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PeopleSoft

PeopleSoft HCM 9.2: PeopleSoft eBenefits

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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

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- 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.

Typographical Convention	***Description***
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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Typographical Convention	*Description*
⇒	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)

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- 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 eBenefits

Understanding PeopleSoft eBenefits

These topics discuss:

- eBenefits components.
- eBenefits roles and security.

eBenefits Components

eBenefits comprises self-service web transactions that interact with the PeopleSoft Human Resources (HR) system. Employees use eBenefits to review, add, and update their benefits information. This list summarizes the pages that employees use in eBenefits:

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

eBenefits Roles and Security

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

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

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

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

User profiles also control the data that each employee can access.

See product documentation for *PeopleTools: Security Administration* for more information.

eBenefits Transactions

eBenefits transactions include:

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

eBenefits Integrations

eBenefits integrates with the following PeopleSoft applications:

- Human Resources.
- Payroll Interface.
- Benefits Administration.
- Payroll for North America.

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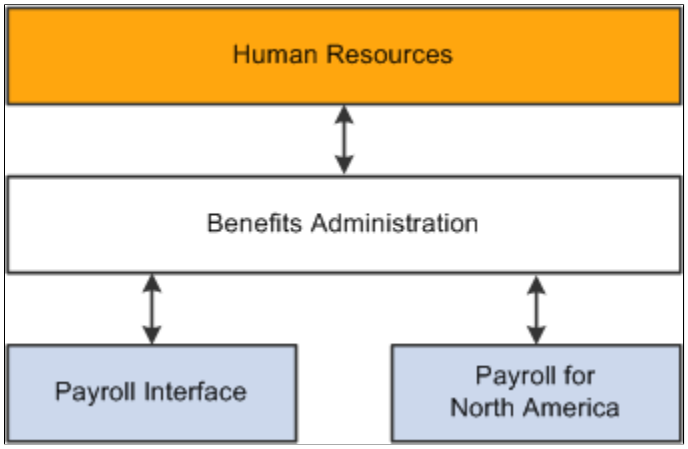
This example illustrates eBenefits integration flow with other PeopleSoft applications.



eBenefits Implementation

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, and business process maps.

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.

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Chapter 2

Setting Up eBenefits

Setting Up eBenefits

These topics describe how to:

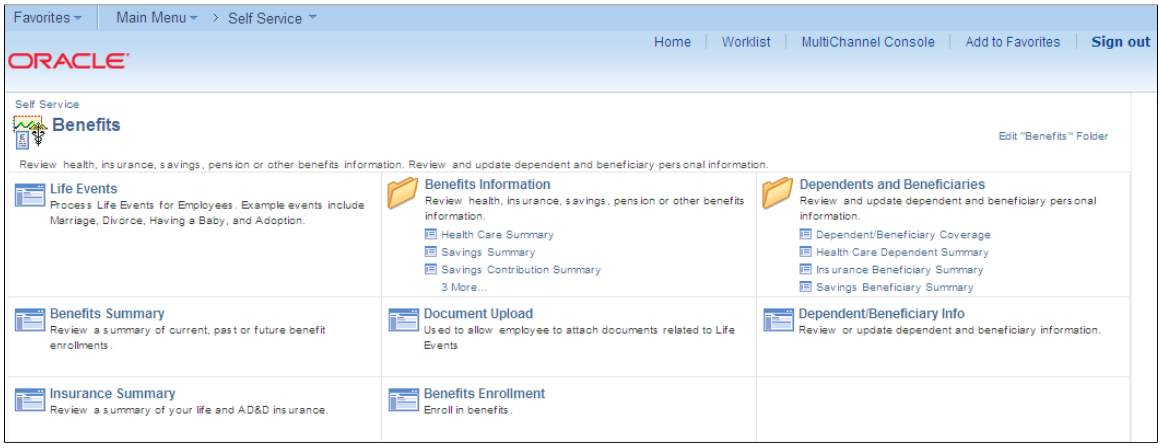
- Use PeopleSoft eBenefits pages.
- Set up page display information.
- Set up uniform resource locators (URLs).
- Establish text catalog data.
- Set up dependent workflow.
- Set up Document Attachment Framework and related content definition.
- Set up suppliers.

Using PeopleSoft eBenefits Pages

The standard menu-driven navigation path for PeopleSoft eBenefits is the traditional PeopleSoft access method that users of PeopleSoft applications are familiar with. The Benefits page presents a simple user interface design for end users. You access it by selecting **Self-Service** > **Benefits.**

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

This example illustrates the self-service Benefits page.



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Note: These Benefits pages have been replaced by equivalent pages in Fluid. For more information, see "Working With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface" (PeopleSoft Benefits Administration).

Setting Up Page Display Information

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

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

The fields that control how benefit plan information appears on the eBenefits plan summary and detail pages and on the enrollment form are located in one of the following pages or components:

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

Related Links

"Building Benefit Programs" (PeopleSoft Human Resources Manage Base Benefits)
"Defining Benefit Plans" (PeopleSoft Human Resources Manage Base Benefits)
"Defining Event Rules" (PeopleSoft Benefits Administration)

Displaying Dependent and Beneficiary Information

The **Collect Dep/Ben** check box appears on these pages:

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

Benefit Program - Plan Type and Option

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

Event Rules

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

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

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

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

Self-Service Group Box

To indicate that an employee can add new dependents through the eBenefits enrollment process, select **Allow Dep/Ben Additions** (allow dependent or beneficiary additions).

As the administrator, you can specify a certificate to be presented to the employee when he or she elects the specified plan type within eBenefits; enter this value in the **Certification ID** field.

Dependent Workflow

Each time a user of eBenefits modifies dependent data, the benefits administrator can monitor certain fields. If a participant changes a particular field value, then you are notified via email. The Dependent Workflow page enables you to select which fields trigger an email to be sent to the benefits administrator. The email notification contains both the old and new values of the fields modified.

See Setting Up Dependent Workflow.

Related Links

"Building Benefit Programs" (PeopleSoft Human Resources Manage Base Benefits)
"Defining Event Rules" (PeopleSoft Benefits Administration)

Displaying Savings Plan Fund Allocations

The **Collect Funds Allocations** check box appears on three pages:

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

Benefit Program - Plan Type and Option

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

Event Rules

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

This field works in concert with the **Ignore Investment Edits** check box for the event rule. If the **Collect Funds Allocations** check box is selected, then the **Ignore Investment Edits** check box should be deselected.

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Suppressing Plan Type Information

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

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 do not 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 does 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.

Displaying Costs

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

Displaying Credits

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

Setting Up the Self-Service Plan Descriptions Field

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

Setting Up Uniform Resource Locators

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

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

You enter the specific uniform resource locator (URL) address, description, and identifier on the URL table. When you have done this, enter only the identifying code in the Benefit Program, Vendor, and Benefit Plan tables.

The **SPD URL ID** field on the Benefit Plan Table page has priority over the**General Policy URL ID** field in the Provider/Vendor Table - Policy Information page when the system displays one or the other next to the plan provider.

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The following rules determine which URL appears next to the plan name on benefit plan review pages:

- If a URL identifier is associated with the **SPD URL ID** field on the Benefit Plan Table page, it is the link that appears on the benefit plan review page.
- If a URL identifier is associated with the **General Policy URL ID** field on the Provider/Vendor Table - Policy Information page and*no***SPD URL ID** value is defined on the Benefit Plan Table page, it is the link that appears on the benefit plan review page.

The **Authorized Providers URL ID** value on the Provider/Vendor Table - Policy Information page is independent of the links listed previously. If a URL identifier is connected to the**Authorized Providers URL ID** field, then that link appears on the Review page next to Find a Health Care Provider under the Additional Information section. This link is for health plan types only; no link appears for the other plan types.

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

Oracle recommends that you use a prefix naming convention in the PeopleSoft application, such as the one shown here:

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

See product documentation for *PeopleTools: System and Server Administration* for more information.

Setting Up Handbook Links

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

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

One URL can exist for the entire handbook or separate URLs for each plan type.

Setting Up General Policy Links

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

Setting Up Authorized Provider Links

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

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Setting Up Summary Plan Description Links

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

Establishing Text Catalog Data

eBenefits uses the text catalog to maintain the wording used on its self-service pages. Text blocks are a collection of paragraphs, sentences, phrases, and words that eBenefits uses when displaying the benefits enrollment and life event pages.

Use the Maintain Text Catalog page to update eBenefit text blocks. Enter HEB (eBenefits) as the object owner when searching for the available text catalog items. For life events, enter LE as the sub ID.

See “Configuring the Text Catalog” (Application Fundamentals).

Defining Text for Flexible Keys

For benefits enrollment pages, some page text is the same for all situations. Some of the text varies from benefit program to benefit program. Other text varies from plan type to plan type. Text can vary by plan type within benefit program, which can still vary by the type of event. To accommodate this, the system keys the text blocks by benefit program, plan type, and event class.

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

- The system looks for a match on the benefit program. It uses only those rows that match the benefit program or, lacking any rows that match the benefit program, uses the rows that do not have a benefit program.
- Within this set of rows, the system looks for a match on plan type. It uses only those rows that match the plan type or, lacking any rows that match the plan type, uses the rows that do not have a plan type.
- Within this set of rows, the system looks for a match on event class. It uses only the row that matches the event class or, lacking a match on event class, uses the row that does not have an event class.

For life event pages, the system keys the text blocks based on the life event type. If a life event type is left blank for a text catalog entry, the text block will be applicable to all life event types.

Identifying Field Lists

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

- Text ID − A character field that uniquely identifies the text block. Life event welcome and exit pages contain default text IDs Welcome and Print which can be modified.
- Language Code − The language for this text block.
- Description − A description of this text block.
- Effective Date − The date on which this text block takes effect.
- Benefit Program − A distinct benefit program or blank.

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- Plan Type − A distinct plan type or blank.
- Event Class − An event class or blank.
- Life Event Type − The type of life event or blank.
- Text − A long field containing the text block itself. The text can include up to five substitution variables.

Setting Up Delivered Text and Effective Dating

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

Setting Up Enrollment Form Technical Information

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

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

The parameters are:

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

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

&TextArea − For situations in which the function returns the text.

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

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

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

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

Setting Up Dependent Workflow

An employee can modify characteristics about a dependent at any time on the Dependent/Beneficiary Personal Information page.

An administrator can configure the Dependent Workflow page to trigger a notification of changes within eBenefits for validating both a benefits certification and dependent data.

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Page Used to Set Up Dependent Workflow

Page Name	*Definition Name*	*Usage*
Dependent Workflow Page	W3EB_DEP_WF	Identify which fields from the Dependent/Beneficiary Personal Information page trigger an email to the administrator.

Dependent Workflow Page

Use the Dependent Workflow page (W3EB_DEP_WF) to identify which fields from the Dependent/Beneficiary Personal Information page trigger an email to the administrator.

Navigation:

Set Up HCM > **Product Related** > **eBenefits** > **Dependent Workflow**

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This example illustrates the fields and controls on the Dependent Workflow page.

Field or Control	*Description*
National ID and Phone	The Fluid User Interface supports multiple entries for national IDs and phone numbers. When this check box is selected, every time any one of the national IDs or phone numbers is modified within the fluid Individual Dependent/Beneficiary Information page, the Benefits Administrator receives an email notification. **Note:** The classic version of the Dependent/Beneficiary Personal Information page has options to enter only one national ID and one phone number.
Email	The Email check box is only applicable for the fluid Individual Dependent/Beneficiary Information page, as the classic page does not have an email field.

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Setting Up Document Attachment Framework

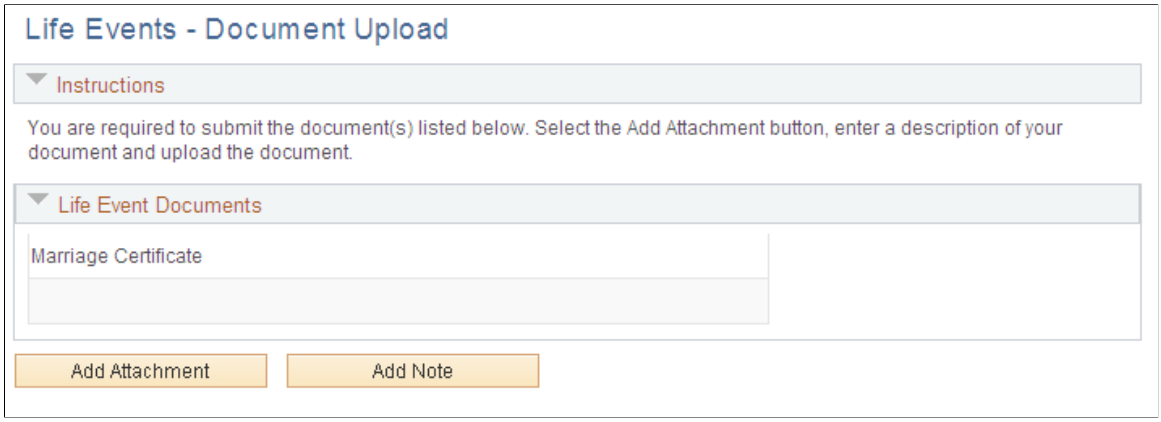
An employee can upload life event documents to PeopleSoft eBenefits using the HR Attachment Framework. Based on the type of life event being processed, the system displays the list of documents to be uploaded.

Page Used to Upload Life Event Documents

Page Name	*Definition Name*	*Usage*
Life Events - Document Upload Page	HR_ATT_DD_HDR	Upload life event documents.

Life Events - Document Upload Page

This example illustrates the Life Events - Document Upload page.



For information on where to approve a document request, see “Using Fluid Approvals to Approve Self Service Transaction Requests” (PeopleSoft eProfile Manager Desktop) and “Pages Used to Approve Self Service Transaction Requests Using Fluid Approvals” (PeopleSoft eProfile Manager Desktop).

Document Attachment Framework Setup

The following set up is required for the instructions on the Life Events - Document Upload page:

Object Type	*Name*
Text ID	ATT_HEADER_INSTR
Object Owner	HEB
sub ID	LE

The following setup is required for the Attachment Framework:

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- Define Authorizations
- Define Authorization Entries
- Define Attachments
- Configure Keys
- Maintain Definitions

Authorization ID	***Authorization Options***
BN_EDITATT	View and edit attachments
BN_VIEWATT	View attachments

Authorization Entry	***Description***
BN_ADOPTCERT	Adoption Certificate
BN_BIRTHCERT	Birth Certificate
BN_MARCERT	Marriage Certificate

Configuration ID	***Description***
BN_CERT	Certificates

Context Key	***Configuration ID***
Life Event Type	BN_CERT

Authorization Entry	***Life Event Type***
BN_ADOPTCERT	Adoption
BN_BIRTHCERT	Birth
BN_MARCERT	Marriage

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Setting Up Suppliers

This section provides an overview of how to set up suppliers.

Pages Used to Set Up Suppliers

Page Name	*Definition Name*	*Usage*
Merchant Profile Page	MERCHANTID	Activate the supplier.
Define FTP Parameters Page	BN_M_SUPPLIER_FTP	Define supplier FTP parameters, such as FTP address and password, that the system needs to communicate with the supplier.
Define Carrier Rpt Schedule Page	BN_M_SCHEDULE	Define carrier reporting schedule information that the system needs to send the correct information to the supplier.

Understanding How to Set Up Suppliers

eBenefits integrates with eBenX, which enables companies to use eBenX benefits data management and distribution services to distribute benefit enrollment data to their benefit providers.

To set up eBenX as a supplier:

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

Merchant Profile Page

Use the Merchant Profile page (MERCHANTID) to activate the supplier.

Navigation:

Set Up HCM > **Common Definitions** > **Supplier Administration** > **Merchant Profile**

Select the **Merchant Enabled** check box.

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

See product documentation for *PeopleTools: System and Server Administration* for more information.

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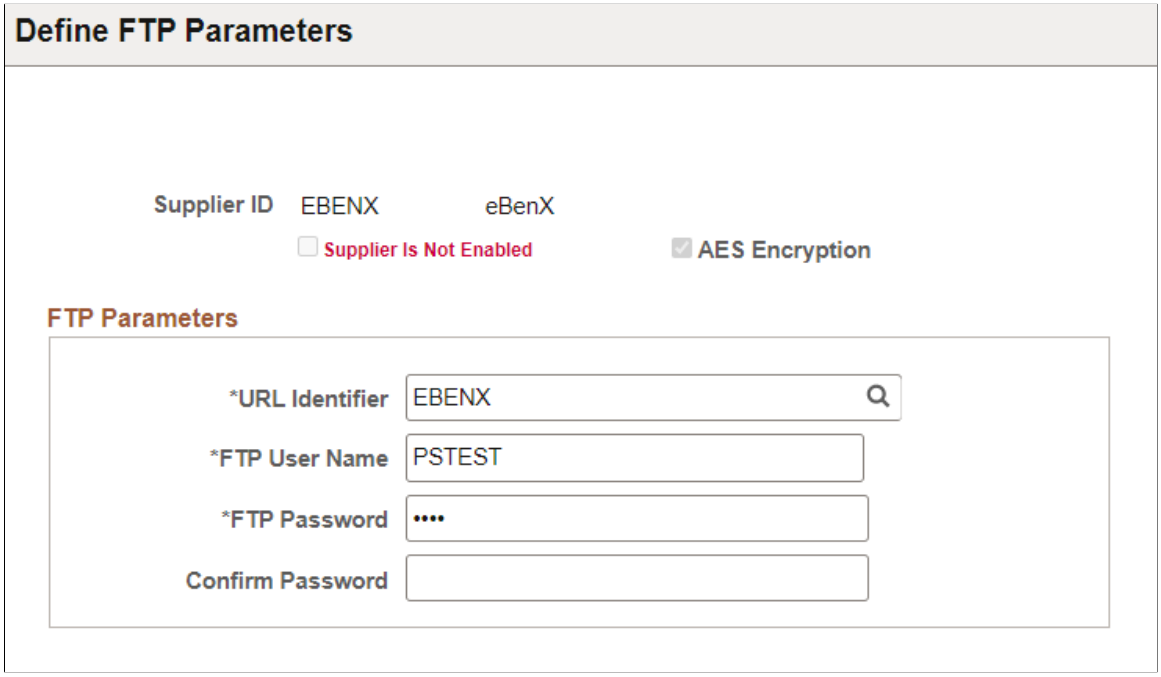
Define FTP Parameters Page

Use the Define FTP Parameters page (BN_M_SUPPLIER_FTP) to define supplier FTP parameters, such as FTP address and password, that the system needs to communicate with the supplier.

Navigation:

Set Up HCM > **Common Definitions** > **Supplier Administration** > **Carrier Report** > **Define FTP Parameters** > **Define FTP Parameters**

This example illustrates the fields and controls on the Define FTP Parameters page.



Field or Control	*Description*
Supplier ID	Displays the identification number that the system assigned to the supplier when the supplier was entered in the Merchant Profile page.
Supplier Enabled	Select to indicate whether you can transmit data to the supplier. If you deselect this check box, you must access to the Merchant Profile page and select the **Merchant Enabled** check box.

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Field or Control	*Description*
AES Encryption	Select to enable AES Encryption when you transmit the eBenX interface file to the supplier. AES Encryption uses the AES 128 encryption algorithm to encrypt the FTP password. When user selects this check box, the system prompts to enter the *FTP password* and the *Confirm Password*. On save, the **AES Encryption** check box becomes read only. There is no option to switch to old encryption. **Note:** This option is available from PeopleTools 8.60 and above.
FTP Address	Enter the supplier's FTP address.
FTP User Name	Enter your logon name. The eBenX representative will provide this information.
FTP Password	Enter the password that is assigned to you to access the supplier's site. The eBenX representative will provide this information.

Define Carrier Rpt Schedule Page

Use the Define Carrier Rpt Schedule page (BN_M_SCHEDULE) to define carrier reporting schedule information that the system needs to send the correct information to the supplier.

Navigation:

Set Up HCM > **Common Definitions** > **Supplier Administration** > **Carrier Report** > **Define Carrier Rpt Schedule** > **Define Carrier Rpt Schedule**

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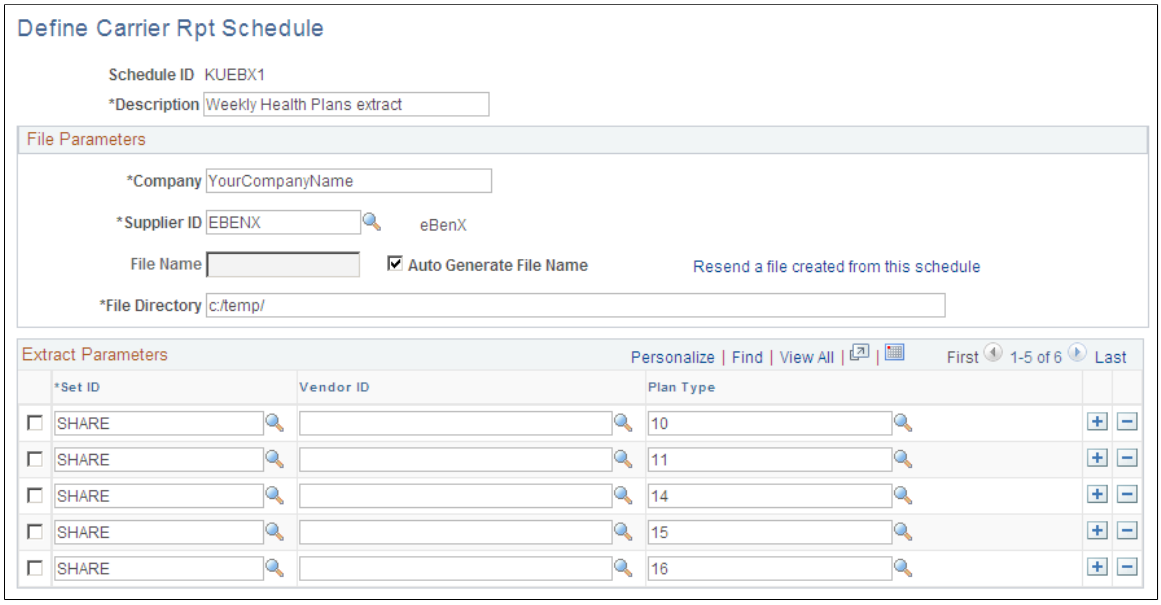
This example illustrates the fields and controls on the Define Carrier Rpt Schedule page.



Field or Control	*Description*
Schedule ID	Displays the unique identification code that is assigned to this schedule. It can be up to six characters long.
Company	Enter the name of your company. This information is included in the header section of the files that are sent to the supplier.
Supplier ID	Select the supplier ID from the list of valid options.
File Name	The name of the file sent to the supplier. You can create your own name or have the system generate a name for you. When creating your own name, make sure that it is a name that helps you easily identify the contents. If you run the Carrier Interface Schedule process more than once using the same name and directory, a sequence number is placed in front of the file name. For example, if you send a file with the name eBenX twice, the first and second file names will be eBenX.txt and 2eBenX.txt, respectively. To have the system generate a name, leave *File Name* blank and select *Auto Generate File Name.*
Auto Generate File Name	Select to create a file name for yourself. When you select this check box, the **File Name** field becomes unavailable for entry. The system creates the name using the following format: <Schedule ID name>_YYYY-MM-DD-HH.MM.SS.txt.
Resend a file created from this schedule	This link appears only if a file was created by this schedule. Click it to display the Resend File page.

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Field or Control	*Description*
File Directory	Enter the name of the directory located on the application server where the extract file is to be stored.
Extract Parameters	This group box enables you to select only the information that you want to extract from the BN_SNAP files for this supplier. You can enter more than one row of parameters.
Set ID	If you want enrollment information for a specific setID, select a setID from the list of available options. You must enter at least one setID.
Vendor ID	If you want enrollment information for a specific benefit provider, select a vendor ID from the list of available options. If you want information for all benefit providers, leave this field blank.
Plan Type	If you want enrollment information for a specific benefit plan type, select a plan type from the list of available options. If you want information for all plan types, leave this field blank.

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Chapter 3

Enrolling in eBenefits

Understanding the eBenefit Enrollment Process

Use the eBenefits enrollment pages to communicate to employees their benefit choices, communicate additional information that is necessary to process the benefits enrollment through the Benefits Certification form, and notify HR of employees' benefit elections.

Note: Benefits Enrollment pages have been replaced by equivalent pages in Fluid. For more information, see “Working With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface” (PeopleSoft Benefits Administration).

Communicate Benefit Choices

The enrollment process begins when the system creates an enrollment event and notifies the employee of the event. You can link to the Benefits Enrollment page from the Benefits page. From the Benefits Enrollment page, you can then access the Enrollment Summary page, where employees review eligible benefit elections, and link to all plan-type pages where elections can be made.

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

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

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

For all plan types, the system always shows the plans available and indicates whether the option of waiving coverage is available. However, you can modify the setup tables so that the system suppresses the plan types if the employees have no choice available.

Note: Calculation amounts that appear on the benefit enrollment pages are only estimated amounts. These amounts are estimated based on the event date and do not take the pay period date into account; actual amounts are calculated in batch for each pay period.

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Note: Because the system validates the relationship of a person to an employee, you cannot perform a benefit enroll for a dependent unless their relationship is defined as a qualified dependent relationship type.

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

Communicate Additional Information

The benefits administrator can decide whether a benefit plan has certain criteria that an employee needs to meet prior to enrolling. If so, a Benefits Certification appears when the employee clicks the **EDIT** button. The Benefits Certification contains a series of statements or questions presented to the employee. The administrator assigns a value for each certificate ID defined, and decisions are made regarding the participant's benefits based on the resulting scores. When you view the Enrollment Summary section of the Benefits Enrollment page, you can select a benefit plan in which to enroll.

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

Notify Human Resources of Elections

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

Pages Used to Enroll in Benefits

Page Name	*Definition Name*	*Usage*
Benefits Enrollment - Open Enrollment - Information Page	W3EB_ENR_INFO	View enrollment information. After your initial enrollment, the only time you can change your benefit choices is during open enrollment or a qualified family status change. This page provides you with additional information about your enrollment.
Benefits Enrollment - Open Enrollment Page	W3EB_ENR_SELECT	View enrollment information and information about an enrollment event. The enrollment process is initiated when eligibility and event rules have been processed to produce a list of valid benefit choices.
Benefits Enrollment - Open Enrollment (summary) Page	W3EB_ENR_SUMMARY	Review benefit plan elections. This page displays which benefit options are open for edits. All of your benefit changes are effective as of the date of the benefit change event. Your enrollment is not complete until you submit your choices to the Benefits Department.
Benefits Enrollment - Medical Page	W3EB_ENR_1X_ELECT	Review or elect health (medical) plan-type benefits.

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Page Name	***Definition Name***	***Usage***
Benefits Enrollment - Medical (summary) Page	W3EB_ENR_1X_SMRY	View all plans, coverage levels, and costs condensed into a single grid.
Benefits Enrollment - Life Page Benefits Enrollment - Supplemental Life Page Benefits Enrollment - Dependent Life Page Benefits Enrollment - AD and D Page Benefits Enrollment - Dependent AD and D Page	W3EB_ENR_2X_ELECT	Enroll dependents in life insurance plans.
Benefits Enrollment - Long Term Disability Page Benefits Enrollment - Short Term Disability Page	W3EB_ENR_357X_ELCT	Use the disability pages to enroll in disability benefits.
Benefits Enrollment - 401(k) Page Benefits Enrollment - Profit Sharing Page Benefits Enrollment - Employee Stock Purchase Page	W3EB_ENR_4X_ELECT	Enroll in savings plan benefits.
Benefits Enrollment - Leave Plans Page	W3EB_ENR_357X_ELECT	Enroll in leave plan benefits.
Flex Spending Health Page Flex Spending Dependent Care Page	W3EB_ENR_6X_ELECT	Enroll in FSA plan benefits.
Flex Spending Health (worksheet) Page Flex Spending Dependent Care (worksheet) Page	W3EB_ENR_6X_WKSHT	Estimate per-pay-period contributions.
Benefits Enrollment - Pension Plan Page	W3EB_ENR_8X_ELECT	Enroll in pension plan benefits.
Benefits Enrollment - Vacation Buy Page Benefits Enrollment - Vacation Sell Page	W3EB_ENR_9X_ELECT	Enroll in vacation plan benefits.
Submit Benefit Choices Page	W3EB_ENR_SUBMIT	Submit your benefit choices to the system.

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Page Name	*Definition Name*	*Usage*
Submit Confirmation Page	W3EB_ENR_CONFIRM	Confirm that your benefit choices have been submitted to the system.

Related Links

Suppressing Plan Type Information

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Chapter 4

Reviewing Benefit Information

Reviewing and Editing Health Plan Information

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

Note: This feature has been replaced by the Benefits Details functionality in Fluid. For more information, see "Working With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface" (PeopleSoft Benefits Administration).

These topics assume that the employee has completed the enrollment process and is accessing the Health Plan pages to review health plan information.

Pages Used to Review and Edit Health Plan Information

Page Name	*Definition Name*	*Usage*
Health Care Summary Page	W3EB_GRID	Review health plan coverage.
Medical Page Dental Page Vision Page Domestic Partner Medical Page	W3EB_HEALTH_PLANS	Use the Medical page to review medical plan coverage. Use the Dental page to review dental plan coverage. Use the Vision page to review vision plan coverage. Use the Domestic Partner Medical page to review domestic partner medical plan coverage.
Health Care Dependent Summary Page	W3EB_DEPSMRYBYNM	Review dependents covered under health plans.

Related Links

Understanding the eBenefit Enrollment Process

Reviewing Insurance Plan Information

This section assumes that the employee has completed the enrollment process and is accessing insurance plan pages to review insurance plan information or to modify his or her beneficiary allocations.

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Note: This feature has been replaced by the Benefits Details functionality in Fluid. For more information, see “Working With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface” (PeopleSoft Benefits Administration).

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

Pages Used to Review Insurance Plan Information

Page Name	*Definition Name*	*Usage*
Insurance Summary Page	W3EB_GRID	Display summary information about all insurance plan types for which you are enrolled. This page includes links to plan-type detail pages and a link to the enrollment page.
Life Page Supplemental Life Page AD and D Page Dependent AD and D Page Dependent Life Page Supplemental AD and D Page	W3EB_LIFEADD_MAIN	Use the Life page to display information about your life insurance plan and access associated plan beneficiaries. Use the Dependent Life page to review dependent life insurance information. Use the Dependent Life AD/D page to review dependent AD/D insurance information.
Change Current Beneficiaries and Allocations Page	W3EB_LFE_CHG_ALLOC	View and update allocation information.
Short-Term Disability Page Long-Term Disability Page	W3EB_DISAADD_MAIN	Use the disability pages to display information about your disability insurance plan.
Insurance Beneficiary Summary Page	W3EB_LIFINSALLBYNM	Review beneficiary insurance information and allocations.

