Oracle Fusion Cloud Human Resources

Benefits Questions and Answers

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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons ⓘ to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

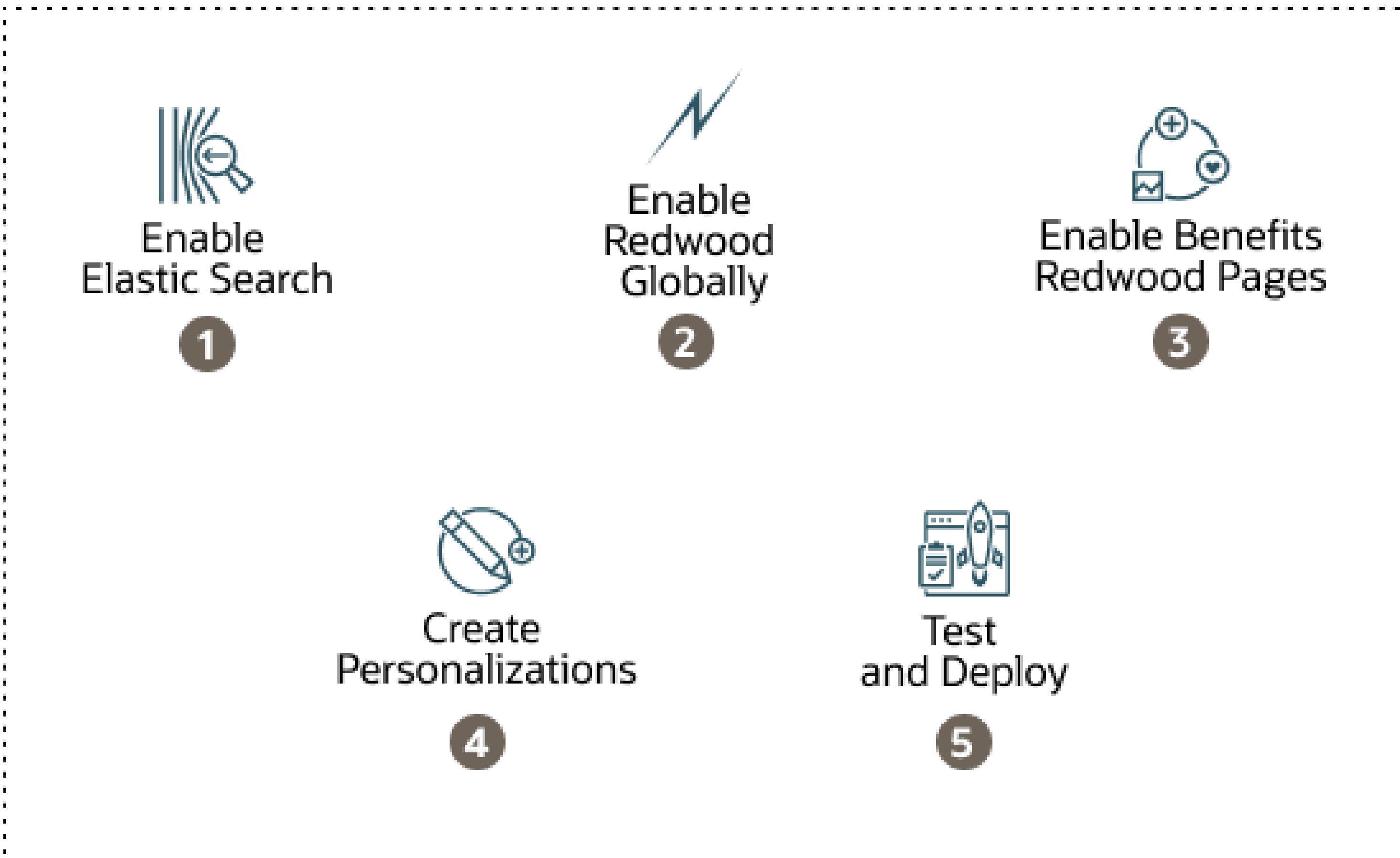
You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

1 Benefits Questions and Answers

How do I adopt Redwood for Benefits?

Here's a diagram to guide you on the best way to move to Redwood.



Make sure you do these steps in a test environment first, then in your production environment. Here's how you move to Redwood:

1. Enable elastic search.
    a. Turn on these profile options:
        - HRC_ELASTIC_SEARCH_ENABLED
        - ORA_BEN_PERSON_SEARCH_INDEX_ENABLED
        - PER_PERSON_INDEX_FUZZY_SEARCH_ENABLED. This is optional. Turn on this profile option if you'd like to enable fuzzy search while using the display name as the keyword.
    b. Create the Benefits person search index by running this process on the Scheduled Processes page for each index: **ESS job to create index definition and perform initial ingest to OSCS**.

        You need to set the **Index Name to Reingest** process parameter to **fa-hcm-personbenefits**.

        > **Note:** Make sure that the **FND_MANAGE_SCHEDULED_JOB_DEFINITION_PRIV** privilege has been granted to the benefits administrator or benefits manager role.

    c. Add the necessary privileges if you're using custom roles, and regenerate those roles. See the **Access Requirements** section in these What's New announcements for details:
        - Enable Redwood Experience for Benefits Enrollment Pages in Benefits Summary
        - Enable Redwood Experience for the New Benefits Activity Center
2. Enable the Redwood pages globally using the ORA_HCM_VBCS_PWA_ENABLED profile option.
3. Enable these profile options to get access to all the Redwood pages for Benefits:
    - ORA_BEN_SELF_SERVICE_ENROLLMENT_REDWOOD_ENABLED
    - ORA_BEN_ADMINISTRATIVE_ENROLLMENT_REDWOOD_ENABLED
4. If you've created any personalizations for the Responsive (ADF) pages, you'll need to recreate those personalizations in the Redwood pages using VB Studio. See the *Learning Path for Visual Builder Express and Business Rules* article for details.

    You might also want to reassess how you want to show instructions and information to employees in the Redwood pages. You can integrate an AI Agent that can scan specific documents you upload to provide personalized insights to employees on their benefits packages. See *HCM – Revolutionizing Employee Benefits with AI Agents in Oracle Cloud* and *Enable AI Agent in Redwood Benefits Pages* for more details.
5. Test your Redwood pages, verify if everything's working as you expect, and publish the VB Studio workspace.

Ensure you follow the quarterly and monthly What's New updates to keep up to date on the newest Redwood experiences for Benefits.

