Oracle Fusion Cloud Human Resources

How do I configure benefits eligibility?

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Contents

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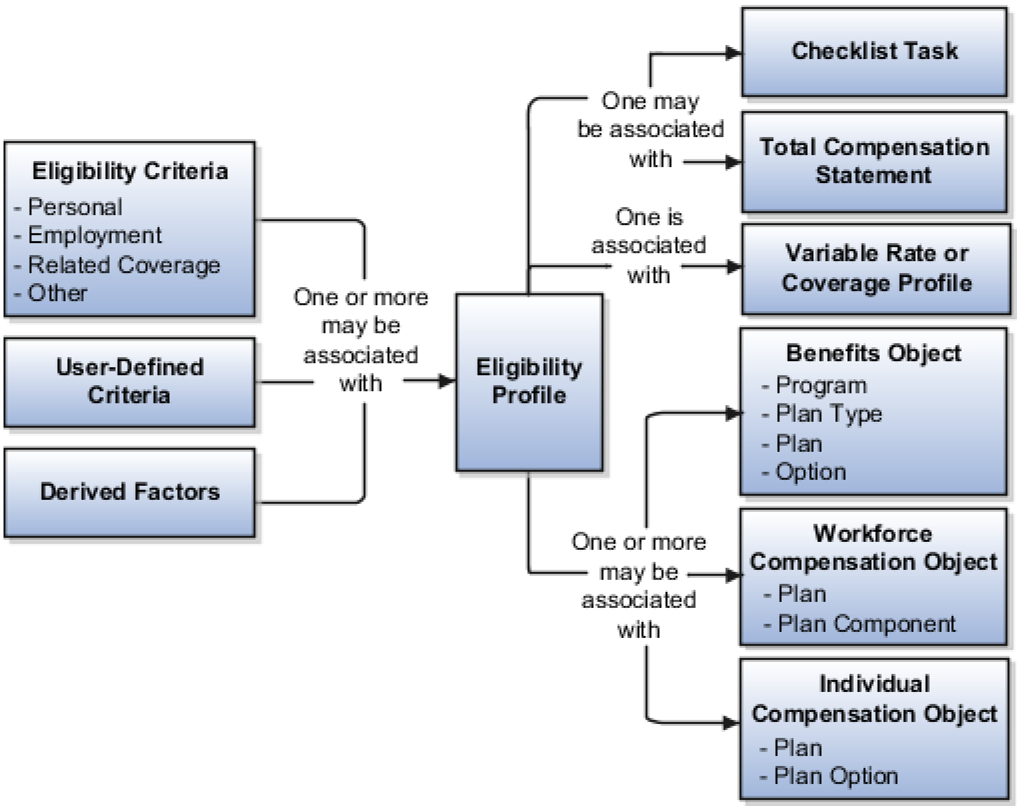
1 How do I configure Benefits Eligibility

How Eligibility Works With Other Objects

You add eligibility criteria to an eligibility profile, and then associate the profile with an object that restricts eligibility.

The following figure shows the relationships between eligibility components.



Eligibility Criteria

You can add different types of eligibility criteria to an eligibility profile. For many common criteria, such as gender or employment status, you can select from a list of predefined criteria values. However, you must create user-defined criteria and derived factors before you can add them to an eligibility profile.

Eligibility Profile

When you add an eligibility criterion to a profile, you define how to use it to determine eligibility. For example, when you add gender as a criterion, you must specify a gender value (male or female) and whether to include or exclude persons who match that value.

Associating the Profile with Objects

This table describes associating eligibility profiles with different kinds of objects and whether you can attach more than one profile.

Object that Uses an Eligibility Profile	Purpose	Whether You Can Attach More Than One Profile?
Variable rate or variable coverage profile	Establish the criteria required to qualify for that rate or coverage	No
Checklist task	Control whether that task appears in an allocated checklist	No
Total compensation statement	Apply additional eligibility criteria after statement generation population parameters	No
Benefits object	Establish the eligibility criteria for specific programs, plans, and options	Yes
Compensation object	Establish the eligibility for specific plans and options	Yes
Performance documents	Establish the eligibility for performance documents	Yes
Check-in templates	Establish the eligibility to use check-in templates for creating check-in documents	Yes
Goal plans or goal mass assignments	Establish eligibility for the goal	Yes
Absence plan	Determine the workers who are eligible to record an absence that belongs to that plan	Yes

Related Topics

- User-Defined Criteria
- Derived Factors
- Eligibility Profiles

Derived Factors

Derived factors define how to calculate certain eligibility criteria that change over time, such as a person's age or length of service. You add derived factors to eligibility profiles and then associate the profiles with objects that restrict eligibility.

Derived Factor Types

Using the **Manage Derived Factors** task, you can create six different types of derived factors:

- Age
- Length of service
- A combination of age and length of service
- Compensation
- Hours worked
- Full-time equivalent

Determination Rules and Other Settings

For each factor that you create, you specify one or more rules about how eligibility is determined. The following table provides example settings for two factors.

Factor	Example Settings
Age derived	Select a determination rule to specify the day on which to evaluate the person's calculated age for eligibility. Example: If the determination rule is set to the first of the year, then the person's age as of the first of the year is used to determine eligibility.
Full-time equivalent	Specify the minimum and maximum full-time equivalent percentage and whether to use the primary assignment or the sum of all assignments when evaluating eligibility. Example: If 90 to 100 percent is the percentage range for the sum of all assignments, then a person who works 50 percent full-time on two different assignments is considered eligible.

For derived factors on time and monetary amounts, you can also set the following rules:

- Unit of measure
- Rounding rule
- Minimum and maximum time or amount

Related Topics

- Examples of Derived Factors
- Eligibility Profiles

Examples of Derived Factors

The scenarios described here illustrate how to define different types of derived factors.

Age

Benefits administrators often use age factors to determine:

- Dependent eligibility
- Life insurance rates

Age factors typically define a range of ages, referred to as age bands, and rules for evaluating the person's age. The following table illustrates a set of age bands that could be used to determine eligibility for life insurance rates that vary based on age.

Derived Factor Name	Greater Than or Equal To Age Value	Less Than Age Value
Age Under 25	1	25
Age 25 to 34	25	35
Age 35 to 44	35	45
Age 45 to 54	45	55
Age 55 to 64	55	65
Age 64 or Older	65	75

The determination rule and other settings for each age band can use the same values, as shown in the following table:

Field	Value
Determination Rule	First of calendar year
Age to Use	Person's
Units	Year
Rounding	None

Length of Service

You use the length of service derived factor to determine eligibility based on an employee's length of service. For example, you can create a derived factor to determine if an employee has completed 10 years of service. You can specify the start date of the length of service period using any rule in the Period Start Date Rule list:

- Adjusted service date

- Date of hire
- Original hire date
- Seniority date

If you select Seniority Date, you use the Seniority Date list to select the specific configuration rule, such as the grade seniority date, to determine the date. If you've other special requirements to calculate the length of service, you can use a formula. You indicate the end of the length of service period by using a determination rule, such as end of month, first of month, as of event date, or end of pay period. The following table shows an example of a set of length-of-service bands.