Reviewing Savings Plan Information

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

Note: This feature has been replaced by the Benefits Details functionality in Fluid. For more information, see “Working With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface” (PeopleSoft Benefits Administration).

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Pages Used to Review Savings Plan Information

Page Name	*Definition Name*	*Usage*
Savings Summary Page	W3EB_GRID	Review summary information about savings plans.
401(k) Page Profit Sharing Page Employee Stock Purchase Page Pension Plan Page	W3EB_VIEWSAVINGS	Review information about your savings plan, review covered beneficiaries, and change fund allocations
Change Current Savings Plan Contributions Page	W3EB_SAVPLAN1	Change current plans contributions.
View Savings Allocations Page Change Current Fund Allocations Page	W3EB_SAVEVWFUND	Review savings plans fund allocations and access pages that enable changes to fund allocations.
Change Current Fund Allocations Page	W3EB_SAVPLAN3_WRK	Change fund allocations.
Savings Contribution Summary Page	W3EB_VWALLSAVCONTR	View savings contributions for all plans.
Change Current Beneficiaries and Allocations Page	W3EB_SAVPLAN4_WRK	Change savings plan beneficiary allocations.

Calculating Pension Estimates

Employees use the Pension Estimates self-service transaction page to calculate and view their pension benefit estimates. They can create separate estimates to illustrate how different retirement dates could affect the pension benefit amount.

This section discusses how to enter pension estimate parameters.

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

Pages Used to Set Up and Calculate Pension Estimates

Page Name	*Definition Name*	*Usage*
Self Service Calculation Defaults Page	PA_SSV_DEFAULTS2	Define parameters for the Estimate Pension self-service transaction.

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Page Name	*Definition Name*	*Usage*
Pension Estimates Page	PA_I_ESTIMATE	Enter information to run the Estimate Pension calculation.
Pension Plan Estimates - Payment Options Summary Page	PA_I_RESULTS	Display a summary of the plans for which you qualify. This page appears only if you are eligible for more than one plan.
Pension Plan Estimates − Payment Options Details Page	PA_I_RESULTS_PLAN	Display a list of all the estimated benefit payment options for a specified plan. If you are eligible only for one plan, the system bypasses the Pension Estimates - Payment Options Summary page and directly accesses the user to the Pension Plan Estimates − Payment Options Details page.
Optional Forms Description Page	PA_I_OPFORM_DISP	Display a description of the payment options the company has defined for the available pension plans.

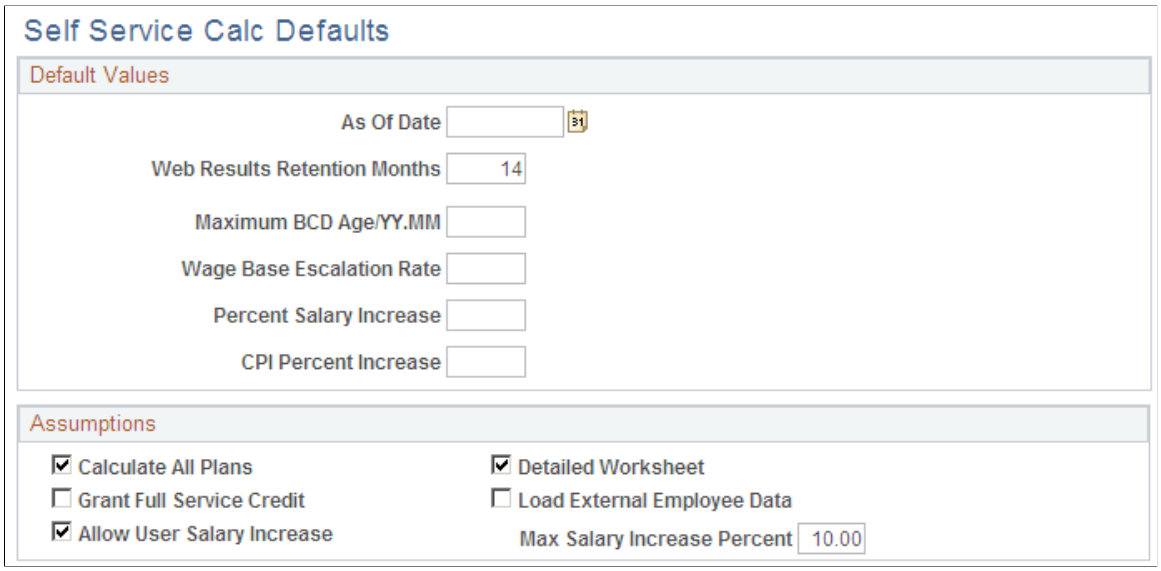
Self Service Calculation Defaults Page

Use the Self Service Calc Defaults page (PA_SSV_DEFAULTS2) to define parameters for the Estimate Pension self-service transaction.

Navigation:

Set Up HCM > **Product Related** > **Pension** > **Self Service Calc Defaults** > **Self Service Calc Defaults**

This example illustrates the fields and controls on the Self Service Calc Defaults page.



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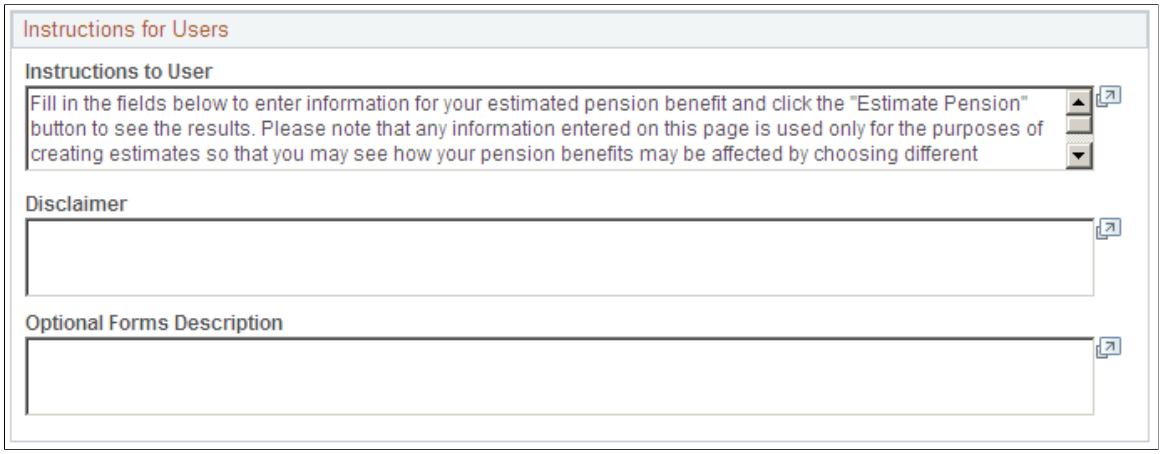
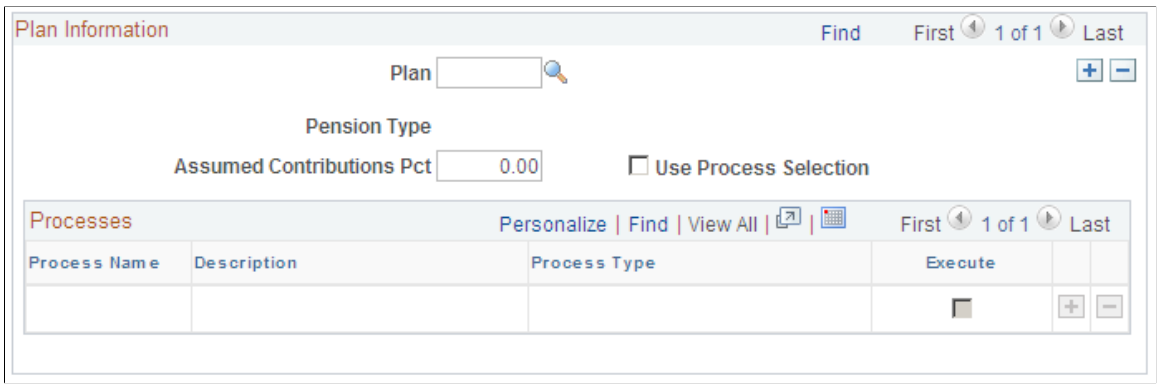
This example illustrates the fields and controls on the Self Service Calc Defaults page (2 of 3).



This example illustrates the fields and controls on the Self Service Calc Defaults page (3 of 3).



Default Values

Field or Control	*Description*
As Of Date	Because your plan rules are effective-dated, you need to enter an as of date for the rules. If you are reproducing a past estimate, this date ensures that you use only the data that was available at the time.
Web Results Retention Months	Enter the number of months that you want the database to retain the user's calculation results. Every time the user runs this Estimate Pensions calculation, it replaces the previous calculation results.
Maximum BCD Age/YY.MM (maximum benefit commencement date age)	Enter the maximum BCD age in YY.MM format.

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Field or Control	*Description*
Wage Base Escalation Rate	Enter the wage base escalation rate. The wage base escalation rate is the assumed rate of increase in the taxable wage base. This is used for Social Security calculations and it can also affect other calculation components, depending on the plan rules.
Percent Salary Increase	Enter the salary increase percentage. The salary increase percentage is the assumed rate of increase in periodic earnings.
CPI Percent Increase (consumer price index percent increase)	Enter the CPI percent increase. The CPI percent increase is the assumed rate of increase in the CPI-W table. This is used for Social Security benefit increases.

Assumptions

Field or Control	*Description*
Calculate All Plans	Select to have the system use all pension plans that have been defined in your Pensions Administration system.
Detailed Worksheet	Select to preserve intermediate results for reporting purposes.
Grant Full Service Credit	Select to have the calculation give the employee full credit for all the service that was forfeited because of a withdrawal of contributions.
Load External Employee Data	Select to have the the system run your own process to bring relevant employee data into the calculation linkage, where it is available to all the pension functions.
Allow User Salary Increase	Select to enable the user to select his or her own projected salary increase for use in the Estimate Pension calculation.
Maximum Salary Increase Percent	If you selected the **Allow User Salary Increase** check box, enter a maximum salary increase percent limit.

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Instructions for Users

Field or Control	*Description*
Instructions to User	Enter any instructions that you want the user to read. These instructions appear at the top of the Estimate Pension page.
Disclaimer	Enter information that appears to the user at the top of the Disclaimer page.
Optional Forms Description	Enter payment descriptions that users access by clicking the **Descriptions of Options for Forms of Payment** button on the Pension Plan Estimate - Eligible Plans page.

Plan Information

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

Plan Information - Processes

Field or Control	*Description*
Process Name	The process name is the name that your organization has assigned to the specific process; the description follows.
Process Type	The process type tells you how your organization defined the processing rules; you can disregard this field.

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Field or Control	*Description*
Execute	Select for every process that you want to run.

Reviewing Flexible Spending Account Information

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

Note: This feature has been replaced by the Benefits Details functionality in Fluid. For more information, see “Working With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface” (PeopleSoft Benefits Administration).

Flexible spending accounts (FSAs) are plans that enable employees to save money on out-of-pocket health or dependent care expenses by enabling them to pay with pretax dollars. There are two types of accounts — Health Care Spending Account (HCSA) and Dependent Care Spending Account (DCSA). In Health Care Spending Account (HCSA), employees can elect to contribute money on a pretax basis to this type of account and later reimburse themselves for certain qualifying medical expenses. In Dependent Care Spending Account (DCSA), employees contribute pretax dollars into this account and use it to reimburse themselves for day care expenses.

Pages Used to Review FSA Account Information

Page Name	*Definition Name*	*Usage*
Flexible Spending Accounts Page	W3EB_FSA_ACCT_LIST	Review flexible spending accounts activity.
Flexible Spending Account Review Page	W3EB_FSA_ACCT_DTLS	Review details of flexible spending accounts.
Flexible Spending Account Claim Details Page	W3EB_FSA_CLAIM_DTL	Review details of flexible spending accounts.
Flexible Spending Account Payment Details Page	W3EB_FSA_CLAIMPYMT	Review details about FSA claim payments.
Flexible Spending Account Payment Details Page	W3EB_FSA_PYMTCLAIM	Review details about FSA payments.

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Reviewing Dependent and Beneficiary Information

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

Pages Used to Review Dependent and Beneficiary Information

Page Name	*Definition Name*	*Usage*
Dependent and Beneficiary Coverage Summary Page	W3EB_DEPBEN_SUM	Display summary dependent/beneficiary benefit information.
Dependent and Beneficiary Information Page	W3EB_PERS_DTA_SMRY	Display a summary of dependent and beneficiary personal information.
Dependent/Beneficiary Personal Information Page	W3EB_DEPBEN_DETAIL	Review and update detailed dependent and beneficiary personal information.

Note: These pages have been replaced by equivalent pages in Fluid. For more information, see “Working With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface” (PeopleSoft Benefits Administration).

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Chapter 5

Managing Life Events

Understanding Life Events

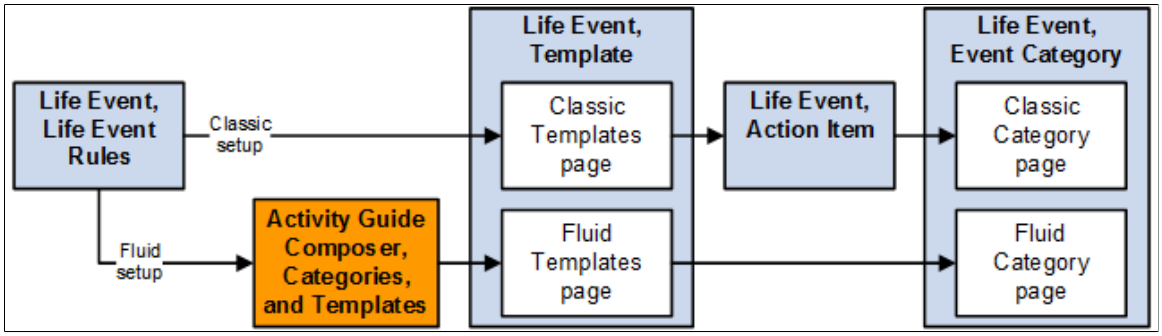
Life Events transactions can streamline the life event process for employees by enabling them to update personal data and then change their benefit enrollments, all from one self-service transaction. PeopleSoft eBenefits, by default, delivers four major life event transactions that have immediate impact 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 used different pages within the components to set up Life Events for classic versus Life Events for fluid. Regardless of the interface you choose to use, you will start by defining rules in the Life Event Rules table. If you are setting up life events for fluid, you will use the Activity Guide Composer pages (to set up your templates and steps. Next, you will access the Template component to identify the template as a Life Event template. This component consists of two pages: one for classic setup and one for fluid setup. To define the steps for classic life events, use the Action Item pages. Finally, use the Event Category pages to set up life event categories for the employee self service Life Event selection menu landing page.



In addition to the out-of-the-box life events, benefits administrators can create other life events based on the requirements of their organization. To create a life event, benefits administrators can:

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- Define and maintain life event templates and then create action items or steps that form part of the template.
- Clone an existing life event to create a new life event with similar requirements.

Defining Life Event Rules

These topics provide overview and setup information for life event rules.

Use the Life Event Rules (W3EB_LE_RULES) component to set up life event rules.

Page Used to Define Life Event Rules

Page Name	*Definition Name*	*Usage*
Life Event Rules Page	W3EB_LE_RULES	Set up rules that control how data and information is processed for life events such as changes in marital status, birth, or adoption.

Understanding Life Event Rules

Life Event Rules enable organizations to control what an employee can perform on a life event. By default, PeopleSoft eBenefits supports four Life Event Types: Marriage, Birth, Adoption, and Divorce. Customers can add new life event types and define a set of rules for each life event type according to the practices established by the organization.

Life event rules enable organizations to control whether an employee can automatically update the HR database while processing a life event, based on the practices established by the organization.

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

Update to HR Database	*Requirement*
Create BAS_ACTIVITY trigger	• **Benefits Administration** is selected on the Installation Table. • The employee has at least one job managed by PeopleSoft Benefits Administration as of the life event effective date. • **Allow Event Creation** is selected on the Life Event Rules page. • The employee enters the transaction within the period described by the Maximum Days to Notify parameter.

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Update to HR Database	*Requirement*
Create COBRA_ACTIVITY trigger	If an employee is managed by PeopleSoft Base Benefits, a COBRA activity is triggered when: • **COBRA Administration** is selected on the Installation Table. • **Benefits Administration** is not selected on the Installation Table. • **Proof 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 *Divorce.* • **Proof Required** is not selected on the Life Event Rules page.

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

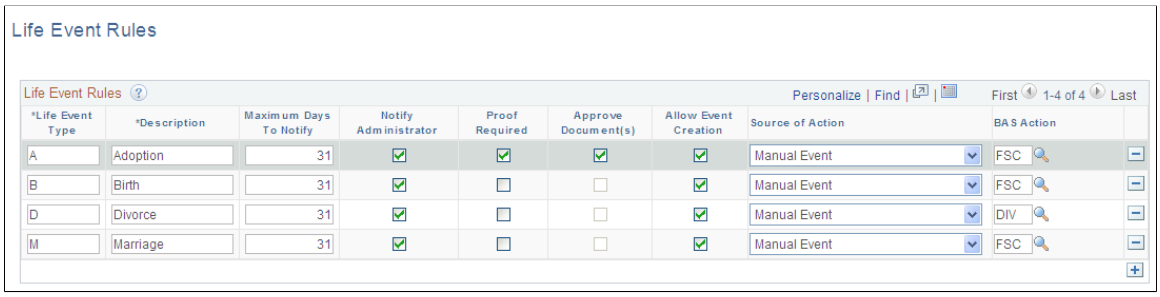
Life Event Rules Page

Use the Life Event Rules page (W3EB_LE_RULES) to set up life event rules that affect how data and information is processed for changes in marital status, birth, or adoption.

Navigation:

Set Up HCM > Product Related > eBenefits > Life Event > Life Event Rules > Life Event Rules

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



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.

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

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.

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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*
Classic Templates Page	W3EB_LE_LIST	Define life event templates for the classic Life Event pages.
Fluid Templates Page	W3EB_LE_FLU_LIST	Associate an Activity Guide Composer template with the Benefits Life Event template for the fluid Life Event pages.
Action Item Page	W3EB_LE_ITEM02	Create action items that define the steps an employee will perform to record and complete a life event using the classic Life Events pages.
Child Action Item Page	W3EB_LE_ITEM_SEC	Create sub-steps for a life event action item using the classic Life Events pages.
Dependent Action Item Page	W3EB_LE_DEPEND_SEC	Specify which life event action items must be completed by the employee prior to completing this action item when using the classic Life Events pages.

Understanding Life Event Templates (Including Action Items / Steps)

A template corresponds to a life event category type, such as a birth, death, marriage, or divorce. You can define a life event template and then specify action items or steps that form part of the template, based on your business requirements. For example, you can define an *Adoption Event* template and specify action items or steps that need to be processed to complete the adoption life event. Employees can then use the available life event template to process their life events.

The PeopleSoft application delivers the *Adoption Event*, *Birth Event*, *Divorce Event*, and *Marriage Event* templates for both classic and fluid users.

Action items or steps constitute the individual tasks that an employee needs to perform in order to complete a life event. When using classic Life Events, you will create action items. When using fluid Life Events, you will assign steps to your templates. Customers can define and group action items or steps to configure a life event based on their business needs. You can assign the order these should appear within a life event, indicate whether a task is required or not, define parent and child (subsidiary) relationships, and

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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.

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Important! When you include a change like adding additional steps in a category, you will need to clone or insert a new effective dated row in the templates that use this category with an effective date equal to or greater than the effective date of the category to utilize the new step in your templates. The system will not automatically insert steps into the template. By inserting a new effective dated row that is equal to or greater than that of the category, you can now opt to include the new steps into the template.

The following table lists the delivered steps for the *LIFEEVENT* category:

Step	***Description***
ADDRESS	Home and Mailing Address
BENEFIT ENROLL	Benefit Enrollment
BENEFIT SUMMARY	Benefit Summary
BIRTH DATE	Birth/adoption Date
CONTACT INFO	Contact Information
DEPBENE SUMMARY	Dependent/Beneficiary Coverage
DEPENDENTBENEF	Dependent and Beneficiary
DIRECT DEPOSIT	Direct Deposit
DOCUMENT UPLOAD	Document Upload
ELECTION REVIEW	Benefit Election Review
EMERGCONTACT	Emergency Contact
MARITAL STATUS	Marital/Divorce Status
NAME	Name
SUMMARY	Summary
TAX WITHHOLDING	Tax Withholding

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Step	*Description*
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.

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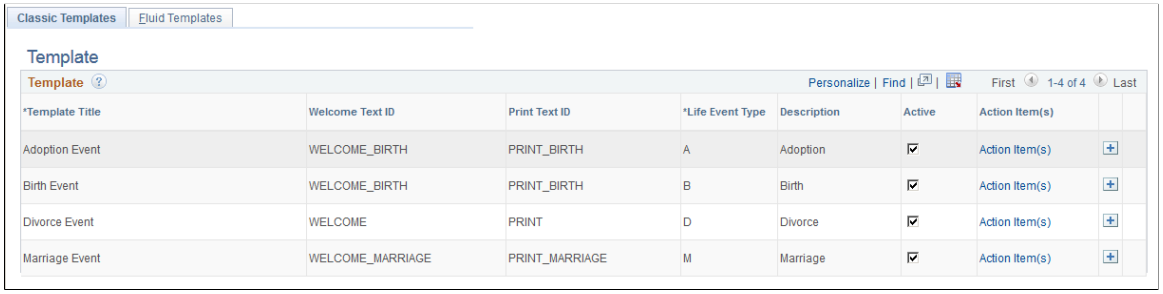
Classic Templates Page

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.



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 *HEB* and the sub ID is equal to *LE* on the Text Catalog are available for selection.
Print Text ID	Specify the text to be displayed on the completion and exit page of the Life Event component.
Life Event Type	Specify a life event type for each template. The HCM application provides Marriage, Birth, Adoption, and Divorce life events by default. In addition, you can create other life events specific to your organization using the Life Event Rules table.
Description	Displays the description for the selected life event type.

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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 - Classic Category Page, and therefore eligible to be included in the life event selection menu for the end user. For more information, see: Setting Up the Life Event Selection Menu
Action Item(s)	Select this link to access the Action Item component to create a list of transaction pages that should be part of the life event template. Action items are the various tasks a user may need to complete to record a life event change.

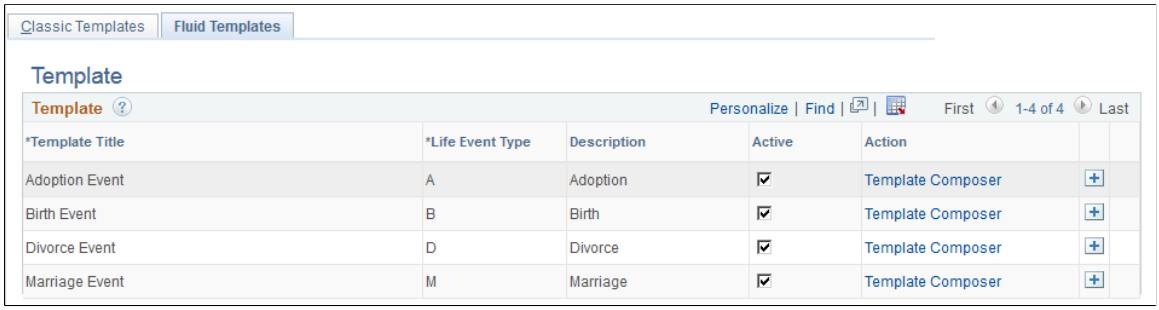
Fluid Templates Page

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.



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: • *Adoption Event* • *Birth Event* • *Divorce Event* • *Marriage Event* 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.

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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

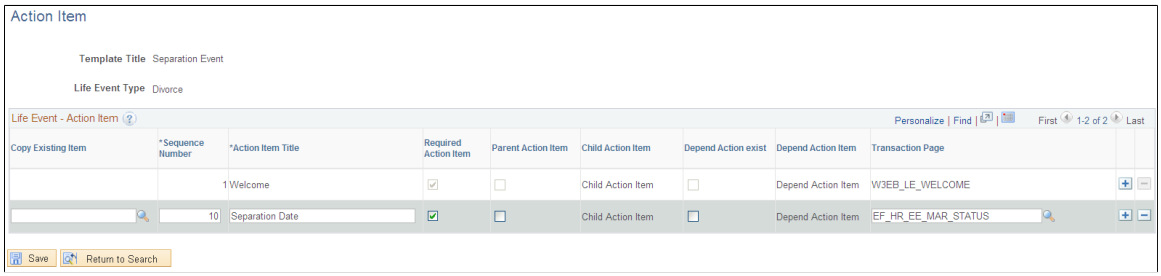
Use the Action Item page (W3EB_LE_ITEM02) to create action items that define the steps an employee will perform to record and complete a life event using the classic Life Events pages.

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.



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.

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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:*PeopleTools: Applications User's Guide*

For more information about developing and deploying action items, see: *PeopleTools: Portal Technology*

Child Action Item Page

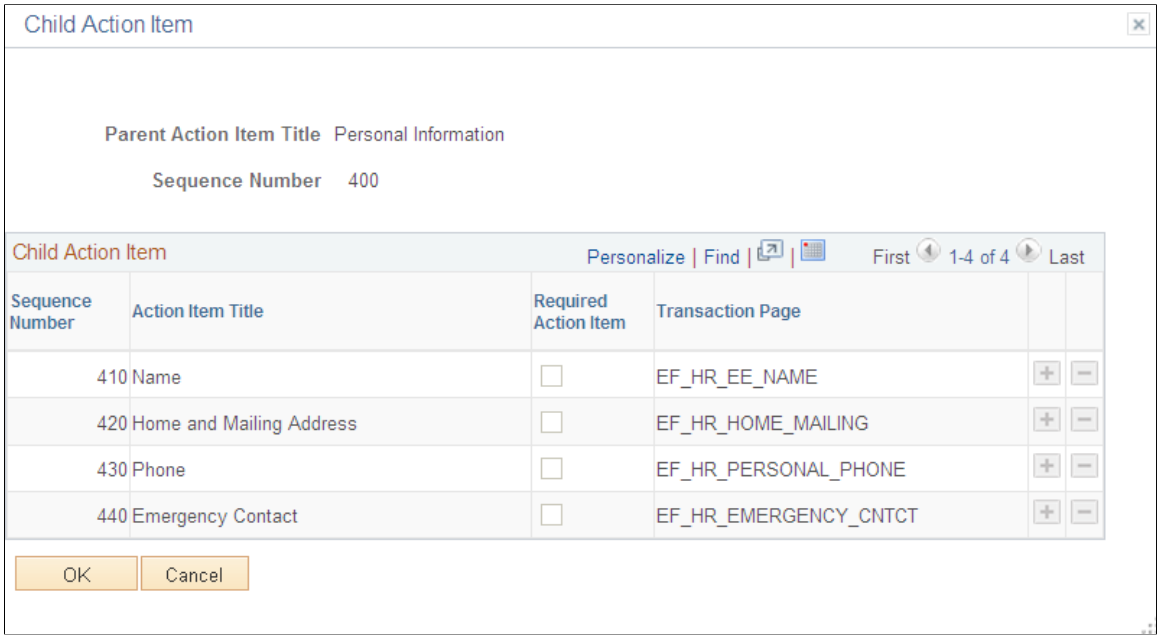
Use the Child Action Item page (W3EB_LE_ITEM_SEC) to define sub-steps of a life event action item when using the classic Life Events pages. Child item sequence numbers should have a number greater than the parent item.

Note: This page if for classic life events. Do not use this page if you are creating templates and steps for fluid Life Events. Use the “Activity Guide Templates Page” (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.



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 if for classic life events. Do not use this page if you are creating templates and steps for fluid Life Events. Use the “Activity Guide Templates Page” (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.

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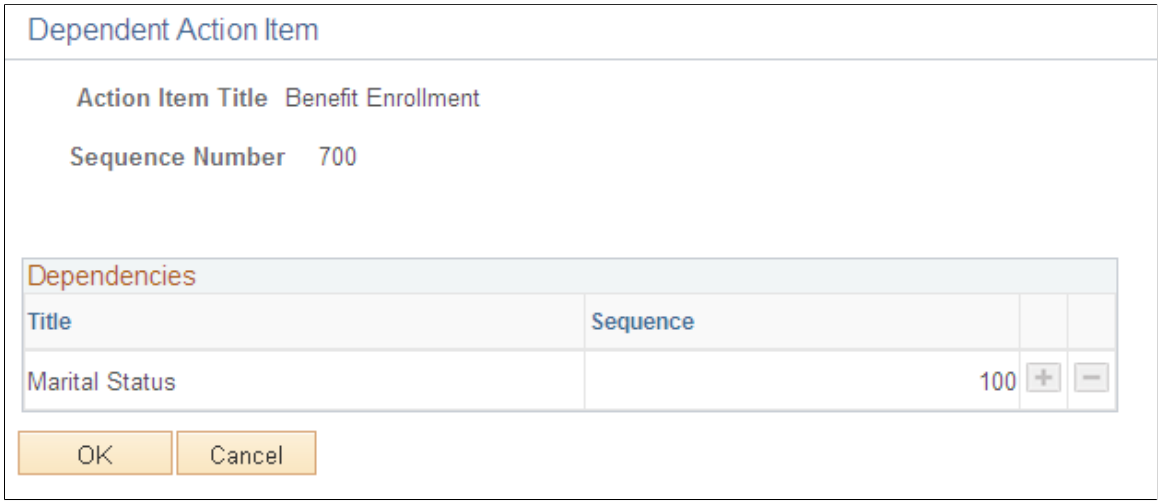
Navigation:

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.



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.

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.

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Page Used to Define the Life Event Selection Menu

Page Name	*Definition Name*	*Usage*
Classic Category Page	W3EB_LE_EVT_CAT	Set up life event categories for the classic employee self service Life Event selection menu.
Fluid Category Page	W3EB_LE_FLU_CAT	Set up life event categories for the fluid employee self service Life Event selection menu.