Related Topics

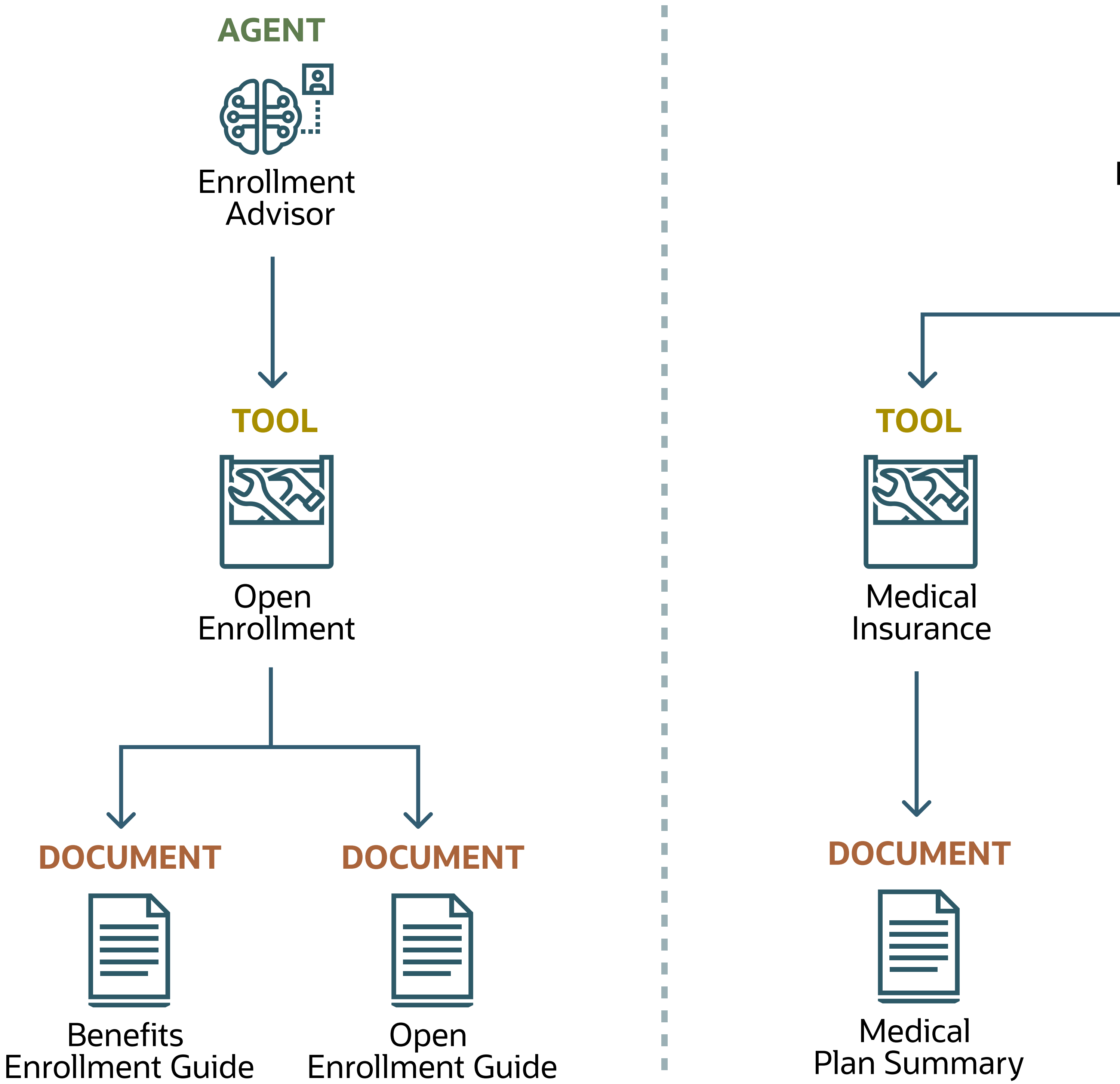
- *What are the top questions and answers about Redwood adoption?*
- *How do I get started with Oracle's Redwood experiences?*
- *What are the best personalization tips and tricks I should know in VB studio?*
- *What are the newest Redwood features in Benefits?*
- *How do I use the redesigned Benefits self-service enrollment pages?*
- *How do I add a Redwood deep link?*
- *How do I hide the Redwood Change Beneficiaries, Beneficiary Organizations, and Person Info quick actions?*
- *How do I add additional details on the Redwood Temporary ID Card page?*

- *How do I personalize the seeded cards on the Support tab?*
- *How do I personalize the fields in the Redwood Person Info page?*
- *How do I show or hide the Redwood Primary Care Physician quick action?*
- *How do I personalize the Redwood Get to Know Your Benefits section?*
- *How do I add a Redwood quick action to the Home page?*
- *How do I enable a profile option?*

How do I set up AI Agents in Redwood Benefits pages?

AI agent-enabled guided journeys answer user questions about benefits programs, plans, and policies through a chat experience.

You can upload benefits related documents by using document tools that are used by an AI agent to answer any questions through a chat experience. Here's a diagram to show you how it works.


AGENT
Enrollment Advisor
TOOL
Open Enrollment
DOCUMENT
Benefits Enrollment Guide
DOCUMENT
Open Enrollment Guide
TOOL
Medical Insurance
DOCUMENT
Medical Plan Summary

Here's how you set up AI agents:

1. Ensure you've set up these security privileges:
   - HRC_MANAGE_AI_AGENT_PRIV
   - HRC_ACCESS_AI_AGENT_CHAT_PRIV
2. Enable these profile options:
   - ORA_HCM_VBCS_PWA_ENABLED
   - ORA_PER_GUIDED_JOURNEYS_SETUP_REDWOOD_ENABLED
   - ORA_PER_AGENT_TASK_TYPE_GUIDED_JOURNEYS_ENABLED
   - ORA_BEN_SELF_SERVICE_ENROLLMENT_REDWOOD_ENABLED
3. Do these steps on the Configure HCM Agents page. See the Set Up AI Agents section in the *How do I set up AI Agents for Redwood Pages* playbook if you need more details.
   a. Add a new document tool and upload the required benefits documents. You can add multiple tools.
   b. Add a new agent and link the tool you created.
   c. Run the Process Agent Documents process.
   d. Create a guided journey. Add an Agent task type and select the agent you created.
   e. Activate the guided journey. Take note of the journey code.
4. Configure the benefits page with the guided journey. See the *Extend Application Page with Agent Guided Journey* topic for details. In summary:
   a. On the home page, click **Me** > **Benefits**.
   b. Edit the page in Visual Builder Studio.
   c. Set the **pageLevelJourneyCode** property with the journey code you created.
5. Preview and publish your changes.

Related Topics

- How do I enable a profile option?

How do I add videos to the Review Employee Resources Redwood page in Benefits?

You can create a guided journey that has a video task. You can configure it to appear as a banner at the page level.

Here's how:

1. Set the ORA_PER_GUIDED_JOURNEYS_ENABLED and ORA_PER_GUIDED_JOURNEYS_SETUP_REDWOOD_ENABLED profile options to Y.
2. Create a guided journey for the Review Employee Resources page. In the guided journey, you create a task to add a video.
3. Enable the guided journey for the Review Employee Resources page using Visual Builder Studio and test the setup. You configure the video task so that it displays at the page level in the Review Employee Resources page.

Create a Guided Journey

You need to create guided journey template and tasks. You can create a journey by building on an existing template or create a brand-new template. In this scenario, you create a new template and create task of type Video.

1. On the Home page, click **My Client Groups**, then select the **Guided Journey** quick action (Journeys Setup section).
2. Create a guided journey. Make note of the guided journey code. You need to enter this code for the page properties in VB Studio when you enable the journey.
3. Click **Create Draft**.
4. In the Tasks section of the Overview tab, create the video task.
   a. In the Task Type list, select **Video**.
   b. In the Video Type list, select **Embedded URL**.
   c. In the Task URL field, enter the video URL.
   d. Save your changes.
5. Preview the journey and activate the journey template.

Enable the Guided Journey

Configure properties for the tasks you want to display at the page level in the Review Employee Resources page.

1. On the Home page, click **Me** > **Show More** > **Review Employee Resources** (Benefits section).
2. From the Settings and Actions menu in the global header area, click **Edit Page in Visual Builder Studio**. Ensure that you have appropriate access to the VB Studio configuration to see this option.
3. Create a project or select an existing one. Then, select the **Express** option.
4. You want to enable the guided journey at the page level. The **pageLevelJourneyCode** property controls the display of the guided journey at the page level. Set it with the journey code you noted in an earlier step. You can use similar properties to display the guided journey at the section level too, if that's your requirement.
5. Preview and publish your changes.
6. Do these steps to test the setup:
   a. Verify that the banner for the video appears.
   b. Click the banner. The video link should open in the side panel.

Related Topics

- How do I enable a profile option?

How do I enable or disable the Get to know your benefits step?

In the Self Service Configuration page, you select or clear the **Display the Get to know your benefits page** check box depending on your requirement. Here's how:

1. On the Home page, click **Benefits Administration, Plan Configuration**.
2. In the Tasks panel drawer, click **Self-Service Configuration**.
3. Select the check box named **Display the Get to know your benefits page** to enable the pre-enrollment step. To disable the step, clear the check box.

4. Save your changes.

How do I hide the image and text on the Before you enroll section?

Here's how:

1. Ensure you have the Self-Service Enrollment page open. On the Settings and Actions menu in the global area, click **Edit Page in Visual Builder Studio**. Ensure that you have appropriate access to the VB Studio configuration to see this option.
2. Create a project or select an existing one. Then, select the **Express** option.
3. Under Page Properties, clear the **showDefaultContentOnWelcome** check box to hide the welcome content.
4. Preview and publish your changes.

How do I add more details on Temporary ID Card page?

You can personalize the Temporary ID Card page to add other details like relation, date of birth, national identifier, and dependent person number.

Here's how you personalize the Temporary ID Card page:

1. On the Home page, click **Me**, **Benefits**.
2. Click **Temporary ID Card** from the quick action menu.
3. From the Settings and Actions menu in the global header area, click **Edit Page in Visual Builder Studio**. Ensure that you have appropriate access to the VB Studio configuration to see this option.
4. Create a project or select an existing one. Then, select the **Express** option.
5. In the Properties pane, select the Constants tab.
6. Click **dependentAdditionalDetailsMode**. This variable controls the rendering of other fields, such as Relation, Date of Birth, National Identifier, Dependent Person Number, and so on. Valid values for these fields are REL, DOB, NID, PNUM, and OFF. You can add only one of these values. By default, it shows the National Identifier of the dependent. For example, replace the current value with DOB if you'd like to display the date of birth. You can use the value OFF to show only the dependent name.
7. Preview and publish your changes.

