illustrates the fields and controls on the Comparison Plan Data page.

Comparison Plan Data

Benefit Program KU1

Benefit Plan KUMED

Effective Date 01/01/2022

Plan Type Medical

Template ID KUMEDICAL

*Status Active

Preview

Save

Plan Image

Image Type Provider URL ID

Image

URL ID KULOGOBCBS

Cost Information Alignment

Definition Name	Alignment
Pay Period Cost	Left
Coverage Level Cost	Left
Plan Cost and Credit Detail	Left

Compare Data

Benefit Plan	Effective Date	Plan Type	Section	Attribute	Attribute Line	Value	Formatted Value	Format Text	Select Footnote	Footnotes
KUMED	01/01/2022	Medical	Out-Of-Pocket Maximum	Coverage	Family	\$5,500	\$5,500			
KUMED	01/01/2022	Medical	Hospital/Facility	Emergency Room		\$150 copay	\$150 copay			
KUMED	01/01/2022	Medical	Hospital/Facility	Inpatient Services		\$150 per admit	\$150 per admit			
KUMED	01/01/2022	Medical	Hospital/Facility	Outpatient Surgery		\$100 per surgery	\$100 per surgery			
KUMED	01/01/2022	Medical	Prescription Benefits	Mail-Service		Tier 1 - \$25¹² \$25¹²	Tier 1 - \$25 ¹² Tier 2 - \$55 Tier 3 - \$85			1, 2
KUMED	01/01/2022	Medical	Prescription Benefits	Retail Pharmacy		Tier 1 - \$15¹ \$15¹	Tier 1 - \$15 ¹ Tier 2 - \$35 Tier 3 - \$45			1

Field or Control	Description
Benefit Program	Displays the benefit program.
Plan Type	Displays the plan type.
Benefit Plan	Displays the benefit plan.
Template ID	Displays the template ID.
Status	Displays the status of the comparison plan data. Available values are <i>Active</i> and <i>Inactive</i> .
Effective Date	The date the row in the table becomes effective. This date determines when you can view and change information.
Preview	Click to view a preview of the Plan Comparison component for the entered data.
Save	Click to save the comparison plan data.

Field or Control	Description
Image Type	Select the image type for the benefit plan. Available options are: • Provider URL ID: Select to choose image from the URL ID table. • Provider Image: Select to choose image from the image table.
Image	When Provider Image is selected for Image Type , the Image field is enabled. Select image from the image table. The plan image logo is displayed under the URL ID field.
URL ID	When Provider URL ID is selected for Image Type , the URL ID field is enabled. Select image from the URL ID table. The plan image logo is displayed under the URL ID field.
Definition Name	Displays the predefined section names delivered as system data.
Alignment	Select to define the alignment for the system delivered data. Available values are Center , Justify , Left , and Right .
Section	Displays the section of the comparison plan template for the benefit plan.
Attribute	Displays the attribute of the comparison plan template for the benefit plan.
Attribute Line	Displays the attribute line of the comparison plan template for the benefit plan.
Value	Enter the value for the attribute.
Formatted Value	Displays the formatted text for the content in Value based on the formatting entered in Value or Format Text .
Format Text	Click to format attribute value in Rich Text Editor. Note: The Format Text button is available only on PeopleTools version 8.59 or higher.

Field or Control	Description
Select Footnotes	Click to open the Select Footnotes pop up window. Select the check box to add the footnotes to the attributes.
Footnotes	Displays the Footnote IDs for the footnotes selected in the Select Footnotes window.

Related Links

[Using the Fluid Benefits WorkCenter](#)

Using Plan Comparison In Benefits Enrollment

Benefits Plan Comparison uses the PeopleSoft Fluid User Interface to enable employees to compare benefit plans side by side during benefits enrollment.

Employees can view different aspects of each plan, such as the cost and plan-specific features and choose the plan that covers their needs with the best price

This topic discusses how employees can use benefits plan comparison.

Pages Used to Compare Plans during Benefits Enrollment

This topic discusses on the page used for plan comparison.

Page Name	Definition Name	Usage
Benefits Plan Comparison Page	BNE_COMPARE_FL	Compare benefit plans during benefits enrollment.

Benefits Plan Comparison Page

Use the Benefits Plan Comparison page (BNE_COMPARE_FL) to compare benefit plans during benefits enrollment.

Navigation:

You can access the Benefits Plan Comparison page using these navigations:

- **Employee Self Service > Benefit Details > Benefits Enrollment**
- **Employee Self Service > Benefit Details > Life Events > Benefits Enrollment**
- **Employee Self Service > Open Enrollment > Benefits Enrollment**

Select the **Benefits Enrollment** tab on the left panel, and select a plan type under the **Benefit Plans** section. In the plan page, select the plans to compare under the **Enroll in Your Plan** section. Select the **Compare** button, to open the Benefits Plan Comparison page.

Plan comparison is available only if a comparison template is set up for the benefit program plan type. For *Waive* option, the **Compare Plan** check box is disabled. The Benefits Plan Comparison page displays the data based on the event date. For example, to enroll dependents after a life event, the benefits plan comparison page displays the comparison template and the plan data corresponding to the life event date.

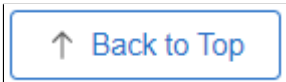
This example illustrates the fields and controls on the Benefits Plan Comparison page (1 of 2).

Benefits Plan Comparison			
These plan descriptions are general in nature. Consult the Health Benefits Plans Handbook for governing provisions. The following represents the member's responsibility.			
Expand All / Collapse All	Enhanced Medical Plan	Basic Out-of-Network Medical	Medical HMO Plan 2
Currently Selected			
Pay Period Cost			
The cost shown is based on the dependents you have enrolled.			
Employee + Spouse	\$83.00	\$11.00	\$59.00
Coverage Level Cost			
These are all the available Coverage Costs			
Employee Only	\$10.00 Before-Tax	\$-4.00 Before-Tax	\$-3.00 Before-Tax
Employee + Spouse	\$83.00 Before-Tax	\$11.00 Before-Tax	\$59.00 Before-Tax
Currently selected coverage			
Employee + Child(ren)	\$151.00 Before-Tax	\$36.00 Before-Tax	\$115.00 Before-Tax
Family	\$245.00 Before-Tax	\$56.00 Before-Tax	\$195.00 Before-Tax
Employee + Domestic Partner	\$10.00 Before-Tax	\$51.00 Before-Tax	\$-3.00 Before-Tax
Family (with Domestic Partner)	\$238.00 Before-Tax	\$91.00 Before-Tax	\$115.00 Before-Tax
Copays			
These are flat amounts you pay, if applicable, for services that are not subject to the deductible.			
Office Visit	\$25 non-specialist \$40 specialist	\$20 non-specialist \$35 specialist	no copay
Emergency Room	\$150	\$100	no copay
Urgent Care	\$35	\$25	no copay

This example illustrates the fields and controls on the Benefits Plan Comparison page (2 of 2).