A derived factor for length of service defines a range of values and rules for calculating an employee's length of service. The following table shows an example of a set of length-of-service bands. You can use the length-of-service bands to determine eligibility for compensation objects such as bonuses or severance pay.

Derived Factor Name	Greater Than or Equal To Length of Service Value	Less Than Length of Service Value
Service Less Than 1	0	1
Service 1 to 4	1	5
Service 5 to 9	5	10
Service 10 to 14	10	15
Service 15 to 19	15	20
Service 20 to 24	20	25
Service 25 to 29	25	30
Service 30 Plus	30	999

The determination rule and other settings for each length-of-service band are the same:

Field	Value
Period Start Date Rule	Date of hire This sets the beginning of the period being measured.
Determination Rule	End of year This sets the end of the period being measured.
Age to Use	Person's

Field	Value
Units	Year
Rounding	None

Compensation

A derived factor for compensation defines a range of values and rules for calculating an employee's compensation amount. The following table shows an example of a set of compensation bands. You can use the compensation bands to determine eligibility for compensation objects such as bonuses or stock options.

Derived Factor Name	Greater Than or Equal To Compensation Value	Less Than Compensation Value
Less than 20000	0	20,000
Salary 20 to 34000	20,000	35,000
Salary 35 to 49000	35,000	50,000
Salary 50 to 75000	50,000	75,000
Salary 75 to 99000	75,000	100,000
Salary 100 to 200000	100,000	200,000
Salary 200000 Plus	200,000	999,999,999

The determination rule and other settings for each compensation band are the same:

Field	Value
Determination Rule	First of year
Unit of Measure	US Dollar
Source	Stated compensation
Rounding	Rounds to nearest hundred

Related Topics

- Eligibility Profiles
- Derived Factors

Options for Using Age to Determine Eligibility

The Age to Use value that you select for an age derived factor determines whose birth date is used to calculate the derived age. The most common value is Person's.

Use the **Manage Derived Factors** task to configure age derived factors.

Person's Age

You usually use **Person's** as the **Age to Use** setting. With this setting, each person's own birth date is used to calculate age for eligibility evaluation, as shown in the following table.

Scenario	Result
You select **Person's** as the **Age to Use** value, and associate the age derived factor with a dependent eligibility profile.	Each dependent's eligibility is evaluated based on the age calculated from their own birth date.

Other Age to Use

To evaluate participant or dependent eligibility or rates based on another person's age, such as a spouse or child, select a value other than Person's.

The following table provides examples.

Scenario	Result
You select **Person's oldest child** as the **Age to Use** value, and associate this derived factor with a dependent eligibility profile.	Eligibility for all dependents is based on the age of the participant's oldest child. For example, all dependents become ineligible when the oldest child reaches the maximum age of eligibility.
You select **Inherited Age** as the **Age to Use** value, and associate this derived factor with a dependent eligibility profile.	Eligibility for all dependents is based on the date of birth as defined in the person extra information flexfield.

Related Topics

- Derived Factors
- Examples of Derived Factors

Examples of User-Defined Criteria

The following scenarios illustrate how you can create different types of user-defined criteria for use in eligibility profiles associated with benefits and compensation objects.

In each example, you must:

1. Create the user-defined criteria using the Manage User-Defined Criteria task in the Plan Configuration work area.
2. Add the user-defined criteria to an eligibility profile using the Manage Eligibility Profile task.
3. Set the criteria values to use in the eligibility profile.
4. Associate the eligibility profile with the relevant benefits or compensation object.

Base Eligibility on a User-Defined Attribute

Your commercial diving company wants to offer different benefit rates to employees who dive to depths greater than 330 feet.

1. On either the create or edit page for user-defined criteria, set the following values.

Field	Value
Table	Person Attributes
Column	BEN_DIVE_DEPTH
Lookup	BEN_DIVE_DEPTH
Enable range validation one	Selected

2. On either the create or edit page for the eligibility profile, add the user-defined criteria to an eligibility profile.
3. On the Other tab, User-Defined Criteria subtab, set the following values.
   You might have to refresh the Meaning list before you see the choice that you want. To do so, click another subtab, such as Formula, and then click the User-Defined Criteria tab again.

Field	Value
Set 1 Meaning	330
Set 1 To Meaning	9999
Exclude	Clear

4. Associate the eligibility profile with a benefit variable rate profile.

Base Eligibility on a Formula

Your company wants to offer a spot incentive bonus to hourly employees who worked 100 percent of their scheduled shift hours in a three-month period. In the Setup and Maintenance work area, you used the Manage Fast Formula task to create the formula that calculates Scheduled Hours minus Worked Hours for each week in the previous three months. If the result of successive calculations is less than or equal to zero, then the formula returns a result of Yes.

1. On the create or edit page for user-defined criteria, enter the following values.

Field	Value
Access One Formula	Worked_Sched_Hours_Percent
Enable range validation one	Clear

2. On either the create or edit page for the eligibility profile, add the user-defined criteria to an eligibility profile.
3. On the Other tab, User-Defined Criteria subtab, set the following values.
   You might have to refresh the Meaning list before you see the choice that you want. To do so, click another subtab, such as Formula, and then click the User-Defined Criteria tab again.

Field	Value
Set 1 Meaning	Yes
Exclude	Clear

4. Associate the eligibility profile with the bonus compensation object.

> **Tip:** For very complex scenarios, your organization or implementation team can write a company-defined program to evaluate eligibility.

Use Eligibility to Exclude

Your organization wants to exclude workers with a work-at-home assignment from a transportation allowance.

1. On the create or edit page for user-defined criteria, set the following values.

Field	Value
Table	Assignment
Column	Work_at_home

Field	Value
Lookup	YES_NO
Enable range validation one	Clear

2. On either the create or edit page for the eligibility profile, add the user-defined criteria to an eligibility profile.
3. On the Other tab, User-Defined Criteria subtab, set the following values.

   You might have to refresh the Meaning list before you see the choice that you want. To do so, click another subtab, such as Formula, and then click the User-Defined Criteria tab again.

Field	Value
Set 1 Meaning	Yes
Exclude	Selected

4. Associate the eligibility profile with the transportation allowance compensation object.

Related Topics

- User-Defined Criteria
- Configure Your Own Criteria Based on Lookups and Flexfields

User-Defined Criteria

You can define your own eligibility criteria that meet any special requirements of your organization. Associate your criteria with eligibility profiles.