How do I hide the quick actions on the Benefits self-service landing page?

You can hide these quick actions on the Benefits self-service landing page:

Quick Action	Steps to Hide
Primary Care Physicians	1. On the Home page, click **Benefits Administration**, **Plan Configuration.** 2. In the Tasks panel drawer, click **Self-Service Configuration**. 3. Clear the check box named **Display primary care physician**. 4. Save your changes.
Change Beneficiaries Beneficiary Organizations Person Info	1. Open the page. 2. From the Settings and Actions menu in the global header area, click **Edit Page in Visual Builder Studio**. Ensure that you have appropriate access to the VB Studio configuration to see this option. 3. Create a project or select an existing one. Then, select the **Express** option. 4. In the Page Properties section, set the value of these drop-down lists as false: ◦ Show Change Beneficiaries ◦ Show Beneficiary Organizations ◦ Show Person Info 5. Preview and publish your changes.
Before You Enroll Dependent Care FSA Document Records Health Care FSA Calculator HSA Calculator Report a Life Event Review Employee Resources Temporary ID Card	See *Hide a Quick Action*

How do I personalize the Support tab that appears on the self-service landing page?

If you click the Support tab on the self-service landing page, you can see the four predefined cards.

These cards are delivered with predefined primary text and secondary text. These texts act just as placeholders. As an administrator, you can personalize the primary and secondary text. You can add appropriate URLs to these cards to make them functional. When the cards are personalized and published, they will be available to the employees. Also, you can hide the existing cards or display more cards.

Here's how you personalize the cards:

1. On the Home page, click **Me**, **Benefits**.
2. Click the Support tab.
3. From the Settings and Actions menu in the global header area, click **Edit Page in Visual Builder Studio**. Ensure that you have appropriate access to the VB Studio configuration to see this option.

4. Create a project or select an existing one. Then, select the **Express** option.
5. In the Properties pane, select the Constants tab.
6. Click a field to personalize it. For example, click **card1Description** to change the description of the first card. You can personalize these fields:

Fields that You Can Personalize for the Predefined Cards on the Support Tab

Field	Details
Card description	This is the description that appears on the card.
Card text	This is the bold text that appears on the card.
Card URL	You can configure the URL of a page so that the page opens when you click the card.

7. Preview and publish your changes.

How do I regenerate Access Control List data for a user?

If the Access Control List (ACL) data isn't available for the logged-in user, you need to regenerate the ACL for the affected user by using one of these methods:

Method 1:

1. Navigate to **My Client Groups** > **Workforce Structure** > **Preview HCM Data Security**.
2. Search for the user name.
3. Select **Regenerate access control list** from the Oracle Search Actions list of values.

Method 2:

1. Navigate to **Tools Scheduled Processes**.
2. Click **Schedule New Process** and enter these values:
   - Type: Job
   - Name: Compute Users ACL
   - User Population: All Users

How do I enable pending actions alert within the Benefits Summary page?

Here's how:

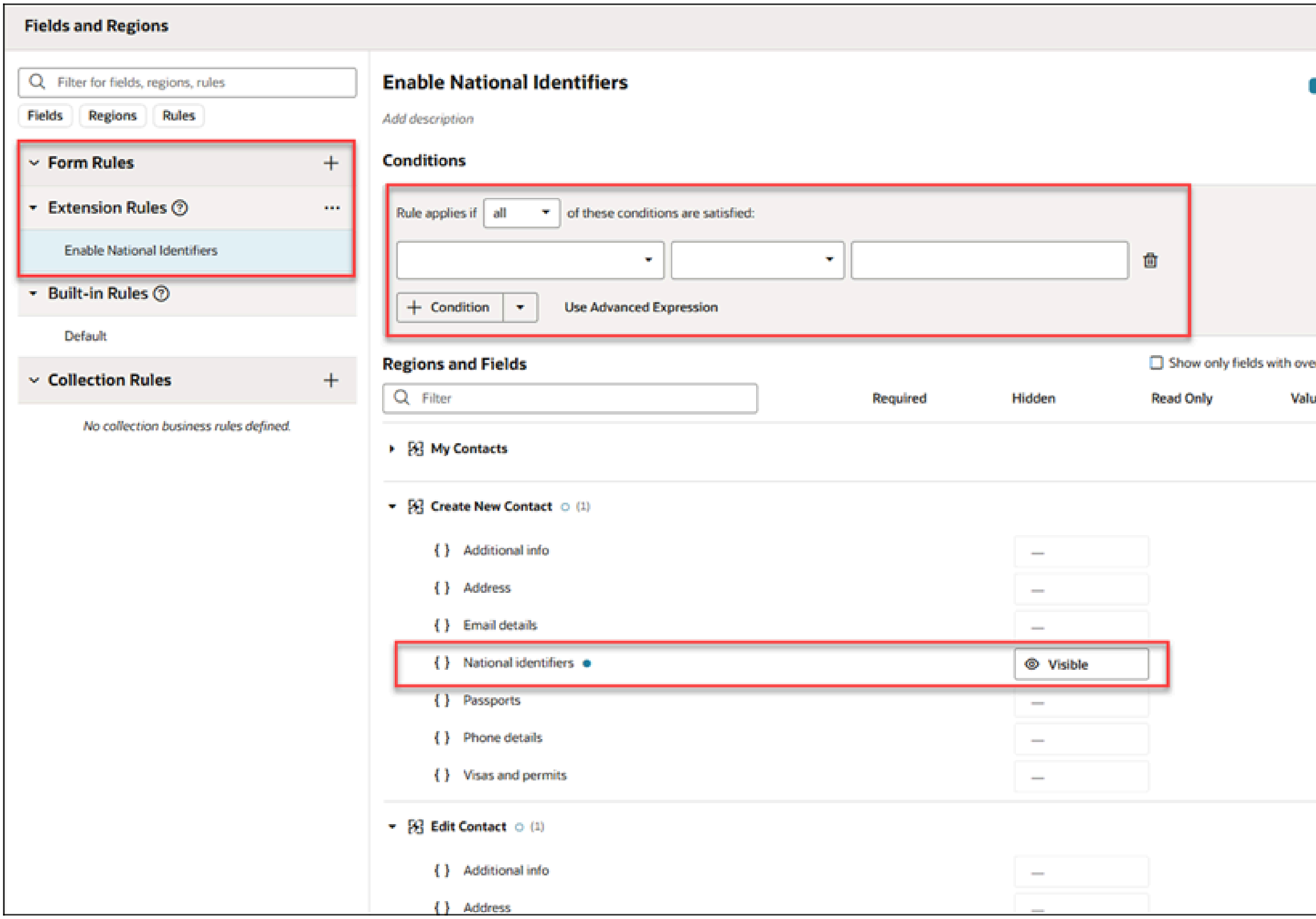
1. Navigate to **Tools** > **Alerts Composer**.
2. Search for the **Benefit Pending Action** alert.
3. Enable the alert.
4. Use the Filters tab to add filters. For example, if you'd like the alert to be sent only for specific plans or programs, you can add a filter for it.

5. Use the Templates tab to change the wording, format, or to add graphics and links. Use more templates if needed.
6. Use the Run Options tab to define a schedule for resource alerts and change the delivered runtime settings.

How do I personalize the My contacts region in the Before you enroll page?

Here’s how you add business rules to the My contacts region:

1. Navigate to **Me** > **Benefits** > **Before You Enroll**.
2. On the Settings and Actions menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
3. In the Business Rules area, click the **Configure Fields and Regions** button.
4. In the Form Rules area, click the **+** button to add a new rule.
5. Enter a label such as Enable National Identifier.
6. Click **Create**.
7. You can add **Conditions** to limit who sees this business rule based on user roles, legal employer, or business unit.
8. In the **Regions and Fields** area, change the value of the field to **Visible**.
9. Preview and publish your changes.



Here's how you hide the button to add contacts page on the Before you enroll page

1. Navigate to **Me** > **Benefits** > **Before You Enroll**.
2. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
3. In the Page Properties area, select the region where you want to hide the button and set **N** as the value.
4. Preview and publish your changes.

