Oracle Fusion Cloud Human Resources

How do I configure benefit extracts?

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1 Benefits Extracts: Enrollments, Designations, Rates, and Coverages

Ways to Extract Benefits Data

You can extract benefits data using 2 ways: use benefits user entities in HCM Extracts, or use a combination of Fusion Benefits Extracts, also known as BENXML, and HCM Extracts.

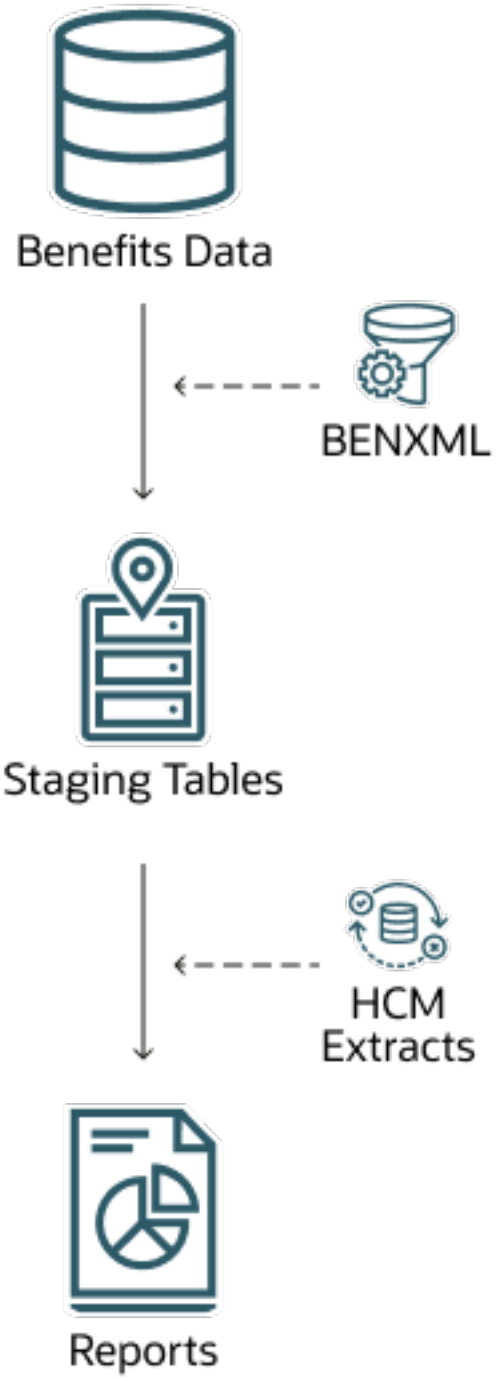
You can extract worker enrollment results, designated dependents and beneficiaries, and corresponding rates and coverage values. Here's a table that provides details on each method of extracting benefits data.

Extract Method	Details
BENXML and HCM Extracts	Use BENXML to pull the benefits data from the transaction tables into staging tables. Then, you use HCM Extracts to extract that data to generate data files or reports.
HCM Extracts	You use the Benefits user entities to extract the data from the Benefits transaction tables.

Overview of Extracting Benefits Data Using BENXML

You can use Fusion Benefits Extracts, also known as BENXML, to populate the Benefits staging tables. Then, you use HCM Extracts to pull the staged data and make it available for reporting.

Here's a diagram that summarizes the extract flow.