Other Services			
Ambulance	\$150 copay	20% coinsurance ²	\$100 per transport (one-way)
Chiropractic/ Acupuncture	\$25 copay per visit ⁴	40% coinsurance ^{3, 4}	\$15 copay per visit, max \$450 per year
Urgent Care	\$35 per visit	40% coinsurance ³	\$15 copay
Diagnostic/ X-Ray, Ultrasound	no copay	40% coinsurance ³	no copay
Home Health Services	\$35 per visit	40% coinsurance ³	\$15 per visit, max 100 visits per year
Imaging (MRI, CT, PET)	\$100 per test	40% coinsurance ³	\$100 per test
Note: This is a summary only. In the event of any conflict between this chart and applicable plan documents, the plan documents will govern.			
Footnotes			
¹ If a member requests a brand name drug when a generic drug exists, the member pays the generic drug copay plus the difference in cost between the prescription drug maximum allowed amount for the generic drug and the brand name drug dispensed. The Preferred Generic Program does not apply when the physician has specified "dispense as written" (DAW) or when it has been determined that the brand name drug is medically necessary for the member. In such case, the applicable copay for the dispensed drug will apply.			
² These Benefits are payable only after satisfaction of the annual deductible. Provider payments are based on negotiated fees.			
³ These Benefits are payable only after satisfaction of the annual deductible. Provider will pay a maximum daily amount based on the "Allowable Amount" as defined in the EOC. You are responsible for any charges above the Allowable Amount, as summarized in the "Summary of Benefits" and defined in the EOC.			
⁴ Chiropractic benefit only includes manipulations and exams. This benefit does not include X-rays, labs, other radiology or other services that are not considered to be a manipulation treatment.			
Back to Top			

Field or Control	Description
Print View	Select to open the Plan Comparison report in a new tab in the same browser. The employee can save or print the report. To configure the display of the Print View button, see Benefit Program Table - Plan Type and Option Page .
	Important! For optimal printing, we recommend that you compare no more than 4 plans.

Field or Control	Description
	Select to add plans for comparison. The number of the plans that can be selected for comparison is defined in the template configuration page. Default value is three. To define the plan comparison limit, see Comparison Template Page.
	Select to drag and drop the benefit plan columns, and to reorder the columns. On a small form factor, use the left and right arrows to view the benefit plans.
<i>Benefit Plans</i> logo (insurance provider logo)	Displays the plan image logo (insurance provider logo) to the left of benefit plan name. The benefit plan logo does not appear on a small form factor. To define the plan image logo, see Comparison Plan Data page.
	Select to remove plans.
Expand All/Collapse All	Select to expand or collapse all the sections.
	Select to view the footnotes for the attribute value on a pop-up window. To define the footnotes for the attributes, see Comparison Plan Data page
	Select to go to the top of the page. The Back to Top button is displayed at the bottom of the page when the user starts to scroll from the top of the page.

Benefits Assistant

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 using ODA

With the Benefits Assistant tile, Benefits users can access the Benefits Assistant 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 to [Oracle Digital Assistants and Skills](#).

For Benefits Assistant, the Benefits Assistant skill consists of the following intents:

- EntryGreeting
- GetAdminContactInfo
- GetDependentBeneficiary
- GetLifeEventInfo
- 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	UpdateBenefitSummary
SUMM_UPD_ACTION	

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
- 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” (Enterprise Components)

PeopleSoft Employee Digital Assistant

PeopleSoft Intelligent Chatbot Assistant from Oracle (PeopleSoft PICASO) is a consolidated, single-point access chatbot where your employees can ask questions spanning multiple PeopleSoft applications like Absence, Benefits, Employee Directory, Expenses, North American Payroll, and more. For information on PeopleSoft PICASO, see “Understanding PeopleSoft PICASO” (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.

<i>Examples of Use Cases</i>	<i>Benefits component from which the chatbot retrieves information</i>
• 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

Examples of Use Cases	Benefits component from which the chatbot retrieves information
- 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
- 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 for the Benefits users.

Pages Used to Configure Benefits Assistant as an Administrator Using the PeopleSoft Fluid User Interface

Page Name	Definition Name	Usage
<u>Content Ref Administration Page</u> For details, refer topic in Enterprise Components: “Adding the Chatbot for a New Skill to a PeopleSoft Page as a Tile” (Enterprise Components)	PORTAL_CREF_ADM	Add the Benefits Assistant tile to the Benefit Details Tile dashboard.
<u>Bot Definitions Page</u> For details, refer topic in Enterprise Components: “Bot Definition Page” (Enterprise Components)	EOCB_BOTSRCH_FL	View, edit or add a new bot definition.

Page Name	Definition Name	Usage
“Add Bot Definition Page” (Enterprise Components)	EOCB_ADDBOTDEFN_FL	Add a new Bot Definition.
<u>Maintain Bot Definition page</u> For details, refer topic in Enterprise Components: “Maintain Bot Definition Page” (Enterprise Components)	EOCB_BOTDEFN_FL	View the existing definitions for a chatbot.
“Maintain Branding Template Page” (Enterprise Components)	EOCB_BRNDTMPL_FL	Control the branding aspects of the bot definition.
<u>Component Mapping Page</u> For details, refer topic in Enterprise Components: “Adding the Chatbot to a PeopleSoft Page as a Widget” (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:

- Using the *BEN_CHAT_ASST* that is delivered with the system, edit and add the bot app ID from the ODA channel.
 - Navigate to **Enterprise Components > Chatbot Configurations > Bot Definitions**.
 - 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:
PS_ORWEBSDK_DEFAULT_V1. You can choose to use this template without making any changes.

- 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” (Enterprise Components)

“Understanding the Chatbot Architecture” (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.

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” (Enterprise Components).

This example illustrates the fields and controls on the Content Ref Administration page (1 of 2).

The screenshot shows the 'Content Ref Administration' page with the 'Fluid Attributes' tab selected. The breadcrumb trail is 'Root > Self Service > HR Fluid Components >'. The page title is 'Content Ref Administration'. The fields and controls are as follows:

- Name:** HC_BEN_CHATBOT_FLU
- CreatedBy:** PS
- Parent Folder:** HR Fluid Components
- *Label:** Benefit Assistant
- Copy object** button
- Select New Parent Folder** button
- Long Description (254 Characters):** Benefit ChatBot Assistant
- Product:** HC
- Sequence number:** 95
- Owner ID:** HBN (with a search icon) **Base Benefits**
- Usage Type:** Target (dropdown menu)
- Storage Type:** Remote by URL (dropdown menu)
- *Valid from date:** 01/01/1900 (calendar icon)
- Valid to date:** (calendar icon)
- Creation Date:** 05/20/2020
- WSRP Producing:** ☐
- No Template:** ☒
- Fluid Mode:** ☒
- Display on Small Form Factor:** ☒

At the bottom, there are three links: 'Create Content Reference Link', 'Add Content Reference', and 'Test Content Reference'.

This example illustrates the fields and controls on the Content Ref Administration page (2 of 2).

URL Information

Node Name: HRMS

URL Type: PeopleSoft Generic URL

*Portal URL: c/EOCB_MENU_FL.EOCB_CLIENT_FL.GBL?BOTID=BEN_CHAT_ASST

☐ Hide from portal navigation ☐ Hide from MSF navigation [IWC Message Events](#)

Content Reference Attributes

Name: DASHBOARD_TILE

Label: ☐ Translate

Attribute value: true

Links

1-1 of 1

Portal Name	Label	Link Definition
EMPLOYEE	Benefit Assistant	Link Definition

Select the **Fluid Attributes** tab to open the **Tile Repository** section.

This example illustrates the fields and controls on the Fluid Attributes tab.

Structure and Content

General Security **Fluid Attributes**

[Root > Self Service > HR Fluid Components >](#)

Tile Information

Image Name: PS_CHAT_CLIENT_M_FL

Display In: Modal

Modal Parameters: sStyle@frame-pt_chatclientpage;bAutoClose@0

Height: 1 ☐ Autosize

Width: 1 ☐ Resizable

Refresh Timer: 0

Event Name:

☐ Interactive ☐ Disable Main Hotspot

Dynamic Tile Content

URL Type: None

Tile Repository

Select a folder below to create a link to the Tile Repository. If the folder selection is disabled, this Tile is already available in the Tile Repository.