How do I personalize the banner on the Self-Service Benefits landing page?

You can personalize these aspects:

- Background image
- Background color

- Foreground image

To change the image on the banner, you need to copy the URL where the image is stored.

1. Open the Self-Service Enrollment page. On the Settings and Actions menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
2. Create a project or select an existing one. Then, select the **Express** option.
3. In the Page Properties section, do these steps:
   a. To change the background color, select the **bannerBackgroundColor** field, and change the color. For example, you can change the color to dark ocean. You can click the **?** icon to see the supported values.
   b. To change the background image, select the **bannerbackgroundImageURL** field and paste the URL.
   c. To change the foreground image, select the **bannerforegroundImageURL** field and paste the URL.
4. Preview and publish your changes.

How do I personalize the Need Help Contact Us region in various Benefits pages?

Here's how:

1. Open the page. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
2. To hide the default information, in the **Page Properties** area, you can set the value of these properties to **false**:
   - **showNeedHelpRegion** for the Benefits Enrollment page and Self-Report a Life Event page.
   - **showDefaultNeedHelp** for the self-service landing page.
3. To show the personalized information, set the value of the **showCustomNeedHelp** field to **true**.
4. In the **customNeedHelpTitle** field, enter the title information. You can use only plain text in this field.
5. In the **customNeedHelpDefaultText** field, enter your text. You can use HTML code in this field.
6. You can add a journey by entering your journey code in **customNeedHelpJourneyCode** field. If you wish to show only specific tasks within that journey, use **customNeedHelpJourneyTaskCode** field.
7. Preview and publish your changes.

How do I personalize the Benefits Summary Person Information header?

You can enable up to 4 additional attributes to be displayed in the person information header:

- Person Number
- Assignment Number
- Business Title
- Position Code
- Position
- Job

- Legal Employer
- Work Email
- Department
- Business Unit

Here's how you can personalize:

1. Navigate to **Benefits Administration** >**Benefits Activity Center**.
2. Search for the employee and open the page where you want to add new attributes.
3. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
4. In the Page Properties area, set the value of the attribute you wish to display to **true**.
5. Preview and publish your changes.

How do I enable the default attributes?

You add business rules for the default attributes in these Benefits Activity Center pages:

- Benefit Court Order
- Benefits Summary
- Benefit Relationships
- Person Beneficiary Organization
- Billing
- Person Benefit Balances
- Person Benefit Groups
- Person Info

Here's how:

1. Navigate to **Benefits Administration** **Benefits Activity Center**.
2. Search for the employee and open the page where you want to add new attributes.
3. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
4. In the Business Rules area, click the **Configure Fields and Regions** button.
5. In the Form Rules area, click the **+** button to create a rule.
6. Enter a label. For example, Benefit Group Enable Regions.
7. Click **Create**.
8. [Optional] You can add conditions to limit who can see the business rule based on user roles, legal employer, and business unit.
9. In the Regions and Fields area, change the value to **visible**.
10. Preview and publish your changes.

How do I hide the Self-reported life event region in the Benefits Summary page?

Here's how:

1. Navigate to **Benefits Administration** > **Benefits Activity Center**.
2. Search for the employee.

3. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
4. In the Page Properties area, set the value of the **show self-reported life events** attribute to **false**.
5. Preview and publish your changes.

How do I hide the Post Enrollment region in the self-service enrollment pages?

Here's how:

1. Navigate to **Me** > **Benefits** > **Start Enrollments**.
2. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
3. In the Page Properties area, set the value of the **Hide Post Enrollment Steps** attribute to **true**.
4. Preview and publish your changes.

How do I personalize the self-report a life event page?

You can now choose the self-service groupings to display on the self-report a life event page.

1. Navigate to **Benefits Administration** > **Plan Configuration** > **Task List** > **Benefits Life Events**.
2. Search for the self-assigned life event.
3. Click **Actions**, **Correct**.
4. Select the self-service grouping for the life event:
   a. Select **Employee Events** to display the event in the Me grouping.
   b. Select **Spouse/Domestic Partner Events** to display the event in the My spouse or domestic partner grouping.
   c. Select **Child Events** to display the event in the My Child grouping.
   d. If you don't select any groupings, the event will be displayed in the Me grouping.
5. Save your changes.

Here's how you change the display name of the self-service grouping text:

1. Navigate to **Configuration Sandbox Create**. Create a sandbox that includes the UI text.
2. Enter the current text in the Find field. For example, My spouse or domestic partner.
3. Enter the new text in the Replace field. For example, My spouse.
4. Clear all the check boxes in the Types section except **User Interface Text**.
5. Click **Search**.
6. Exclude any strings that you don't want replaced with the new text.
7. Click **Replace Strings** to update the existing text and save your changes.

How do I add validation rules for Benefits contact pages?

Here's how:

1. Navigate to **Me** > **Benefits** > **Before You Enroll**. You can any other pages that support validation rules.
2. On the **Settings and Action**s menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
3. Click the **Validate Fields Value** button.
4. If you haven't created validations before, click **Validation**.
5. Add a label and click **Create**.
6. Click **Edit** in the Conditions region.
7. Create the conditions for your validation rule.
8. Click **Done**.
9. Add the summary, severity, and details of the message.
10. Here's how you use advanced validation rules:
    a. Click the **Use Advanced Conditions** button.
    b. Click the **Code** button.
    c. Add the **Java Script** code.
11. Save your changes.
12. Preview and publish your changes.

All the benefits contact pages support these advanced validation rules.

Supported Validation Rules on Benefits Contact Pages

Validation Rules	Sample Java Script

Require national identifier for specific relationship type and age.	`/* eslint-disable dot-notation */`
	`define([], () => {`
	` 'use strict';`
	
	` function isOlderThanSixMonths(dob) {`
	` const currentDate = new Date();`
	` const birthDate = new Date(dob);`
	` // Calculate the difference in months`
	` const monthDiff = currentDate.getMonth() - birthDate.getMonth() +`
	` (12 * (currentDate.getFullYear() - birthDate.getFullYear()));`
	` // Check if the age is greater than or equal to 6 months`
	` const isOlderThanSixMonths = monthDiff > 6 || (monthDiff === 6 &&`
	` currentDate.getDate() >= birthDate.getDate());`
	
	` return isOlderThanSixMonths;`
	`}`
	
	` /**`
	` *`
	` * @param {object} context`
	` * @return {boolean}`
	` */`
	` function runCondition(context) {`

<table>
<tr><th>Validation Rules</th><th>Sample Java Script</th></tr>
<tr><td></td><td><pre><code> const { $objectContext, $fields, $modules, $user, $value } = context;

 let dob = $fields['contactRelationships']['dateOfBirth'].$value();
 let nidCountry = $fields['personNationalIdentifiers']['LegislationCode'].
$value();

 if (dob && isOlderThanSixMonths(dob) && (nidCountry == null || nidCountry ==
 "")) {
 return true;
 }

 return false;
 }

 return { runCondition };
});</code></pre></td></tr>
<tr><td>Require national identifier for specific relationship type.</td><td><pre><code>/* eslint-disable dot-notation */
define([], () => {
 'use strict';

 /**
 *
 * @param {object} context
 * @return {boolean}
 */
 function runCondition(context) {
 const { $objectContext, $fields, $modules, $user, $value } = context;

 if (($fields['contactRelationships']['ContactType'].$value() == 'S'
 || $fields['contactRelationships']['ContactType'].$value() == 'DP'
 || $fields['contactRelationships']['ContactType'].$value() == 'P') &&
 ($fields['personNationalIdentifiers']['LegislationCode'].$value() == '' ||
 $fields['personNationalIdentifiers']['LegislationCode'].$value() == null)) {
 return true;
 }

 return false;
 }

 return { runCondition };
});</code></pre></td></tr>
<tr><td>Require date of birth for specific relationship types.</td><td><pre><code>/* eslint-disable dot-notation */
define([], () => {
 'use strict';

 /**
 *
 * @param {object} context
 * @return {boolean}
 */
 function runCondition(context) {
 const { $objectContext, $fields, $modules, $user, $value } = context;

 if (($fields['contactRelationships']['ContactType'].$value() == 'S'
 || $fields['contactRelationships']['ContactType'].$value() == 'DP'
 || $fields['contactRelationships']['ContactType'].$value() == 'C')
 && ($fields['contactRelationships']['dateOfBirth'].$value() == '' ||
 $fields['contactRelationships']['dateOfBirth'].$value() == null)) {</code></pre></td></tr>
</table>