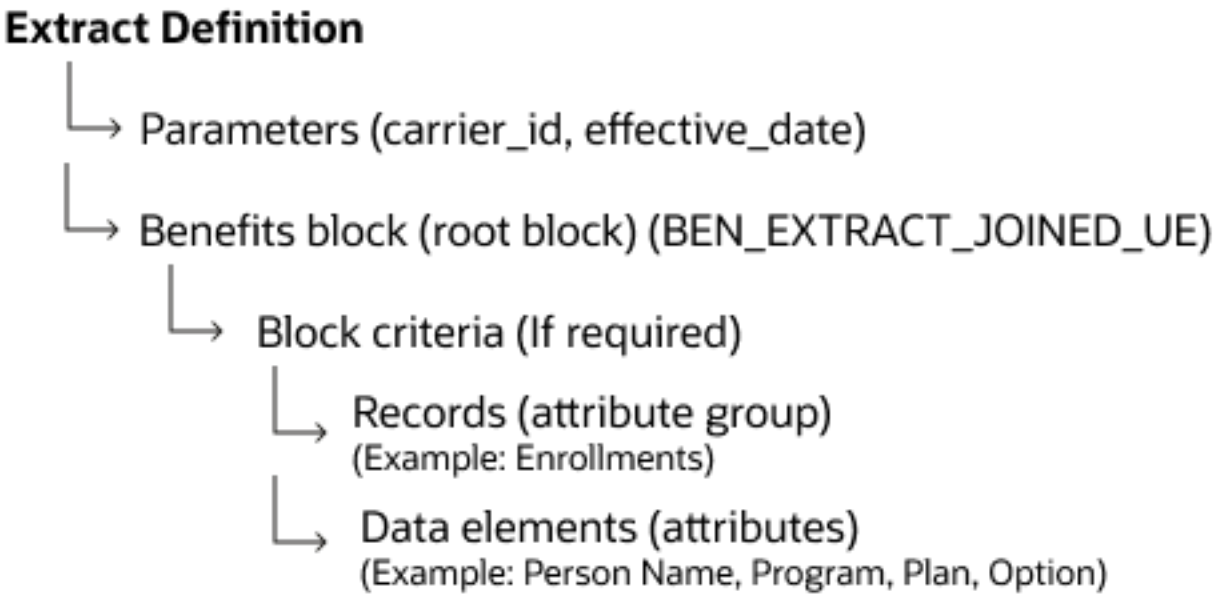


BENXML populates these staging tables with benefits data:

- BEN_EXTRACT_REQUEST
- BEN_EXTRACT_REQ_DETAILS

BENXML uses the carrier to filter benefits data before sending them to the staging tables. You configure the carrier using the Manage Plan Carriers task in the Plan Configuration work area. You then use the BEN_EXTRACT_JOINED_UE user entity in HCM Extracts to extract the staged data from the 2 tables. The BEN_EXTRACT_JOINED_UE user entity in HCM Extracts requires an additional carrier_id parameter. This is the same carrier ID that BENXML uses to filter and send benefits data to the staging tables.

Here's the structure of the extract definition that uses the BEN_EXTRACT_JOINED_UE user entity.



Overview of Extracting Benefits Data Using User Entities in HCM Extracts

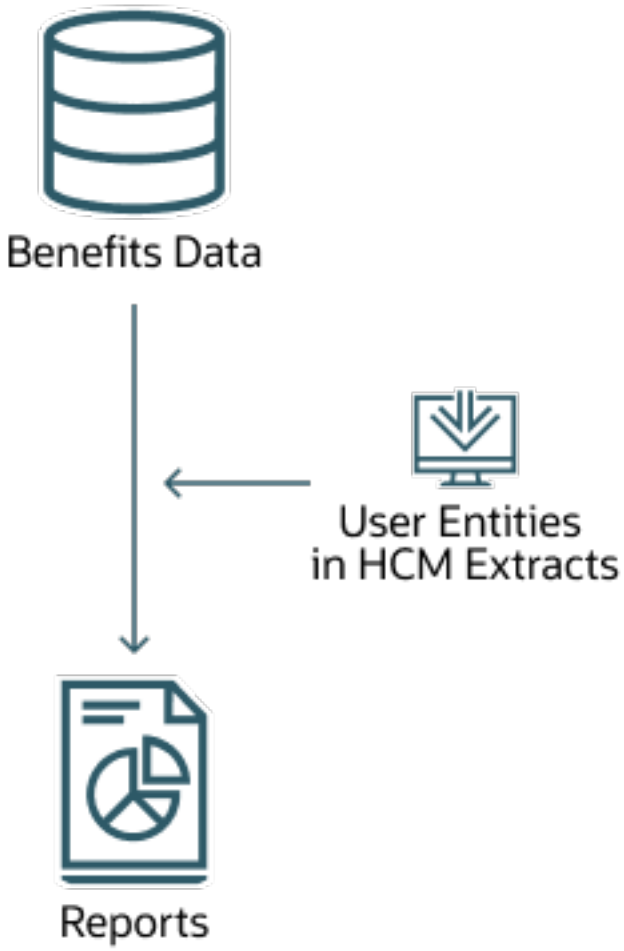
You can use benefits user entities in HCM Extracts to access benefits tables and extract data to make it available for reporting.