Classic Category Page

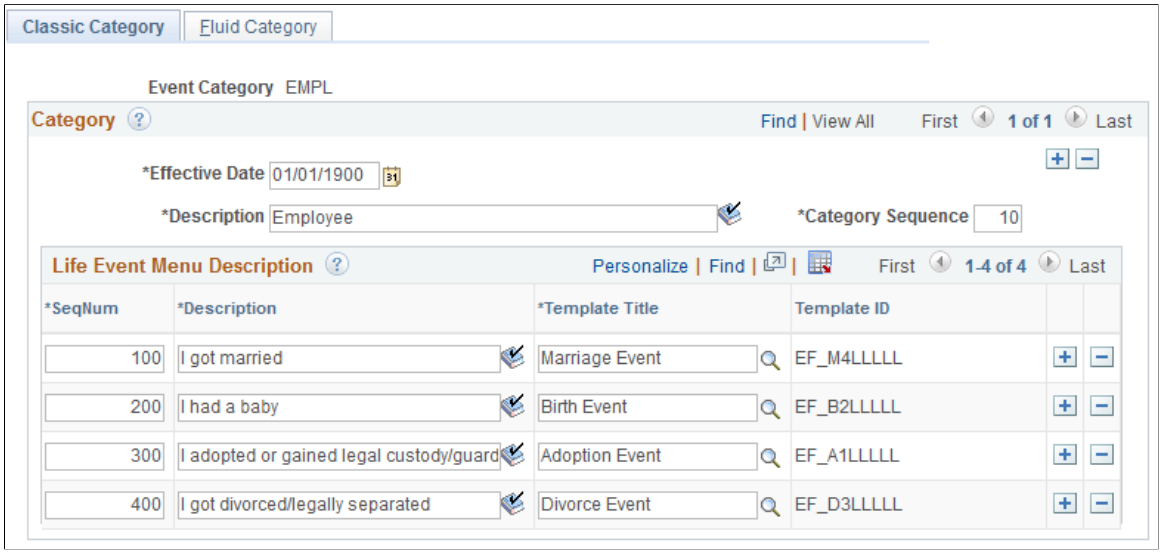
Use the Classic Category page (W3EB_LE_EVT_CAT) to set up life event categories for the classic employee self service Life Event selection menu.

Note: This page is for classic setup. If you want to set up categories for fluid Life Events, use the Fluid Category Page.

Navigation:

Set Up HCM > **Product Related** > **eBenefits** > **Life Event** > **Event Category** > **Classic Category**

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



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

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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.
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

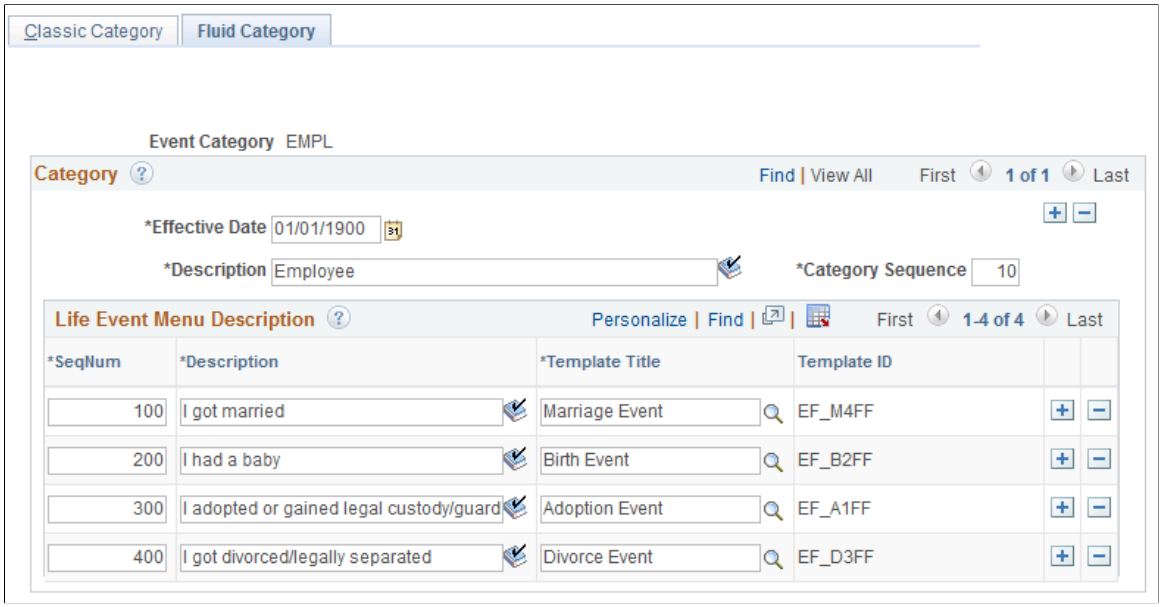
Use the Fluid Category page (W3EB_LE_FLU_CAT) to set up life event categories for the fluid employee self service Life Event selection menu.

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.



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.

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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: *EF_*, *x* (where *x* equals *A* for adoption, *B* for birth, *D* for divorce, or *M* for marriage). For example, an organization may create the template ID *EF_B100* for a birth, or *EF_D200* for a divorce life event. This naming convention, with the first 4 characters starting as such, must be followed to ensure that the Life Event templates are processed correctly. Activity Guide Composer template IDs must be seven characters in length so you can use the remain three characters for your own purposes.

Related Links

"Managing Activity Guide Templates" (Enterprise Components)

Creating Life Event Descriptive Pages

These topics describe how to create life event descriptive pages.

Understanding Life Event Descriptive Pages

Create life event descriptive pages to guide employees through the action items (pages) that they will need to complete for a self-service life event. After selecting a life event on the Life Event main page, the employee needs to follow a vertical pagelet containing action items to process the event. You can create descriptive Life Event pages such as a Welcome page to include a greeting, a brief description of the steps involved in this event, and any additional information the employee may want to read before proceeding to the actual event, or a custom Exit page to conclude the life event.

Page Used to Create Life Event Descriptive Pages

Page Name	*Definition Name*	*Usage*
Maintain Text Catalog Page	HR_SSTEXT_TEXT	Create life event descriptive pages.

Maintain Text Catalog Page

Use the Maintain Text Catalog page (HR_SSTEXT_TEXT) to create the descriptive pages. The Maintain Text Catalog page provides the flexibility to present custom instructions to the employees.

Navigation:

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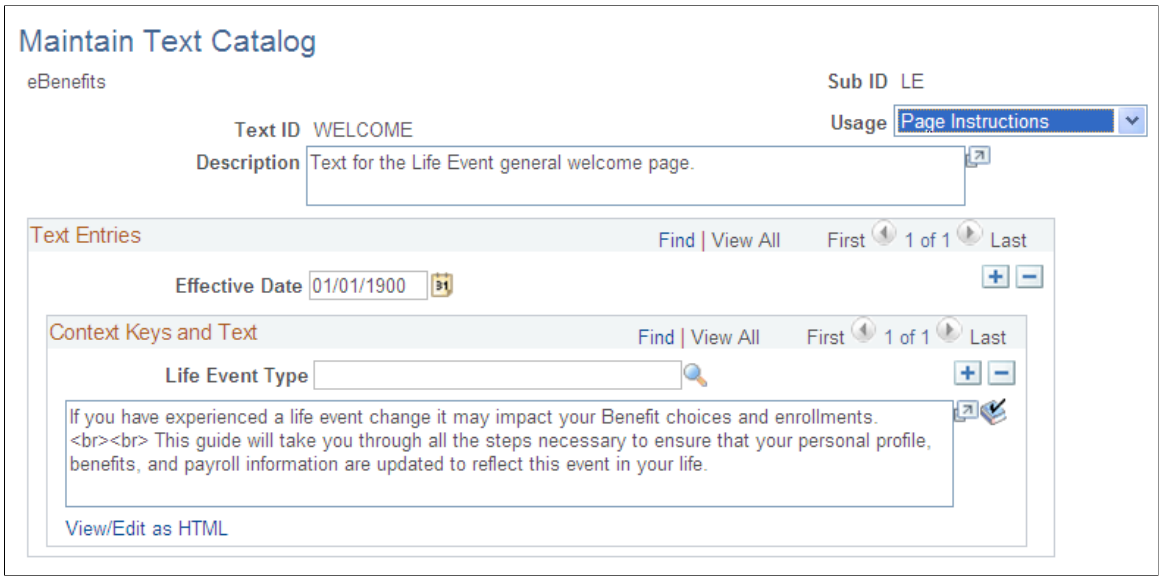
Set Up HCM > Product Related > eBenefits > Maintain Text Catalog > Maintain Text Catalog

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.



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.

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Context Keys and Text

Field or Control	*Description*
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

Configuring the Employee Enrollment Summary Statement

These topics describe how to configure the Employee Enrollment Summary Statement.

Understanding the Enrollment Summary Statement

After an employee completes a life event, a new Benefit Preliminary Enrollment Summary Statement report will be generated.

This report provides a summary of the employee's benefit election data and enables the employee to view the new elections after a life event change. The enrollment statement displays four main sections - the personal information, dependent information, investment, and dependent/beneficiary sections. You can configure the report to display or hide any of the four sections using the Enrollment Statement Controls setup page. The Enrollment Statement Controls setup page enables you to display or hide sections based on the life event type.

Page Used to Configure the Employee Enrollment Summary Statement

Page Name	*Definition Name*	*Usage*
Enrollment Statement Controls Page	W3EB_SMRY_CNTRL	Configure the preliminary benefit enrollment summary statement.

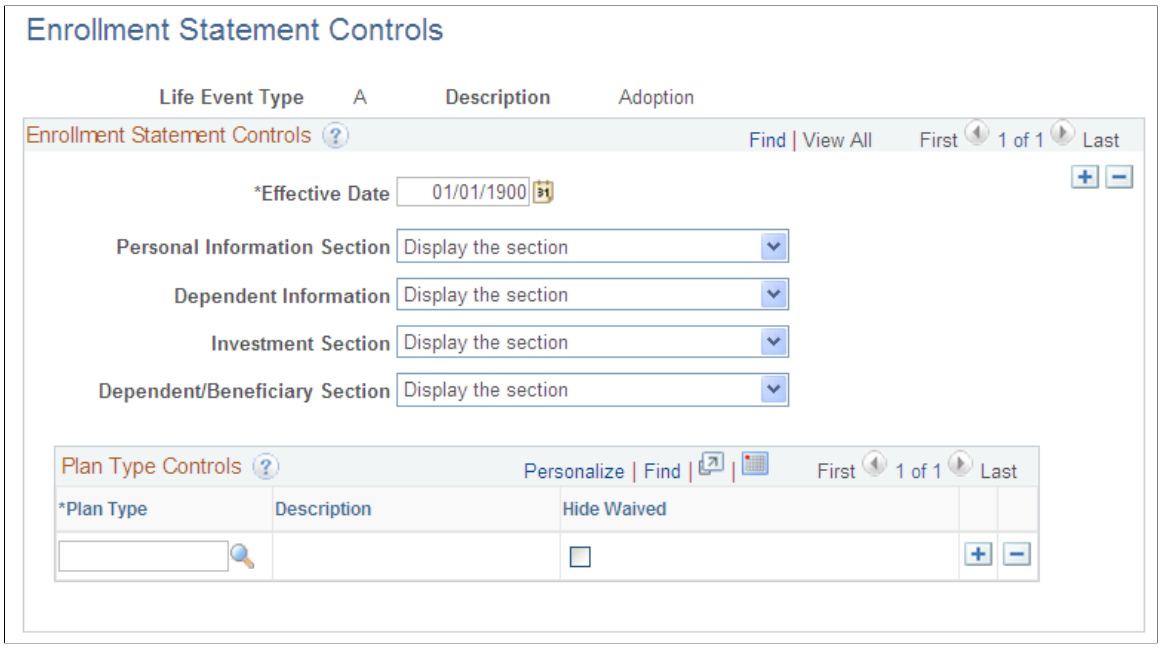
Enrollment Statement Controls Page

Use the Enrollment Statement Controls page (W3EB_SMRY_CNTRL) to configure the Benefit Preliminary Enrollment Summary Statement.

Navigation:

Set Up HCM > **Product Related** > **eBenefits** > **Enrollment Statement Controls** > **Enrollment Statement Controls**

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

Field or Control	*Description*
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.

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Plan Type Controls

Field or Control	*Description*
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).

- Fluid Life Events

  To access the fluid Life Events pages, from the fluid Employee Self Service landing page (or the landing page where you have placed the tile), select the Benefit Details Tile, and then select the Life Events option.

To process a life event, select your life event from the list of available life event on the selection page. An activity guide process guides you through the required sub-steps or action items to complete the life event. An activity guide page lists all the steps, or action items, within the life event. The status of each action item in the activity guide page changes as you navigate through the activity guide. The system provides easy navigation through the activity guide steps. You can stop processing a life event temporarily and continue at a later point, or you can completely cancel (delete) the life event instance. When you complete a life event, the activity guide provides a visual indication that all the action items and steps are complete.

You can perform the following activities while processing a life event:

- Upload documents required to process the life event. Based on the type of the employee life event being processed, the system displays the required document type(s) to be uploaded.
- Change benefits enrollment.
- Review your benefits election and go back to previous steps to make additional changes if necessary.

Note: At any given time, you can execute only one instance of a life event at a time (in either classic or fluid).

These topics describe how to process the following out-of-the-box life events:

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- 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 (Marital Status or Divorce Status Page)	HR_EE_MARITAL_ FL	Enter changes for a marital status and submit the changes.
Life Events — Document Upload Page	HR_ATT_DD_HDR	Life Events - Document Upload Page	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.

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Classic Page Name	*Classic Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Benefits Summary Page	W3EB_GRID	Benefits Summary Page	W3EB_GRID_FLU	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	Dependent/Beneficiary Info Page	W3EB_DEPBEN_ RVW	Update dependent/ beneficiary information.
W-4 Withholding Certificate Page	PY_IC_W4_DATA_ 2020	Pay and Compensation - “Tax Withholding Page” (PeopleSoft ePay)	PY_W4_MAIN_FL	Review and change tax information.
Direct Deposit Page	PY_IC_DD_LIST	Pay and Compensation - Direct Deposit Page	PY_IC_DD_LIST	Review direct deposit information.

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Classic Page Name	*Classic Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Benefit Enrollment Page	W3EB_LE_ENROLL	Benefit Enrollment Page	W3EB_LE_ENROLL	Start benefits enrollment and enroll for available benefits. **Note:** A dependency relationship is defined on the Marital Status Change action item and benefit enrollment. Hence, benefits enrollment will be available only if you have updated and submitted the martial status.
Benefits Election Review Page	W3EB_LE_CONFIRM	Benefits Statements Page	W3EB_LE_CONFIRM	Review benefits election. Click **Print** to generate a preliminary Benefits Enrollment Summary Statement containing your personal information and information about dependent/ beneficiary enrollment, benefits elections, and investment choices. Go back to any previous steps and make additional changes before completing the benefits enrollment.

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Classic Page Name	*Classic Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Event Completion and Exit Page	W3EB_LE_PRINT	Summary Page	AGC_SUMMARY_FL	Complete and exit the life event. View confirmation of the life event process completion. Additionally, view custom information about any additional tasks that you need to do related to this life event. When you click **Complete**, the system verifies whether all the required action items have been completed and displays an error message if any are incomplete.

See product documentation for *PeopleTools: Workflow Technology* for related information.

Processing the Child Birth Event

Employees begin the Child Birth transaction by navigating to Life Events and then selecting the **I had a baby** radio button. The system displays the Change Status Date page on which the employee needs to enter the date of child birth.

Note: An employee can also add a new spouse and other dependents from the life event for Marriage.

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	Welcome to <Transaction Name> Event Page	AGC_INFO_FL	Read the instructions on the Welcome page to initiate your child birth event. This page contains custom information about the life event.
Birth Date Page	W3EB_BRTH_ADPT _DT	Birth Date Page (Birth Date or Adoption Date Page)	W3EB_BRTH_ADPT _DT	Enter the date of child birth and submit.
Life Events — Document Upload Page	HR_ATT_DD_HDR	Life Events - Document Upload Page	HR_ATT_DD_HDR	Upload a proof document, for example, birth certificate for the life event, or enter a note relevant to the event.
Benefits Summary Page	W3EB_GRID	Benefits Summary Page	W3EB_GRID_FLU	Review your current benefits.
Dependent and Beneficiary Coverage Summary Page	W3EB_DEPBEN_ SUM	Dependent and Beneficiary Coverage Summary Page	W3EB_DEPBEN_ SUM	Review summary information about dependent/beneficiary benefits.
Add/Review Dependent/Beneficiary Page	W3EB_DEPBEN_ RVW	Dependent/Beneficiary Info Page	W3EB_DEPBEN_ RVW	Update dependent/ beneficiary information.
W-4 Withholding Certificate Page	PY_IC_W4_DATA_ 2020	Pay and Compensation - “Tax Withholding Page” (PeopleSoft ePay)	PY_W4_MAIN_FL	Review and change W-4 tax information.
Direct Deposit Page	PY_IC_DD_LIST	Pay and Compensation - Direct Deposit Page	PY_IC_DD_LIST	Review and change direct deposit information.

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Classic Page Name	*Classic Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Benefit Enrollment Page	W3EB_LE_ENROLL	Benefit Enrollment Page	W3EB_LE_ENROLL	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 Statements Page	W3EB_LE_CONFIRM	Review benefits election. Click **Print** to generate a preliminary Benefits Enrollment Summary Statement containing your personal information and information about dependent/ beneficiary enrollment, benefits elections, and investment choices. Go back to any previous steps and make additional changes before completing the benefits enrollment.
Event Completion and Exit Page	W3EB_LE_PRINT	Summary Page	AGC_SUMMARY_FL	View confirmation of the child birth event completion. Additionally, view custom information about any additional tasks that you need to do related to this life event. When you click **Complete**, the system verifies whether all the required action items have been completed and displays an error message if any are incomplete.

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Processing the Adoption Event

Employees begin the Adoption transaction by navigating to Life Events and then selecting the **I adopted or gained legal custody/guardianship of a child** radio button. The system displays the Change Status Date page on which the employee needs to enter the date of adoption.

After the employee accesses the transaction, the system displays a series of pages that direct the employee through the adoption process. Rules that are set on the Life Event Rules page and the Action Items for the Adoption transaction determine which pages will be displayed by the system.

Pages Used to Process the Adoption Event

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

Page Name	*Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Welcome Page	W3EB_LE_ WELCOME	Welcome to <Transaction Name> Event Page	AGC_INFO_FL	Read the instructions on the Welcome page to initiate the adoption event. This page contains custom information about the life event.
Adoption Date Page	W3EB_BRTH_ADPT _DT	Adoption Date Page (Birth Date or Adoption Date Page)	W3EB_BRTH_ADPT _DT	Enter the date of adoption and submit.
Life Events — Document Upload Page	HR_ATT_DD_HDR	Life Events - Document Upload Page	HR_ATT_DD_HDR	Upload a proof document, for example, adoption certificate, or enter a note relevant to the event. When you upload a document, a notification is sent to the Benefits Administrator to approve the document. After the document is approved, you will receive an e-mail notification to return to the Adoption event to continue benefits enrollment.
Benefits Summary Page	W3EB_GRID	Benefits Summary Page	W3EB_GRID_FLU	Review your current benefits.

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Page Name	*Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Dependent and Beneficiary Coverage Summary Page	W3EB_DEPBEN_SUM	Dependent and Beneficiary Coverage Summary Page	W3EB_DEPBEN_SUM	Review summary information about dependent/beneficiary benefits.
Add/Review Dependent/Beneficiary Page	W3EB_DEPBEN_RVW	Dependent/Beneficiary Info Page	W3EB_DEPBEN_RVW	Update dependent/beneficiary information.
W-4 Withholding Certificate Page	PY_IC_W4_DATA_2020	Pay and Compensation - “Tax Withholding Page” (PeopleSoft ePay)	PY_W4_MAIN_FL	Review and change W-4 tax information.
Direct Deposit Page	PY_IC_DD_LIST	Pay and Compensation - Direct Deposit Page	PY_IC_DD_LIST	Review and change direct deposit information.
Benefit Enrollment Page	W3EB_LE_ENROLL	Benefit Enrollment Page	W3EB_LE_ENROLL	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.

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Page Name	*Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Benefits Election Review Page	W3EB_LE_CONFIRM	Benefits Statements Page	W3EB_LE_CONFIRM	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 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.

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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	Welcome to <Transaction Name> Event Page	AGC_INFO_FL	Read the instructions on the Welcome page to initiate the divorce event. This page contains custom information about the life event.
Marital Status Change Page	HR_EE_MAR_ STATUS	Divorce Status Page (Marital Status or Divorce Status Page)	HR_EE_MARITAL_ FL	Enter the date of divorce and the changed marital status.
Life Events — Document Upload Page	HR_ATT_DD_HDR	Life Events - Document Upload Page	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	Benefits Summary Page	W3EB_GRID_FLU	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.

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Classic Page Name	*Classic Definition Name*	*Fluid Page Name*	*Fluid Definition Name*	*Usage*
Add/Review Dependent/Beneficiary Page	W3EB_DEPBEN_RVW	Dependent/Beneficiary Info Page	W3EB_DEPBEN_RVW	Update dependent/beneficiary information.
W-4 Withholding Certificate Page	PY_IC_W4_DATA_2020	Pay and Compensation - "Tax Withholding Page" (PeopleSoft ePay)	PY_W4_MAIN_FL	Review and change W-4 tax information.
Direct Deposit Page	PY_IC_DD_LIST	Pay and Compensation - Direct Deposit Page	PY_IC_DD_LIST	Review and change direct deposit information.
Benefit Enrollment Page	W3EB_LE_ENROLL	Benefit Enrollment Page	W3EB_LE_ENROLL	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	Benefits Statements Page	W3EB_LE_CONFIRM	Review benefits election. Click **Print** to generate a preliminary Benefits Enrollment Summary Statement containing your personal information and information about dependent/beneficiary enrollment, benefits elections, and investment choices. Go back to any previous steps and make additional changes before completing the benefits enrollment.

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Classic Page Name	Classic Definition Name	Fluid Page Name	Fluid Definition Name	Usage
Event Completion and Exit Page	W3EB_LE_PRINT	Summary Page	AGC_SUMMARY_FL	View confirmation of the 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.

Page Name	Definition Name	Usage
Benefit Details Tile	HC_EBEN_SS_NAVCOLL_FL (cref for the tile)	Access benefits-related self-service transactions.
Life Events Page	W3EB_SEL_EVNT_FLU	Initiate processing for a life event that affects benefits.
The Activity Guide Composer Framework for Life Events (common elements on pages used to apply for jobs)	N/A	In the Life Events fluid pages, the application appears within the context of the Activity Guide Composer framework. The Activity Guide Composer shows the steps in the Life Events transactional process and provides navigation buttons for proceeding through the steps.
Welcome to <Transaction Name> Event Page	AGC_INFO_FL	Read the instructions on the Welcome page to initiate your life event.

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Page Name	*Definition Name*	*Usage*
Marital Status or Divorce Status Page	HR_EE_MARITAL_FL	(Marriage and Divorce events) Enter the new marital status and as of date.
Birth Date or Adoption Date Page	W3EB_BRTH_ADPT_DT	(Birth and Adoption events) Enter the date of child birth or the date of adoption and submit.
Life Events - Document Upload Page	HR_ATT_DD_HDR	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 on the Life Event Rules Page, the system uses the Approval Workflow Engine to notify the appropriate parties that you have uploaded a document.
Benefits Summary Page	W3EB_GRID_FLU	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.
“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.

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Page Name	*Definition Name*	*Usage*
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.
Dependent and Beneficiary Coverage Summary Page	W3EB_DEPBEN_SUM	(Birth and Adoption events) Review dependent/beneficiary summary coverage information.
Dependent/Beneficiary Info Page	W3EB_DEPBNSMRY_FL	Review a summary of dependent/ beneficiary information or add new dependents or beneficiaries.
Add Individual Dependent/Beneficiary Information Page	W3EB_DEPBEN_DTL_FL	Review and update detailed dependent and beneficiary personal information.
Pay and Compensation - “Tax Withholding Page” (PeopleSoft 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.
Pay and Compensation - Direct Deposit Page	PY_IC_DIR_DEP_FL	Review and update direct deposit information.
Benefit Enrollment Page	W3EB_LE_ENROLL	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 martial status, adoption or birth date for the life event you are entering.

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Page Name	Definition Name	Usage
Benefits Statements Page	BAS_STMT_LIST_FL	View a list of benefits enrollment preview and confirmation statements.
Summary Page	AGC_SUMMARY_FL	Complete and exit the life event.

See product documentation for *PeopleTools: Workflow Technology* for related information.

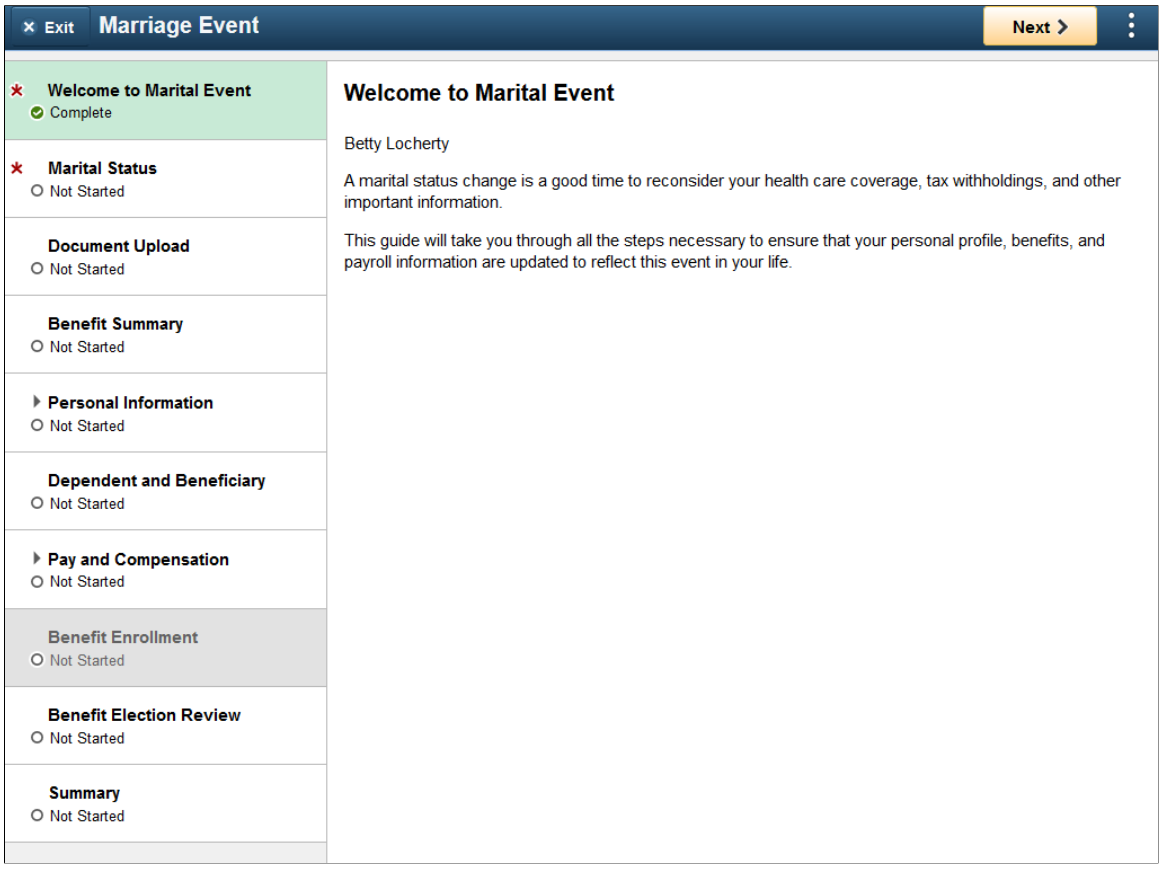
The Activity Guide Composer Framework for Life Events

In the Life Events fluid pages, the application appears within the context of an Activity Guide Composer framework to display the steps a user has to perform.

The Activity Guide Composer framework shows a list of application steps in the left panel and the page that corresponds to the current step in the right panel. The Activity Guide also provides navigation buttons in the page banner.

To set up templates using the Activity Guide Composer, see the “Understanding the Activity Guide Composer” (Enterprise Components) documentation.

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



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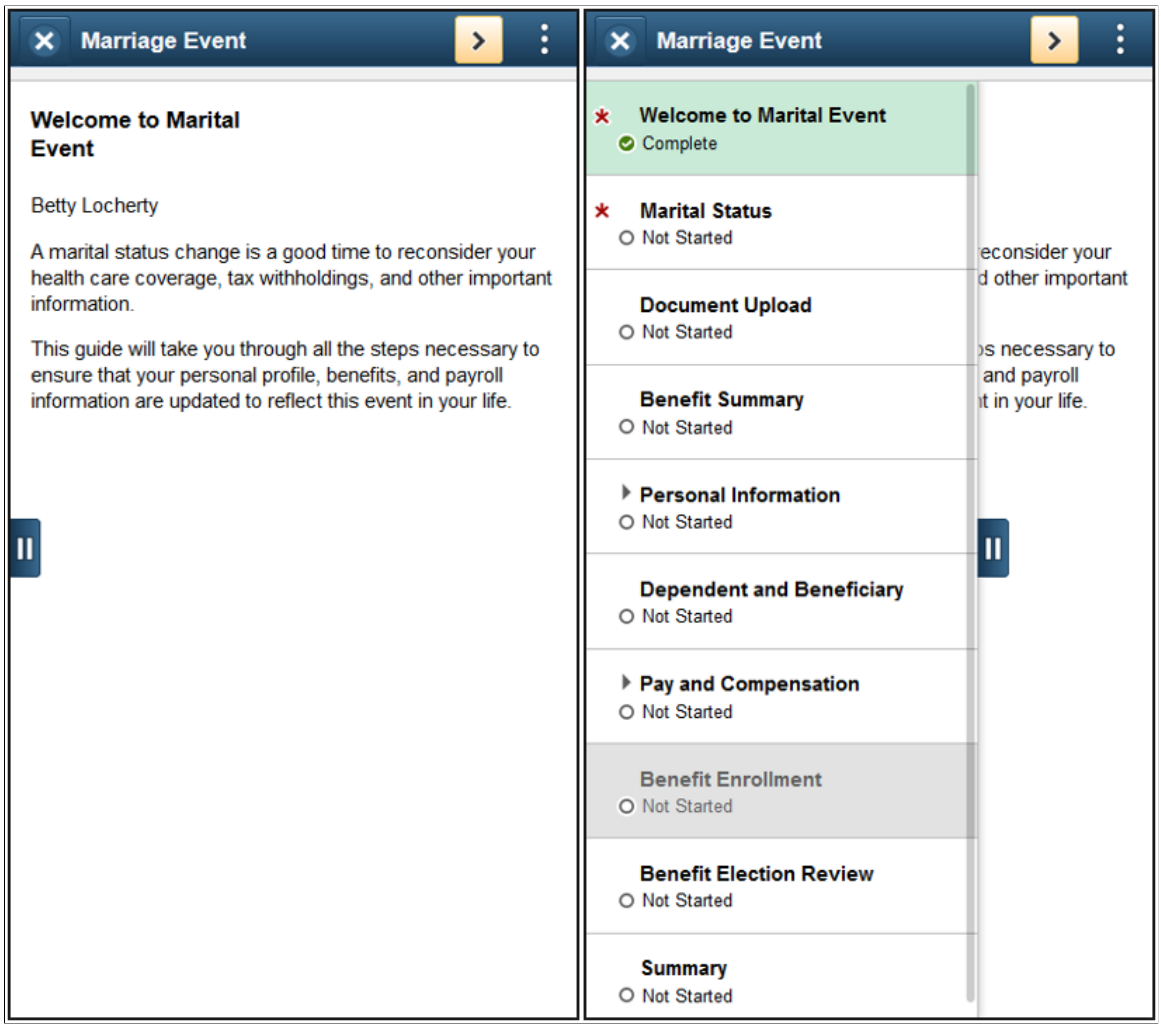
This example illustrates the layout for the Life Events page on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.