Folder: HC_SELF_SERVIC_FL_GBL

Folder Label: Employee Self Service [View Definition](#)

Include In Repository

☐ Homepage ☒ Dashboard ☐ NavBar

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

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.

Bot Definitions

Save

General Configurations

ODA Release VersionOn or After 19.10

*Default Branding TemplateDefault Branding – ODA or

*ODA Server URIidcs-oda-aa2e2347d7584f54a

* Changing the ODA Release Version value will remove the branding for earlier version, associated with one or more bot definitions. The default branding template for the new ODA release version value will be applied for the bot definitions and can be manually overridden on bot definition page.

Bot Definitions

+ Add

3 rows

Bot ID	Bot Name	Bot Type	Edit	Delete
1 HGA_CHAT_ASST	Absence Assistant	Both		
2 HRCN_CHAT_ASST	Employee Directory Assistant	Both		
3 BEN_CHAT_ASST	Benefit Assistant	Both		

Field or Control	Description
	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

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.

Field or Control	Description
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” (Enterprise Components).

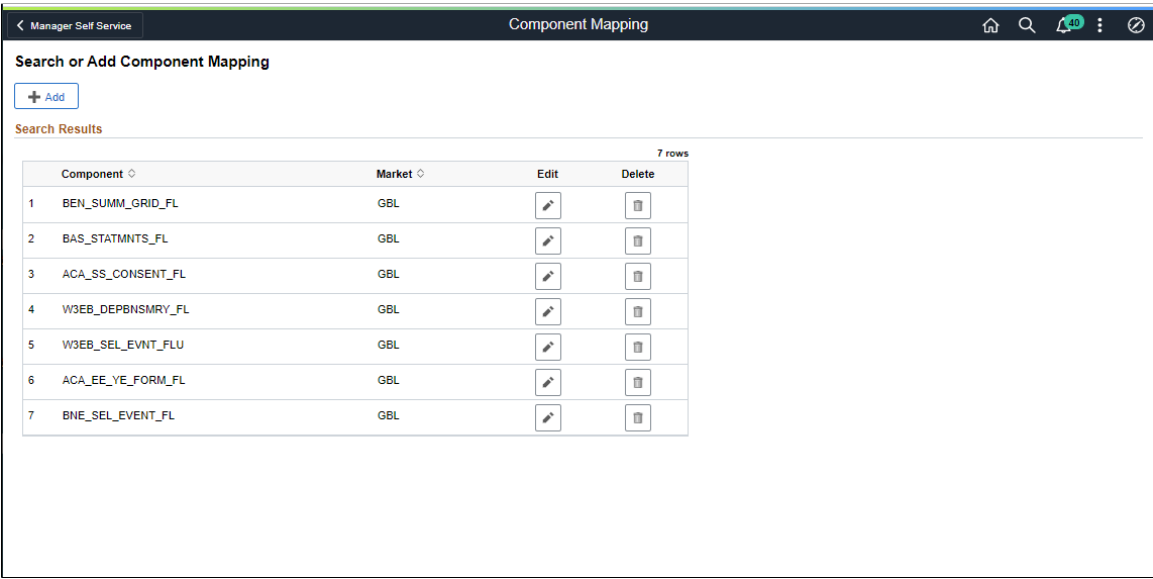
Component Mapping Page

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:

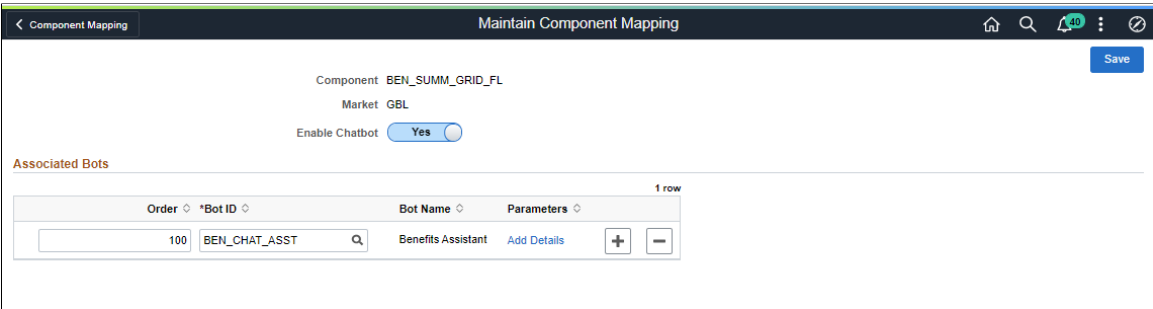
Enterprise Components > Chatbot Configurations > Component Mapping

This example illustrates the fields and controls on the Component Mapping Page.



Field or Control	Description
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 on the component pages.

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.

Pages Used to Communicate with the Benefits Assistant Chatbot

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Benefits Assistant Tile</u>	HC_HGA_CHAT_ASST_FLU (cref for the tile)	Launch the Benefits Assistant chatbot from the Benefit Details Tile dashboard.
<u>Benefits Assistant Page</u>	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.

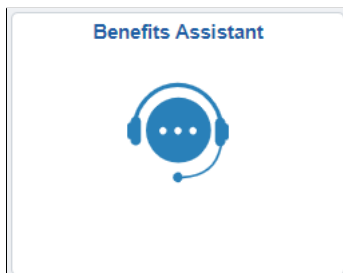
Benefits Assistant Tile

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

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.

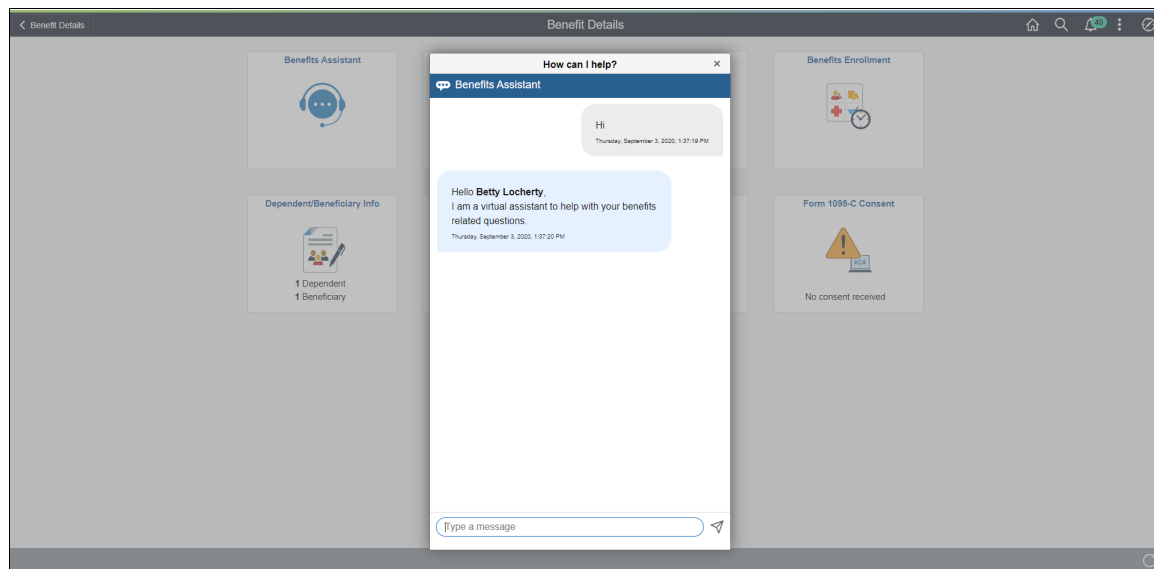
Navigation:

- 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.