Here are the 4 benefits user entities that you can use in HCM extracts:

User Entity	Details
BEN_EXT_ENRT_RSLT_UE	Enrollment results
BEN_EXT_ENRT_DPNT_UE	Enrollment results and dependents
BEN_EXT_ENRT_BNF_UE	Enrollment results and beneficiaries

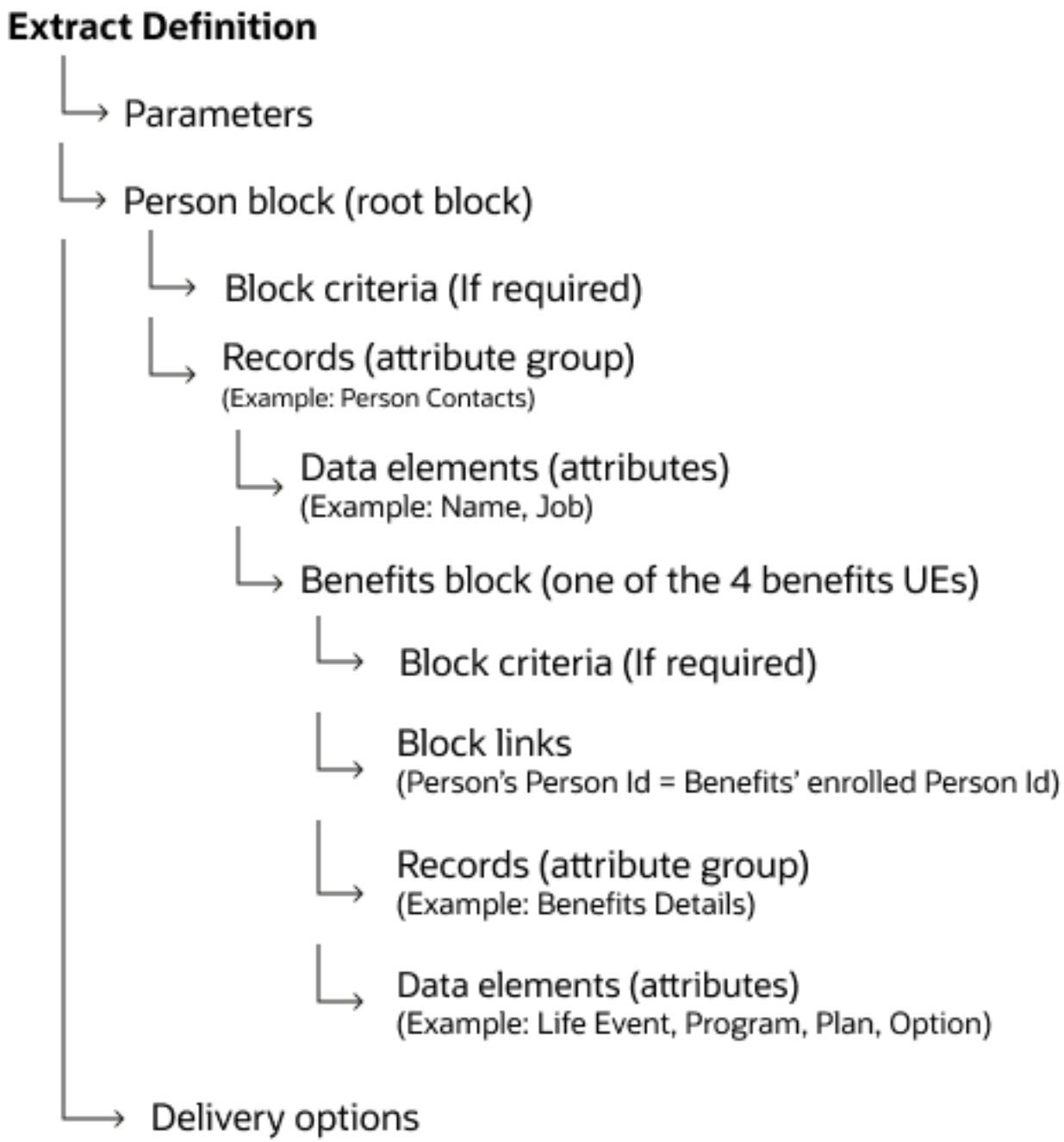
User Entity	Details
BEN_EXT_ENRT_RTCVG_UE	Enrollment results, rates, and coverage