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.

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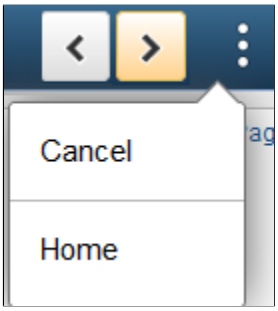
Field or Control	*Description*
or Exit button	Click this button to exit the Life Events data entry and summary pages. If you have not clicked the **Complete** button on the Summary page before exiting, you can resume this life event data entry at a later time. You cannot start another life event transaction until you have either completed this life event transaction or you 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.

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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 completing 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 to 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: • *Not Started*: These are unvisited steps. • *Visited*: When you first reach a step, the status changes to this. • *Complete*: In some instances, the system will automatically mark the step as *Complete* where the system can correctly infer that the task for the step is done. If it is uncertain if a step is complete, the system will mark it as *Visited*. • *In Progress*: This status appears for required steps that you have visited, but you have not entered the required data and saved. Users can return to steps and substeps by clicking the step.

For more information on how to display steps and selecting and organizing steps, see the “Activity Guide Composer - Activity Guide Type Page” (Enterprise Components), “Activity Guide Composer - Select Steps Page” (Enterprise Components), and “Activity Guide Composer - Organize and Configure Steps Page” (Enterprise Components).

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<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.

Field or Control	*Description*
<Title Text>	Displays a page title that includes the step name. For substeps, the page title includes both the step and substep name, separated by a hyphen. For example, *Pay and Compensation - Direct Deposit* indicates that the step title is *Pay and Compensation* and the substep title is *Direct Deposit.*

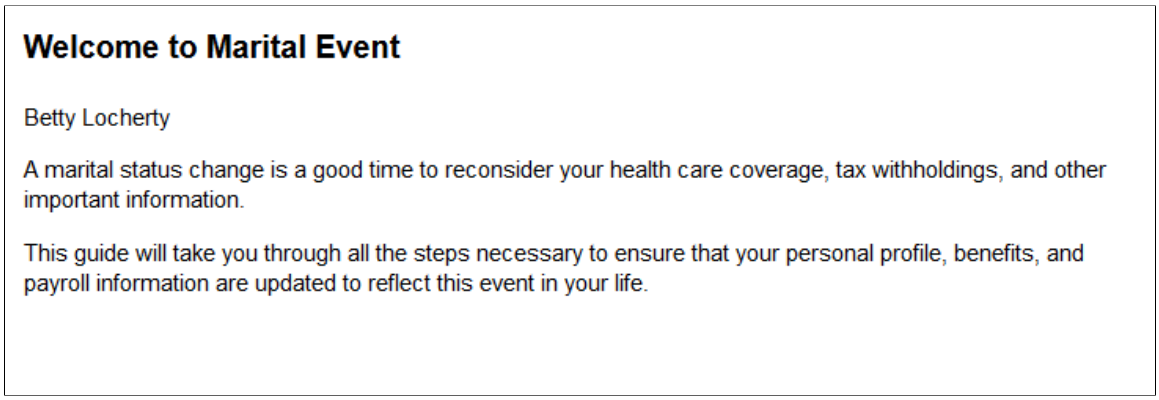
Welcome to <Transaction Name> Event Page

Use the Welcome to <Transaction Name> Event page (AGC_INFO_FL) to read the instructions on the Welcome page to initiate your life event.

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.



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 Martial and Divorce events will display this step.

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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.

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 divorce, 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 to 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

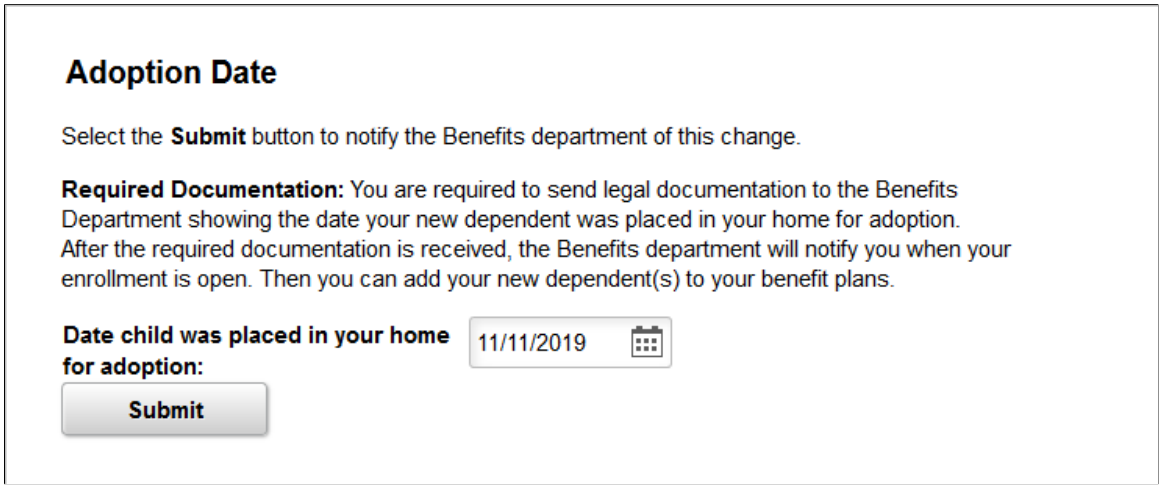
Use the Birth Date or Adoption Date page (W3EB_BRTH_ADPT_DT) to enter the date of child birth or the date of adoption and submit..

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 Adoption Date page..



Note: The Birth Date and Adoption Date pages display the same information. The Adoption Date page is depicted in the previous example.

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.

For information about the pages used to for the two delivered marital status change events, see the following topics:

- Processing the Adoption Event
- Processing the Child Birth Event

Benefits Summary Page

Use the Benefits Summary page (W3EB_GRID_FLU) to review current benefit enrollments.

Navigation:

Select the Benefits Summary step from the left panel or use the **Next** and **Previous** buttons to navigate to the page.

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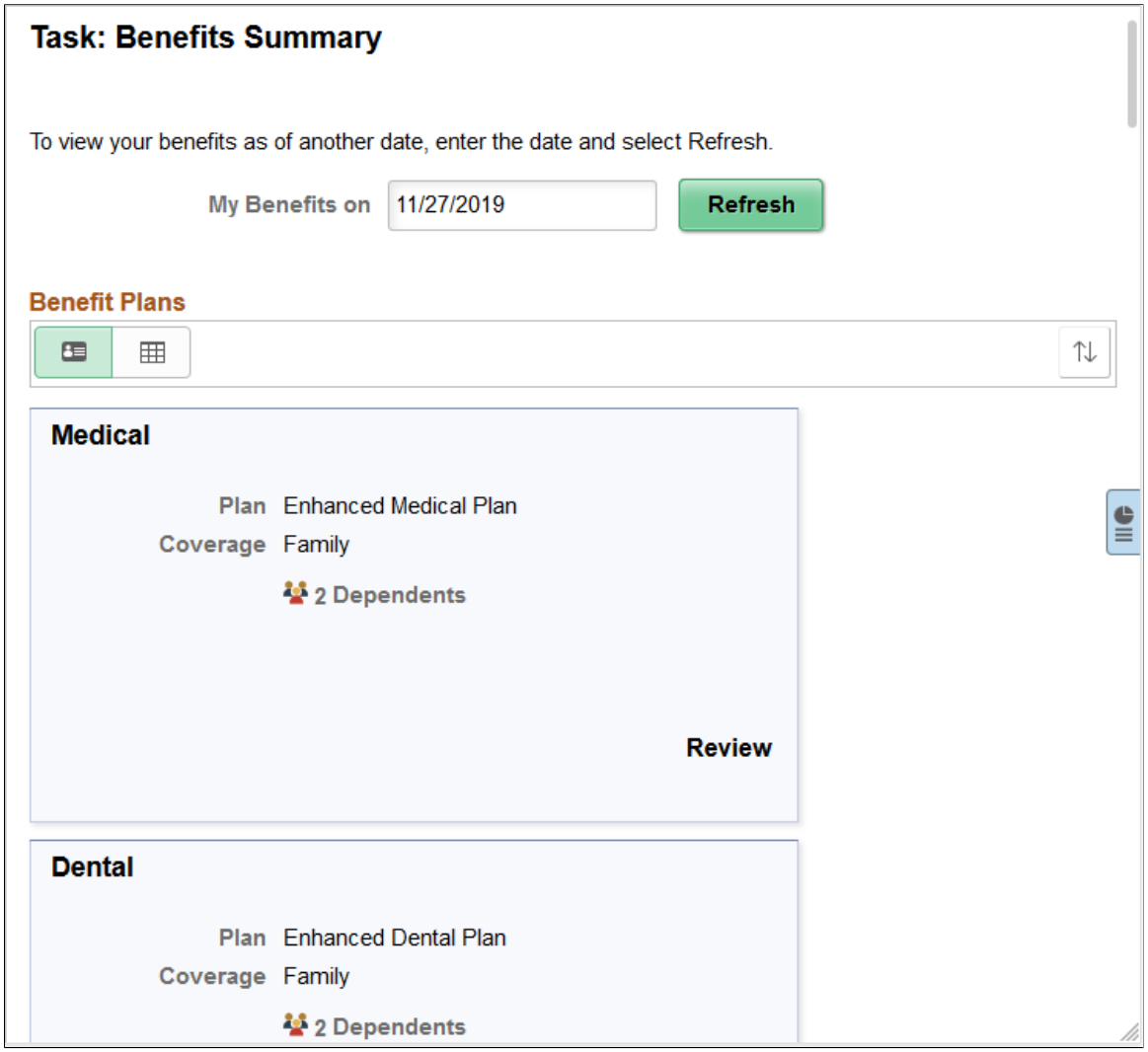
This example illustrates the fields and controls on the Benefits Summary page.



View a summary of current employee benefit data.

Field or Control	*Description*
As Of Date	Initially, 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.

The grid that summarizes the employee's benefits shows the type of benefit, a description of the benefit, and the employee's coverage or participation. Click a row that has a right facing arrow to access the classic self-service pages that show more details about this benefits selection.

Related Links

Benefits Summary Page

Dependent and Beneficiary Coverage Summary Page

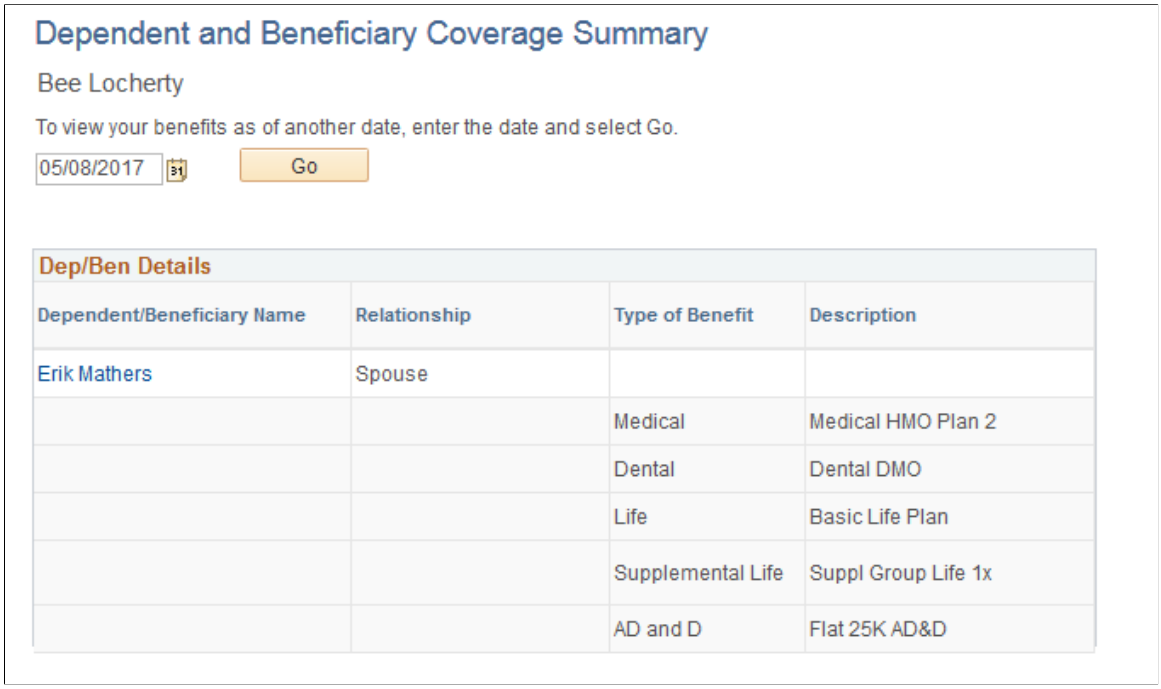
Use the Dependent and Beneficiary Coverage Summary page (W3EB_DEPBEN_SUM) to review dependent/beneficiary summary coverage information.

Note: The delivered Adoption and Birth events will display this step.

Navigation:

Select the Dependent and Beneficiary Coverage Summary step from the left panel, or use the **Next** and **Previous** buttons to navigate to the page.

This example illustrates the Dependent and Beneficiary Coverage Summary page.



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.

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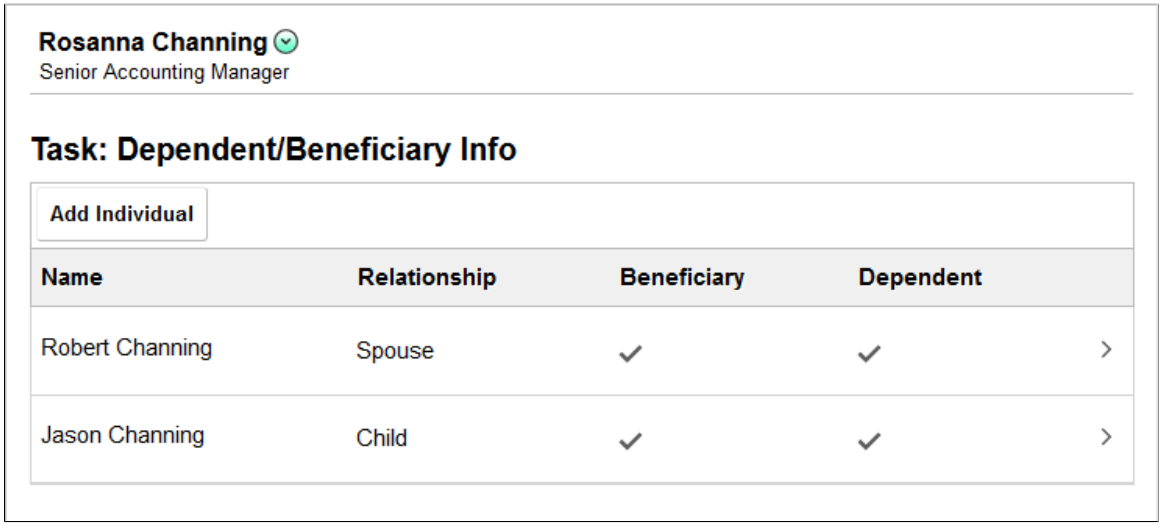
Dependent/Beneficiary Info Page

Use the Dependent/Beneficiary Info page (W3EB_DEPBNSMRY_FL) to review a summary of dependent/beneficiary information or add new dependents or beneficiaries.

Navigation:

Select the Dependent/Beneficiary Info step from the left panel, or use the **Next** and **Previous** buttons to navigate to the page.

This example illustrates the Dependent/Beneficiary Info page.



Click an existing dependent or beneficiary row to access the Add Individual Dependent/Beneficiary Information Page and view and update the person's information, or click the **Add Individual** button to access the same page and enter a new dependent or beneficiary.

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.

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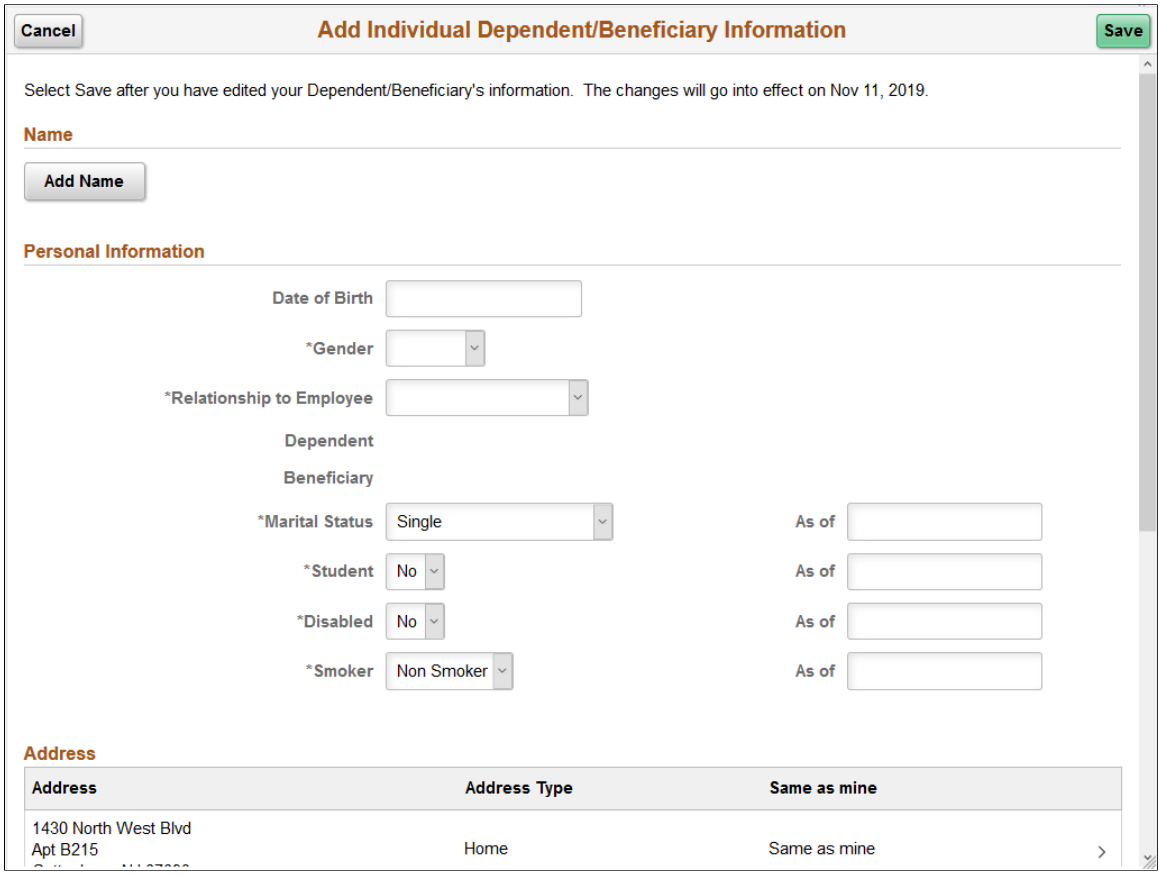
This example illustrates the Add Individual Dependent/Beneficiary Information page.



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

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.

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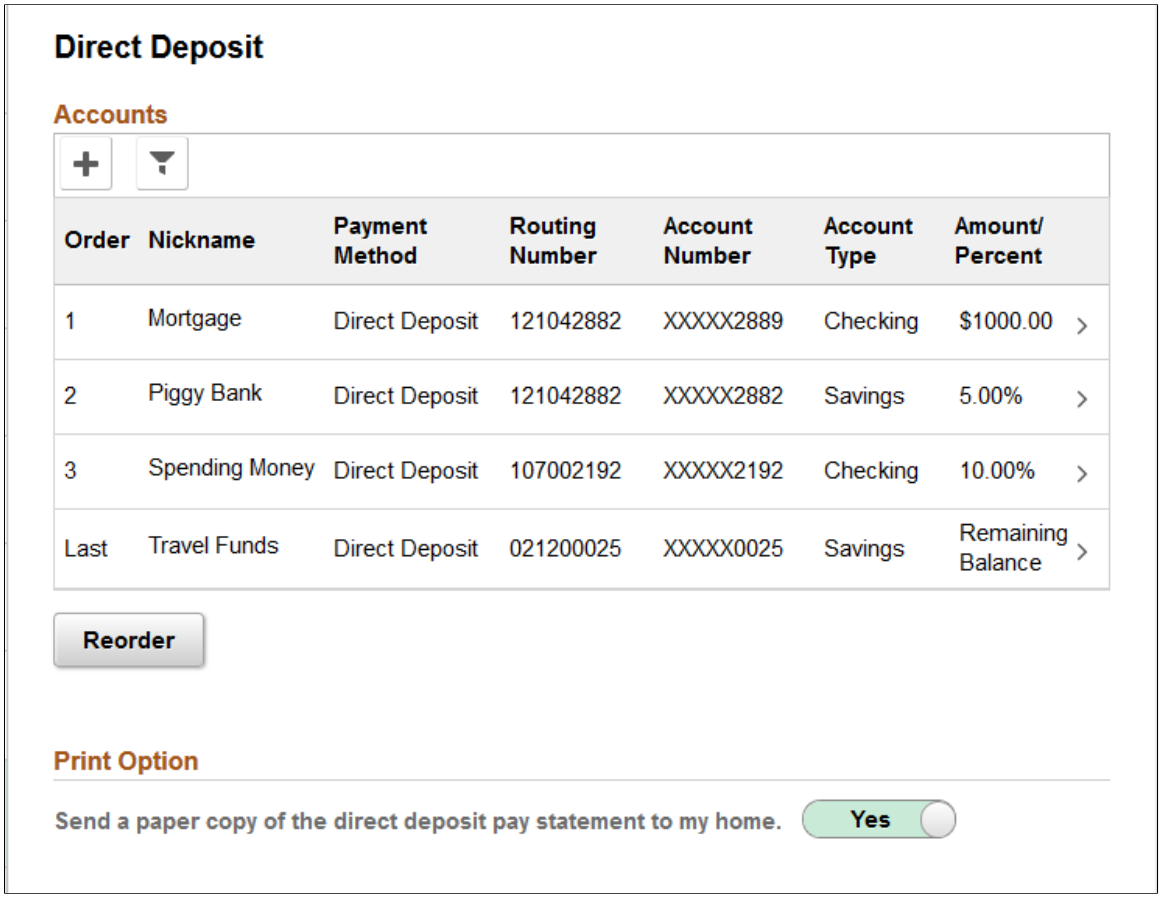
This example illustrates the Pay and Compensation - Direct Deposit page.



Use this page to view your direct deposit elections or add new direct deposit information.

Select the account row to access the **Edit Account Page** and view details about each item. Select the Edit (pencil) icon to update information for an existing entry.

Click the **+ (Add Account)** button to add a new direct deposit.

Note: Multiple direct deposit changes are not allowed in the same day.

Select 'Yes' in the Print Option for a paper copy of the direct deposit pay statement.

Benefit Enrollment Page

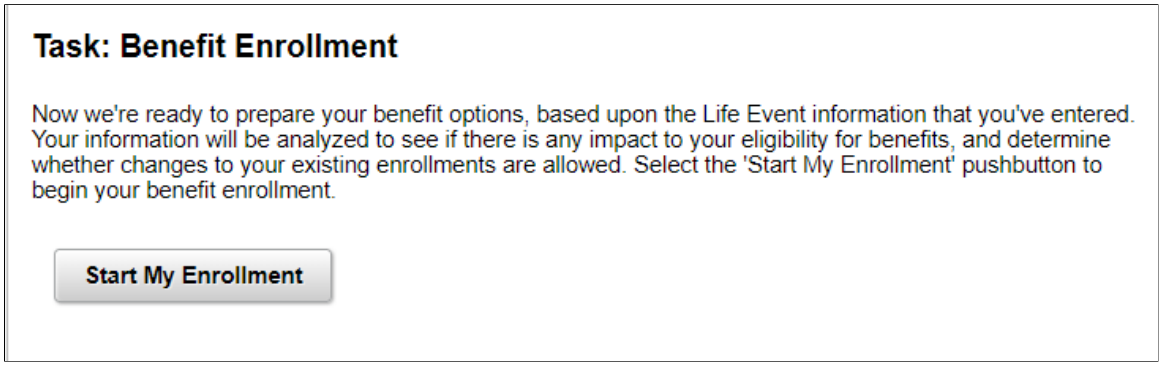
Employees use the Benefit Enrollment page (W3EB_LE_ENROLL) to start the benefits enrollment process and enroll for available benefits.

Note: A dependency relationship exists between the benefit enrollment and either the marital status, adoption date, or birth date, depending upon the transaction you are performing. Hence, the Benefit Enrollment page will be available only if you have updated and submitted the martial status, adoption or birth date for the life event you are entering on the Marital Status or Divorce Status Page or Birth Date or Adoption Date Page.
For more information on setting up dependencies, see the "Activity Guide Composer - Organize and Configure Steps Page" (Enterprise Components) documentation.

Navigation:

Select the Benefit Enrollment step from the left panel, or use the **Next** and **Previous** buttons to navigate to the page after you have completed the dependency step for this life event.

This example illustrates the Benefit Enrollment page.



The Benefit Enrollment step in the fluid Life Events page provides access to the classic pages for selecting benefits during a life event change. Click the **Start My Enrollment** button to start the process.

Note: If an employee cancels a life event after completing the Benefit Enrollment step, an email alert is sent to the benefits administrator.

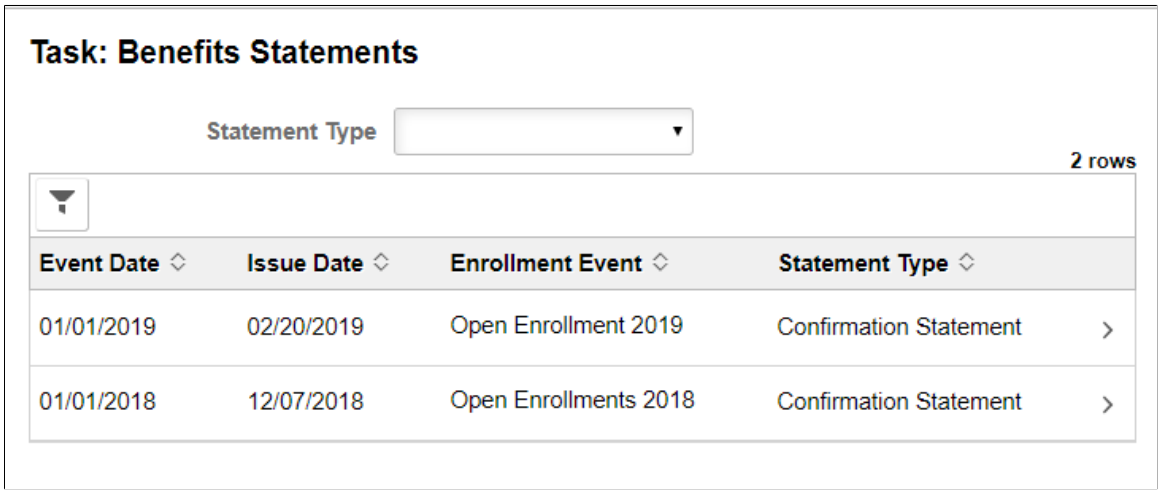
Benefits Statements Page

Use the Benefits Statements page (BAS_STMT_LIST_FL) to view a list of benefits enrollment preview and confirmation statements.

Navigation:

Select the Benefits Statements step from the left panel, or use the **Next** and **Previous** buttons to navigate to the page.

This example illustrates the Benefits Statements page.



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Field or Control	*Description*
Statement Type drop down	The available statement types are Enrollment Preview and Confirmation Statement.
Filter icon	Use the filter to select statements according to event date range, job title and event.
Event Date	Displays the date when the enrolled benefits event start.
Issue Date	Displays the date the statement data was generated and stored.
Job Title	Displays the job title of the employee.
Enrollment Event	Displays the event description.
Statement Type	Available statement types are: Confirmation Statement or Enrollment Preview.

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.

Related Links

"Viewing Fluid Benefit Statements as an Employee in Self Service" (PeopleSoft Benefits Administration)

Summary Page

Use the Summary page (AGC_SUMMARY_FL) to complete and exit the life event.

Navigation:

Select the Summary step from the left panel, or use the **Next** button to navigate to the page.

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This example illustrates the Summary page.

Summary Complete

Congratulations!

You have completed your Birth Event

Here is a list of things to keep in mind now that you have a new child:

Find out if your medical plan offers discounts on infant care equipment, home nurse visits, and postnatal classes.
Evaluate day care centers.
Evaluate our Dependent Care Spending Account plan to assist with day care expenses.
Schedule your baby's first visit with the pediatrician.
Order a Social Security or Social Insurance card for your baby.

Select the Complete pushbutton to end this event.

Steps 10 rows

Template	Status	Date Completed	Required	Due Date	Go to Step
Welcome to the Birth Event	Complete	05/08/2017	Yes		Go to Step
Birth Date	Complete	05/08/2017	Yes		Go to Step
Document Upload	Not Started		No		Go to Step
Benefit Summary	Not Started		No		Go to Step
Dependent/Beneficiary Coverage	Not Started		No		Go to Step
Dependent and Beneficiary	Not Started		No		Go to Step
Tax Withholding	Not Started		No		Go to Step
Direct Deposit	Visited		No		Go to Step
Benefit Enrollment	Visited		No	08/16/2017	Go to Step
Benefit Election Review	Visited		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.