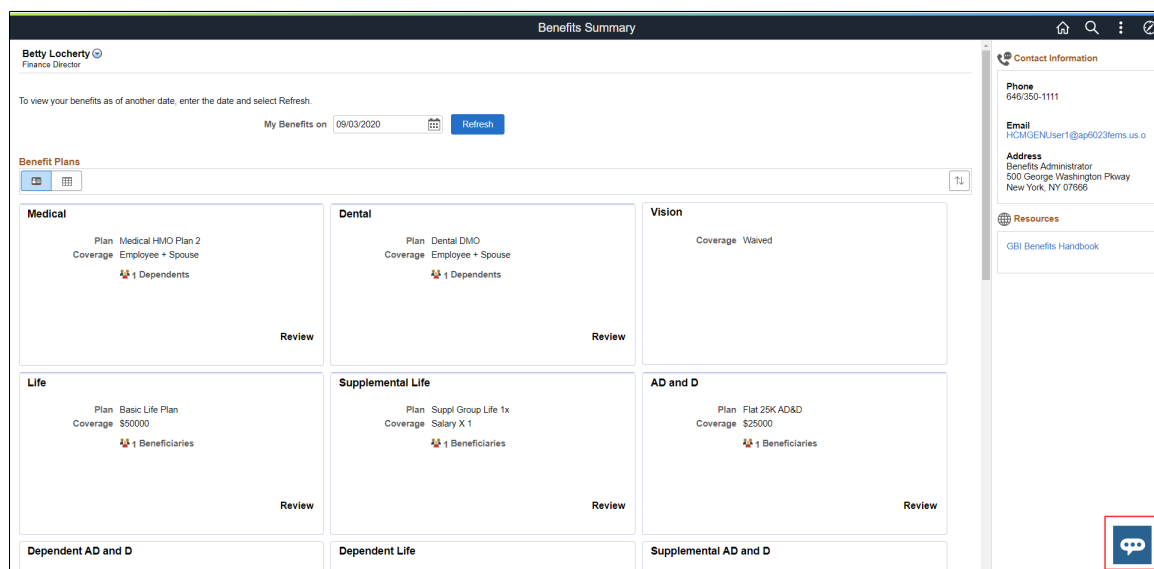
Note: The Benefits Assistant widget is not available on the Open Enrollment page.

- 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.

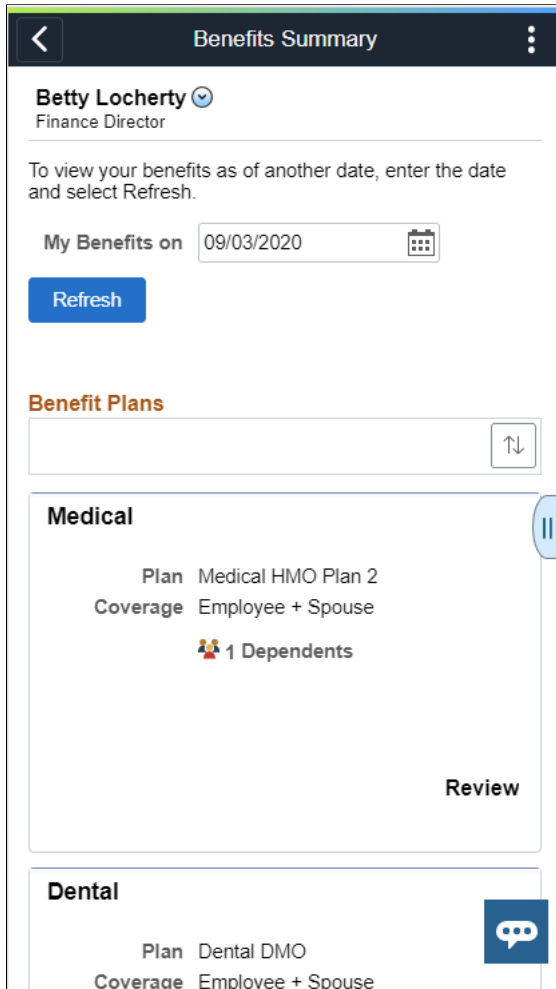
This example illustrates the Benefits Assistant page accessed from the Benefits Details Tile dashboard.



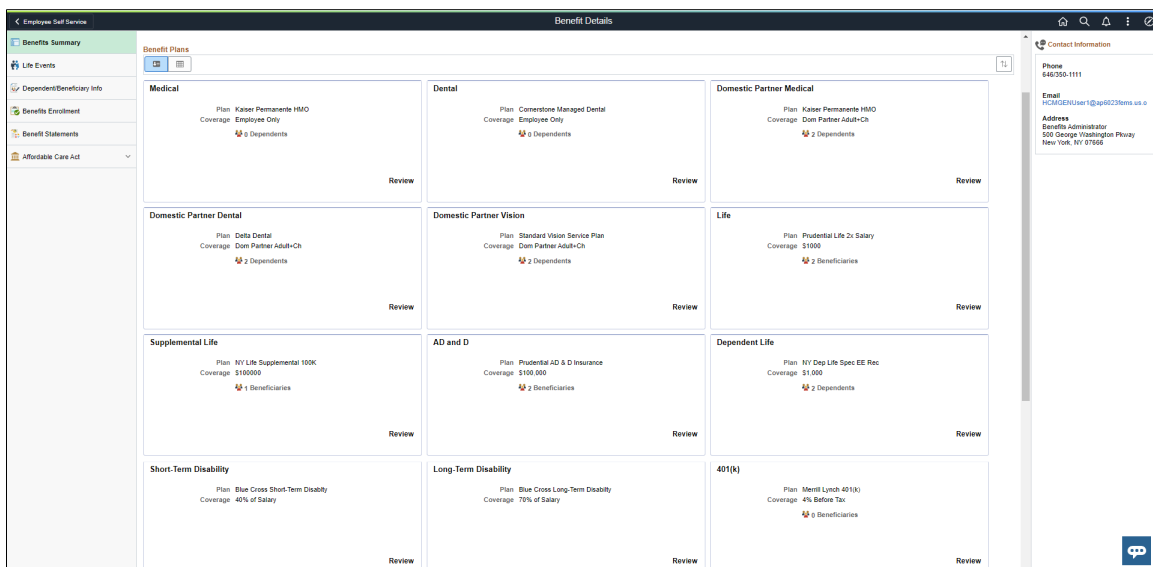
This example illustrates the Benefits Assistant widget as seen in a fluid Benefits Summary page on a laptop device.



This example illustrates the Benefits Assistant widget as seen on a smartphone.



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.

This example illustrates a general query on benefit plans.

The screenshot shows a chatbot window titled "How can I help?" with a close button (X). The chatbot's name "Benefits Assistant" is displayed in a blue header. The user's message, "Tell me about my benefit plans", is shown in a grey bubble with a timestamp of "Thursday, September 3, 2020, 3:56:09 PM". The chatbot's response, in a light blue bubble, asks the user to "Please select a benefit plan category for your enrolled benefit plans." and provides five buttons: "Health Benefits", "Life and Accidental Death", "Disability Insurance", "Savings Plans", and "Pension Plans". The timestamp for the chatbot's response is "Thursday, September 3, 2020, 3:56:12 PM". At the bottom, there is a text input field with the placeholder "Type a message" and a send button (paper plane icon).