This topic provides an example and discusses creating and using a user-defined criteria.

Example

Your organization wants to use work-at-home assignment as the eligibility criteria for a monthly telecommunications allowance. The table and column already exist, but the data isn't available from existing eligibility criteria tabs on the Create Eligibility Profile page. Therefore, you must first create the work-at-home criteria so that you can then use it with an eligibility profile.

Creating the Criteria

Use the **Manage User-Defined Criteria** task in the Plan Configuration work area. The data for the eligibility criterion that you create must be stored in a table that's accessible to the application. The procedure varies depending on the table.

Data Table	Procedure
Person Attributes or Assignments table	1. Select the table and table column from lists. You must understand the basic structure of these tables. 2. Select the lookup type to use to validate input values, including user-defined lookup types that you created for either table. For details, see the Setting Up Lookup-Based User-Defined Criteria: Worked Example topic. 3. If the field stores a numeric value or a date, specify a range of valid values.
Other tables	1. Use the **Manage Fast Formulas** task in the Setup and Maintenance work area. 2. Select your formula on the Create User-Defined Criteria page.

Using the Criteria

You can define one or two sets of criteria on the Create User-Defined Criteria page. The participant must meet the criteria defined in either set to be considered eligible or ineligible.

After you create your user-defined criteria, you can add it to an eligibility profile on the User-Defined Criteria tab in the **Other** category.

Related Topics

- Examples of User-Defined Criteria
- Eligibility Profiles
- Configure Your Own Criteria Based on Lookups and Flexfields

Example of Using Range of Scheduled Hours

This example illustrates how to define eligibility criteria based on the number of hours a worker is scheduled to work within a specified period.

Weekly and Monthly Ranges

You want to limit eligibility for a benefits offering to workers who were scheduled to work either of the following ranges. Both ranges are as of the end of the previous quarter:

- Between 30 and 40 hours each week
- Between 130 and 160 hours each month

To do this, add two different ranges on the Range of Scheduled Hours subtab under the Employment tab of the create or edit eligibility profile pages. Set the values for the weekly range as shown in the following table:

Field	Value
Sequence	1
Minimum Hours	30
Maximum Hours	40
Scheduled Enrollment Periods	Weekly
Determination Rule	End of previous quarter

Set the values for the monthly range as shown in this table:

Field	Value
Sequence	2
Minimum Hours	130
Maximum Hours	160
Scheduled Enrollment Periods	Monthly
Determination Rule	End of previous quarter

Related Topics

- Eligibility Profiles
- Create a Participant Eligibility Profile

Configure Your Own Criteria Based on Lookups and Flexfields

This example demonstrates how you create user-defined criteria based on user-defined lookups and associate the user-defined criteria with benefits eligibility profiles.

Scenario: A commercial diving company wants to offer different benefits rates to divers who dive deeper than 330 feet.

Summary of Tasks

To create lookup-based user-defined criteria for benefits eligibility profiles, you first perform these tasks in the Setup and Maintenance work area.

1. Create the benefit lookup.
2. Create the benefit value set.
3. Create the additional global segment on the descriptive flexfield.
4. Deploy the modified descriptive flexfield.

Next, you perform these tasks in the Plan Configuration work area.

1. Create the lookup-based user-defined criteria.
2. Create the eligibility profile and associate the new user-defined criteria.

Create Benefit Lookup

While you can use the Manage Benefit Lookups task to edit existing benefits lookups, you must use the Manage Common Lookups task in the Setup and Maintenance work area to create benefits lookups.

1. Create the lookup type, as shown in this table. Start the Lookup Type value with BEN_ for easy searching. This also ensures that the lookup is available in the Manage Benefit Lookups task.

Field	Value
Lookup Type	BEN_DIVE_DEPTH
Meaning	Dive Depth
Description	Identifies whether the diver dives deeper than 330 feet
Module	Eligibility Profiles

2. Click **Save**.

   You must create the lookup type before you can add lookup codes.
3. In the Lookup Codes section, add and enable the lookup codes that you want to use for the lookup, as shown in this table.

Field	Values for Code 1	Values for Code 2
Lookup Code	SHALLOW	DEEP
Display Sequence	1	2
Enabled	Select	Select

Field	Values for Code 1	Values for Code 2
Start Date	1/1/2000	1/1/2000
Meaning	Shallow	Deep
Description	Dives 330 feet or less	Dives deeper than 330 feet

4. Click **Save and Close** to return to the Overview page.

Create Benefit Value Set

Use the Manage Value Sets task of the Setup and Maintenance work area to complete this task with the default values for fields unless the steps specify other values.

1. Complete the initial fields, as shown in this table.

Field	Value
Value Set Code	BEN_DIVE_DEPTH
Module	Eligibility Profiles
Validation Type	Table
Value Data Type	Character

2. Complete the Definition fields, which appear after you select the validation type, as shown in this table.

Field	Value
FROM Clause	HCM_LOOKUPS
Value Column Name	MEANING
ID Column Name	LOOKUP_CODE
WHERE Clause	LOOKUP_TYPE='BEN_DIVE_DEPTH'

Create Global Segment

Use the Manage Descriptive Flexfields task in the Setup and Maintenance work area. Use the default values for fields unless the steps specify other values.

1. Search for the Persons Attributes descriptive flexfield. To add more attributes to the Assignments table, you search for and edit the Assignment Attributes descriptive flexfield.
2. In the Search Results section, select the **Person Attributes** row.
3. On the Search Results toolbar, click the **Edit** button.
4. On the Global Segments toolbar, click the **Create** button.
5. Complete the general fields, as shown in this table.

Field	Value
Name	Dive Depth
Code	BEN_DIVE_DEPTH

6. Complete the Column Assignment fields, as shown in this table.

Field	Value
Data Type	Character
Table Column	The next available attribute, such as ATTRIBUTE1

7. In the Validation section **Value Set** field, select **BEN_DIVE_DEPTH**.
8. In the Display Properties section **Display Type** field, select **Drop-down List**.
9. Click **Save and Close** to return to the Edit Descriptive Flexfield page.
10. Click **Save and Close** to return to the Manage Descriptive Flexfields page.

Deploy Modified Descriptive Flexfield

You deploy the edited descriptive flexfield to expose the field in the application and make it available for use when creating user-defined criteria.

1. On the Search Results toolbar, click **Deploy Flexfield**.
2. Click **Done** to return to the Overview page.

Create Lookup-Based User-Defined Criteria

Use the Plan Configuration work area to complete this task with the default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click **Manage User-Defined Criteria** to open the Manage User-Defined Criteria page.
2. On the Search Results toolbar, click **Create**.
3. Complete the User-Defined Criteria fields, as shown in this table.