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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.

Page Used to Approve Life Event Documents

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

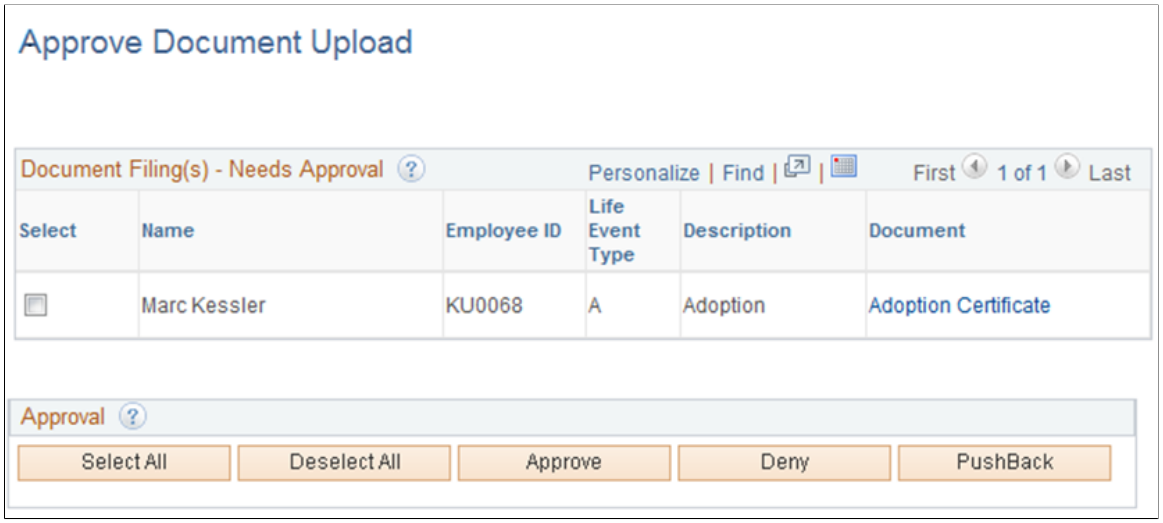
Approve Document Upload Page

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

Navigation:

Benefits > **Approve Document Upload** > **Approve Document Upload**

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



Field and Control Definitions

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.
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.

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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*
Pending Approvals — Life Event Page	EOAWMA_TXNHDTL_FL	Approve a life event document.

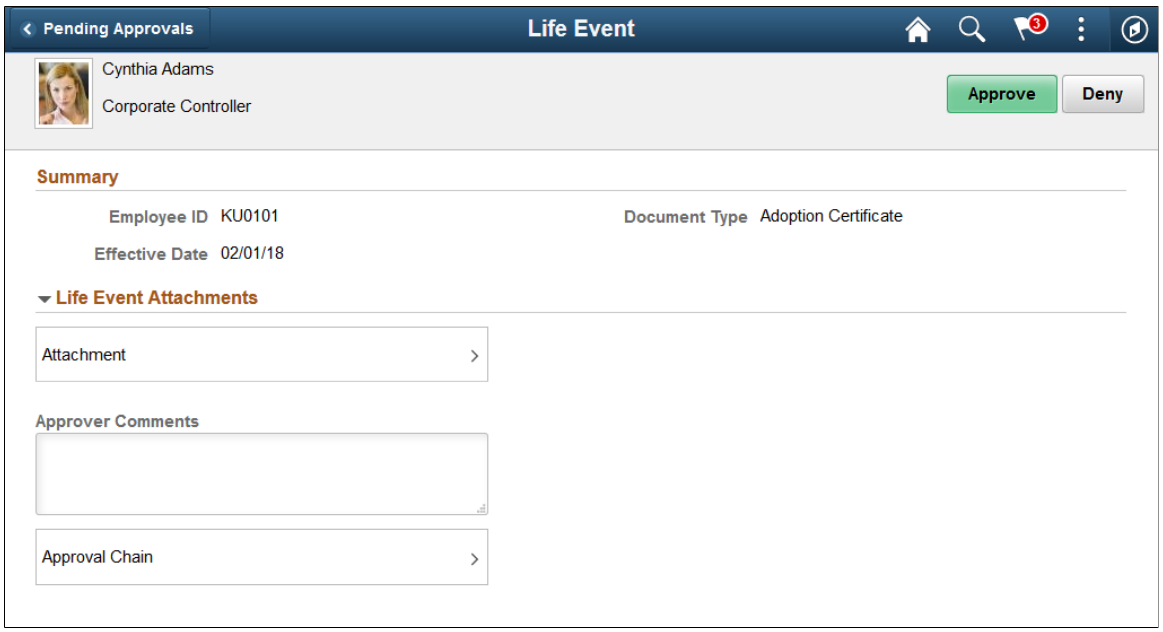
Pending Approvals — Life Event Page

Use the Pending Approvals — Life Event page (EOAWMA_TXNHDTL_FL) to approve a life event document.

Navigation:

On the Workforce Administrator home page, click the Approvals tile to access the Pending Approvals page. From the left panel, click Life Event.

This example illustrates the fields and controls on the Pending Approvals — Life Event 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).

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Field or Control	*Description*
Approve and **Deny** buttons	Use these buttons to take action on the requested approval.
Attachments	Click this item to open the Attachment modal window, where the details of the document uploaded is displayed. You can also access the document uploaded from this Attachment modal window.
Approver Comments	Enter any comments related to the approval action you take.
Approver Chain	**Click this item to open the Approval Chain page, where you can review information about all the approvers 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.

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- *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.

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Reviewing the Delegation Transaction

This table lists the delegation transaction delivered for Life Events document approval:

Transaction Name	*Transaction Type*	*Role*
Manage Approve Document	Approve	Delegate Manage Appr Document

Steps to Set Up a Delegation Request

A delegator follows these steps to delegate Life Event document approval requests using self-service:

1. Navigate to the Manage Delegation page.
2. Click the **Create Delegation Request** hyperlink.
3. Enter the **From Date** and **To Date** for the delegation request, and then click the **Next** button.
4. Select the transaction(s) to delegate authority. For Life Event document approval delegation, select the **Approve Life Event Documents** transaction. Click the **Next** button.
5. Review the proxy list and select a proxy to whom the authority for document approval will be delegated.
6. Select the **Notify Delegator** check box to receive a courtesy email notification on delegation and then click **Submit**.
7. View the confirmation message and click **OK**.

Delegating Document Approval Requests

Life Events document approval delegation enables the Benefits administrator to:

- Create a delegation request to allow a proxy to approve the document on his/her behalf.
- Review the list of transactions delegated and the proxy assigned for each transaction.
- Revoke or withdraw the delegated authority when required.

The following illustrations display the steps to delegate authority for employee Life Event document approval:

Managing Delegations

Use the Manage Delegation page to create the delegation request.

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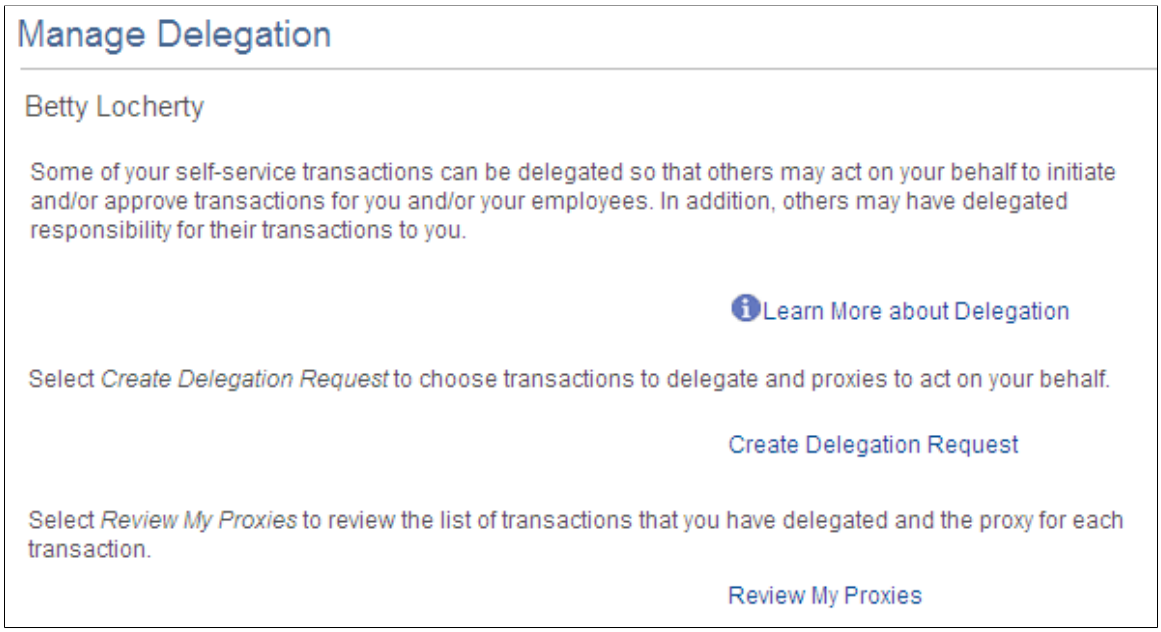
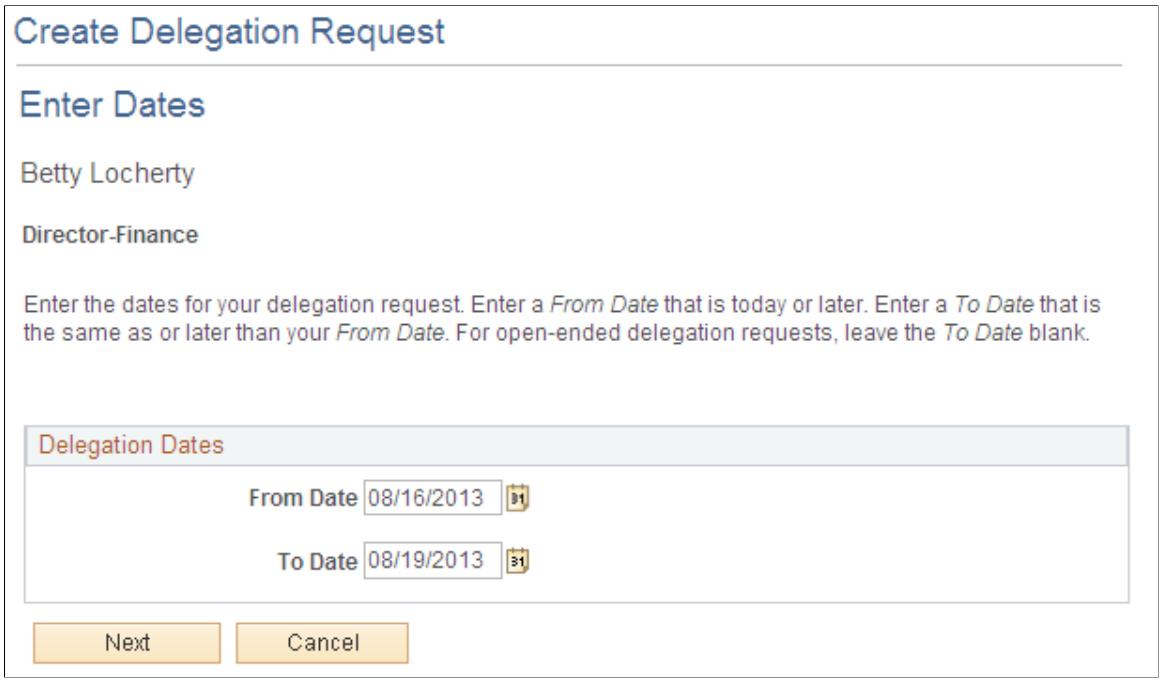
This example illustrates the fields and controls on the Manage Delegation page.



Entering Dates for the Delegation Request

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

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



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.

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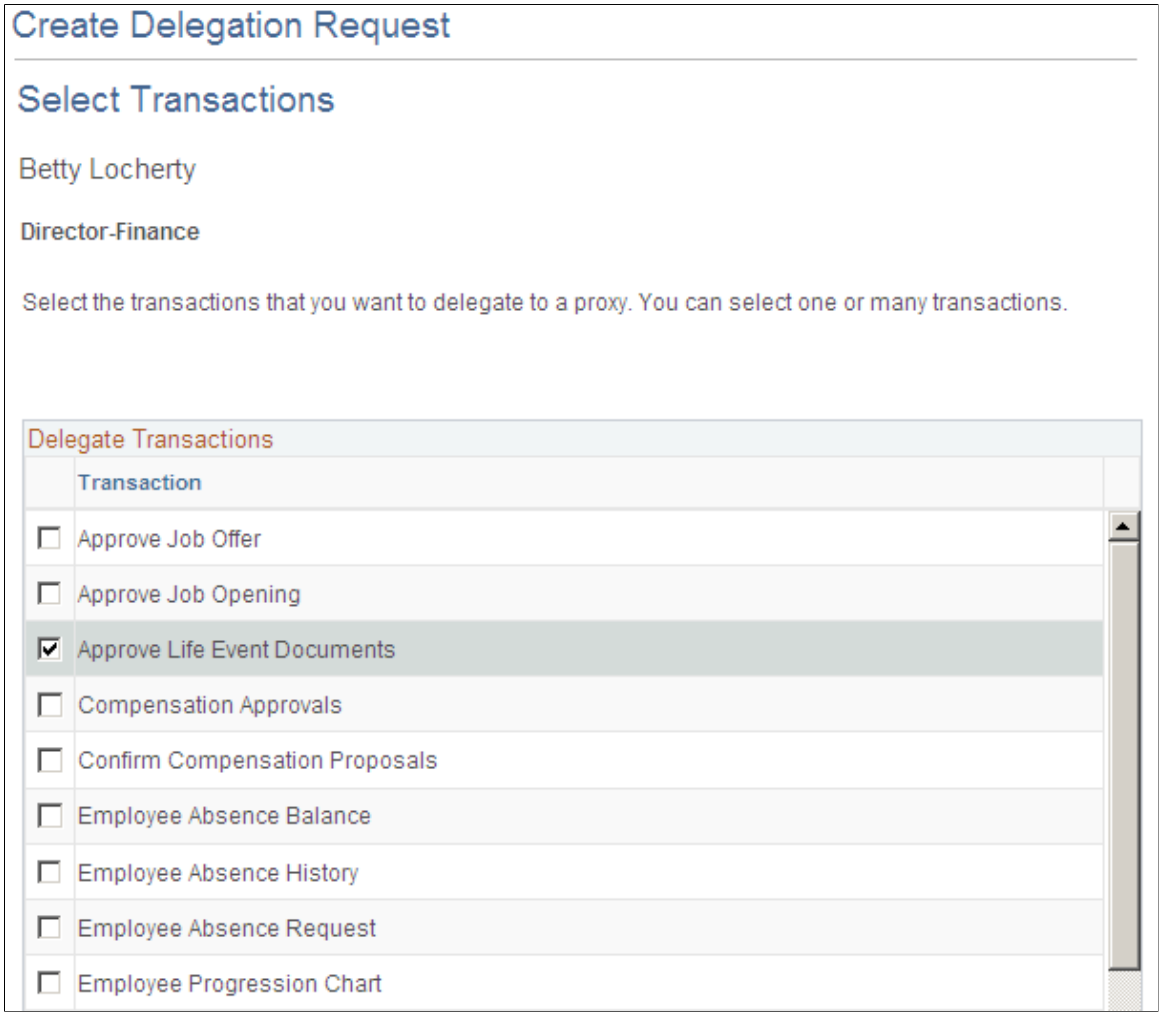
This example illustrates the fields and controls on the Create Delegation Request — Select Transactions page.



Selecting Proxy by Hierarchy

Use the Select Proxy by Hierarchy page to select the proxy to whom the authority of document approval should be delegated.

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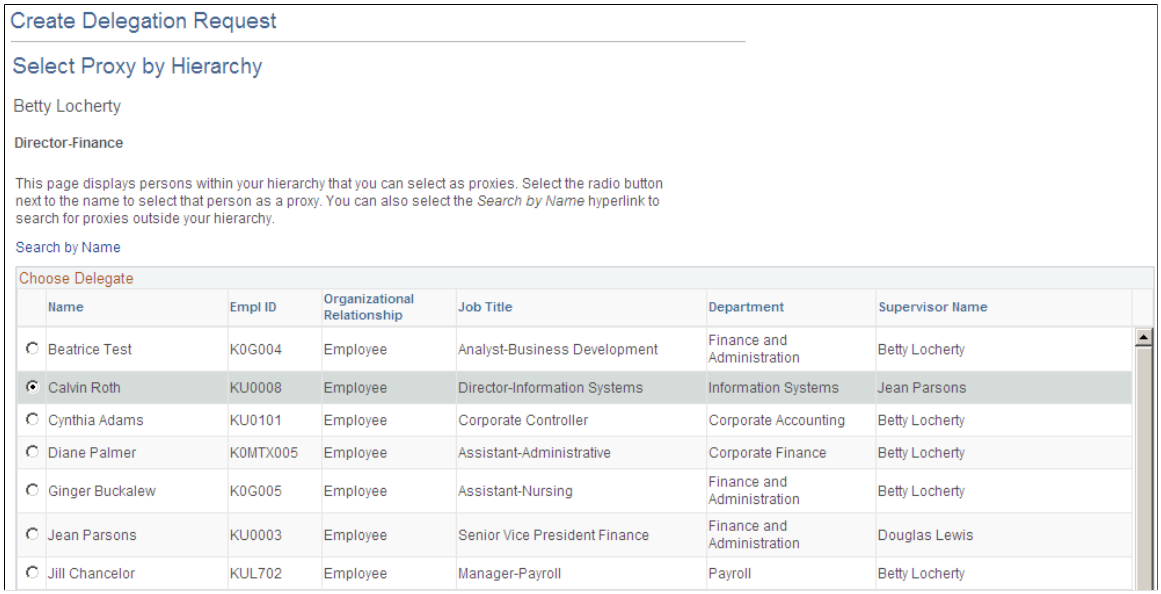
This example illustrates the fields and controls on the Create Delegation Request — Select Proxy by Hierarchy page.



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 Chancelor	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.

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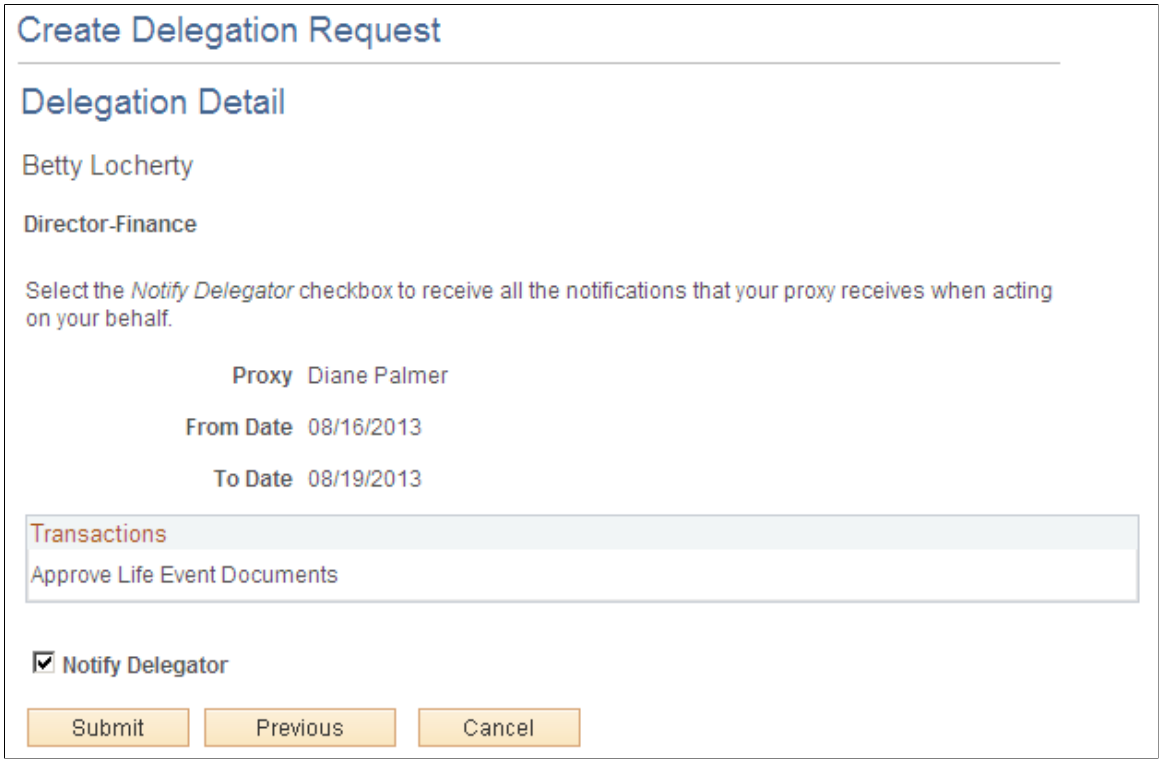
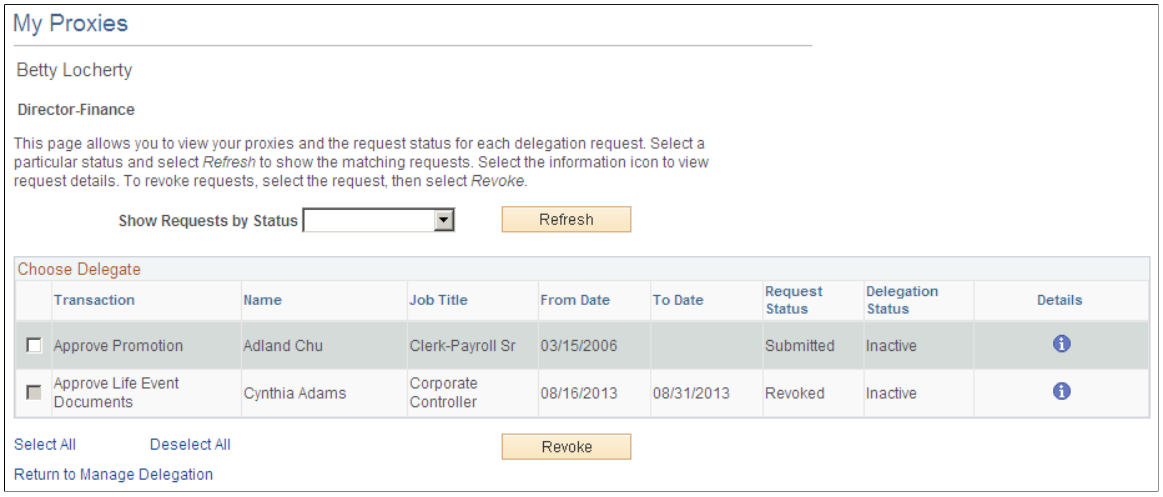
This example illustrates the fields and controls on the Create Delegation Request - Delegation Detail page.



Viewing Proxies

Use the My Proxies page to view all the proxies and request status for the delegation request. Additionally, use the My Proxies page to revoke any of the delegated transactions at any point in time during the delegation period.

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



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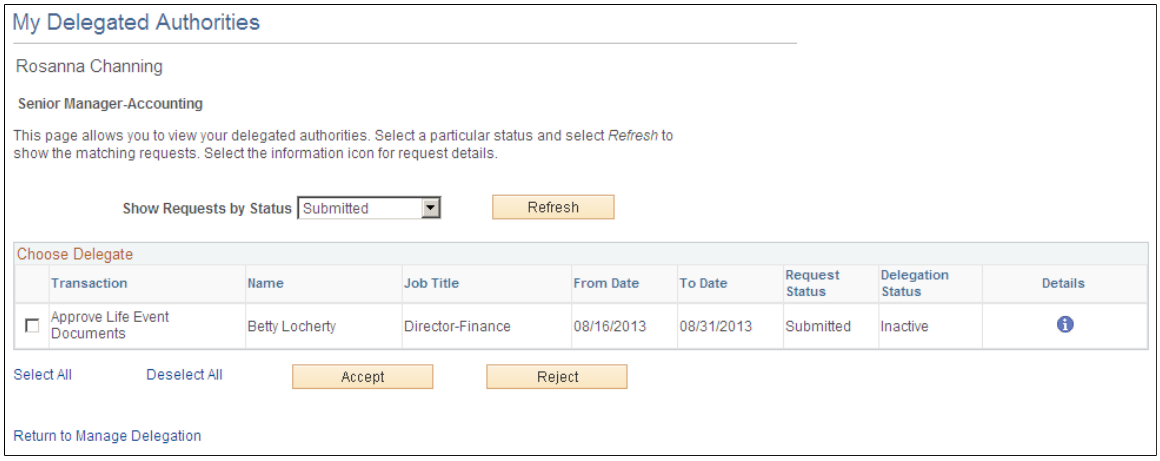
Viewing Delegation Authorities

After the proxy receives the email notification for the delegation request, he/she can access the My Delegated Authorities page to accept or reject the request.

Use the My Delegated Authorities page to manage delegated authorities.

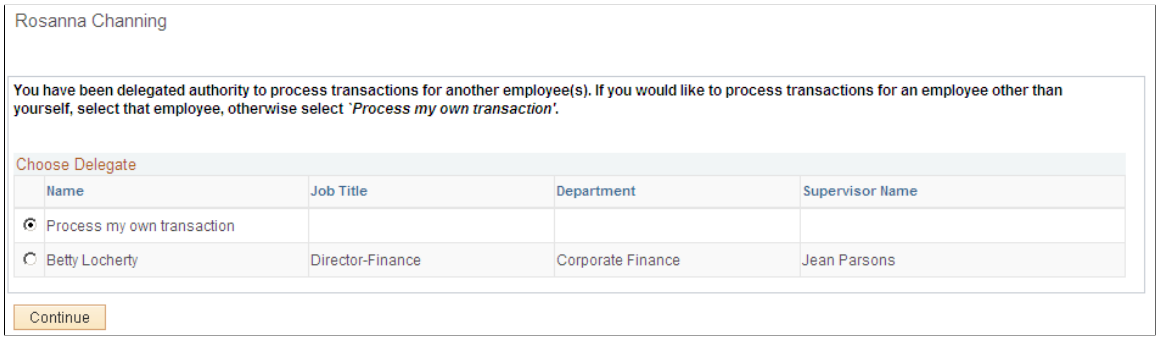
This example illustrates the fields and controls on the My Delegated Authorities page.



Selecting the Role for Document Approval

When approving employee Life Event documents, use the **Select Role** page to determine whether to process your own employee document approval transactions or the delegated approval transactions.

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



Click Continue to navigate to the Approve Document Upload page to approve Life Event documents. For more information, see section “Approving Life Event Documents”.

Managing Delegation Authorities

To maintain delegations and update any invalid rows, the HCM Delegation Administrator needs to run the Manage Delegated Authorities process on a daily basis.

Use the Maintain Delegation Authority page to run the Manage Delegated Authorities process.

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

Run the Manage Delegated Authorities process to:

- Update the request status and delegation status.
- Revoke all delegation requests that have expired as of the current date.
- Search for and update inactive proxies.
- Insert or delete delegation permissions within the proxy's role.

Managing Benefits Instances

These topics describe how to manage Benefits Instances, such as Life Events and Open Enrollment activity guide instances.

Understanding Benefits Instances Maintenance

When an employee starts processing a life event using self-service or an Open Enrollment activity, an instance of the event is stored in the system so that the employee can continue the event later. When the event is completed, the instance is deleted. If an employee started a life event or an Open Enrollment activity unintentionally, and had not deleted or canceled the event, the Benefits Administrator can delete the event using the Manage Benefits Instances page.

Note: The Manage Benefits Instances page is only for the use of the Benefits Administrator for maintenance purposes. Before deleting any life event or an Open Enrollment activity using this page, ensure that the event is not required and is not in use.

Page Used to Manage Benefits Instances

Page Name	*Definition Name*	*Usage*
Manage Benefits Instances Page	W3EB_LE_INSTANCE	Delete benefits instances (for example, Life Events and Open Enrollment activity guide instances) that are no longer required.

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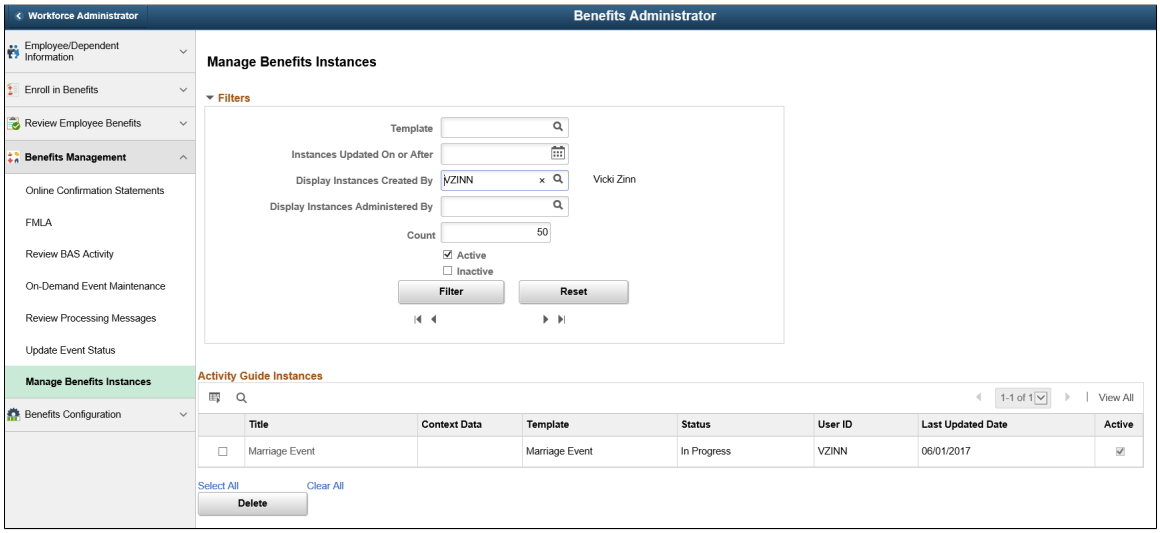
Manage Benefits Instances Page

Use the Manage Benefits Instances page (W3EB_LE_INSTANCE) to delete benefits instances (for example, Life Events and Open Enrollment activity guide instances) that are no longer required.

Navigation:

Benefits > **Manage Benefits Instances** > **Manage Benefits Instances**

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.