This example illustrates a general query on benefit plans — Options list 1.

How can I help?

Benefits Assistant

enrolled benefit plans.

Health Benefits

Life and Accidental Death

Disability Insurance

Savings Plans

Pension Plans

Thursday, September 3, 2020, 3:56:12 PM

Health Benefits

Thursday, September 3, 2020, 3:56:42 PM

Please select a benefit plan to continue

Medical

Dental

Vision

Thursday, September 3, 2020, 3:56:43 PM

Type a message

This example illustrates a general query on benefit plans — Options list 2.

The screenshot shows a chat window titled "How can I help?". Inside, the "Benefits Assistant" header is followed by a prompt: "Please select a benefit plan to continue". Below this prompt are three buttons: "Medical", "Dental", and "Vision". A timestamp "Thursday, September 3, 2020, 3:56:43 PM" is displayed. Below the buttons, a message bubble shows the user has selected "Medical" with a timestamp of "Thursday, September 3, 2020, 3:57:06 PM". The assistant's response displays the user's medical plan details as of 08/01/2000: "Plan Name - Medical HMO Plan 2", "Plan Provider - Kaiser Permanente", and "Coverage - Employee + Spouse". Below these details are three buttons: "View Dependents Enrolled", "View Latest Deductions", and "View Provider Details". At the bottom, there is a text input field with the placeholder "Type a message" and a send button.

Note: The options to view the latest deductions are available only for organizations with the PeopleSoft Payroll for North America.

This example illustrates a general query on benefit plans — latest deductions.

How can I help?

Benefits Assistant

Your Medical plan details as of 08/01/2000 are:

Plan Name - Medical HMO Plan 2
Plan Provider - Kaiser Permanente
Coverage - Employee + Spouse

View Dependents Enrolled

View Latest Deductions

View Provider Details

View Latest Deductions

Thursday, September 3, 2020, 3:57:49 PM

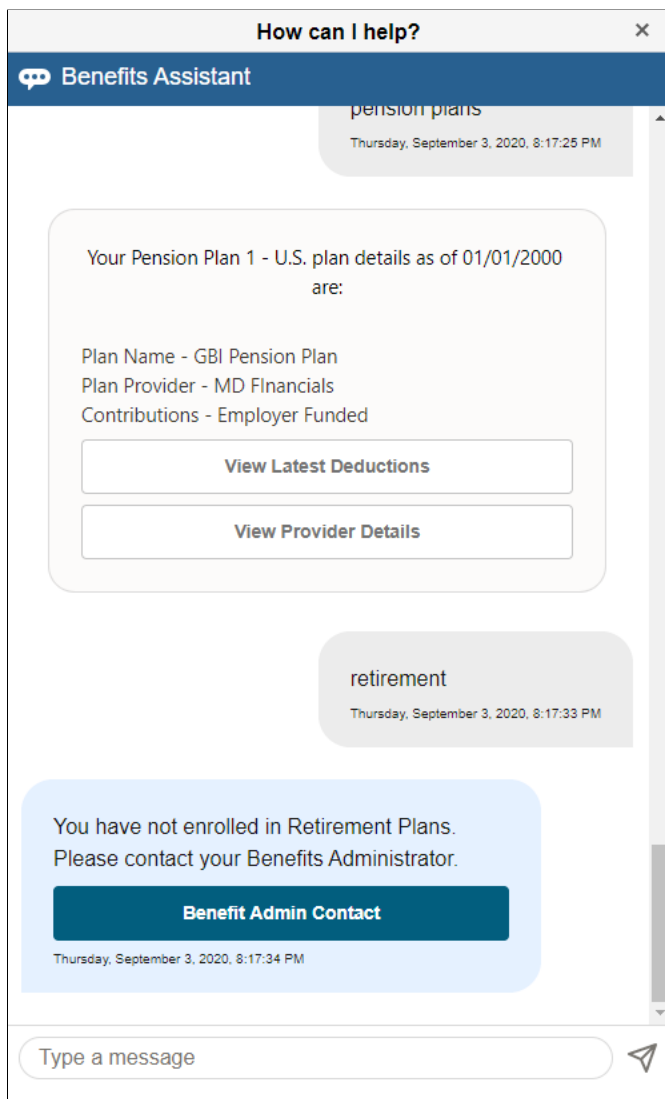
Your latest deductions for Medical plan, Medical HMO Plan 2 are:

Employee Contribution - \$57.23
Employer Contribution - \$57.23
Pay Period End Date - 03/21/2020

Type a message

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.

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.

This example illustrates a query for Dependents/Beneficiaries.

How can I help?

×

Benefits Assistant

Give me a list of my dependents and beneficiaries

Saturday, September 5, 2020, 1:11:05 PM

Please find details of your dependents and beneficiaries listed on your profile.

To view your enrolled Dependents or Beneficiaries, select the button

Person Name - Erik Mathers

Relationship - Spouse

Date of Birth - 10/12/1951

Dependent - Yes

Beneficiary - Yes

Dependent Enrollment(s)

Beneficiary Designation(s)

Type a message

➤

This example illustrates a query for Dependents/Beneficiaries.

How can I help?

Benefits Assistant

Relationship - Spouse
Date of Birth - 10/12/1951
Dependent - Yes
Beneficiary - Yes

Dependent Enrollment(s)

Beneficiary Designation(s)

Dependent Enrollment(s)
Saturday, September 5, 2020, 1:14:34 PM

Your dependent enrollment details are:

Medical HMO Plan 2
Erik Mathers - Spouse

Dental DMO
Erik Mathers - Spouse

Beneficiary Designation(s)

Type a message

This example illustrates a query for Dependents/Beneficiaries.

How can I help?

Benefits Assistant

Dental DMO
Erik Mathers - Spouse

Beneficiary Designation(s)

Beneficiary Designation(s)
Saturday, September 5, 2020, 1:15:18 PM

Your beneficiary designation details are:

Basic Life Plan
Erik Mathers - 100%(Primary)

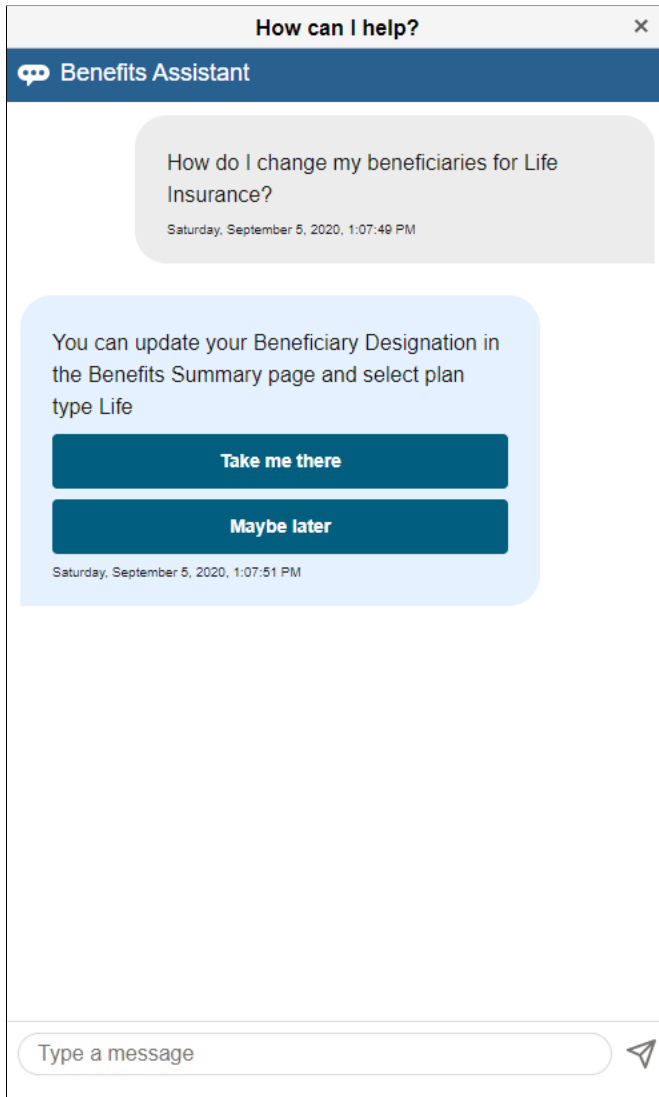
Suppl Group Life 1x
Erik Mathers - 100%(Primary)