Field	Value
Name	Ben Dive Depth
Short Code	BEN_DIVE_DEPTH

4. Complete the Set 1 fields, as shown in this table.

Field	Value
Table	Person Attributes
Column	Attribute that you selected for your global segment, for example ATTRIBUTE1
Lookup	BEN_DIVE_DEPTH

5. Click **Save and Close** to return to the Manage User-Defined Criteria page.

Create Eligibility Profile and Associate User-Defined Criteria

Use the Plan Configuration work area to complete this task with the default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click **Manage Eligibility Profiles** to open the Manage Eligibility Profiles page.
2. On the Search Results toolbar **Create** menu, select **Create Participant Profile**.
3. In the Eligibility Profile Definition section **Name** field, enter **Ben Dive Depth**.
4. In the User-Defined Criteria tab Eligibility Criteria section, add your user-defined criteria as shown in this table.

Field	Value
Sequence	1
User-Defined Criteria	Ben Dive Depth
Exclude	Clear
Set 1 Meaning	Deep

5. Be sure that you select the value in the **Set 1 Meaning** field.

   You might have to refresh the list before you see the choice that you want:

   a. Select another tab, such as Formula.
   b. Select the User-Defined Criteria tab again.
6. Click **Save and Close** to return to the Manage Eligibility Profiles page.

Related Topics

- User-Defined Criteria
- Examples of User-Defined Criteria

Manage Benefits Derived Factors in the Integrated Workbook

Use the integrated Microsoft Excel workbook available in the Manage Derived Factors page to create, edit, and delete multiple derived factors simultaneously.

The workbook contains the following tabs with each tab enabling you to configure derived factors belonging to a particular type:

- Age
- Length of Service
- Age and Service
- Compensation
- Hours Worked
- Full-Time Equivalent

You perform these basic steps to configure derived factors using the workbook:

1. Generate and populate the workbook.
2. Create, edit, or delete derived factors in multiple tabs.
3. Upload edits.
4. Resolve errors if required.

Repeat these steps as many times as required to accommodate revisions.

Generating and Populating the Workbook

Perform these steps:

1. Navigate to the Plan Configuration work area, Manage Derived Factors page.
2. Click **Prepare in Workbook**.

Creating Derived Factors

For example, if you want to enter derived factors for Age:

1. Select the Age worksheet.
2. Click **Search** on the Derived Factors tab that's available as part of the Excel ribbon toolbar.

3. Insert a row at the end of the search results and enter the data for the new derived factor.
4. Click **Upload**. You can enter data in multiple workbooks.

Making Changes to Existing Derived Factors

For example, to make changes to a Compensation derived factor:

1. Select the required worksheet and enter the name of the specific derived factor you want to change.
2. Click **Search**.
3. Make the required changes to the derived factors.
4. Click **Upload**.

Resolving Errors

The upload process automatically updates the **Status** field in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application database
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

How You Delete Incorrect Billing Charges

You can delete incorrect billing charges that are in unpaid status from the Billing page in Benefits Service Center.

After you delete the charges, the application restores the data to how it was before.

For example, you want to waive off billing charges for some employees after the bills were generated. These billing charges are in Unpaid status, and you can delete them. When you delete the charges, they neither appear on the employee's Year to Date totals (YTD) nor appear as dues in the subsequent bills.

You can only delete the latest unpaid billing charge. For example, you've multiple billing charges that are in the Unpaid status. You need to delete those charges first before you can delete a specific unpaid billing charge.

In the following example, there are multiple billing charges that are in Unpaid status. To delete the bill number 10001 or 10002, you need to first delete the bill number 10003.

Example on Deleting Billing Charges in Unpaid Status

Billing Period	Bill Number	Start and End Date	Status
Bill_Feb_2021	10003	1/2/2022-28/2/2022	UNPAID
Bill_Jan_2021	10002	1/1/2021-31/1/2021	UNPAID

Billing Period	Bill Number	Start and End Date	Status
Bill_Dec_2020	10001	1/12/2020-31/12/2020	UNPAID

In the following example, there's one billing charge that's in Open status and one in Unpaid status. To delete the bill number 10004, you need to first delete the bill number 10005.

Example on Deleting Billing Charges in Unpaid and Open Status

Billing Period	Bill Number	Start and End Date	Status
Bill_Apr_2021	10005	1/4/2021-30/4/2021	OPEN
Bill_Mar_2021	10004	1/3/2021-31/3/2021	UNPAID

You can add reasons and comments on why you're deleting the billing charges. You need to extend a lookup named **Reason for Deleting the Bill Charge** (ORA_BEN_BILL_DEL_REASON) to add your business-specific reasons. Even after you delete a charge, you can use the **Show Deleted Unpaid Bill Charges** option in the Billing page on Benefits Service Center to view it. You can view the reasons too.

Enable Benefits Extracts to Fetch V3 Seniority Date

By default, Fusion Benefits extracts (BENXML extract file contains an empty original hire date when you're using V3 seniority date, and you need to create a fast formula to fetch the date.

Here's how you use the correct V3 seniority date:

1. In the **Setup and Maintenance** work area, search for the **Manage Administrator Profile Values** task.
2. Search for the **ORA_PER_SENIORITY_DATE_AT_ENT** profile option code.
3. Set the value of the profile option **ORA_PER_SENIORITY_DATE_AT_ENT** to Enterprise Seniority Date – Person level.
4. Click **Save and Close**.

Related Topics

- Populate V3 Seniority Dates for Employees

Populate V3 Seniority Dates for Employees

Here's how you populate the V3 seniority dates for employees.

You do this after you set up the profile options:

1. Click **Navigator** > **My Client Groups** > **Person Management**.
2. Search for the person.

3. Click **Actions** > **Personal and Employment** > **Seniority Dates**.
4. Click **Recalculate Seniority** to populate the V3 seniority dates.
5. Check and confirm the value is available for the person's enterprise seniority date.

Related Topics

- Enable Benefits Extracts to Fetch V3 Seniority Date

Home Address for Service Area Eligibility

You can use the employee's home address instead of the primary address or work address for eligibility profiles.

For example, you want the benefit rates to be based on the home postal code or service area for a remote employee.

Here are some considerations when you use home address for service area eligibility:

- Eligibility profiles use the employee's primary address by default.
- The profile option is enabled at the site level only, it can't be enabled at any other level.
- The profile option enables this feature for all eligibility profiles across modules.
- The profile option works anywhere the eligibility profiles are used such as, variable rates or variable coverages.
- The profile option only works with eligibility profiles. You can't use it elsewhere in the application.
- We don't recommend you to change the profile option back and forth.