<table>
<tr><th>Validation Rules</th><th>Sample Java Script</th></tr>
<tr><td></td><td><pre><code> return true;
 }

 return false;
 }

 return { runCondition };
});</code></pre></td></tr>
<tr><td>Require home address for specific relationship types.</td><td><pre><code>/* eslint-disable dot-notation */
define([], () => {
 'use strict';

 /**
 *
 * @param {object} context
 * @return {boolean}
 */
 function runCondition(context) {
 const { $objectContext, $fields, $modules, $user, $value } = context;

 if (($fields['contactRelationships']['ContactType'].$value() ==
 'S' || $fields['contactRelationships']['ContactType'].$value() ==
 'DP' || $fields['contactRelationships']['ContactType'].$value() ==
 'C') && ($fields['personAddress']['AddressLine1'].$value() == '' ||
 $fields['personAddress']['AddressLine1'].$value() == null)) {
 return true;
 }

 return false;
 }

 return { runCondition };
});</code></pre></td></tr>
<tr><td>Require phone number for contacts marked as emergency contact.</td><td><pre><code>/* eslint-disable dot-notation */
define([], () => {
 'use strict';

 /**
 *
 * @param {object} context
 * @return {boolean}
 */
 function runCondition(context) {
 const { $objectContext, $fields, $modules, $user, $value } = context;

 if (($fields['contactRelationships']['EmergencyContactFlag'].$value() ==
 true) && ($fields['personPhones']['LegislationCode'].$value() == '' ||
 $fields['personPhones']['LegislationCode'].$value() == null)) {
 return true;
 }

 return false;
 }

 return { runCondition };
});</code></pre></td></tr>
</table>

<table>
<tr><th>Validation Rules</th><th>Sample Java Script</th></tr>
<tr><td>Require gender and date of birth for a specific legislation and only for benefit eligible contacts.</td><td><pre>
/* eslint-disable dot-notation */
define([], () => {
 'use strict';

 /**
 *
 * @param {object} context
 * @return {boolean}
 */
 function runCondition(context) {
 const { $objectContext, $fields, $modules, $user, $value } = context;

 if(($objectContext.LegislationCode.includes('US'))){
 if (($fields['contactRelationships']['dateOfBirth'].$value() === null
 || $fields['contactRelationships']['gender'].$value() === null) &&
 $fields['contactRelationships']['ContactTypeMeaning'].$value() === 'Spouse')
 {
 return true;
 }
 }
 return false;
 }

 return { runCondition };
});
</pre></td></tr>
</table>

How do I void the Open, Administrative, or Unrestricted Open life events in bulk?

Here's how:

1. Navigate to **Benefits Administration** > **Evaluation and Reporting** > **Summary**.
2. Click the Processes tab.
3. Click **Submit** for the Back Out Life Events process.
4. Enter an effective date.
5. Select the validation mode.
6. Select either the Open, Administrative, or Unrestricted Open life event.
7. Select one of the following parameters:
   a. organization name
   b. location
   c. benefits group
   d. legal entity
   e. person selection formula
8. Select Voided – Data cannot be reinstated.
9. Enter a reason.
10. Modify the value in the Estimate of Impacted People number field.
11. Submit the changes.

How do I void the Unrestricted life events in bulk?

Here's how:

1. Navigate to **Benefits Administration** > **Evaluation and Reporting** > **Summary**.
2. Click the Processes tab.
3. Click **Submit** for the Back Out Unrestricted Life Events process.
4. Enter an effective date.
5. Select the validation mode.
6. Select one of the following parameters:
    a. organization name
    b. location
    c. benefits group
    d. legal entity
    e. person selection formula
7. Select Voided – Data cannot be reinstated.
8. Enter a reason.
9. Modify the value in the Estimate of Impacted People number field.
10. Submit the changes.

How do I hide the annual rate value for a plan?

Here's how:

1. Navigate to **Benefits Administration** > **Plans**.
2. Search for the plan.
3. Navigate to the Additional Configuration step.
4. Select the **Hide annual rate** check box.
5. Save your changes.

How do I hide the support tab on the Self-Service Benefits landing page?

Here's how:

1. Navigate to **Me** > **Benefits**.
2. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
3. In the Page Properties area, set the value of the **Hide Support Tab on Self-Service Landing Page** attribute to **true**.

4. Preview and publish your changes.

How do I hide the Print All Benefits button on the self-service View All Enrollments page?

Here's how:

1. Navigate to **Me** > **Benefits**, and click the **View All Enrollments** button.
2. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
3. In the Page Properties area, set the value of the **Hide Print All Benefits Button on the View All Enrollment Page** attribute to **true**.
4. Preview and publish your changes.

How do I show the dependent and beneficiary person number on the self-service View All Enrollments page?

Here's how:

1. Navigate to **Me** > **Benefits**, and click the **View All Enrollments** button.
2. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
3. In the Page Properties area, set the value of the **Show Dependent and Beneficiary Person Number on the View All Enrollment Page** attribute to **true**.
4. Preview and publish your changes.

How do I show the total cost region for flex programs on the self-service View All Enrollments page?

1. Navigate to **Me** > **Benefits**, and click the **View All Enrollments** button.
2. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
3. In the Page Properties area, set the value of the **Show Total Cost Region for Flex Program on the View All Enrollment Page** attribute to **true**.
4. Preview and publish your changes.

How do I hide the View Report button on the Benefits Activity Center View Enrollments page?

Here's how:

1. Navigate to **Benefits Administration** > **Benefits Activity Center**.
2. Search for an employee, and click **Enroll, View Enrollments**.
3. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
4. In the Page Properties area, set the value of the **Hide View Report Button on View Enrollment** attribute to **true**.
5. Preview and publish your changes.

How do I show the dependent and beneficiary person number on the Benefits Activity Center View Enrollments page?

Here's how:

1. Navigate to **Benefits Administration** > **Benefits Activity Center**.
2. Search for an employee, and click **Enroll, View Enrollments**.
3. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
4. In the Page Properties area, set the value of the **Show Dependent and Beneficiary Person Number on Program Plan Selection** attribute to **true**.
5. Preview and publish your changes.

How do I show the total cost region for flex programs on the Benefits Activity Center View Enrollments page?

Here's how:

1. Navigate to **Benefits Administration** > **Benefits Activity Center**.
2. Search for an employee, and click **Enroll, View Enrollments**.
3. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
4. In the Page Properties area, set the value of the **Show Total Cost Region for Flex Program on Program Plan Selection** attribute to **true**.
5. Preview and publish your changes.

How do I show the event name on the program card on the Benefits Activity Center View Enrollments page?

Here's how:

1. Navigate to **Benefits Administration** > **Benefits Activity Center**.
2. Search for an employee, and click **Enroll, View Enrollments**.
3. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
4. In the Page Properties area, set the value of the **Show Life Event Name on Program Card** or **Show Unrestricted Event Name on Program Card** attribute to **true**.
5. Preview and publish your changes.

How do I hide the View Report button on the self-service View Enrollments page?

Here's how:

1. Navigate to **Me** > **Benefits**, and click the **View All Enrollments** button.
2. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
3. In the Page Properties area, set the value of the **Hide View Report Button on View Enrollment** attribute to **true**.
4. Preview and publish your changes.

How do I show the dependent and beneficiary person number on the self-service View Enrollments page?

1. Navigate to **Me** > **Benefits**, and click the **View All Enrollments** button.
2. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
3. In the Page Properties area, set the value of the **Show Dependent and Beneficiary Person Number on Enrollment Journey** attribute to **true**.
4. Preview and publish your changes.

How do I show the total cost region for flex programs on the self-service View Enrollments page?

Here's how:

1. Navigate to **Me** > **Benefits**, and click the **View All Enrollments** button.
2. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
3. In the Page Properties area, set the value of the **Show Total Cost Region for Flex Program on Enrollment Journey** attribute to **true**.
4. Preview and publish your changes.

How do I show the event name on the self-service program card?

1. Navigate to **Me** > **Benefits**, and click the **View All Enrollments** button.
2. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
3. In the Page Properties area, set the value of the **Show Life Event Name on Program Card or Show Unrestricted Event Name on Program Card** attribute to **true**.
4. Preview and publish your changes.