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

Activity Guide Instances

Field or Control	*Description*
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.

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Chapter 6

Managing Affordable Care Act Consent Processing

Understanding ACA Consent Processing

This section provides an overview of U.S. ACA – Electronic Format for Form 1095-C – Employee Consent Processing.

Under the Affordable Care Act, Applicable Large Employers (ALEs) use Forms 1094-C and 1095-C to report information about offers of health coverage and enrollment in health coverage for their employees. Form 1095-C is used to report information about an individual employee. Employers that offer employer-sponsored self-insured coverage also use Forms 1095-C to report information to the Internal Revenue Service (IRS) and to employees about individuals who have minimum essential coverage under the employer plan. Form 1094-C is used to report to the IRS summary information for each employer and to transmit Forms 1095-C to the IRS.

Note: Employers are responsible for reviewing IRS instructions and reporting requirements to determine their specific reporting obligations under the Affordable Care Act.

The Affordable Care Act requires that employees must affirmatively consent to receive Form 1095-C in an electronic format instead of receiving a paper copy. PeopleSoft eBenefits provides a consent form on Employee Self Service for employees to consent to receive the electronic version of Form 1095-C. Once the consent is given, employees can view and print Form 1095-C from Employee Self Service.

Note: In order for an employee to have access to the consent process, the employer must be identified as an ALE Member in the ACA Applicable Large Employer Table.

Managing ACA Consent Processing

This topic provides an overview of employee consent to receive Form 1095-C in the electronic format and discusses how to manage the consent process.

Pages Used to Manage ACA Consent Processing

Page Name	*Definition Name*	*Usage*
Form 1095-C Consent Page	ACA_SS_CONSENT	Enable employees to grant or withdraw consent to receive Form 1095-C electronically.

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Page Name	*Definition Name*	*Usage*
Review 1095-C Consent Status Page	ACA_REVIEW_CONSENT	Monitor employee consent status. Review the history of each employee's consent and email notification status.
1095–C Consent Status Report Page	ACA_RC_BAC010	Run the BAC010 report, which lists employees' most current consent status based on dates and status codes that you specify in the report request parameters.
Reset 1095-C Consent Status Page	ACA_RESET_RCNTL	Reset consent status to 'Consent Reset by Employer' for all employees from all ALE Members, all employees from selected ALE Member(s), or selected employee(s). Enter run parameters for the Reset Form Consent Application Engine process (ACA_RESET).

Form 1095-C Consent Page

Use the Form 1095-C Consent page (ACA_SS_CONSENT) to enable employees to grant or withdraw consent to receive electronic Form 1095-Cs. Appropriate text appears on the page based on the employee's current status. After saving an update on the page, the employee must enter password verification. After verification, the system displays confirmation of the submission and triggers an email confirmation of the change.

Navigation:

Self Service > **Benefits** > **1095-C Consent**

Note: This page has been replaced by the Form 1095-C Consent page in Fluid. For more information, see "Working With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface" (PeopleSoft Benefits Administration).

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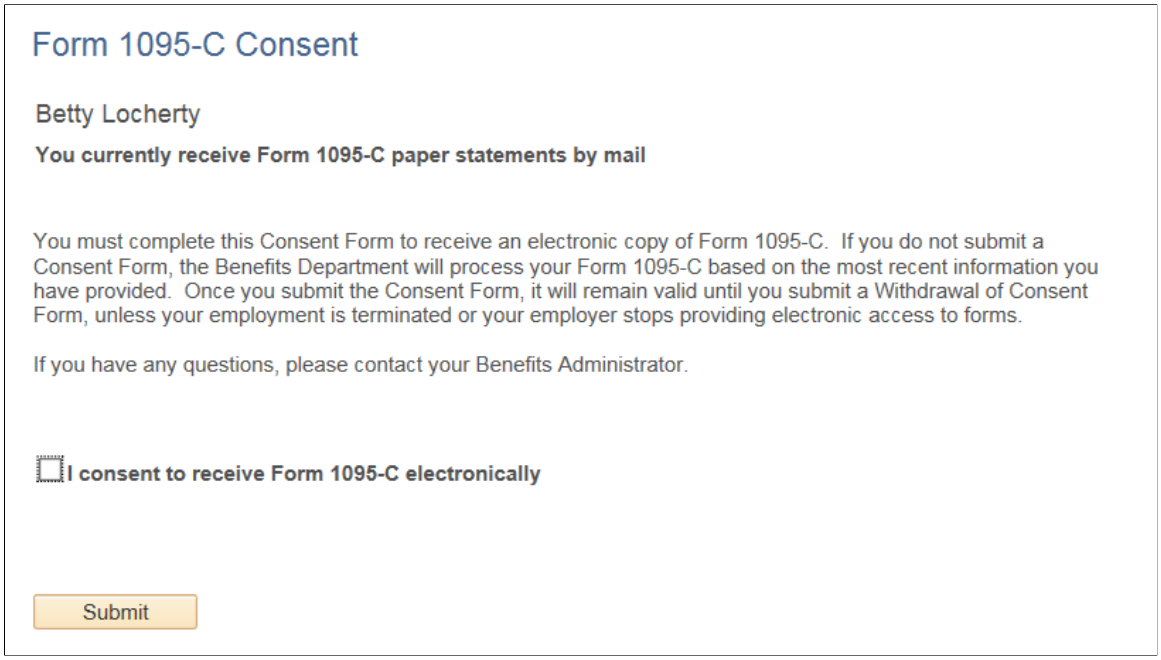
This example illustrates the fields and controls on the Form 1095-C Consent page.

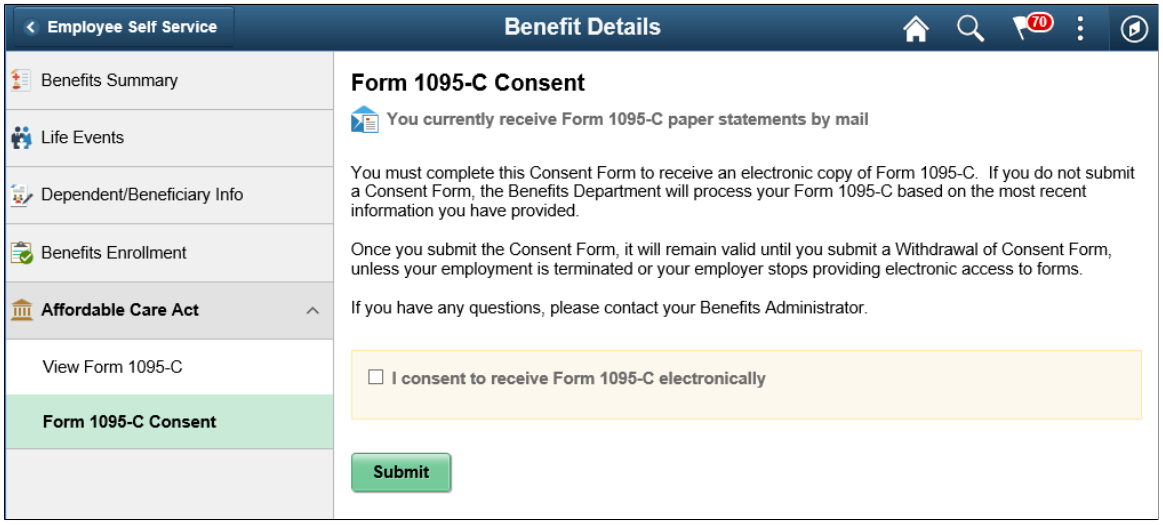


Form 1095-C Consent Page for Mobile Users

PeopleSoft provides the Fluid User Interface for an employee using the Consent Process on mobile devices. As a PeopleTools pre-requisite for the Form 1095-C Consent to be enabled on Mobile, the employee should have the ‘My Benefit Fluid’ role assigned.

On a PeopleSoft Fluid User Interface home page, tap the **Benefits** tile to access the Benefits page. Form 1095-C Consent tab is displayed under Affordable Care Act on the left-hand navigation of the Benefit Details page.

This example illustrates the fields and controls on the Fluid User Interface of the Form 1095-C Consent page.



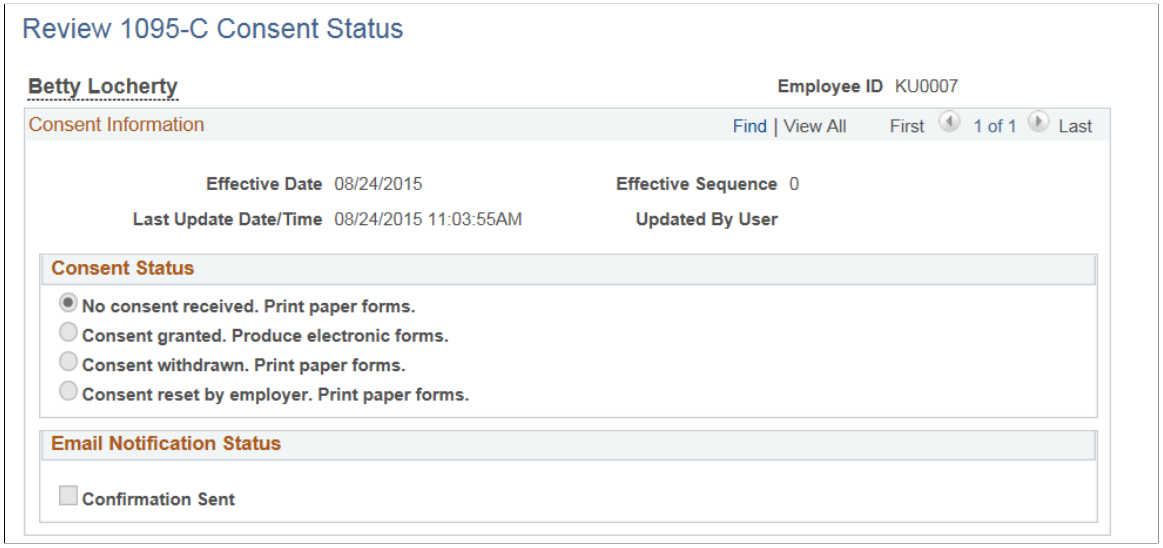
Review 1095-C Consent Status Page

Use the Review 1095-C Consent Status page (ACA_REVIEW_CONSENT) to monitor employee consent and review the history of each employee's consent and email notification status.

Navigation:

Benefits > **ACA Annual Processing** > **Consent Process** > **Review 1095-C Consent Status**

This example illustrates the fields and controls on the Review 1095-C Consent Status page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
No consent received. Print paper forms.	The employee has not granted consent; Form 1095-C will be in the print format.
Consent granted. Produce electronic forms.	The employee has granted consent; Form 1095-C will be in the electronic format only.
Consent withdrawn. Print paper forms.	The employee has withdrawn consent; Form 1095-C will be in the print format.
Consent reset by employer. Print paper forms.	The employer has reset consent; Form 1095-C will be in the print format.
Confirmation Sent	The check box displays as selected if email notification regarding the Consent Status change has been sent successfully.

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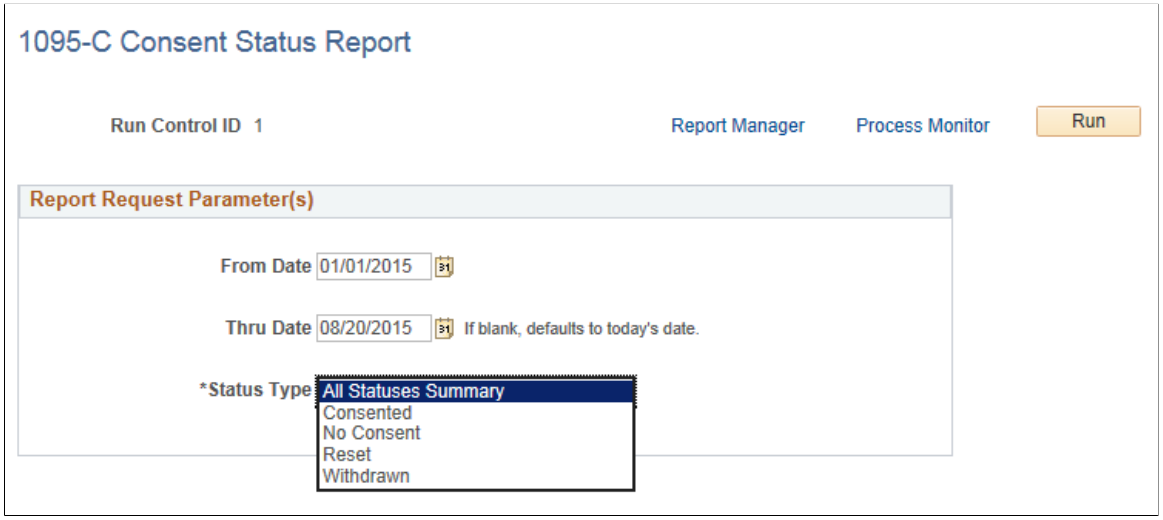
1095–C Consent Status Report Page

Use the 1095-C Consent Status Report page (ACA_RC_BAC010) to run the BAC010 report, which lists employees' most current consent status based on dates and status codes that you specify in the report request parameters.

Navigation:

Benefits > **ACA Annual Processing** > **Consent Process** > **1095-C Consent Status Report**

This example illustrates the fields and controls on the 1095-C Consent Status Report page.



Reset 1095-C Consent Status Page

Use the Reset 1095-C Consent Status page (ACA_RESET_RCNTL) to reset consent status to **Consent Reset by Employer**. An administrator can reset the consent status for all employees from all ALE Members, all employees from selected ALE Member(s), or selected individual employee(s).

Enter run parameters for the Reset Form Consent Application Engine process (ACA_RESET).

Navigation:

Benefits > **ACA Annual Processing** > **Consent Process** > **Reset 1095-C Consent Status**

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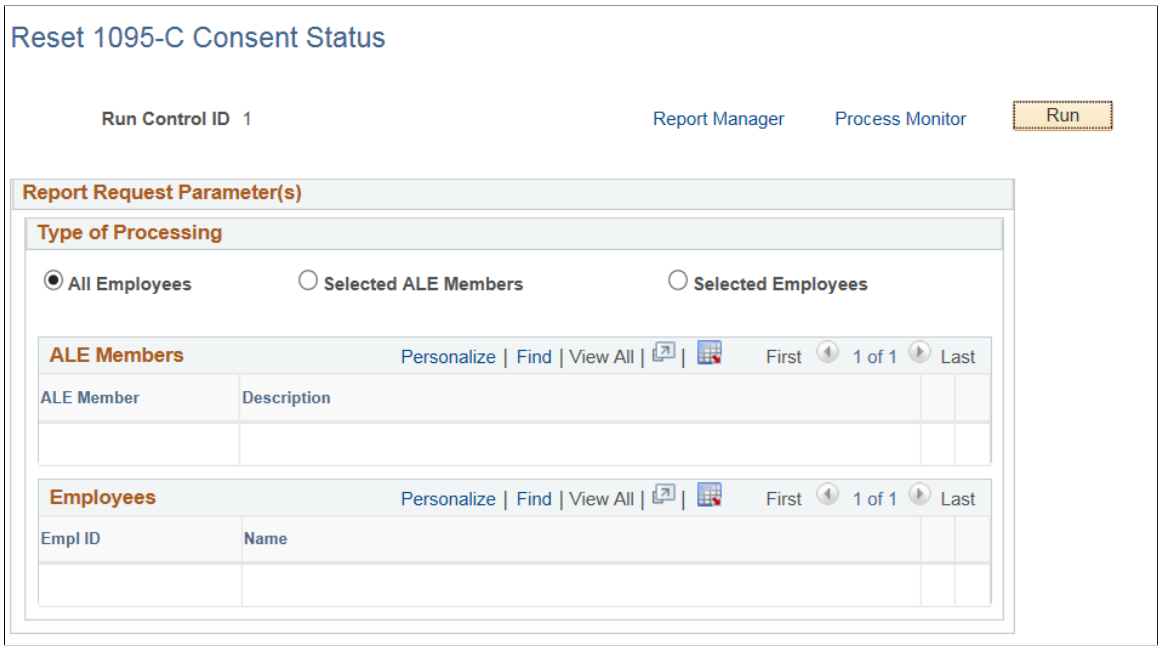
This example illustrates the fields and controls on the Reset 1095-C Consent Status page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
All Employees	Select this option to reset the consent status for all employees from all ALE Members.
Selected ALE Members	Select this option to reset the consent status for all employees from selected ALE Member(s).
Selected Employees	Select this option to reset the consent status for selected employee(s) only. **Note:** The Benefits Administrator can use the **Selected Employees** option to manually reset the consent for terminated employees, who had earlier provided consent. Once reset, these terminated employees will receive a paper copy of the Form 1095-C during the print process.

Viewing Form 1095-C

PeopleSoft system only supports printing of Form 1095-C. In addition to the printed paper copy, an electronic version of the PDF form for employee Self Service is also provided. Employees can view this PDF form of Form 1095–C via Self Service.

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Page Used to View Form 1095-C

Page Name	*Definition Name*	*Usage*
View Form 1095-C Page	ACA_EE_YE_FORM	To view the Form 1095-C via Self Service.

View Form 1095-C Page

Use the View Form 1095-C page (ACA_EE_YE_FORM) to view the Form 1095-C. Whether or not the employee has consented to receive electronic forms, the employee's 1095-C forms will appear on this page. Once the form is released, a link appears on this page. The link opens the PDF Form 1095-C for viewing.

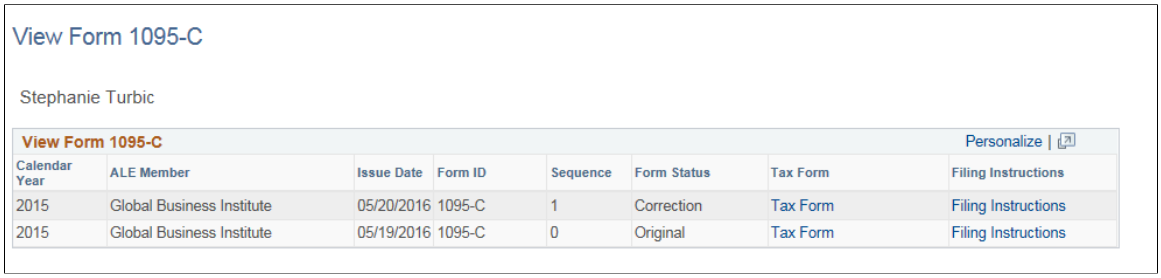
Note: Only forms with a print status of 'Final' can be released.

Note: This page has been replaced by the View Form 1095-C page in Fluid. For more information, see "Working With Benefit Details Tile Dashboard Using The PeopleSoft Fluid User Interface" (PeopleSoft Benefits Administration).

Navigation:

Self Service > **Benefits** > **View Form 1095-C**

This example illustrates the fields and controls on the View Form 1095-C page.



Field or Control	*Description*
Tax Form	Click this link to open the PDF format of Form 1095–C.
Filing Instructions	Click this link to open the filing instructions of the Form 1095–C for the current year.

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Chapter 7

Using the PeopleSoft Fluid User Interface for eBenefits

Using the PeopleSoft Fluid User Interface to Manage Benefits

This topic discusses how employees use the PeopleSoft Fluid User Interface to perform benefits-related self-service activities.

The eBenefits 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.

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

Pages Used to Manage Benefits Using the PeopleSoft Fluid User Interface

Page/Tile Name	*Definition Name*	*Usage*
Benefit Details Tile	HC_EBEN_SS_NAVCOLL_FL (cref for the tile) W3EB_ENR_TILE_FLU (page for dynamic data)	Access benefits-related self-service transactions.
Benefits Summary Page	W3EB_GRID_FLU	View information about current benefits.
Dependent and Beneficiary Information Page	W3EB_DEPBNSMRY_FL	Update information about dependents and beneficiaries.
Life Events Page	W3EB_SEL_EVNT_FLU	Initiate processing for a life event that affects benefits.

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Page/Tile Name	*Definition Name*	*Usage*
Benefits Enrollment pages: “Benefits Enrollment Event Selection Page” (PeopleSoft Benefits Administration) “Benefits Enrollment Page” (PeopleSoft Benefits Administration)	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.
View Form 1095-C Page	ACA_EE_YE_FORM_FL	View the Form 1095-C generated each year and submitted to the IRS.
Form 1095-C Consent Page	ACA_SS_CONSENT_FL_GBL	Access the consent form to grant or withdraw consent to receive the Form 1095-C for the current year in an electronic format.

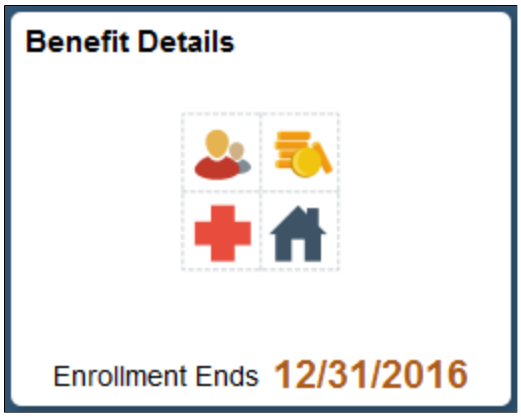
Benefit Details Tile

Employees use the Benefit Details tile to access benefits-related self-service transactions.

Navigation:

The Benefit Details tile is delivered as part of the “Employee Self Service 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 for the tablet.



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This example illustrates the Benefit Details tile for the smartphone.

Click the Benefit Details tile to access the Benefit Details page.

During open enrollment period, live content will be displayed on the tile giving the open enrollment's end date.

Benefits Summary Page

Use the Benefits Summary page (W3EB_GRID_FLU) to view summary information about current benefits.

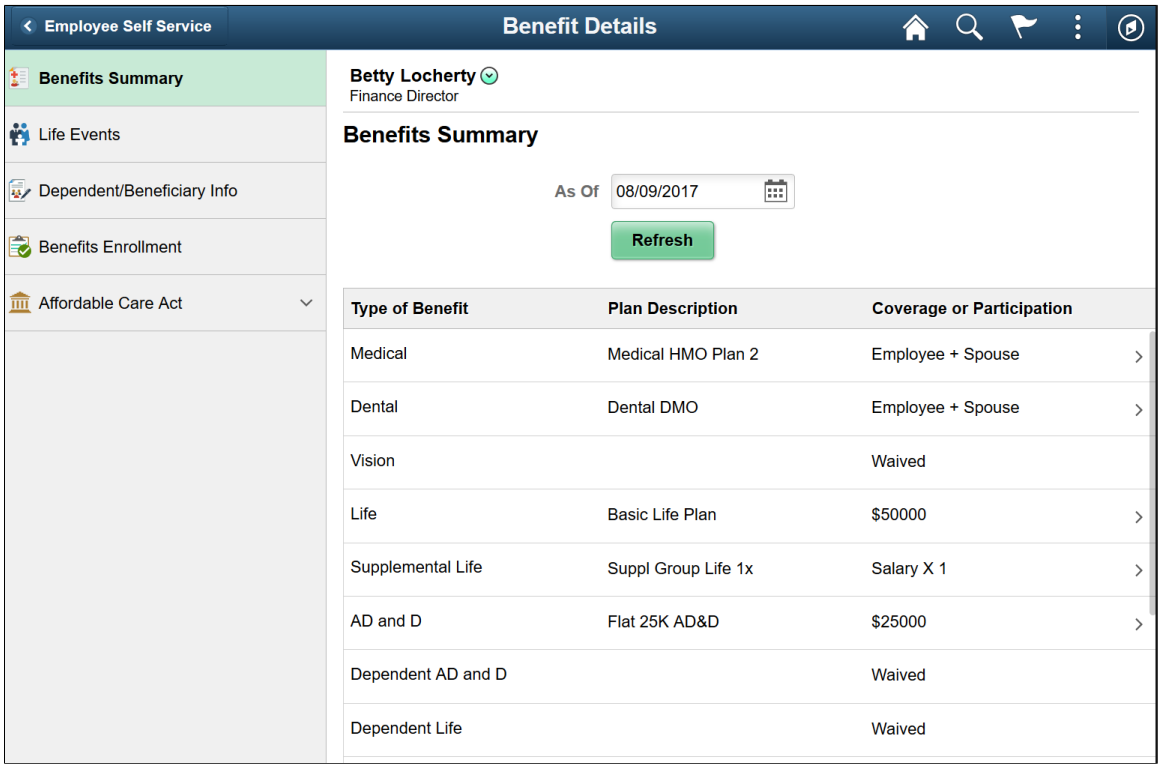
Navigation:

- Click the Benefit Details tile on a PeopleSoft Fluid User Interface homepage.

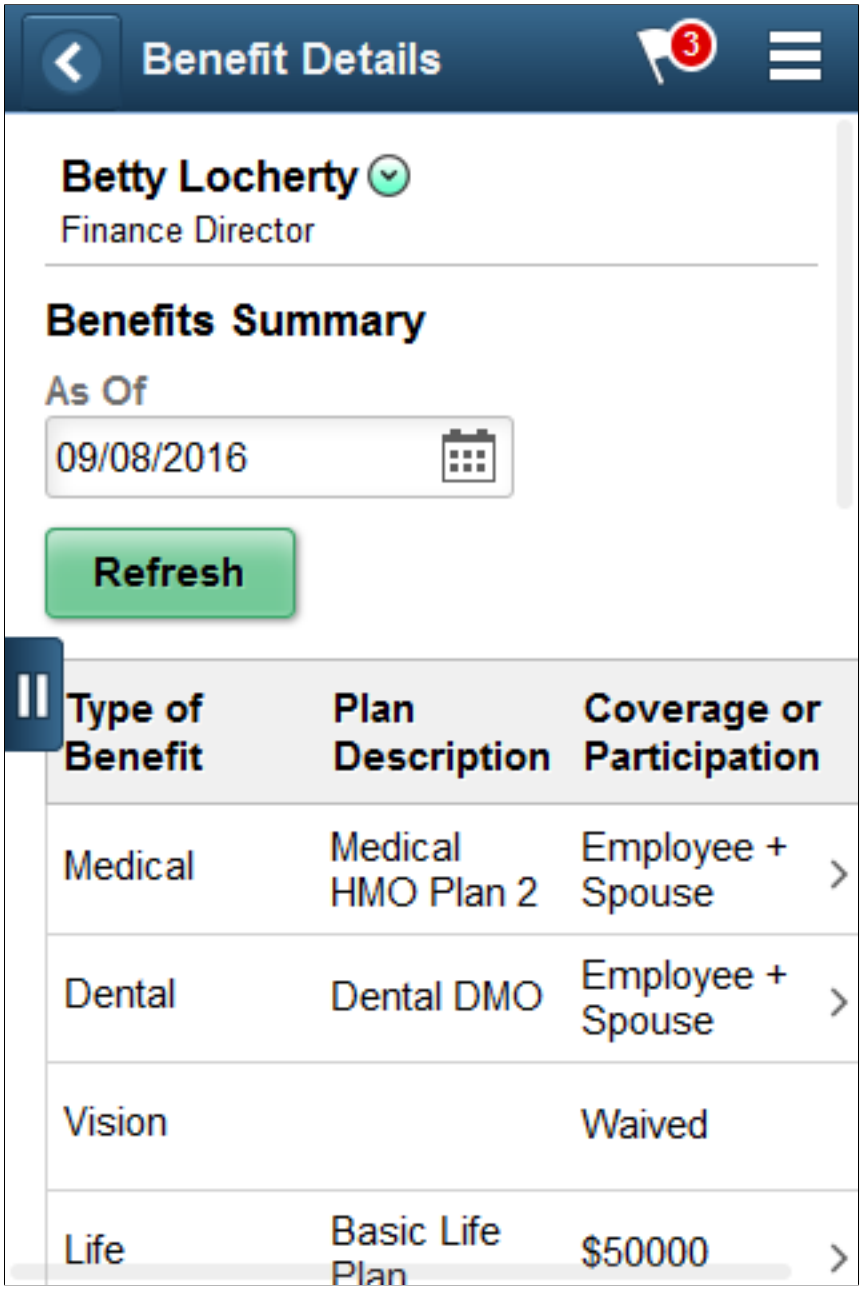
  The Benefit Details tile is on the delivered Employee Self-Service home page.

- **Self Service** > **Benefits** > **Benefits Details**

This example illustrates the Benefits Summary page for the tablet.



This example illustrates the Benefits Summary page for the smartphone.



Field or Control	*Description*
As Of Date	Initially, the page displays benefits as of the current date. To view benefits as of a different date, choose a new As Of date and click the Refresh button.

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Field or Control	*Description*
Benefits Summary-	The grid that summarizes the employee's benefits shows the type of benefit, a description of the benefit, and the employee's coverage or participation. You can access additional details about Reviewing and Editing Health Plan InformationReviewing Insurance Plan Information and Reviewing Savings Plan Information benefits by clicking those items to access the classic self-service pages that show those details.

Dependent and Beneficiary Information Page

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

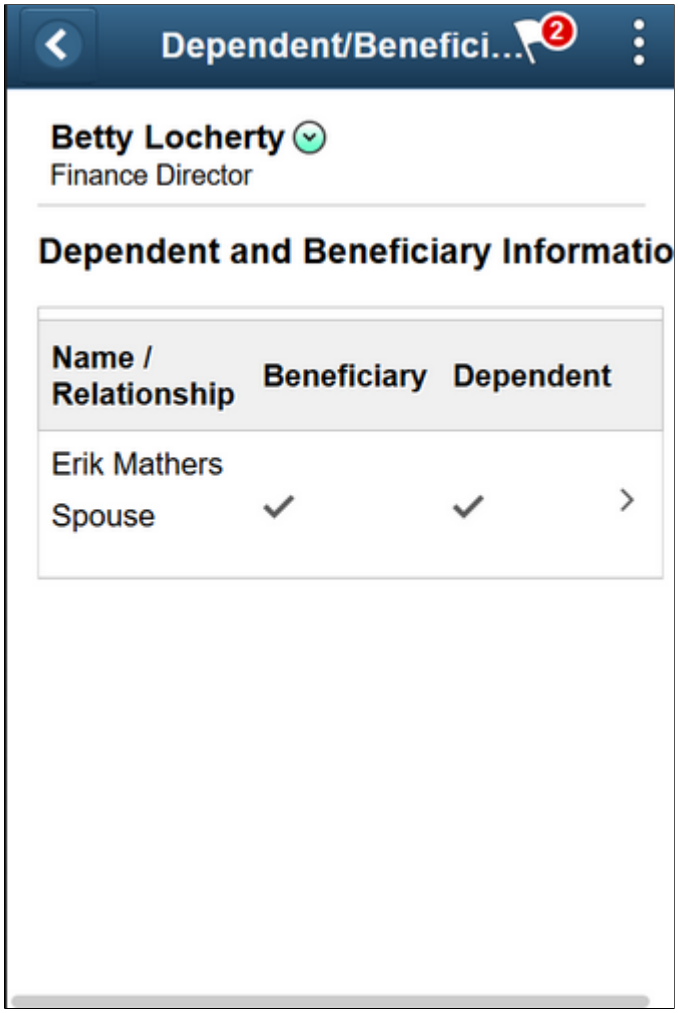
Note: Whenever an employee makes changes to the Dependent/Beneficiary Info page in Employee Self Service, the changes are automatically reflected in the administrator (Update Dependent/Beneficiary) pages.
If the administrator has set up the Dependent Workflow, he/she can select to receive an email notification when an employee modifies the Dependent/Beneficiary Info page.