Use Home Address for Service Area Eligibility

Here's how you enable the home address for service area eligibility:

1. In the **Setup and Maintenance** work area, search for the **Manage Administrator Profile Values** task.
2. Search for the **ORA_BEN_ELIG_ENABLE_SVC_AREA_EVALUATION_WITH_HOME_ADDRESS** profile option code.
3. In the **Site** field, select **Y** to change the profile option to site level.
4. Click **Save and Close**.

FAQ for Eligibility Criteria

What happens if I include multiple criteria in an eligibility profile?

If you define multiple values for the same criteria type, such as two postal code ranges, a person must satisfy at least one of the criteria to be considered eligible. For example, a person who resides in either postal range is eligible.

If you include multiple criteria of different types, such as gender and age, a person must meet at least one criterion defined for each criteria type.

What happens if I don't select the Required option when I add an eligibility profile to an object?

If you add only one eligibility profile to an object, then the criteria in that profile must be satisfied, even if the Required option isn't selected.

If you add multiple eligibility profiles, these rules apply:

- If all profiles are optional, then at least one of the profiles must be satisfied.
- If all profiles are required, then all the profiles must be satisfied.
- If some but not all profiles are required, then all required profiles must be satisfied and at least one optional profile must also be satisfied.

How can I use a workbook to link participant eligibility profiles with a benefit offering?

When you create or edit programs or plans, in the Eligibility step, click Prepare in Workbook. In the spreadsheet that appears, you create a row for each participant eligibility profile that you want to associate with the offering.

You can delete existing participant eligibility profiles that are associated with an offering. Double-click the **Mark for Deletion** column of the participant eligibility profile row that you want to delete, and upload the workbook.

You can find all the workbook actions, such as upload, search, end date, and delete, in the **Manage Eligibility Profiles** ribbon tab on the spreadsheet toolbar.

2 Eligibility Profiles for Benefits and Other Objects

Eligibility Profiles

Create eligibility profiles to define criteria that determine whether a person qualifies for objects that you associate the profile with. You can associate eligibility profiles with objects in various business processes.

The following are key aspects of working with eligibility profiles:

- Planning and prerequisites
- Specifying the profile type, usage, and assignment usage
- Defining eligibility criteria
- Excluding from eligibility
- Assigning sequence numbers
- Adding multiple criteria
- Viewing the criteria hierarchy

Planning and Prerequisites

Before you create an eligibility profile, consider the following:

- If an eligibility profile uses any of the following to establish eligibility, you must create them before you create the eligibility profile:
  - Derived factors
  - User-defined formulas
  - User-defined criteria
- Consider whether to combine criteria into one profile or create separate profiles depending on:
  - Whether the object for which you're creating eligibility accepts only one eligibility profile or more than one
  - Performance considerations
- Use names that identify the criteria being defined rather than the object with which the profile is associated, because eligibility profiles are reusable.

  Example: Use Age20-25+NonSmoker rather than Supplemental Life-Minimum Rate.

Specifying Profile Type, Usage, and Assignment Usage

This table describes the basic profile attributes that you specify when you create an eligibility profile:

Setting	Description
Profile Type	Use only dependent profiles for Benefits plans or plan types when determining eligibility of participants' spouses, family members, or other individuals who qualify as dependents. All other profiles are participant profiles.
Usage	Determines the type of objects the participant profile can be associated with, such as benefits offerings and rates, compensation plans, checklist tasks, goal plans or mass goal assignments, or performance documents. Selecting **Global** makes the profile available to multiple business process usages.
Assignment to Use	Determines the assignment that the eligibility process evaluates for the person • Select **Specific assignment** when the usage is Compensation or Performance. • Select a value that includes **benefit relationship** when the usage is Benefits. You select this value to restrict eligibility evaluation to active assignments that are associated with the benefits relationship of the person on a given date. If you select other values, then you might need to include eligibility criteria to exclude inactive assignments. • Select one of the following values for all other usages, such as total compensation statements: ○ Any assignment - enterprise ○ Employee assignment only - enterprise ○ Primary employee assignment only - enterprise

Defining Eligibility Criteria

Here's the list of eligibility criteria that you can use to configure benefit offerings:

Category	Description
Personal	• Gender • Person Type • Disabled • Uses Tobacco • Service Areas • Home Location • Postal Code Ranges • Leave of Absence • Termination Reason • Qualification • Competency • Marital Status • Religion

Category	Description
Employment	• Assignment Status • Hourly or Salaried • Assignment Category • Grade • Job • Position • Payroll • Salary Basis • Department • Legal Entities • Performance Rating • Quartile in Range • Work Location • Range of Scheduled Hours • People Manager • Job Function • Job Family • Hire Date • Probation Period • Business Unit
Derived factors	• Age • Length of Service • Compensation • Hours Worked • Full-Time Equivalent • Combined Age and Length of Service • Benefit Groups • Health Coverage Selected • Participation in Another Plan • Formula • User-Defined Criteria
Other	• Benefit Groups • Health Coverage Selected • Participation in Another Plan • Formula • User-Defined Criteria
Related coverage	• Covered by Another Plan

Category	Description
	• Covered by Another Plan in Program • Covered by Another Plan Type in Program • Covered by Another Program • Dependent Eligible for Another Plan Type in Program • Eligible for Another Plan • Eligible for Another Plan Type in Program • Enrolled in Another Option in Plan • Enrolled in Another Plan • Enrolled in Another Plan in Program • Enrolled in Another Plan Type in Program • Enrolled in Another Program • Other Coverage
Labor Relations	• Bargaining Unit • Labor Union Member • Union • Collective Agreement

Some criteria, such as gender, provide a fixed set of choices. The choices for other criteria, such as person type, are based on values defined in tables. You can define multiple criteria for a given criteria type.

Excluding from Eligibility

For each eligibility criterion that you add to a profile, you can indicate whether persons who meet the criterion are considered eligible or are excluded from eligibility. For example, an age factor can include persons between 20 and 25 years old or exclude persons over 65.

If you:

- Exclude certain age bands, then all age bands not explicitly excluded are automatically included.
- Include certain age bands, then all age bands not explicitly included are automatically excluded.

Assigning Sequence Numbers

You must assign a sequence number to each criterion. The sequence determines the order in which the criterion is evaluated relative to other criteria of the same type.

Adding Multiple Criteria

If you define multiple values for the same criteria type, such as two postal code ranges, a person must satisfy at least one of the criteria to be considered eligible. For example, a person who resides in either postal range is eligible.

If you include multiple criteria of different types, such as gender and age, a person must meet at least one criterion defined for each criteria type.

Viewing the Criteria Hierarchy

Select the View Hierarchy tab to see a list of all criteria that you've saved for this profile. The list is arranged by criteria type.