How do I show the total cost region on the self-service enrollment guided process?

1. Navigate to **Me** > **Benefits**, and click the **Enroll Now** button.
2. Edit the enrollment in the **Enroll in benefits that matter to you** area**.**
3. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
4. In the Page Properties area, set the value of the **Show Total Cost Region for Flex Program on the Enrollment Guided Process** attribute to **true**.
5. Preview and publish your changes.

How do I add a guided journey to a plan type grouping in self-service enrollment page?

Here's how:

1. Navigate to **Me** > **Benefits**, and click the **Enroll Now** button.
2. Edit the enrollment in the **Enroll in benefits that matter to you** area.
3. On the **Settings and Actions** menu in the global header, click **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
4. In the Page Properties area, locate **Set Journey Codes for Plan Type Groupings** and click the **+** button to add a new journey.
5. Expand to enter the more properties.
6. Enter your category code, this field is required for guided journey to render. Possible values are TS1, TS2 … TS18. You can find your plan type grouping category code in the Benefits Setup Diagnostic Report.
7. Enter your journey code.
8. [optional] Enter your journey task code.
9. Preview and publish your changes.

How do I use Benefits AI Agents?

Select **Me** > **Benefits**, **AI Chat**.

You can use the AI Agents work area to:

- Search for available agents
- View your conversations with agents
- Start or resume a chat session with an agent

What happens when program or plan status changes during eligibility override?

When a program or plan is changed from eligible to ineligible, all lower-level objects become ineligible as the override migrates down. When a program or plan is changed from ineligible to eligible, lower-level objects must also be made eligible, as the override doesn't migrate up.

How do I enable participant eligibility override?

Administrators can manually override the eligibility results for a participant Enable Participant Eligibility Override check box. For example, you can override eligibility when there's special approval to continue coverage for dependents who exceed the plan age limits.

Exercise caution when you override eligibility or enrollment so that the enrollment record doesn't extend indefinitely, for example, when you terminate an employee. Ensure that you enter the through date when you override eligibility, and the coverage end date, when you override an enrollment record.

Here's how:

1. **Benefits Administration** > **Plan Configuration**.
2. In the Eligibility train stop, select the **Enable participant eligibility override** check box in the Configuration tab.

It's recommended to enable participant eligibility override at these levels:

- Program
- Plan type in program
- Plan in program
- Plan
- Option in plan

What are the considerations for hiding a plan’s annual cost?

Here are some points that you need to consider:

- The Hide annual cost field is initially disabled.
- If any plan within a program has the Hide annual rate field enabled, the annual amount will be hidden for all the regions where total cost appears.
- The Hide annual rate field is for standard rate activity type for employee's contribution and its unit of measure is either null or money.

What are the considerations for preventing unintended bulk deletions of life event data?

Here are some points that you need to consider:

- You can use one of these ways to find the count of your started life events:
  - Click **Summary**, Life Events tab, and filter by started life event.
  - Open Benefits Activity Center and filter by started life event.
  - Use the audit log of the evaluate processes.
- Note these points regarding the Estimate of Impacted People parameter:
  - It isn't enabled when the status is Unprocessed or Manual.
  - It's only displayed when the life event is open, administrative, or unrestricted open.
  - It defaults to 50, but you can modify it based on how many person events that you wish to back out to Void.
  - It's displayed in both rollback and save modes.
- You must select at least one person selection parameter when running the Back Out Life Events process.
- You need to review the reinstatement rules to ensure that they meet your company's needs.

How do I enable the benefits legal disclaimer page?

1. Go to **Benefits Administration** > **Plan Configuration**.
2. In the Tasks panel drawer, click **Enrollment Authorizations** under Enrollment Display.
3. Click **Create**, and fill in basic details such as dates, description, and program or plan. Check the dates to ensure that the enrollment text is valid.
4. Enter the text. You can use the toolbar to change the appearance of your text, include hyperlinks, and add HTML code.
5. Save your changes.

What are the best practices to configure benefits billing and payment uploads using HDL or HSDL?

- For using the correct attribute names and formats, it's recommended to use downloaded templates or export sample files.
- Review error and warning messages in Data Exchange or the HDL/HSDL load results. Oracle documentation provides a comprehensive list of error explanations.
- Always process large data sets in batches to isolate and resolve issues efficiently.
- Avoid processing multiple large data loads simultaneously in production.
- Always use the latest Oracle documentation for data loader business objects, attribute details, and sample files.

How can I assign read-only access permissions to various regions in the Benefits Summary page?

Here's an overview of how you assign read-only access permissions to various regions in the Benefits Summary page. These steps are for making the Person Additional Info region read-only. You can follow the same approach for the other regions also. You may refer the table named Role Details to find the privileges to be removed and added. While copying the roles, ensure that you use the **Copy top role and inherited roles** option to copy the entire role hierarchy.

1. Search for and copy the duty role that you want to make read-only, for example, Benefits Enrollment Maintenance. Modify the duty role. For example, modify the duty role to Benefits Enrollment Maintenance Read-only. Search for and remove the aggregate privilege named Manage Benefits Additional Person Info. Ensure that you remove all the aggregate privileges for the Person Additional Info region. For more information, see *Copy and Edit Duty Roles*.
2. Search for and copy the predefined job role that you want to make read only, for example, Benefits Administrator. Modify the job role to something like Benefits Administrator Read-only. Assign the duty role that you modified (Benefits Enrollment Maintenance Read-only) to the custom job role (Benefits Administrator Read-only.) When you assign the modified role, remove the predefined association. In this example, remove Benefits Enrollment Maintenance and add Benefits Enrollment Maintenance Read-only. For more information, see *Copy and Edit Duty Roles*.
3. Create a data role that inherits the custom job role (Benefits Administrator Read-only.) For more information, see *How do I create a data role?*
4. Link the data role to the users whom read-only access should be granted. For more information, see *Assign Abstract and Data Roles to HCMUser*.

Role Details

Region	Actions Allowed for Administrator	Duty Role to Update	Manage Role Privilege to be Removed	Manage Role Privilege to be Added	Data Security Profile to be Removed from Role
Person Additional Info	◦ Add ◦ Edit ◦ End Date ◦ Delete	Benefits Enrollment Maintenance	Manage Benefits Additional Person Info (ORA_BEN_MANAGE_ADDITIONAL_PERSON_INFO)	None	Manage Benefit Person Info On Person Detail
Person Beneficiary Organization	◦ Add ◦ Edit ◦ Delete	Benefits Enrollment Maintenance	Manage Person Beneficiary Organization (ORA_BEN_MANAGE_PER_BNF_ORG)	None	Manage Person Beneficiary Organizations on Person Detail

Region	Actions Allowed for Administrator	Duty Role to Update	Manage Role Privilege to be Removed	Manage Role Privilege to be Added	Data Security Profile to be Removed from Role
Person Benefit Balances	◦ Add ◦ Edit ◦ End Date ◦ Delete	Benefits Management Implementer Benefits Election	Use REST Service - Person Benefit Balances (ORA_BEN_REST_ SERVICE_ACCESS_ PERSON_BENEFTS_ BALANCE)	Use REST Service - Person Benefit Balances Read Only ORA_BEN_REST_ SERVICE_ACCESS_ PERSON_BENEFTS_ BALANCE	Manage Person Benefits Balance on Person Detail
Person Benefits Group	◦ Add ◦ Edit ◦ End Date ◦ Delete	Benefits Management Implementer	Use REST Service - Person Benefits Group (ORA_BEN_REST_ SERVICE_ACCESS_ PERSON_BENEFIT_ GROUP)	Use REST Service - Person Benefits Group Read Only ORA_BEN_REST_ SERVICE_ACCESS_ PERSON_BENEFIT_ GROUP	Manage Person Benefits Group on Person Detail
Benefits Court Orders	◦ Add ◦ Edit ◦ End Date ◦ Delete	Benefits Enrollment Maintenance	Manage Benefit Court Orders (ORA_BEN_ MANAGE_PER_ BENEFIT_COURT_ ORDERS)	None	None
Benefits Billing	◦ Add Benefit Coverage Charges ◦ Add Payments and Edit Person Bill Info ◦ Edit Billed Enrollments	Benefits Enrollment Maintenance	Manage Person Benefits Billing (ORA_BEN_ MANAGE_PER_ BILLING)	None	None
Benefits Relationship	◦ Add ◦ Edit ◦ Refresh	Benefits Enrollment Maintenance	Manage Person Benefits Relationship (ORA_BEN_ MANAGE_PER_ BNFT_RELATION)	None	None