Flat 25K AD&D
Erik Mathers - 100%(Primary)

Dependent Enrollment(s)

Type a message

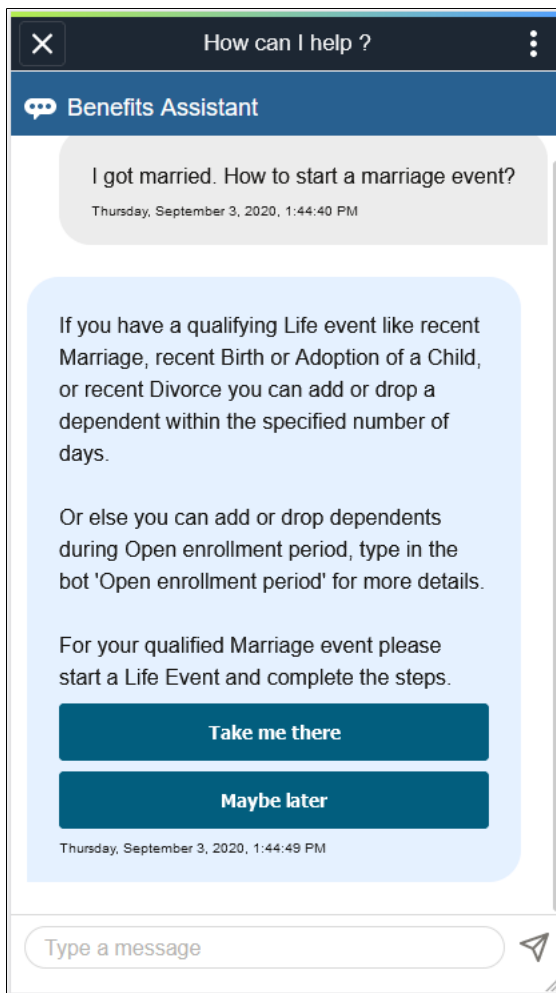
This example illustrates the query to the chatbot updating beneficiary designation.



Queries on Life Event

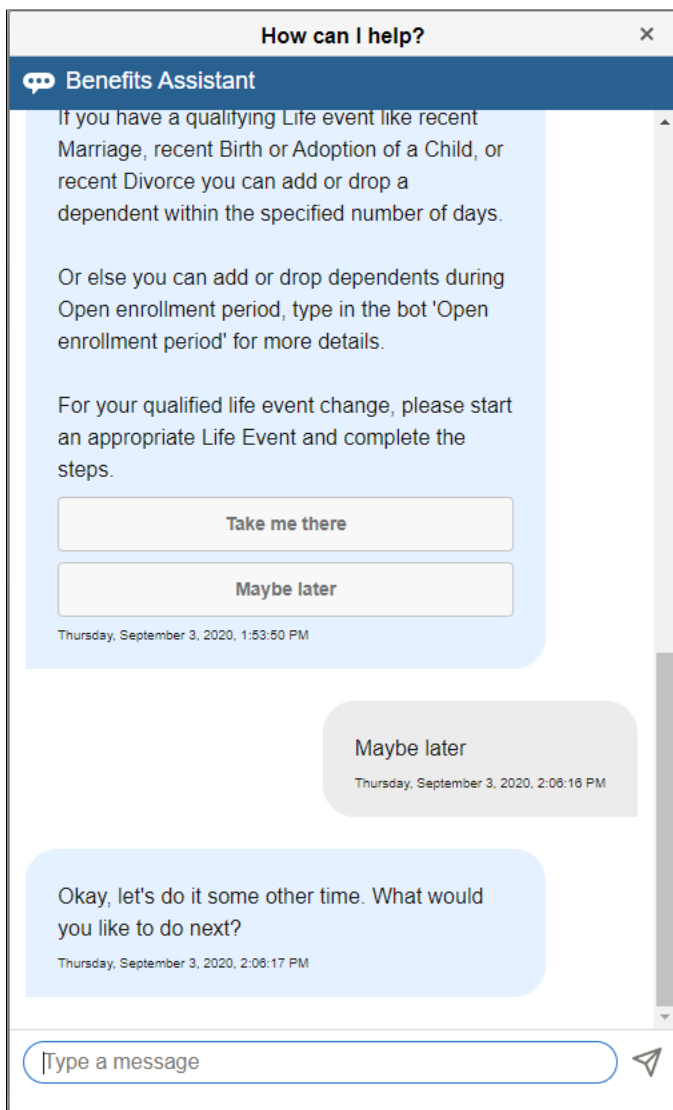
Employees can ask the chatbot how to start life events or how to update their dependents/beneficiaries based on recent life event changes like marriage, childbirth, adoption, divorce etc.

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.

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.

This example illustrates an answer to a query on Open Enrollment.

How can I help?

×

Benefits Assistant

When does the Open Enrollment start?
Friday, September 4, 2020, 2:11:35 PM

Your open enrollment for 2020 starts on 01/01/2020 and ends on 12/31/2020.

You will need to start enrollment and complete steps before 12/31/2020.