Navigation:

Select the Benefit Details tile on a PeopleSoft Fluid User Interface Employee Self Service homepage, select the Dependent/Beneficiary Info tab.

This example illustrates the Dependent and Beneficiary Information page for the tablet.

This example illustrates the Dependent/Beneficiary Info page for the smartphone.



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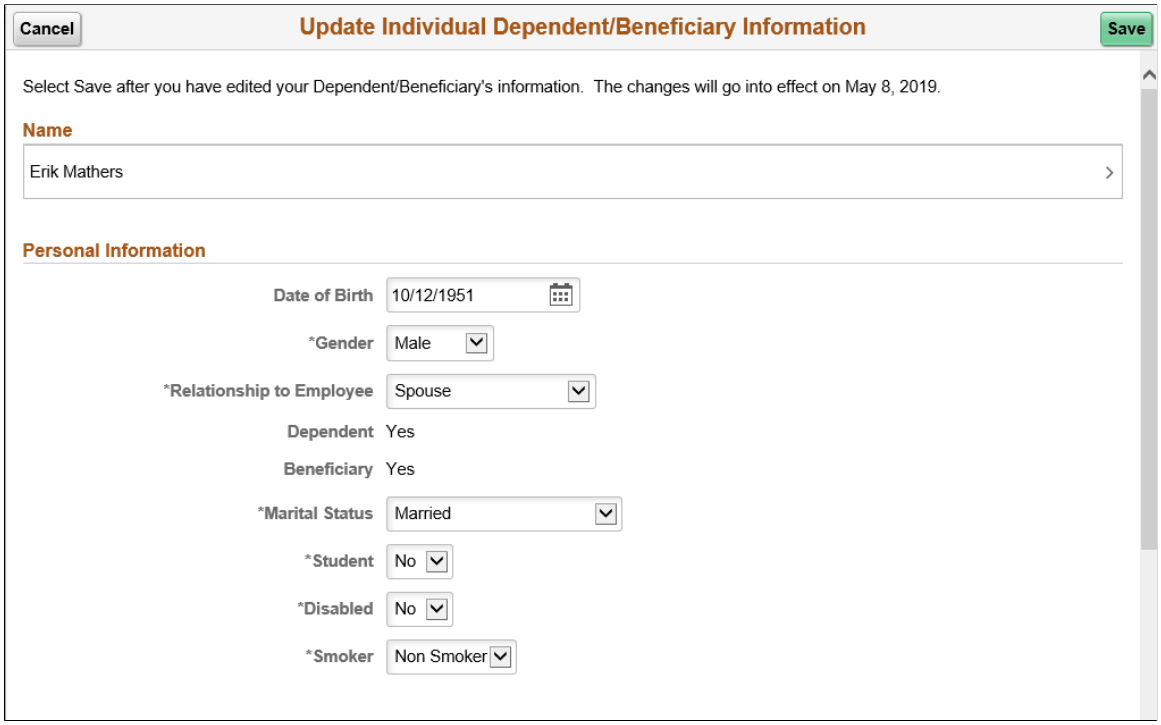
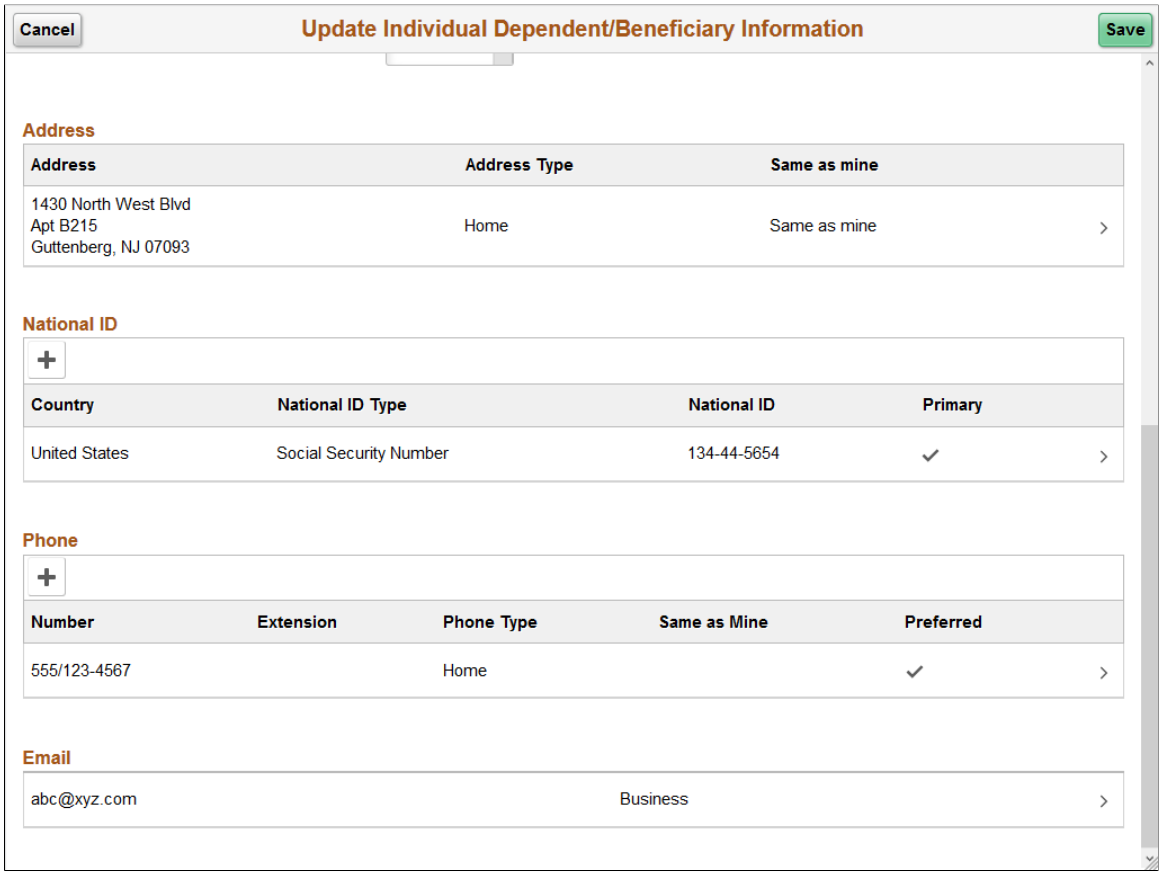
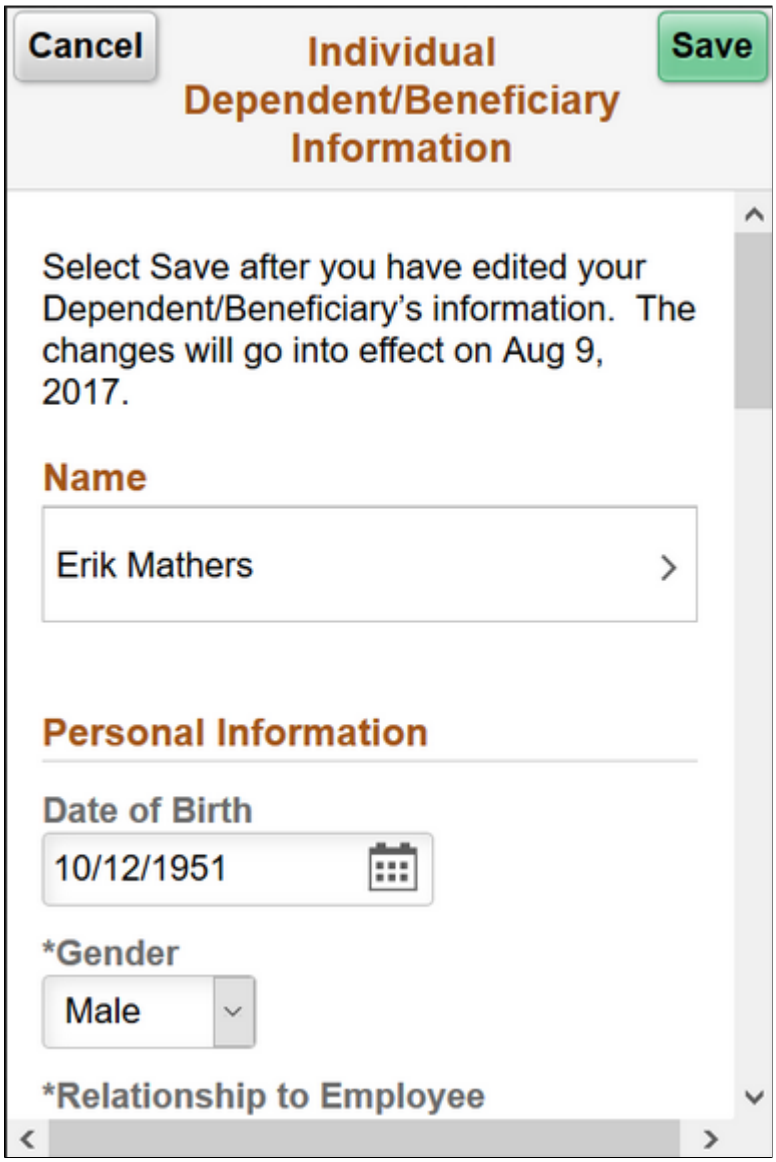
The following example illustrates the Individual Dependent/Beneficiary Information page for the tablet.



The following example illustrates the Individual Dependent/Beneficiary Information page for the tablet.



The following example illustrates the Individual Dependent/Beneficiary Information page for the smartphone.



Name Modal Window

Select the Name field to modify the name of a dependent/beneficiary.

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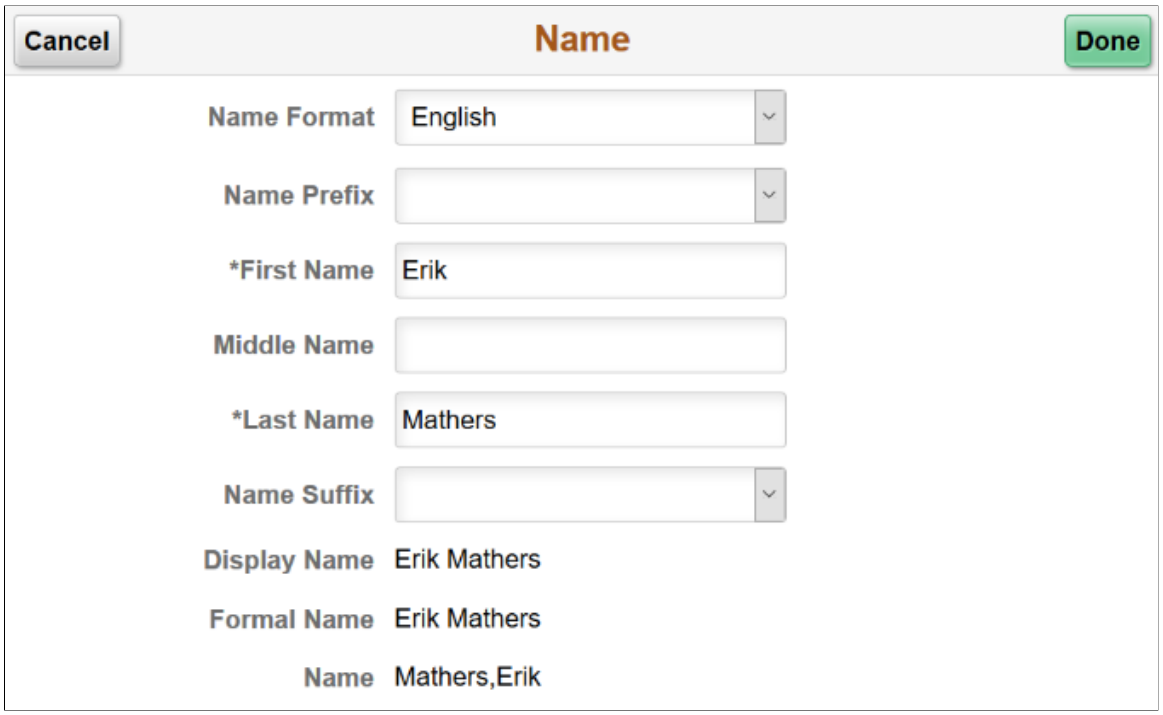
This example illustrates the Name modal window for the tablet.



Address Modal Window

The address of a newly added dependent or beneficiary defaults to the '**Same as mine**' slider equals '**Yes**', and the home address as given in the employee's Personal Information is displayed in the grid.

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

In the **Address** modal window, with the '**Same as mine**' slider equals '**Yes**', you can select an existing address type of the employee.

You can choose '**No**' on the '**Same as mine**' slider to add a different address.

If the employee's Personal Information has a home address, you can select the Address row to open the Address modal window to modify the address.

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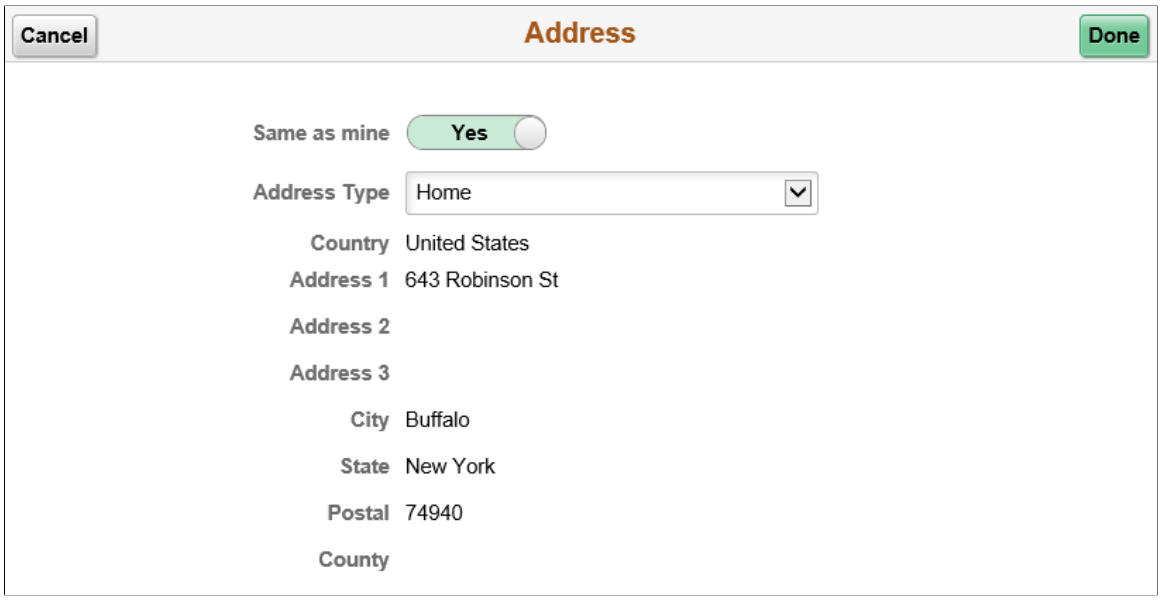
This example illustrates the Address modal window for the tablet.



National ID Modal Window

Select the **Add National ID** button to add the national ID. Dependents and beneficiaries with citizenship in more than one country can have more than one national ID. Add an additional row when required.

Note: The national ID feature is supported only for the countries United States and Canada.
You cannot delete a national ID through Employee Self Service. Only an Admin user has the rights to delete an existing national ID.

This example illustrates the National ID modal window for the tablet.

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.

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Field or Control	*Description*
Primary	When more than one national ID is added, use this option to indicate which national ID should be considered as the primary ID. By default, the first national ID entered is considered the primary ID.

Phone Number Modal Window

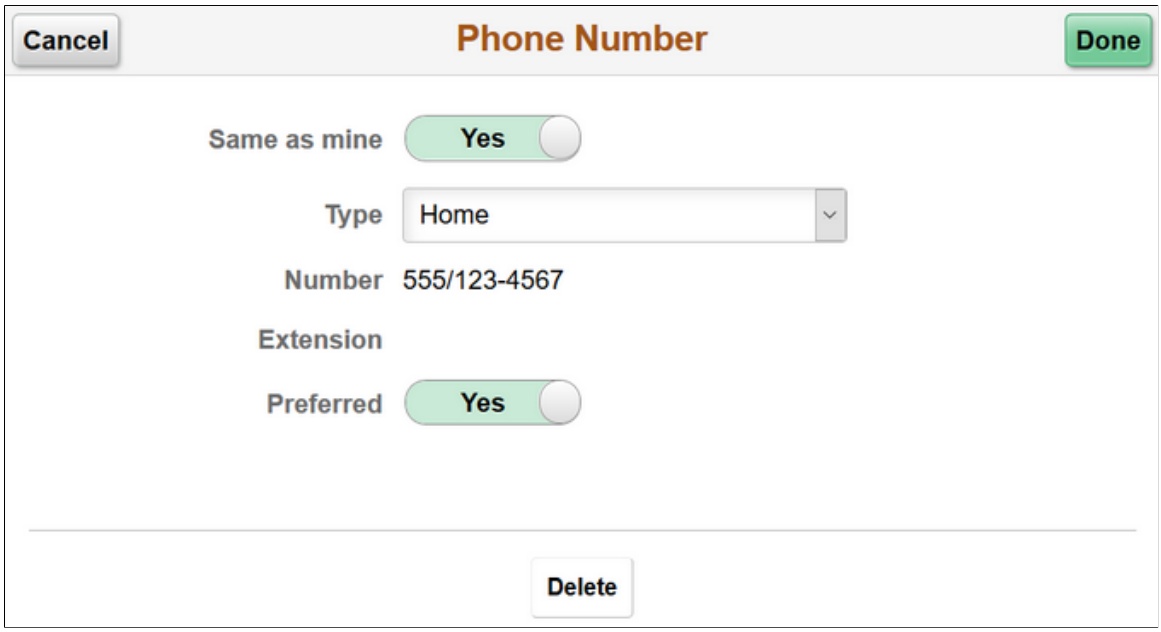
Select the **Add Phone** button to add a phone number.

In the **Phone Number** modal window, the '**Same as mine**' slider defaults to '**No**'. You can choose '**Yes**' on the slider to add an already existing phone number in the employee's Personal Information.

You can choose '**No**' on the slider to add a new phone number for the dependent or beneficiary.

By default, the first phone number you add for the dependent/beneficiary is automatically set as their preferred number.

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



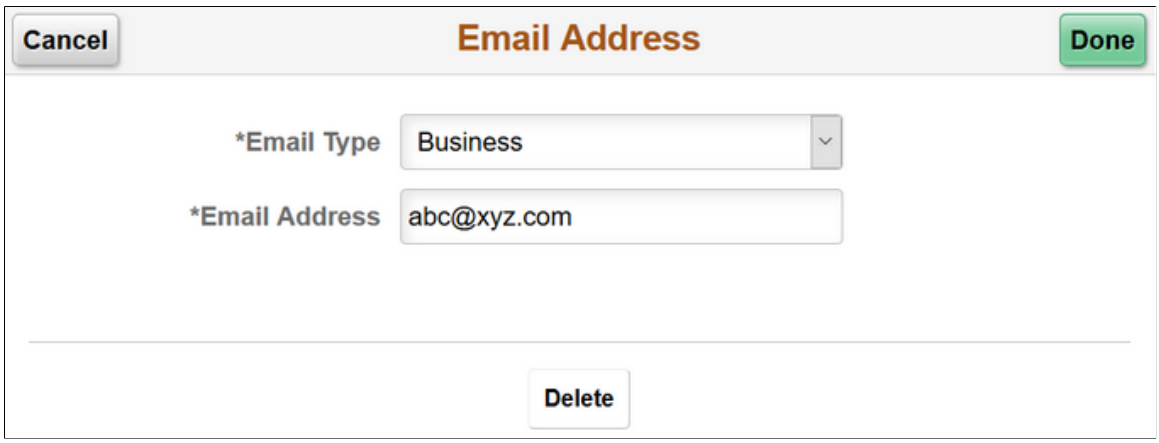
Field or Control	*Description*
Same as mine	Choose **Yes** on the '**Same as mine**' slider to select one of your already existing phone numbers for the dependent/beneficiary. To add a different phone number, choose **No** on the '**Same as mine**' slider.

Field or Control	*Description*
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.

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



Life Events Page

Use the Life Events page (W3EB_SEL_EVNT_FLU) to initiate processing for a life event that affects your benefits.

For the video feature overview on Fluid Life Events, see

Video: PeopleSoft Fluid Life Events .

Navigation:

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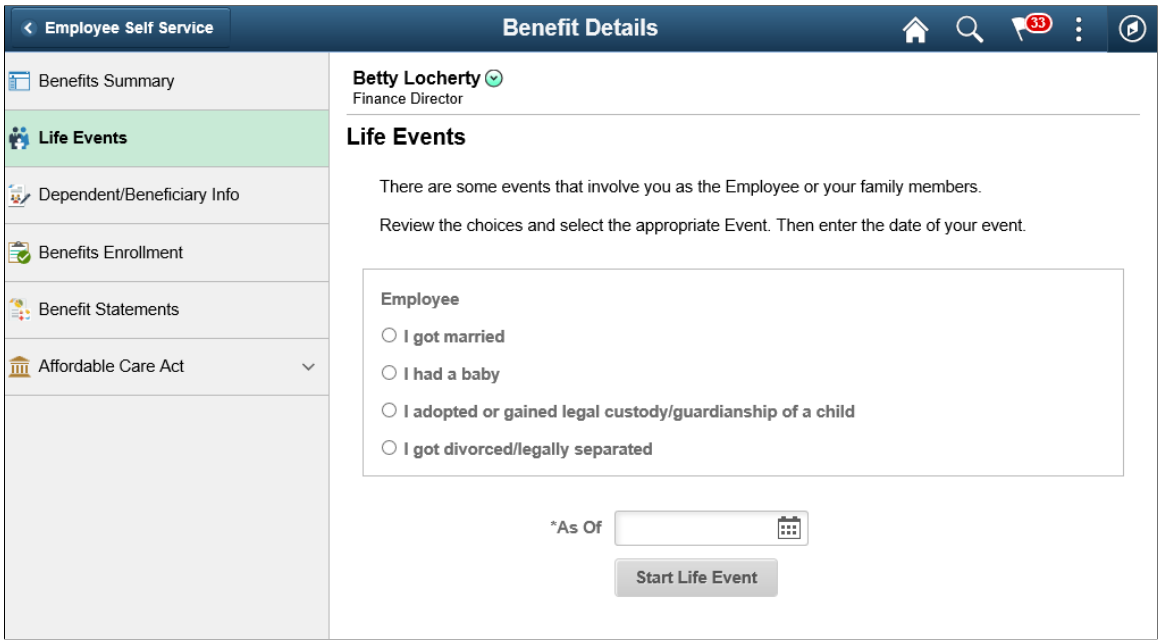
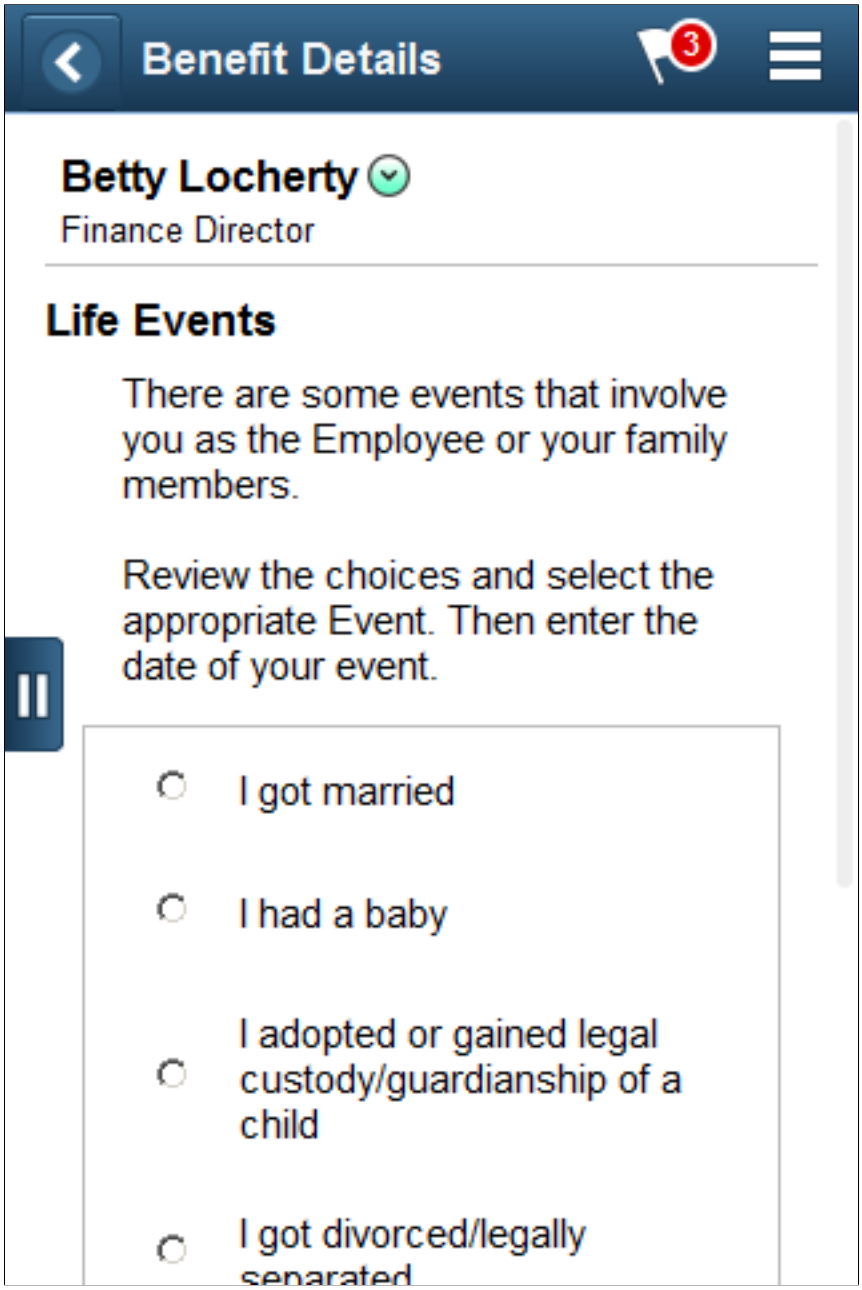
Click the Benefits tile on a PeopleSoft Fluid User Interface home page, then click the **Life Events** tab on the Benefits page.

This example illustrates the Life Events page for the tablet.



This example illustrates the Life Events page for the smartphone.



This page lists the same life event options that an employee sees on the classic life events pages.

When you select the type of life event, the page displays a message with information about the time period within which the life event information must be submitted (for example, within 31 days of the event).

Next you enter the event date and click the **Complete Life Event** button. The system then displays the classic life event pages where you complete the transaction.

For information about the pages used for the four delivered life events, see the following topics:

- Processing the Marriage Event

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- Processing the Child Birth Event
- Processing the Adoption Event
- Processing the Divorce Event

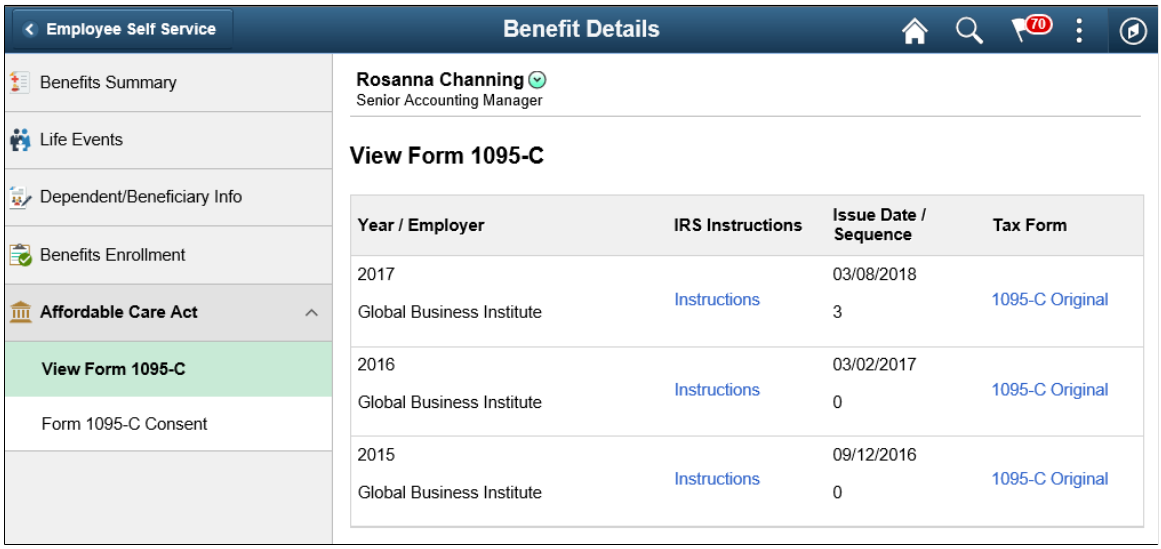
View Form 1095-C Page

Use the View Form 1095-C page (HC_ACA_EE_YE_FORM_FL) to view the Form 1095-C generated each year and submitted to the IRS.

Navigation:

Click the **Benefits** tile on a PeopleSoft Fluid User Interface Employee Self Service homepage, click the **Affordable Care Act** tab on the Benefits Details page, and then click the **View Form 1095-C Consent** tab.

This example illustrates the View Form 1095-C page for the tablet.



Field or Control	*Description*
IRS Instructions	Click this link to open the filing instructions of the Form 1095-C for the corresponding year.
Issue Date/Sequence	Displays the date on which the corresponding form was available in Self Service and the sequence of the form.
Tax Form	Click this link to open the PDF format of Form 1095-C. There are three kinds of tax forms which could be available for the employee: Original, Reissue and Correction.