Region	Actions Allowed for Administrator	Duty Role to Update	Manage Role Privilege to be Removed	Manage Role Privilege to be Added	Data Security Profile to be Removed from Role
Benefits Summary > Potential	Evaluate Life Events: ◦ Backout ◦ Reopen ◦ Close ◦ Enrollment Opportunities ◦ Print Report ◦ Add Open Enrollment ◦ Add Unrestricted Enrollment ◦ Purge Voided and Backed Out Events **Potential Life Events:** ◦ Add Potential ◦ Determine Winning ◦ Evaluate Life Event ◦ Edit Potential ◦ Self-Reported Life Event	Benefits Enrollment Maintenance	Manage Benefits Person Potential Life Events (ORA_BEN_ MANAGE_PERSON_ POTENTAIL_LIFE_ EVENT)	None	None
#Benefits Summary > Enrollments	Pending Actions: ◦ Edit ◦ Close Past Optional Action items in Bulk Enrollments: Override Enrollment Evaluated Life Event: ◦ Enroll ◦ Override Eligibility	Benefits Enrollment Maintenance	#Manage Benefits Participant Enrollment Result by Administrator (ORA_BEN_ MANAGE_ ENROLLMENT_ RESULT_BY_ADMIN)	None	

Scenario for creating 401(k) plans in Benefits

You're a benefits administrator for Vision Corporation. In line with its benefits policy, you plan to set up a 401(k) savings plan for employees, with these features. This scenario is part of the playbook to *set up 401(k) plans in benefits*.

Aspect	Details
Eligibility	All full-time regular employees in the United States can participate in this plan.
Default Enrollment	By default, a pretax contribution (4% of stated salary) is deducted from each pay period. The defaults are applied when you evaluate the life event. Employees can change the contribution at any time.
Employee Contribution	Employees can make either pretax or after-tax contributions year-round, up to USD 23,000. Employees older than 55 years can make after-tax catchup contributions when they exceed the 23,000 USD limit.
Employer Contribution	Vision Corporation matches 50% (after-tax) of each employee’s contribution, up to 6% of the employee’s salary.
Waive	Employees can entirely opt out of the 401k plans.

Related Topics

- How do I set up 401(k) plans in Benefits?

Create after-tax element as part of setting up 401(k) plans

In the scenario, you need to create a payroll element to hold the employee’s after-tax contribution for the 401k catch-up plan.

1. Depending on your access privileges, start the **Elements** task from the My Client Groups quick actions or from the Setup and Maintenance work area.
2. Complete these fields:

Field	Value
Legislative Data Group	Select your legislative data group

Field	Value
Primary Classification	Voluntary Deductions
Secondary Classification	Benefits After Tax

3. Click **Continue**. In the Basic Information page, complete these fields, leaving other fields as is.

Field	Value
At which employment level should this element be attached?	Payroll relationship level
Should every person eligible for the element automatically receive it?	No You want Benefits to make the element entry, not any other application.
Can a person have more than one entry of this element in a payroll period?	No
Earliest entry date	First standard earning date
Latest entry date	Last standard earning date

4. Click **Continue**. In the Additional Details page, click **Percentage deduction** for the What is the calculation rule section. During benefits enrollment, you want participants to enter a percentage of their salary as the contribution, and you want to process that percentage in payroll.
5. Click **Next**, review the details, and submit your changes.
6. Open the element you created and create element eligibility. You don't need to enter any criteria, but make sure that the **Automatic Entry** checkbox is deselected.

Create after-tax employer rate as part of setting up 401(k) plans in benefits

In this example, you create a secondary rate for the after-tax option of the main 401k plan. Link the after-tax element (that you created before) to this rate and configure the calculation method to calculate a contribution that's 25% of the employee contribution rate. This topic is part of the playbook to *set up 401(k) plans in benefits*.

1. Click **Navigator** > **Benefits Administration** > **Plan Configuration**.
2. Start the **Benefit Plan Details** task.
3. Click **Create** > **Standard Rate**.
4. Select the main 401k plan and the After-Tax option.
5. Follow the instructions in the topic to set up the employee contribution rate to complete the rest of your setup.
6. Save your changes.

Create benefit options as part of setting up 401(k) plans

You create the pretax and after-tax options for use with your 401(k) plan. This task is part of the playbook to set up 401(k) plans in Benefits. This task is part of the playbook to set up 401(k) plans in Benefits.

1. On the Home page, click **Benefits Administration** > **Plan Configuration**.
2. On the Tasks panel, click **Benefit Options**.
3. Create a pretax option using the plan type you created earlier.
4. Save your changes.
5. Likewise, create an after-tax option.

Related Topics

- How do I set up 401(k) plans in Benefits?

Create employee contribution rate as part of setting up 401(k) plans in benefits

In this example, you create a primary parent rate of the Employee payroll contribution activity type, for the plan you created. Link the employee element that you created earlier to this rate and configure the calculation method to accept a flat amount from employees during enrollment. This task is part of the playbook on *setting up 401(k) plans in benefits*.

1. Click **Navigator** > **Benefits Administration** > **Plan Configuration**.
2. Start the **Benefit Plan Details task**.
3. Create a standard rate.
4. Provide a meaningful name for your rate, and complete these fields:

Field	Value
Plan Name	Select the 401(k) plan you created in an earlier task.
Legal Employer	Select your legal employer. You can select the payroll element only when you select the legal employer.
Rate Display Type	Primary You want employees to enter the amount they want to contribute to the plan.
Activity Type	Employee Payroll Contribution
Unit of Measure	Percentage
Tax Type Code	Pretax

Field	Value
Parent or Child Rate Type	Parent
Payroll Element	Select the employee contribution element
Element Input Value	Percentage

5. In the Calculation tab, complete these fields:

Field	Value
Calculation Method	Flat amount
Participants enter value during enrollment	Select
Ranges	Enter an appropriate minimum election value, maximum election value, increment, and default value. For example, 1-20, in increments of 1. Remember, according to the scenario, participants should enter a percentage.

6. In the processing information tab, select these checkboxes:
    - Process each pay period by default
    - Recurring
7. Save your changes.

Related Topics

- How do I set up 401(k) plans in Benefits?

Create employee rate as part of setting up a 401(k) catchup plan

In this example, you create a primary rate of the Employee payroll contribution activity type. Link the after-tax element to it. Configure a flat amount calculation method to accept the employee contribution as a percentage.

1. Click **Navigator** > **Benefits Administration** > **Plan Configuration**.
2. Start the **Benefit Plan Details** task.
3. Click **Create** > **Standard Rate**.

4. Provide a meaningful name for your rate, and complete these fields:

Field	Value
Plan Name	Select the 401(k)-catchup plan you created earlier.
Legal Employer	Select your legal employer. You can select the payroll element only when you select the correct legal employer.
Rate Display Type	Primary You want employees to enter the amount they want to contribute to the plan.
Activity Type	Employee Payroll Contribution
Unit of Measure	Percentage
Tax Type Code	After tax
Payroll Element	Select the employee after-tax contribution element
Element Input Value	Percentage

5. Ensure that these checkboxes are selected:
    - Element and input values required
    - Assign on enrollment
    - Display on enrollment
6. In the Calculation tab, complete these fields:

Field	Value
Calculation Method	Flat amount
Participants enter value during enrollment	Select
Ranges	Enter an appropriate minimum election value, maximum election value, increment, and default value. For example, 1-20, in increments of 1. Remember, according to the scenario, you want participants to enter a percentage.

7. In the processing information tab, select **Process each pay period by default**.
8. Save your changes.

Create postal code ranges as part of setting up 401(k) plans in benefits

You need to create a postal code range for use with the eligibility profile that's used to check for employees residing in the United States, among other criteria. You can even use an existing postal code range if you've already set it up.

1. Click **Navigator** > **Benefits Administration** > **Plan Configuration**.
2. On the Tasks panel, click **Benefit Service Area**.
3. Create a postal code range that covers all ZIP codes in the US.
4. Save your changes.

Related Topics

- How do I set up 401(k) plans in Benefits?

Create pretax deduction elements as part of setting up 401(k) plans in benefits

In the scenario, you need to create payroll elements so you can send the employee and employer contributions for payroll processing.