Related Topics

- Examples of Eligibility Profiles
- Derived Factors
- User-Defined Criteria
- Single or Multiple Eligibility Profiles
- Create a Participant Eligibility Profile

Types of Assignments You Can Use in Eligibility Profiles

When you create a participant eligibility profile, you specify which of a worker's assignments is evaluated to determine eligibility. This topic explains each value in the Assignment to Use field and helps you decide which value might work best for your product.

Each value includes the following components:

- Type of assignment
- Organizational level of the assignment

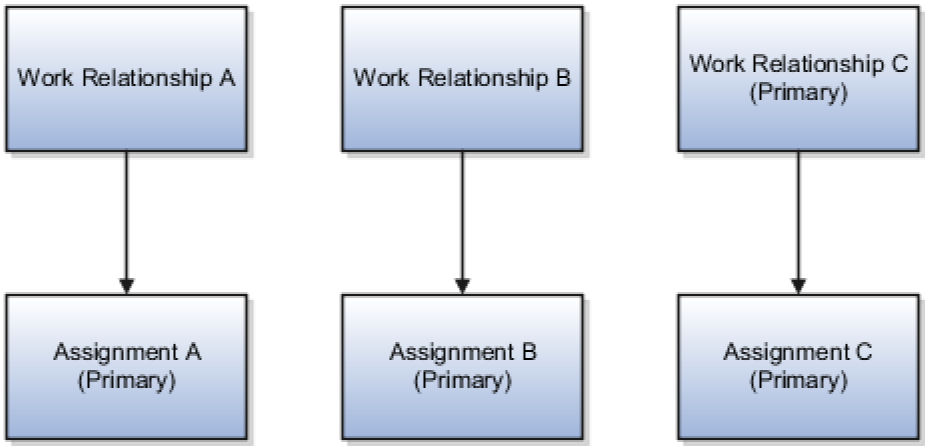
Type of Assignment

The available assignment values relate to the three types of work relationships:

- Employee
- Nonworker

All work relationships, regardless of type, have at least one assignment. When a worker has multiple assignments within a work relationship, one of them is designated as primary. When a worker has multiple work relationships, one of them is designated as a primary work relationship.

The overall primary assignment is the primary assignment in the primary work relationship, as shown in this figure.



According to the example in the figure, the overall primary assignment of the worker is Assignment C.

This table describes the type of assignment options when you select an assignment to use for an eligibility profile.

Type of Assignment	Description
Any assignment	Evaluates assignments that are associated with any of the three work relationships: employee or nonworker
Employee assignment only	Evaluates assignments that are associated with an employee work relationship only
Primary employee assignment only	Evaluates only the employee work relationship assignment that is designated as primary
Benefit nonworker assignment	Evaluates assignments with nonworker work relationship only. Applies only to Benefits participant profiles. Typically used for continuation of benefits after employment terminates
Specific assignment	Evaluates only the selected assignment or the assignment ID that was passed to eligibility evaluation processing at runtime. For example, when you select a person record from the person search page, a product might pass the corresponding assignment ID to eligibility evaluation processing.

Organizational Level

Assignments to Use values also enable you to evaluate the selected type of assignment within one of these levels:

- Benefits relationship
- Legal employer
- Enterprise

This table describes the Assignment to Use values that are applicable to each organizational level.

> **Note:** Values that include **Enterprise** or **Legal employer** also include inactive assignments in the eligibility evaluation. If you want to exclude inactive assignments, you add necessary eligibility criteria when you create or edit the eligibility profile. For example, you can use the Assignment Status eligibility criteria.

Level	Description
Benefits relationship	Evaluates only active assignments that are associated with the worker's benefits relationship effective on a particular date. Select one of these values: • Any assignment - benefit relationship • Benefit nonworker assignment - benefits relationship • Employee assignment only - benefits relationship • Primary employee assignment only - benefits relationship
Legal Employer	Evaluates assignments that exist at the legal employer level. Select one of these values: • Any assignment - legal employer • Employee assignment only - legal employer • Primary employee assignment only - legal employer To use these values, ensure that a benefits relationship configuration exists at the worker's legal employer level. Ensure that that benefits relationship is currently assigned to the assignments you want to evaluate for eligibility.
Enterprise	Evaluates assignments that exist at the enterprise level. Select one of these values: • Any assignment - enterprise • Employee assignment only - enterprise • Primary employee assignment only - enterprise

Recommended Assignment to Use Values

This table describes the recommended Assignment to Use values for products that use eligibility profiles.

Purpose	Description
Benefit programs, plan types, plans, options, variable rate profiles, and variable coverage profiles	Select one of these values: • Any assignment - benefit relationship • Benefit nonworker assignment - benefit relationship • Employee assignment only - benefit relationship • Primary assignment only - benefit relationship
Workforce compensation plans, individual compensation plans, and performance documents	Select **Specific assignment**. Workforce compensation plans, individual compensation plans, and performance documents automatically pass a specific assignment value to eligibility evaluation processing at runtime.
Absence plans, absence types, check lists, goals, total compensation statement	Select one of these values: • Any assignment - enterprise • Employee assignment only - enterprise • Primary employee assignment only - enterprise

Purpose	Description
	You can use other values, such as those that include **Legal employer**, but you must set up a benefits relationship first. If you don't want to set up a benefits relationship, you can use these values and define additional eligibility criteria to consider assignments in specified legal entities.

Single or Multiple Eligibility Profiles

You can define multiple criteria in an eligibility profile or create separate profiles for individual criterion.

To determine the best approach, consider the following:

- Does the object for which you are defining eligibility allow multiple eligibility profiles?
- What is the best approach in terms of efficiency and performance?
- Are your criteria both inclusive and exclusive?

Allowable Number of Eligibility Profiles

If an object permits only one eligibility profile, you must include all criteria in a single profile.

The following table shows which objects permit only one profile and which permit more.

Only One Profile	One or More Profiles
• Checklist tasks • Variable rate profiles • Variable coverage profiles • Total compensation statements • Absence types	• Benefits offerings • Individual and workforce compensation plans • Performance documents • Check-in templates • Goal plans or mass goal assignments • Absence plans

Efficiency and Performance in the Benefits Hierarchy

For optimum performance and efficiency, attach profiles at the highest possible level in the benefits object hierarchy and avoid duplicating criteria at lower levels. For example, to be eligible for a plan type, a person must satisfy eligibility profiles defined at the program and plan type in program levels.

The following objects inherit the eligibility criteria associated with the program:

- Plan types in program
- Plans in program
- Plans
- Options in plans that are in programs

However, it's sometimes more efficient to create more than one profile and attach the profiles at various levels in the hierarchy. The following table illustrates applying successively restrictive exclusion criteria at different levels in the hierarchy:

Level	Eligibility Profile Criteria
Program	Exclude employees who do not have an active assignment.
Plan type in program	Exclude employees who do not have a full-time assignment.
Plan	Exclude employees whose primary address is not within a defined service area.