Take me there

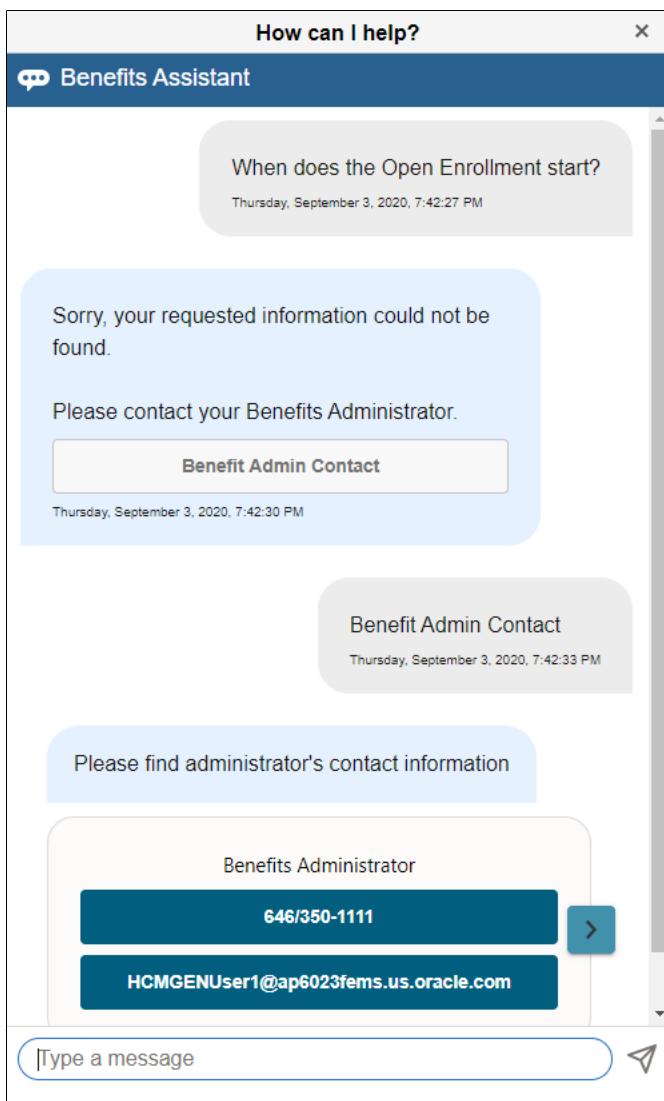
Maybe later

Friday, September 4, 2020, 2:12:12 PM

Type a message

Note: For organizations with only the PeopleSoft Base Benefits product, the Open Enrollment information is not available in the PeopleSoft system.

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.

This example illustrates a query on benefit plan cost.

How can I help?

×

Benefits Assistant

Tell me the cost of my benefit plan

Thursday, September 3, 2020, 5:11:39 PM

Please select a benefit plan category for your enrolled benefit plans.

Health Benefits

Life and Accidental Death

Disability Insurance

Savings Plans

Pension Plans

Thursday, September 3, 2020, 5:11:43 PM

Type a message

This example illustrates a query on benefit plan cost — Options list 1.

How can I help?

Benefits Assistant

enrolled benefit plans:

Health Benefits

Life and Accidental Death

Disability Insurance

Savings Plans

Pension Plans

Thursday, September 3, 2020, 5:20:13 PM

Savings Plans

Thursday, September 3, 2020, 5:21:34 PM

Please select a benefit plan to continue

401(k)

Profit Sharing

Employee Stock Purchase

Thursday, September 3, 2020, 5:21:35 PM

Type a message

This example illustrates a query on benefit plan cost — details

The screenshot shows a chat window titled "How can I help?" with a close button (X). The chat header identifies the "Benefits Assistant" with a speech bubble icon. The conversation begins with a system message: "Savings Plans" followed by a timestamp "Thursday, September 3, 2020, 5:13:11 PM". The assistant then prompts the user: "Please select a benefit plan to continue". Three buttons are provided: "401(k)", "Profit Sharing", and "Employee Stock Purchase". A timestamp "Thursday, September 3, 2020, 5:13:12 PM" follows. The user selects "401(k)", with a timestamp "Thursday, September 3, 2020, 5:13:13 PM". The assistant responds with a summary: "Your latest deductions for 401(k) plan, 401(k) Employer Pct Match are:". Below this, the details are listed: "Employee Contribution - \$200.00", "Employer Contribution - \$200.00", and "Pay Period End Date - 03/21/2020". At the bottom, there is a text input field labeled "Type a message" and a send button (paper plane icon).

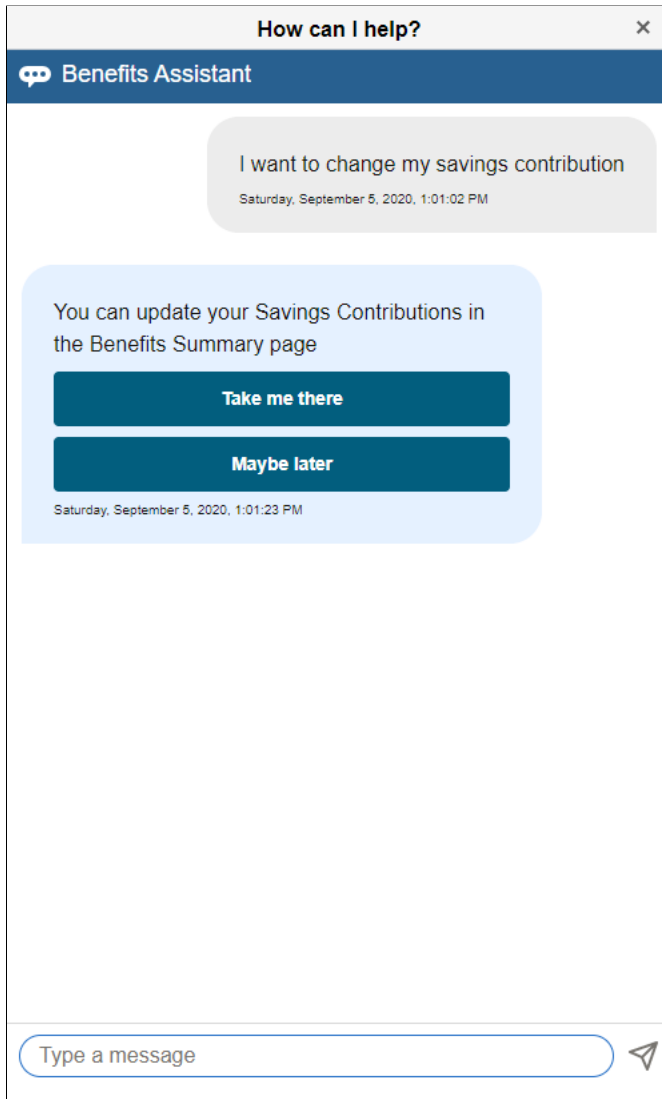
Note: The options to view the latest deductions are available only for organizations with the PeopleSoft Payroll for North America.

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.

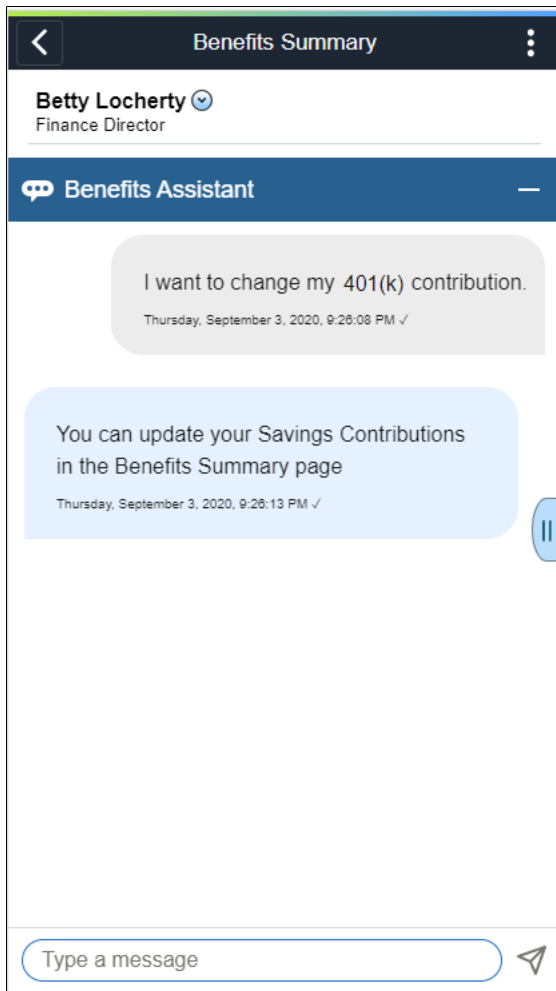
Note: Employees are able to change and update their savings contributions based on the setup on the Benefits Program Table.

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.