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This example illustrates the IRS Instructions page which opens when you click the Instructions link on the View Form 1095-C page.

Form 1095-C (2015) 600215 page 2

Instructions for Recipient

You are receiving this Form 1095-C because your employer is an Applicable Large Employer subject to the employer shared responsibility provision in the Affordable Care Act. This Form 1095-C includes information about the health insurance coverage offered to you by your employer. Form 1095-C, Part II, Employee Offer and Coverage section, includes information about the coverage, if any, your employer offered to you and your spouse and dependent(s). If you purchased health insurance coverage through the Health Insurance Marketplace and wish to claim the premium tax credit, this information will assist you in determining whether you are eligible. For more information about the premium tax credit, see Pub. 974, Premium Tax Credit (PTC). You may receive multiple Forms 1095-C if you had multiple employers during the year that were Applicable Large Employers (for example, you left employment with one Applicable Large Employer and began a new position of employment with another Applicable Large Employer). In that situation, each Form 1095-C would have information only about the health insurance coverage offered to you by the employer identified on the form. If your employer is not an Applicable Large Employer it is not required to furnish you a Form 1095-C providing information about the health coverage it offered.

In addition, if you, or any other individual who is offered health coverage because of their relationship to you (referred to here as family members), enrolled in your employer's health plan and that plan is a type of plan referred to as a "self-insured" plan, Form 1095-C, Part III, Covered Individuals section, provides information to assist you in completing your income tax return by showing you or those family members had qualifying health coverage (referred to as "minimum essential coverage") for some or all months during the year.

If your employer provided you or a family member health coverage through an insured health plan or in another manner, the issuer of the insurance or the sponsor of the plan providing the coverage will furnish you information about the coverage separately on Form 1095-B, Health Coverage. Similarly, if you or family member obtained minimum essential coverage from another source, such as a government-sponsored program, an individual market plan, or miscellaneous coverage designated by the Department of Health and Human Services, the provider of that coverage will furnish you information about that coverage on Form 1095-B. If you or a family member enrolled in a qualified health plan through a Health Insurance Marketplace, the Health Insurance Marketplace will report information about that coverage on Form 1095-A, Health Insurance Marketplace Statement.

TIP *Employers are required to furnish Form 1095-C only to the employee. As the recipient of this Form 1095-C, you should provide a copy to any family members covered under a self-insured employer-sponsored plan listed in Part III, Covered Individuals section, if they request it for their records.*

Part I. Employee

Reports information about you, the employee.

Reports your social security number (SSN). For your protection, this form may show only the last four digits of your SSN. However, the issuer is required to report your complete SSN to the IRS.

! CAUTION *If you do not provide your SSN and the SSNs of all covered individuals to the plan administrator, the IRS may not be able to match the Form 1095-C to determine that you and the other covered individuals have complied with the individual shared responsibility provision. For covered individuals other than the employee listed in Part I, Employee's section, a Taxpayer Identification Number (TIN) may be provided instead of an SSN.*

Part I. Applicable Large Employer

Reports information about your employer. This includes a telephone number for the person whom you may call if you have questions about the information reported on the form or to report errors in the information on the form and ask that they be corrected.

Part II. Employer Offer and Coverage, Lines 14-16

Line 14. The codes listed below for line 14 describe the coverage that your employer offered to you and your spouse and dependent(s), if any. (If you received an offer of coverage through a multiemployer plan due to your membership in a union, that offer may not be shown on line 14.) The information on line 14 relates to eligibility for coverage subsidized by the premium tax credit for you, your spouse, and dependent(s). For more information about the premium tax credit, see Pub. 974.

1A. Minimum essential coverage providing minimum value offered to you with an employee contribution for self-only coverage equal to or less than 9.5% of the 48 contiguous states single federal poverty line and minimum essential coverage offered to your spouse and dependent(s) (referred to here as a Qualifying Offer). This code may be used to report for specific months for which a Qualifying Offer was made, even if you did not receive a Qualifying Offer for all 12 months of the calendar year.

1B. Minimum essential coverage providing minimum value offered to you and minimum essential coverage NOT offered to your spouse or dependent(s).

1C. Minimum essential coverage providing minimum value offered to you and minimum essential coverage offered to your dependent(s) but NOT your spouse.

1D. Minimum essential coverage providing minimum value offered to you and minimum essential coverage offered to your spouse but NOT your dependent(s).

1E. Minimum essential coverage providing minimum value offered to you and minimum essential coverage offered to your dependent(s) and spouse.

1F. Minimum essential coverage NOT providing minimum value offered to you, or you and your spouse or dependent(s), or you, your spouse, and dependent(s).

1G. You were NOT a full-time employee for any month of the calendar year but were enrolled in self-insured employer-sponsored coverage for one or more months of the calendar year. This code will be entered in the *All 12 Months* box on line 14.

1H. No offer of coverage (you were NOT offered any health coverage or you were offered coverage that is NOT minimum essential coverage).

1I. Your employer claimed "Qualifying Offer Transition Relief" for 2015 and for at least one month of the year you (and your spouse or dependent(s)) did not receive a Qualifying Offer. Note that your employer has also provided a contact number at which you may request further information about the health coverage, if any, you were offered.

Line 15. Reports the employee share of the lowest-cost monthly premium for self-only minimum essential coverage providing minimum value that your employer offered you. The amount reported on line 15 may not be the amount you paid for coverage if, for example, you chose to enroll in more expensive coverage such as family coverage. Line 15 will show an amount only if code 1B, 1C, 1D, or 1E is entered on line 14. If you were offered coverage but not required to contribute any amount towards the premium, this line will report "0.00" for the amount.

Line 16. This code provides the IRS information to administer the employer shared responsibility provisions. Other than a code 2C which reflects your enrollment in your employer's coverage, none of this information affects your eligibility for the premium tax credit. For more information about the employer shared responsibility provisions, see IRS.gov.

Part III. Covered Individuals, Lines 17-34

Reports the name, SSN (or TIN for covered individuals other than the employee listed in Part I), and coverage information about each individual (including any full-time employee and non-full-time employee, and any employee's family members) covered under the employer's health plan, if the plan is "self-insured." A date of birth will be entered in column (c) only if an SSN (or TIN for covered individuals other than the employee listed in Part I) is not entered in column (b). Column (d) will be checked if the individual was covered for at least one day in every month of the year. For individuals who were covered for some but not all months, information will be entered in column (e) indicating the months for which these individuals were covered.

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This example illustrates the Tax Form – Form 1095-C which opens when you click a Tax Form link on the View Form 1095-C page.

☐ VOID ☐ CORRECTED OMB No. 1545-2251 **2016** Form **1095–C**

Employer Provided Health Insurance Offer and Coverage

Part I APPLICABLE LARGE EMPLOYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

Global Business Institute
500 George Washington Pkway
New York NY 07666

646/350-2222

▶ Do not attach to your tax return. Keep for your records. Information about Form 1095-C and its separate instructions is at *www.irs.gov/form1095c.*

EMPLOYEE'S name, address, ZIP/postal code & country

Rosanna Channing
4026 Cy Avenue
Casper WY 82604

APPLICABLE LARGE EMPLOYER'S identification number (EIN): 99-4123456

EMPLOYEE'S social security number (SSN): XXX-XX-3591

Part II Employee Offer of Coverage

Plan Start Mo. (Enter 2-digit no.): 00	14 Offer of Coverage (enter required code)	15 Employee Required Contribution (see instructions)	16 Section 4980H Safe Harbor and Other Relief (enter code, if applicable)
All 12 Months		$	
Jan	1E	$ 19.00	2C
Feb	1E	$ 19.00	2C
Mar	1E	$ 19.00	2C
Apr	1E	$ 19.00	2C
May	1E	$ 19.00	2C
June	1E	$ 19.00	2C
July	1E	$ 19.00	2C
Aug	1E	$ 19.00	2C
Sept	1E	$ 19.00	2C
Oct	1E	$ 19.00	2C
Nov	1E	$ 19.00	2C
Dec	1E	$ 19.00	2C

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Department of the Treasury – IRS

Part III Covered Individuals If Employer provided self-insured coverage, check the box and enter the information for each individual enrolled in coverage, including the employee. ☒

	(a) Name of covered individual(s)	(b) SSN or other TIN	(c) DOB (If SSN or other TIN is not available)	(d) Covered all 12 mos.	(e) Months of coverage Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
17	Jason Channing	XXX-XX-4444			X	X	X	X	X	X	X	X	X	X	X	X
18	Robert Channing	XXX-XX-5654			X	X	X	X	X	X	X	X	X	X	X	X
19	Rosanna Channing	XXX-XX-3591			X	X	X	X	X	X	X	X	X	X	X	X
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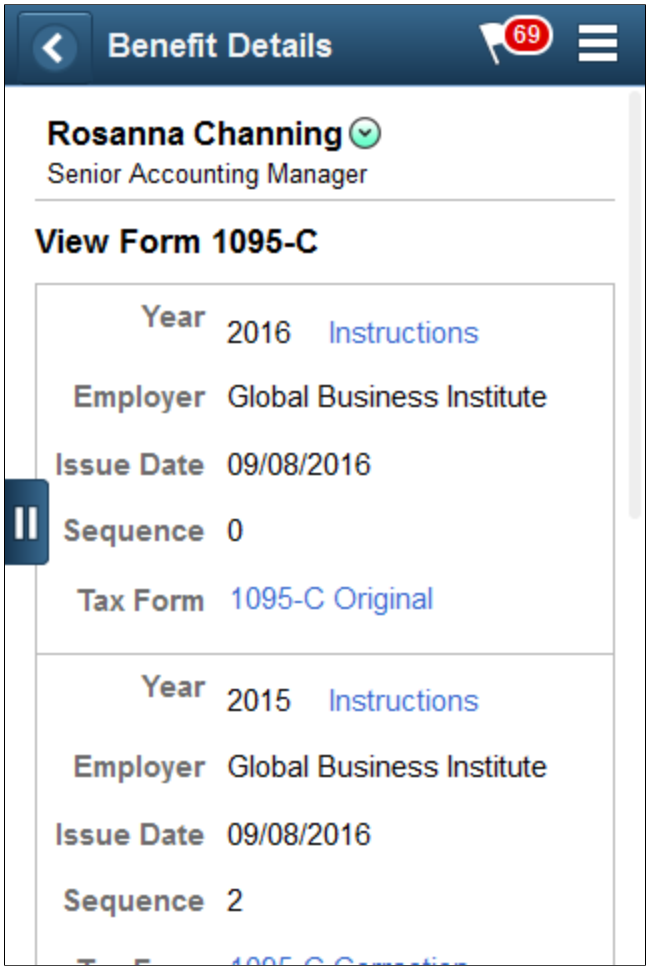
L1095CALT18 Form **1095C** (2016)

This example illustrates the View Form 1095-C page for the smartphone.



Form 1095-C Consent Page

Use the Form 1095-C Consent page (ACA_SS_CONSENT_FL_GBL) to access the consent form to grant or withdraw consent to receive the Form 1095-C for the current year in an electronic format.

Navigation:

Click the Benefits tile on a PeopleSoft Fluid User Interface Employee Self Service homepage, click the Affordable Care Act tab on the Benefits page, and then click the Form 1095-C Consent tab.

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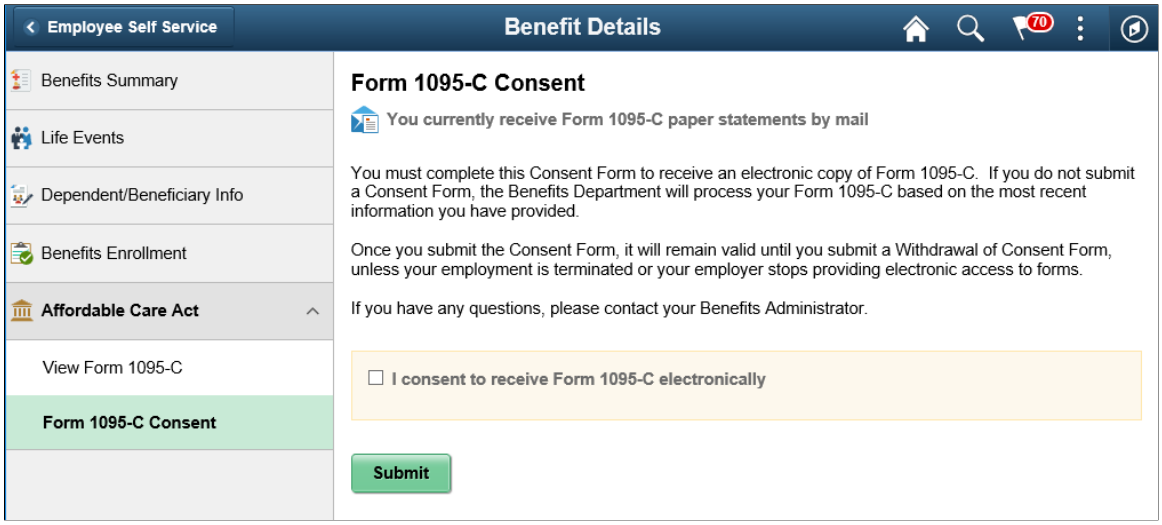
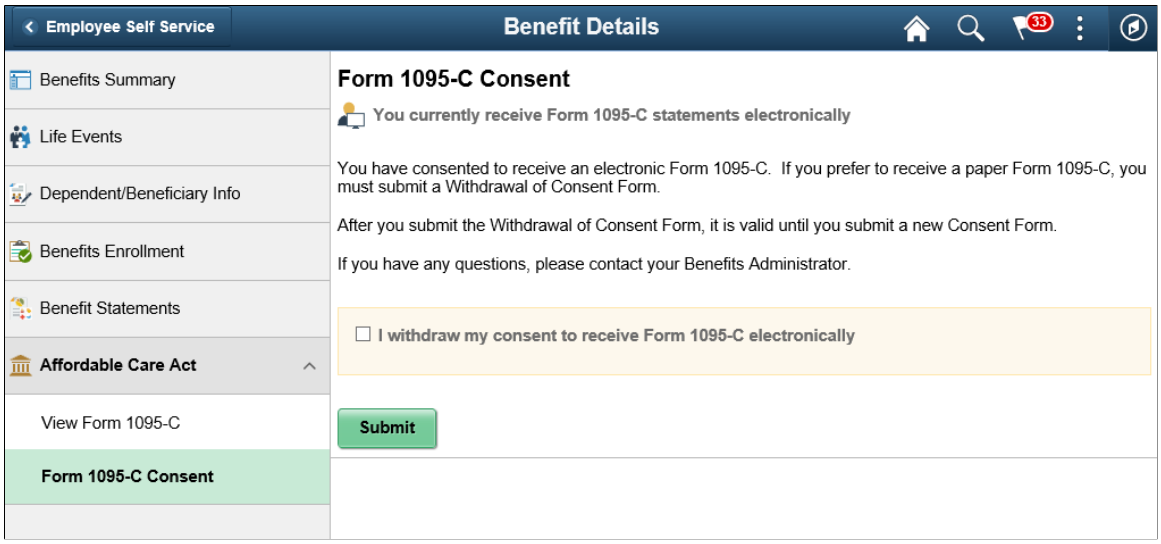
This example illustrates the Form 1095-C Consent page for the tablet.



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



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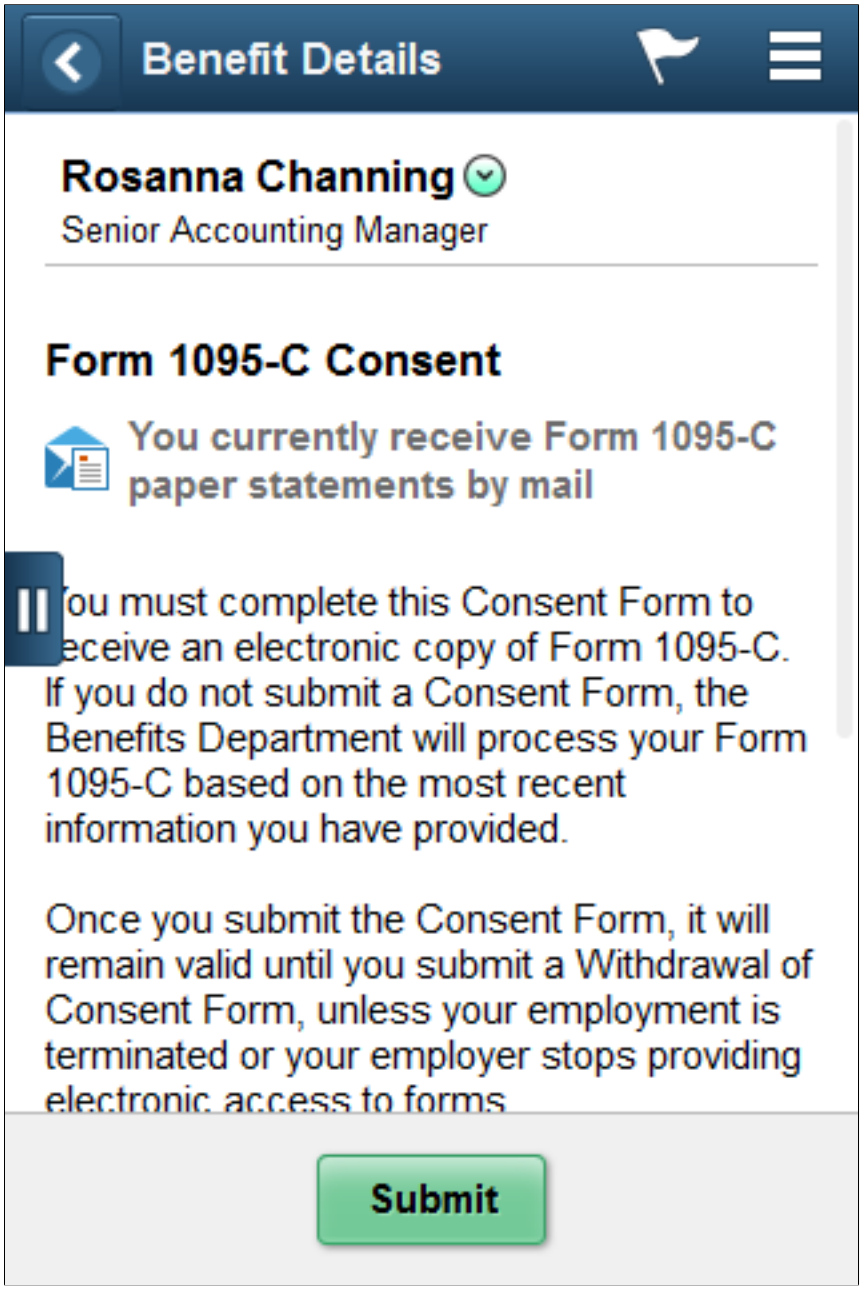
This example illustrates the Form 1095-C Consent page for the Smartphone.



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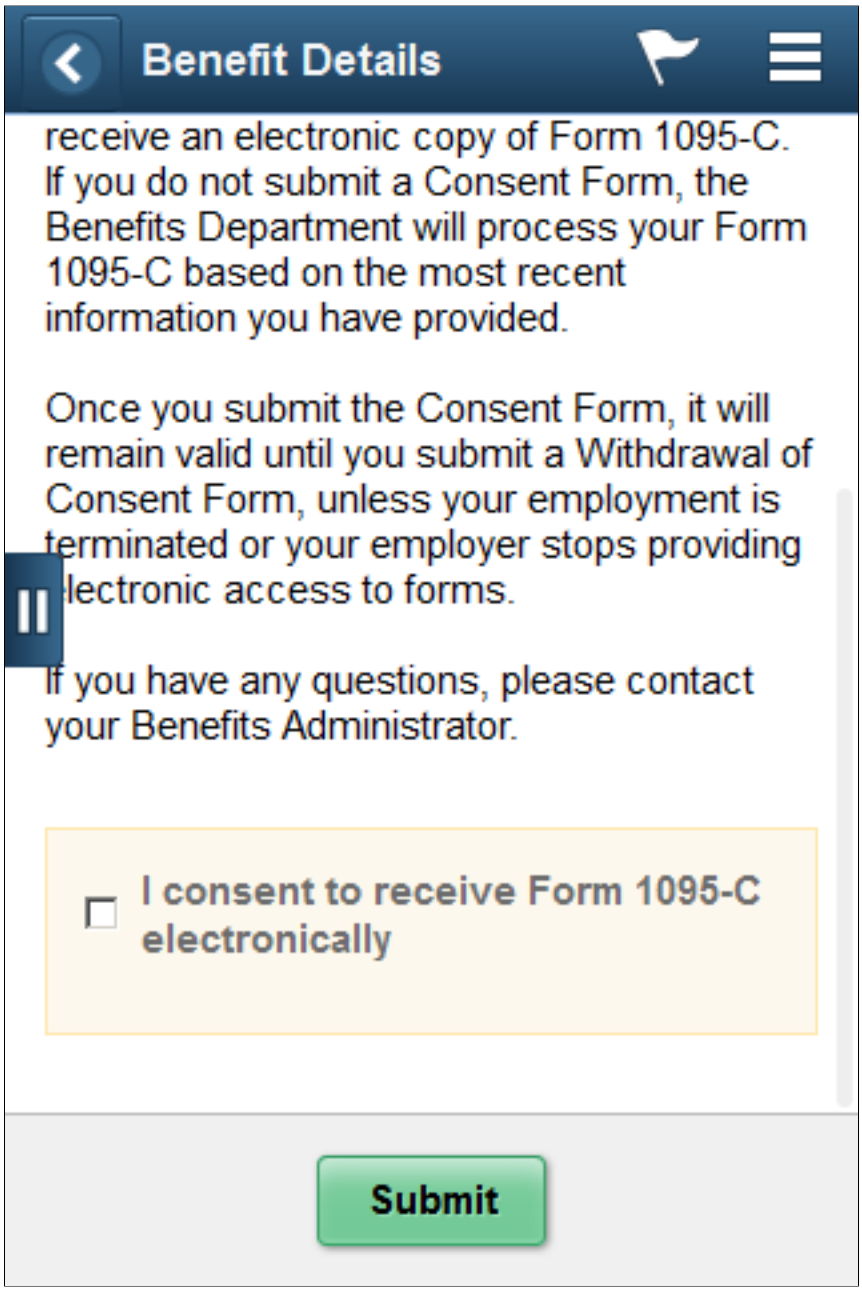
This example illustrates the Form 1095-C Consent page for the Smartphone displaying the checkbox at the bottom of the page.



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Chapter 8

Working with Suppliers

Integrating eBenefits with eBenX

This section provides an overview of eBenX integration and discusses how to send enrollment data.

Pages Used to Send Enrollment Data

Page Name	*Definition Name*	*Usage*
Run Carrier Reporting Schedule Page	BN_M_RUN_CNTL	Extract and send data to a supplier.
Resend File Page	BN_M_REFTP_FILE	Resend a file created from this schedule.

Understanding eBenX Integration

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

To send enrollment data to eBenX:

1. Set up eBenX.
2. Run the Carrier Interface process located in the Manage Base Benefits business process.

   This process writes your most current enrollment data to four records: BN_SNAP_PER, BN_SNAP_JOB, BN_SNAP_PLAN, BN_SNAP_HIST.
3. Run the Carrier Interface Report process within eBenefits.

See Setting Up Suppliers.

Sending Enrollment Data

Use this procedure to send enrollment data.

Sending Data to Suppliers

To send data to a supplier:

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

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

Resending Data to Suppliers

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

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

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

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

Understanding Integration Points

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

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

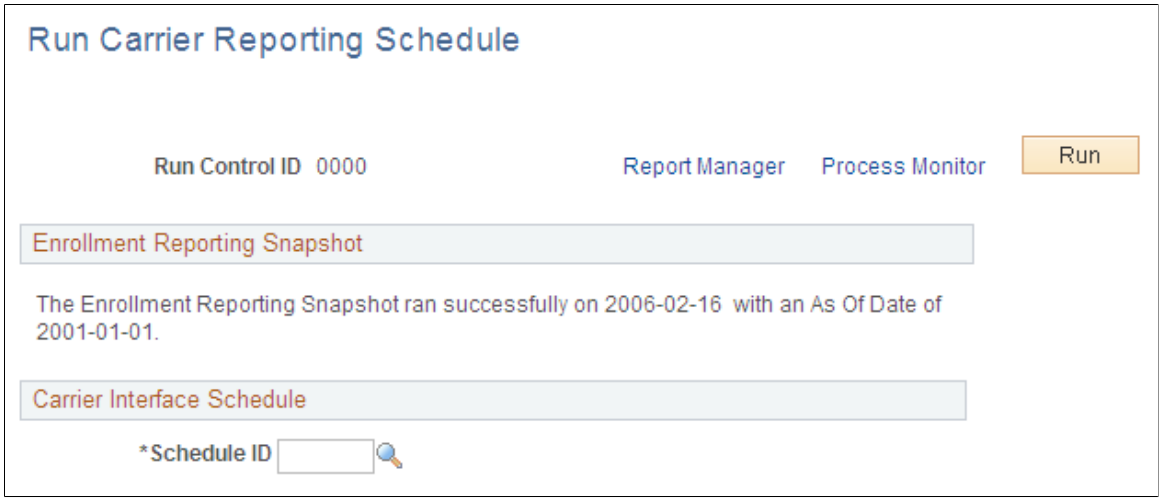
Run Carrier Reporting Schedule Page

Use the Run Carrier Reporting Schedule page (BN_M_RUN_CNTL) to Extract and send data to a supplier.

Navigation:

Set Up HCM > **Common Definitions** > **Supplier Administration** > **Carrier Report** > **Run Carrier Reporting Schedule**

This example illustrates the fields and controls on the Run Carrier Reporting Schedule page.



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Field or Control	*Description*
Enrollment Reporting Snapshot	This group box specifies the date on which the Enrollment Reporting Snapshot process was last run and the as of date entered for that run. These dates are taken from the BN_SNAP _HIST_TBL table. If the BN_SNAP_HIST_TBL or BN_ SNAP table is empty, a message appears in this group box stating that the table is empty and the remaining fields and buttons are unavailable.
Carrier Interface Schedule	This group box enables you to select a schedule ID. You create schedules using the Define Carrier Interface Schedule page.

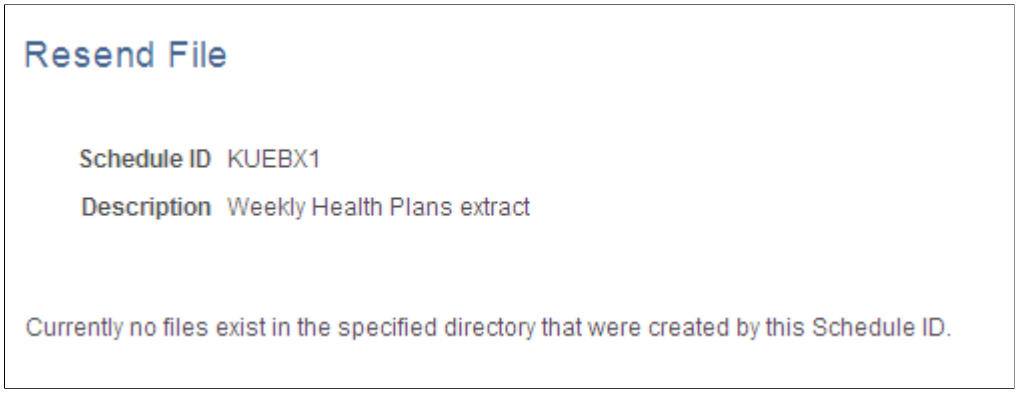
Resend File Page

Use the Resend File page (BN_M_REFTP_FILE) to resend a file created from this schedule.

Navigation:

Click the **Resend a file created from this schedule** link on the Define Carrier Rpt Schedule page.

This example illustrates the fields and controls on the Resend File page.



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

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Chapter 9

eBenefits Delivered Workflow

Delivered Workflow for PeopleSoft eBenefits

This section discusses PeopleSoft eBenefits workflow.

Dependent

This section lists the components of dependent workflow.

Description

Information Type	*Description*
Event Description	Dependent enrollments.
Action Description	The system notifies the benefits administrator of dependent enrollments.
Notification Method	Worklist.

Workflow Objects

Information Type	*Description*
Event	W3EB_DEP_WF
Workflow Action	Automatic
Role	Benefits administrator
Notification Form	Worklist
Business Process	Benefits WF Dependents Notification CI
Business Activity	Find dependent enrollments.

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Information Type	*Description*
Business Event	Notification

Document Approval

This section lists the components of the document approval workflow.

Description

Information Type	*Description*
Action Description	1. The system sends an e-mail notification to the Benefits Administrator when an employee uploads a life event document. 2. The Benefits Administrator approves or denies the document uploaded by the employee. 3. The system sends an e-mail notification to the employee when the Benefits Administrator approves the document, and allows the employee to start benefits enrollment for the life event process.
Notification Method	Worklist.

Events and Templates

The following events and generic templates are used to generate e-mail notifications for the document approval workflow:

Event	*Prerequisites*	*Template Name*	*Description*	*Recipients*
Route for Approval	• Proof required is selected on the Life Event Rules table. • Approve Documents is selected on the Life Event Rules table. • Employee uploads a document.	HC_HEB_AWAITING	Notifies that the document is awaiting approval.	Benefits Administrator

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Event	*Prerequisites*	*Template Name*	*Description*	*Recipients*
On Final Approval	Benefits Administrator approves the document uploaded by the employee.	HC_HEB_APPROVED	Notifies that the document was approved.	Employee
On Final Denial	Benefits Administrator denies the document uploaded by the employee.	HC_HEB_DENIED	Notifies that the document was denied.	Employee

Workflow Events

Event	*Object Name*	*Description*
Route for Approval	Participant	Approver (e-mail notification will be sent to the Benefits Administrator)
	Template Name	HC_HEB_DOC_AWAITING
	Menu Name	Administer Base Benefits
	Approval Component	W3EB_APPR_SUMMARY
	Menu Action	Update
On Final Approval	Participant	Requestor (e-mail notification will be sent to the employee)
	Template Name	HC_HEB_DOC_APPROVED
	Menu Name	W3EB_MENU
	Approval Component	W3EB_ATTACH
	Menu Action	Update
On Final Denial	Participant	Requestor (e-mail notification will be sent to the employee)

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Event	*Object Name*	*Description*
	Template Name	HC_HEB_DOC_DENIED
	Menu Name	W3EB_MENU
	Approval Component	W3EB_ATTACH
	Menu Action	Update

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