Using Both Inclusive and Exclusive Criteria

Eligibility criteria can be used to include or exclude persons from eligibility. Sequencing of criteria is more complicated when you mix included and excluded criteria in the same profile. For ease of implementation, keep excluded criteria in a separate eligibility profile.

Related Topics

- How Eligibility Works With Other Objects
- What happens if I include multiple criteria in an eligibility profile?
- Best Practices for Setting Up Eligibility in a Benefits Hierarchy

Create a Participant Eligibility Profile

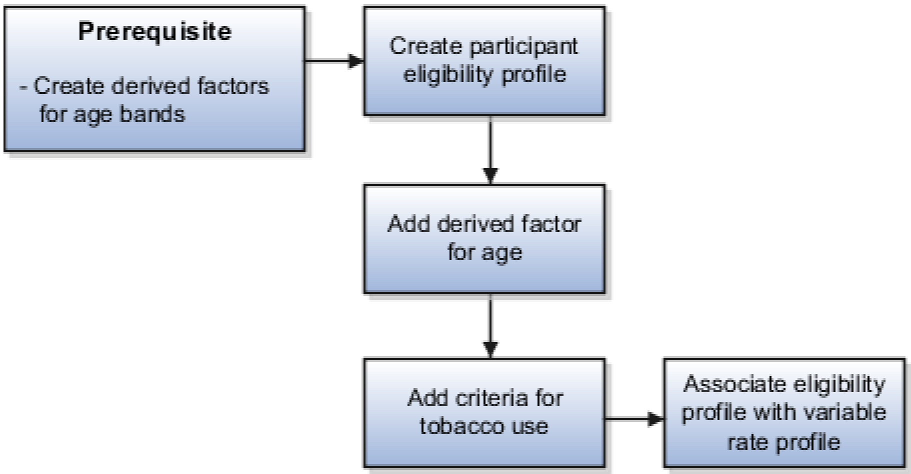
This example demonstrates how to create a participant eligibility profile used to determine eligibility for variable life insurance rates. Use the Plan Configuration work area to complete these tasks.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
What is the profile type?	Participant
What type of object is associated with this profile?	Variable rate for benefits offering
What types of eligibility criteria are defined in this profile?	Age derived factor (must have been previously defined) Uses Tobacco criteria
Should persons meeting these criteria be included or excluded from eligibility?	Included

Decisions to Consider	In this Example

The following figure shows the tasks to complete in this example:



In this example, you create one eligibility profile that defines the requirements for a single variable rate.

- Typically, you create a set of eligibility profiles, one for each variable rate.
- Create a separate profile for each additional rate by repeating the steps in this example, varying the age and tobacco use criteria.

Prerequisites

1. Create an age derived factor for ages less than 30.

Creating the Eligibility Profile

Use default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click **Manage Eligibility Profiles** to open the Manage Eligibility Profiles page.
2. On the Create menu, select **Create Participant Profile**.
3. In the Eligibility Profile Definition section, complete the fields as shown in this table.

Field	Value
Name	Age Under 30+ Non-Smoking
Profile Usage	Benefits
Status	Active
Assignment to Use	Any assignment - benefit relationship

Adding the Derived Factor for Age

Use default values for fields unless the steps specify other values.

1. In the Eligibility Criteria section, select the **Derived Factors** tab.
2. On the Age tab, click **Create**.
3. Complete the fields as shown in this table.

Field	Value
Sequence	1
Age	Select the derived factor that you previously defined for ages under 30
Exclude	Make sure that it's not selected

Adding the Criteria for Tobacco Use

Use default values for fields unless the steps specify other values.

1. Select the **Personal** tab.
2. On the Uses Tobacco tab, click **Create**.
3. Complete the fields as shown in this table.

Field	Value
Sequence	1
Tobacco Use	None
Exclude	Make sure that it's not selected

4. Click **Save and Close**.

Associating the Eligibility Profile with a Variable Rate Profile

Use default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click **Manage Benefits Rates** to open the Manage Benefits Rates page.
2. Select the **Variable Rates** tab.
3. Click **Create**.
4. In the **Eligibility Profile** field, select the eligibility profile you just created.
5. Complete other fields as appropriate for the rate.
6. Click **Save and Close**.

Related Topics

- Examples of Eligibility Profiles
- Derived Factors
- Create a Benefit Variable Rate

Examples of Eligibility Profiles

The following examples show how to use eligibility profiles to determine which workers are eligible for a plan, compensation object, and checklist task.

In each case, you:

1. Create the eligibility profile using the Manage Eligibility Profiles task, which is available in several work areas, including the Setup and Maintenance work area and the Plan Configuration work area.
2. Associate the eligibility profile with the relevant object, such as a benefit plan.

Savings Plan Eligibility

A savings plan, such as a 401k plan, is restricted to full-time employees under 65 years of age. Create an eligibility profile to associate with your plan.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Benefits
Profile Type	Participant

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Assignment Category	Full-Time	No
Derived Factor	Age	Select an age derived factor for the age band of 65 and older	Yes

Bonus Eligibility

You offer a bonus to all employees who received the highest possible performance rating in all rating categories. Create an eligibility profile to associate with your Bonus compensation object.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Compensation, or Global
Profile Type	Participant
Assignment to Use	Specific Assignment

The following table provides the values for the eligibility criteria for each rating category.

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Performance Rating	Select the performance template and rating name, and then select the highest rating value	No

Checklist Task Eligibility

A new hire checklist contains tasks that don't apply to employees who work in India. Create an eligibility profile to associate with each checklist task that doesn't apply to workers in India.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Checklist
Profile Type	Participant

The following table provides the values for the eligibility criteria.

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Work Location	India	Yes

Related Topics

- Eligibility Profiles
- Derived Factors
- How can I restrict benefits enrollment opportunities based on provider location?
- How to Configure Grandfathered Benefits

Multiple Eligibility Profiles

For each eligibility profile that you add to an object, such as a benefit plan, there's a check box called Required that you can select.

If you select this check box, that means the participant needs to necessarily satisfy the criteria in that eligibility profile for them to be eligible for the object.

Only 1 Eligibility Profile

If you add just one eligibility profile, then all the criteria in that profile must be satisfied, even if you don't select the **Required** check box.

Multiple Eligibility Profiles, All Optional

Suppose you add multiple eligibility profiles and you don't select the **Required** check box for any of those profiles, the participant still needs to satisfy at least one of the profiles to be eligible for the object.

Multiple Eligibility Profiles, All Required

If you select the **Required** check box for all the profiles, then the participant must satisfy all of the profiles to be eligible for the object.