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**.

This example illustrates a query for the medical plan provider info.

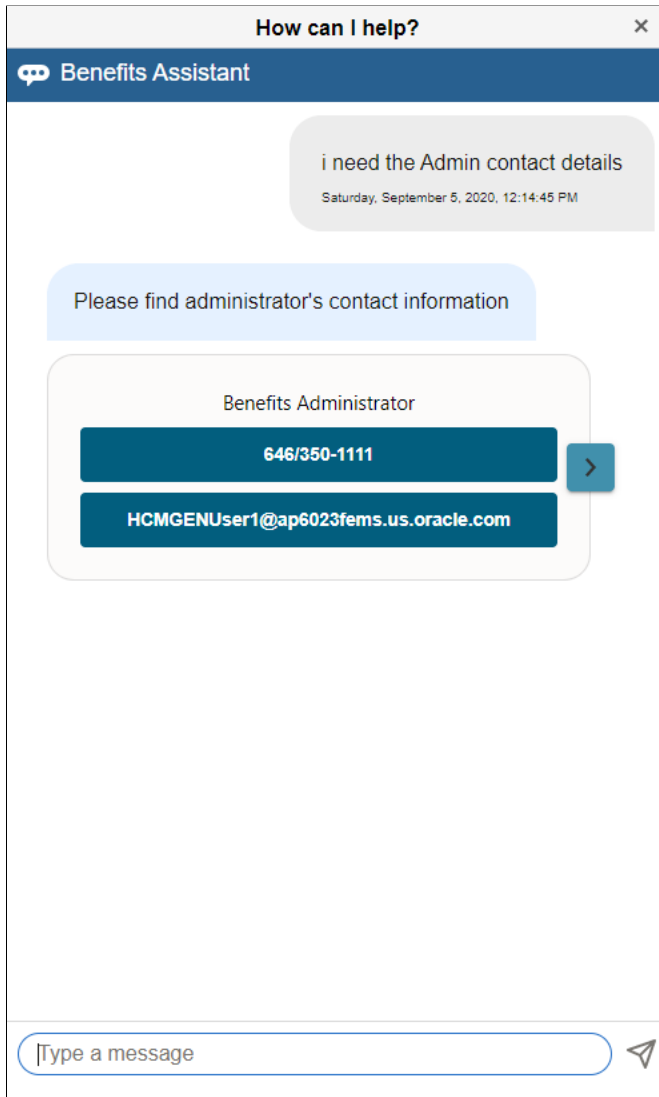
The screenshot shows a chat window titled "How can I help?" with a close button (X). Below the title bar is a blue header with a speech bubble icon and the text "Benefits Assistant". The chat history shows a user message: "I want to know the provider for my medical plan." with a timestamp of "Thursday, September 3, 2020, 6:35:28 PM". The assistant's response is contained in a light gray box with rounded corners. It starts with the text "Your Medical plan, Medical HMO Plan 2 provider is". Below this, it lists "Provider Name - Kaiser Permanente" and "Group Number - M55555". There are two blue buttons: the first says "Customer Service Phone: 555/782-1111" and the second says "Kaiser Permanente". At the bottom of the chat window is a text input field with the placeholder "Type a message" and a send button (chevron icon).

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" (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.

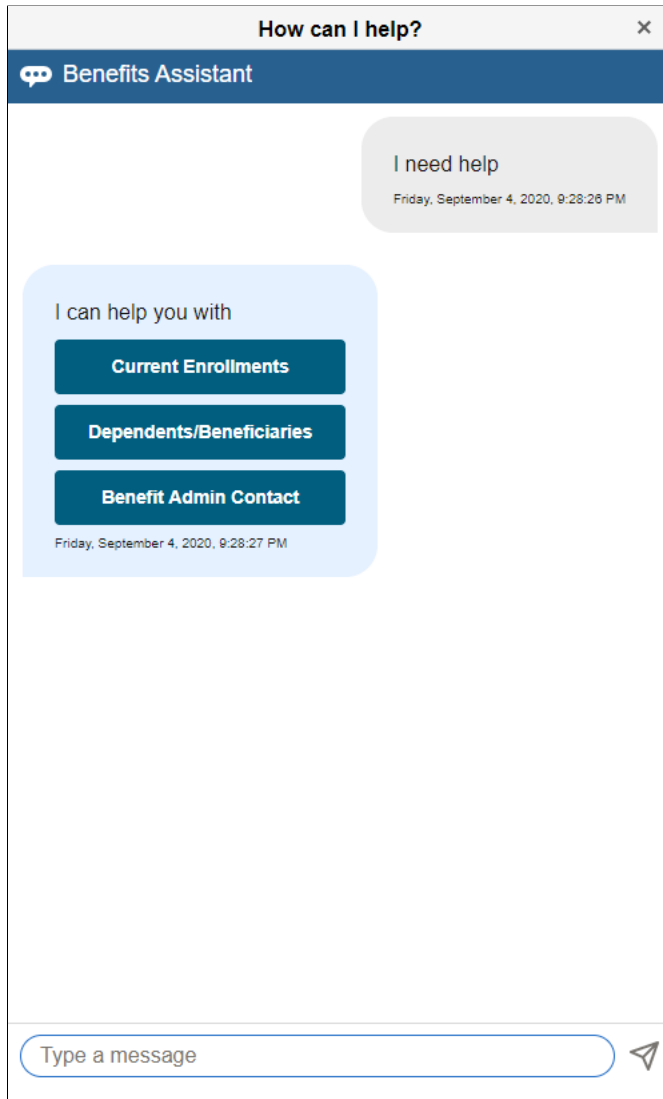
This example illustrates the Administrator Contacts.



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.

This example illustrates the Main Menu on the Benefits Assistant chatbot.



This example illustrates an example for a query with incorrect spelling.

How can I help?

×

 Benefits Assistant

Dnt Pln

Tuesday, September 22, 2020, 12:43:01 PM

I could not complete your request. Try rephrasing your request or select your preferred choice below

Tuesday, September 22, 2020, 12:43:03 PM

I can help you with

Current Enrollments

Dependents/Beneficiaries

Benefit Admin Contact

Tuesday, September 22, 2020, 12:43:03 PM

Type a message



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

<i>Information Type</i>	<i>Description</i>
Event Description	Dependent enrollments.
Action Description	The system notifies the benefits administrator of dependent enrollments.
Notification Method	Worklist.

Workflow Objects

<i>Information Type</i>	<i>Description</i>
Event	W3EB_DEP_WF
Workflow Action	Automatic
Role	Benefits administrator
Notification Form	Worklist
Business Process	Benefits WF Dependents Notification CI

Information Type	Description
Business Activity	Find dependent enrollments.
Business Event	Notification

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

<i>Information Type</i>	<i>Description</i>
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.
Notification Method	Worklist

Workflow Objects

<i>Information Type</i>	<i>Description</i>
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
Notification Form	Worklist
Business Process	Benefits WF Notification CI
Business Activity	Find terminations.
Business Event	Notification

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

Report ID and Report Name	Description	Run Control Page
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
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

Report ID and Report Name	Description	Run Control Page
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
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

Report ID and Report Name	Description	Run Control Page
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: <i>Submitted</i> , <i>Pending</i> , and <i>Ready To Pay</i> .	PRCSRUNCNTL
FSA002 FSA Account Closure	Initiate an SQR that updates the account status to <i>Closed</i> for FSA participants who had an active FSA at the end of the calendar year.	RUNCTL_FSA002(CN)
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](#)

[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.