1. Depending on your access privileges, start the **Elements** task from the My Client Groups quick actions or from the Setup and Maintenance work area.
2. Complete these fields:

Field	Value
Legislative Data Group	Select your legislative data group
Primary Classification	Pretax Deductions You use this classification to define elements for 401(k) deductions.
Secondary Classification	Deferred Compensation 401(k) This classification enables you to create elements specific to a 401(k) implementation.

3. Click **Continue**. In the Basic Information page, complete these fields, leaving other fields as is.

Field	Value
At which employment level should this element be attached?	Payroll relationship level
Should every person eligible for the element automatically receive it?	No You want Benefits to make the element entry, not any other application.
Can a person have more than one entry of this element in a payroll period?	No
Earliest entry date	First standard earning date
Latest entry date	Last standard earning date

4. Click **Next**.
5. In the Additional Details page, complete this questionnaire. Accept the default values for other questions.

Field	Value
Enforce 401(k) Eligible Compensation Limit Check	Yes This addresses these scenario requirements: ◦ Employee contribution shouldn't exceed USD 23000 a year. ◦ Employer contribution in a year shouldn't exceed 6% of the employee's salary.
Should the deferred compensation 401(k) elements have an associated employer-match element?	Yes This addresses the scenario requirement where we need to include the employer contribution in addition to the employee's contribution. A relevant employer element will be created automatically. Later, you link this element to an employer contribution rate that you'll create in a subsequent task.

6. Click **Next**.
7. Review the details and click **Submit**.
8. Open the element you created and create element eligibility. You don't need to enter any criteria, but make sure that the **Automatic Entry** check box is deselected.
9. Click **Submit**.

Create pretax employer rate as part of setting up 401(k) plans in benefits

In this example, you create a secondary rate for the pretax option of the main 401k plan. Link the after-tax element (that you created before) to this rate and configure the calculation method to calculate a contribution that's 25% of the employee contribution rate. This topic is part of the playbook to *set up 401(k) plans in benefits*.

1. Click **Navigator** > **Benefits Administration** > **Plan Configuration**.
2. Start the **Benefit Plan Details** task.
3. Click **Create** > **Standard Rate**.
4. Provide a meaningful name for your rate, and complete these fields:

Field	Value
Plan Name	Select the 401(k) plan you created in an earlier task.
Option	Select the pretax option.
Legal Employer	Select your legal employer. You can select the payroll element only when you select the legal employer.
Rate Display Type	Secondary You want to display the employer contribution amount to employees during enrollment.
Activity Type	Employer Payroll Contribution
Unit of Measure	Percentage
Tax Type Code	After-tax
Parent or Child Rate Type	Child
Payroll Element	Select the employer contribution element that you created before.
Element Input Value	Percentage

5. In the Calculation tab, complete these fields:

Field	Value
Calculation Method	Multiple of parent rate
Multiplier	25 According to the scenario, the employer should contribute 25% of the employee's contribution.

Field	Value
Operator	Percentage of
Parent Rate Name	Select the employee contribution rate you created before.

6. In the processing information tab, select **Process each pay period by default**.
7. Save your changes.

Related Topics

- How do I set up 401(k) plans in Benefits?

How do I set default enrollment path for Redwood self-service Benefits?

You can set a default enrollment path for the Choose How You Want to Enroll step in the benefits enrollment journey.

Here's how:

1. Navigate to **Benefits Administration** > **Plan Configuration**.
2. In the Tasks panel drawer, select **Self-Service Configuration**.
3. Select which path to display by default:
   - Detailed Path (Discovery Path.) When the enrollment flow opens, it automatically starts on the Discovery Path. This path enables participants to choose a more detailed path for enrollment. It gives them the opportunity to review all available benefits in depth and select the coverage that best meets their needs.
   - Fast Path (Express Path.) When the enrollment flow opens, it automatically jumps to the Review and Submit page. This path lets participants quickly review their current enrollments and either submit them as-is or make changes.
   - Hide the step and default to Discovery. The Choose How You Want to Enroll step is completely removed and the Discovery Path opens for the employee.
   - Hide the step and default to Express. The Choose How You Want to Enroll step is completely removed and the employee can directly review and submit the enrollments.
4. Save your changes.

How do I display the life event name within the Redwood Benefits enrollment guided flow?

Here's how:

1. Navigate to the Redwood Benefits enrollment guided flow.
2. On the Settings and Actions menu in the global header, select **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.

3. In the Page Properties area, set the value of the **Show Life Event Name on the Enrollment Guided Process** attribute to **true**.
4. Preview and publish your changes.

How do I translate Benefits attributes on the Redwood pages using translation editor?

You can use the use the Redwood Translation Editor to translate attributes directly on some Benefits Redwood pages.

You don’t need to sign out and sign back in with a different language to enter translations. The editor doesn't auto-translate. You must manually enter translated text for each language.

Ensure that the required languages are enabled. You can view all available languages, whether they're already installed or available for installation and translation. In the Setup and Maintenance work area, use the Manage Languages task in the Application Extensions functional area. For more information, see *Language Packs on Your Application*.

Ensure that you submitted the batch process named Manage Benefits Translation Data with All entities as the entity parameter.

Here's an example of how you can translate the benefits program name.

1. Navigate to **Benefits Administration** > **Plan Configuration** > **Program**.
2. Search for and open the program that you want to translate.
3. On the basic details page, select the **Translation Editor** icon located in the General region.
4. Enter the translated program name in the Program Name field for the selected language.
5. Select **OK** to confirm your entries.
6. Save your changes.

How do I enable the Benefits Certification Agent?

Here's how:

1. Navigate to **Benefits Administration** > **Benefits Activity Center** > **Search for Employee**.
2. Ensure that you're on the Benefits Summary page. On the Settings and Actions menu in the global header, select **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option.
3. In the Page Properties area, set the value of the **Enable Benefits Certification Agent on Enrollment Summary** to **true**.
4. Preview and publish your changes. Once enabled, the agent becomes available within the Benefits Summary experience for certification processing.

How do I use the Benefits Court Order Workflow Agent?

Here's how:

- Enable Benefits Court Order Workflow Agent: Set it to true to see the **Generate** button on court order details page.
- Benefits Court Order Workflow Agent Code. This constant specifies the agent code that is used for the Benefits Court Order Workflow Agent on the Person Benefits Court Orders Summary. You need to keep its default value (ORA_BENEFITS_COURT_ORDER_WORKFLOW_AGENT.)

1. Navigate to **My Client Groups** > **Benefits** > **Benefit Court Orders**. You can open the page from the Benefits Summary page also.
2. Select the employee.
3. Select the **Add (+)** button in the Benefit Court Orders page.
4. Select the **Add (+)** button under the Document Records section.
5. Select the Document Type and select **Add**. If you prefer to manually enter the court order details, you can do that too after selecting the document type. You can either use the agent or use the manual mode to create the court order details.
6. If you don't see the Generate button, on the Settings and Actions menu in the global header, select **Edit Page in Visual Builder Studio**. Ensure that you've appropriate access to the VB Studio configuration to see this option. To enable the Generate button, set the Enable Benefits Court Order Workflow Agent constant to true.
7. Select the document record link, attach the court order file, and save your changes.
8. Select the **Generate** button. The agent begins the content generation. You need to wait till the agent generates the content based on the attached file.
9. The Details and Dependent sections show the generated content. You can review and correct the details. Also, you can add dependents. You need to select the **Ok** button to save your changes.
10. Select the **Save** button to create the court order.

How do I access Benefits elections atom feeds?

All the atom feed entries for Benefits are created and stored in the Benefits Elections collection.

You can access these entries using the collection path: employee/benefitsElections.

To read the entries in a Benefits Elections feed, use this URI:

```
GET /hcmRestApi/atomservlet/employee/benefitsElections
```

How do I configure display sequence for the benefit programs and plans not in program

Here's how:

You need to enable these Redwood profile options. To learn how to enable a profile option, see *How do I enable a profile option*?

- ORA_HCM_VBCS_PWA_ENABLED
- ORA_BEN_SELF_SERVICE_ENROLLMENT_REDWOOD_ENABLED
- ORA_BEN_ADMINISTRATIVE_ENROLLMENT_REDWOOD_ENABLED

1. Navigate to **Benefits Administration** > **Plan Configuration** > **Programs**.
2. Search for and open the program that you want to update.
3. On the Basic Details train-stop, enter the sequence for this program.
4. Save your changes.