Multiple Eligibility Profiles, Some Optional, Some Required

Suppose you included multiple profiles for an object, and you selected the **Required** check box only for some of them. In this case, not only should the participant satisfy all the required profiles, they must satisfy at least one optional profile.

Considerations for Testing and Validating Eligibility Profiles

You can test and validate participant eligibility profiles and review the results in the Plan Configuration work area.

For example, you can test eligibility profiles against specific assignments for a person on different dates. The outcome of the test is saved to a log file for easy access. You can use the log file to identify issues and it helps you fine tune your setup.

You can evaluate:

- Any new profile that you created against an employee to figure out the correctness of the criteria within the profile.
- Employee and Non-Worker assignments only.

If the eligibility profiles use fast formulas, you need to test them separately in the fast formula tester.

The following profile criteria are not supported:

- All objects under the Related Coverage tab on the Participant Evaluation page.
- Objects in the Health Coverage Selected and Participation in Another Plan in the Other tab on the Participant Evaluation page.

Related Topics

- Test and Validate Eligibility Profiles

Test and Validate Eligibility Profiles

Here's how you test and validate eligibility profiles:

1. Click **Navigator** > **Benefits Administration** > **Plan Configuration** .
2. In the **Actions** panel, click **Evaluate Formulas and Eligibility Profiles**.
3. Select **Eligibility profile** as the setup object to evaluate.
4. Follow the prompts to test the eligibility profile.
5. Click the icon in the Results column to see the eligibility status. Download the log file to see more details.

Related Topics

- Considerations for Testing and Validating Eligibility Profiles

How to Configure Grandfathered Benefits

Configure grandfathered eligibility to enable already enrolled participants to retain eligibility for a benefit that they would otherwise not be able to elect. For example, continue a benefit for only those employees of an acquired company who were already enrolled on the acquisition date.

The following are the steps to configure grandfathered benefits eligibility:

1. Set the Grandfathered Benefit Group as the criterion for the Grandfathered Eligibility Profile.
2. Associate the Grandfathered Eligibility Profile to the associated benefit offering.
3. Assign the Grandfathered Benefit Group to the participants who are eligible for the associated benefit offering.

Creating and Assigning a Benefit Group

1. In the Plan Configuration work area Tasks panel drawer, click **Manage Benefit Groups** to open the Manage Benefits Group page.
2. Create a benefit group using a descriptive name, such as Grandfathered Eligibility with the name of the offering.

3. Use one of the following tasks to assign the benefit group to workers who qualify for the benefit:

Task	Work Area	Description
Manage Person Habits and Benefit Groups	Enrollment	Search for individuals and assign the benefit group
Manage Processes and Uploads	Evaluation and Reporting	Assign benefit groups using the Upload Person Benefit Groups integrated workbook

Creating and Using an Eligibility Profile

1. In the Plan Configuration work area, use the **Manage Eligibility Profiles** task to create an eligibility profile using these criteria:

Criteria Type	Criteria Name	Value
Other	Benefit Groups	Select the grandfathered benefit group that you created.

2. In the Plan Configuration work area, attach the eligibility profile to the benefit offering using these steps in the program or plan configuration guided process:
    a. After searching for the program or plan, select the appropriate offering in the hierarchy table on the Eligibility step of the guided process.
    b. In the Eligibility Profiles section, select the grandfathered eligibility profile that you created and set the **Required** value as appropriate.

Related Topics

- Manage Person Benefit Groups in the Integrated Workbook

Manage Postal Code Ranges and Service Areas in the Integrated Workbook

You can define postal code ranges and service areas for use as eligibility criteria using a single integrated Microsoft Excel workbook. Then, upload them into the application database. Repeat these steps as many times as required to accommodate revisions.

The basic process for managing postal code ranges and services areas using the workbook is:

1. Generate the workbook.
2. Edit postal code ranges and service areas in their respective worksheets.

3. Upload edits.
4. Resolve errors.

Generating the Workbook

In the Plan Configuration work area:

1. In the Tasks panel drawer, click **Manage Benefit Service Areas** to open the Manage Benefit Service Areas page.
2. In the Search Results section of either the Postal Code Ranges or Service Areas tab, click **Prepare in Workbook**.

Editing Postal Code Ranges and Service Areas in the Workbook

The worksheet columns in each section are the same as fields in the corresponding application dialog box, as shown in this table.

Worksheet Section	Dialog Box
Postal Code Ranges	Create Postal Code Ranges
Service Areas	Create Service Area

In the respective worksheet:

1. Create the postal code ranges.
2. Upload the postal ranges if you plan to add them to service areas.
3. Create the service areas and edit existing ones.
4. Enter the postal code ranges that comprise the service area for each added service area.

   You can enter multiple postal code ranges for a single service area. To do so, name the service area in the first column of the Postal Code Ranges section for each postal code row.

   > **Note:** The postal code ranges must exist in the application database before you can enter them in the worksheet rows. Upload any new postal code ranges first, before you upload your service area edits.

Uploading Edits

After you complete your edits, click **Upload**.

The process:

- Uploads to the application tables only those rows marked as changed
- Updates the Worksheet Status field only if the server or database becomes inaccessible during upload

When you upload the service area worksheet with postal code ranges that weren't successfully uploaded, the data in the Service Area section might upload successfully. However, an error status indicates invalid postal code range for any rows in the Postal Code Ranges section with values not yet uploaded.

> **Note:** You can't edit postal code ranges in the worksheet if they uploaded successfully. To edit the postal code ranges after upload, use the Manage Postal Code Ranges and Service Areas page in the Plan Configuration work area.

Resolving Errors

The upload process automatically updates the **Status** field in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application database
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

Related Topics

- What's the difference between Export to Excel and desktop integration for Excel?
- Guidelines for Using Desktop Integrated Excel Workbooks
- Set Up Desktop Integration for Excel

FAQs for Eligibility Profiles

How can I restrict benefits enrollment opportunities based on provider location?

Create an eligibility profile with the Employment criteria type and Work Location criteria using the Manage Eligibility Profiles task in the Plan Configuration work area.

If the work location definition doesn't correspond to the provider location:

1. Define the provider's service area by listing the relevant postal codes using the Manage Benefit Service Area task.
2. Use that service area to define an eligibility profile that uses the Service Area criteria in the Personal criteria type.

Assign the eligibility profile to the benefits offering that you want to restrict.

How can I know the person type of a participant?

Person type information, such as Participant, Employee, Ex Worker, Dependent, or Beneficiary, enables you to easily address eligibility-related and other questions from participants.

To know the person type of a participant, open the Benefits Service Center page. On the side panel, click Person Info. On this page, you can see the participant's active person types and the validity periods. In the Person Info section, you can also see additional details, such as disability details, coverage in other plans, and student status.