Here's a diagram that summarizes the extract flow.



These user entities query the actual benefits transaction tables to pull in data from enrollments, dependents, beneficiaries, and rates along with a few additional supporting tables. There are over 400 database items that cover almost all attributes, such as basic person details, enrollment results, person events, covered dependents, beneficiaries, person habits, participant rate and coverage. You can use other BEN database items using formulas.

To use the user entities, you need to build a new extract definition in HCM Extracts. Here's a concise version of an extract definition that uses benefits user entities.


Extract Definition
Parameters
Person block (root block)
Block criteria (If required)
Records (attribute group)
(Example: Person Contacts)
Data elements (attributes)
(Example: Name, Job)
Benefits block (one of the 4 benefits UEs)
Block criteria (If required)
Block links
(Person's Person Id = Benefits' enrolled Person Id)
Records (attribute group)
(Example: Benefits Details)
Data elements (attributes)
(Example: Life Event, Program, Plan, Option)
Delivery options

Extract Benefits Data Using BENXML

You run the Extract Benefits Data process and then use HCM Extracts to pull that data. Here are the steps at a high level.

1. *Run the Extracts Benefits Data process* from the Evaluation and Reporting work area.
2. *Create an extract for the BEN_EXTRACT_JOINED_UE user entity* in the Data Exchange work area.
3. *Create a layout template* using the BI Publisher app.
4. *Prepare the extract data and generate the report*.

Run the Extracts Benefits Data process

You submit the benefits data extract using the Extract Benefits Data process from the Evaluation and Reporting work area.

1. Click **Navigator** > **Benefits Administration** > **Evaluation and Reporting**.
2. In the Overview page, click the **Extract Benefits Data** tab.
3. Click **Submit**.
4. In the Carrier Name field, select your carrier.
5. Click **Submit**.
   You can find the extract request you submitted in the Search Results section of the Extract Benefits Data page.

Create Extract Definition for the BEN_EXTRACT_JOINED_UE User Entity

Create an extract definition for the BEN_EXTRACT_JOINED_UE user entity in the Manage Extract Definitions page of the Data Exchange work area.

1. Click **Navigator** > **My Client Groups** > **Data Exchange**.
2. In the HCM Extracts section, click **Extract Definitions**.
3. In the Extract Definitions page, click **Create**.
4. In the Create Extract Definition window, complete these details. Leave the rest of the fields as is.

Field	Value
Name	A meaningful name for the extract definition, such as BEN_JOINED_EXT
Type	HR Archive
Consumer	Report

5. Click **OK**.
6. On the Define page, click **Add** in the Parameters section to create a parameter called `carrier_id`. You also need a parameter called effective_date, but you don't need to create it as it's already available in the

BEN_EXTRACT_JOINED_UE user entity. Make sure you provide these details when you create the `carrier_id` parameter.

Field	Value
Name	Carrier ID
Tag Name	carrier_id **Note:** This value is case sensitive.
Data Type	Number
Display Format	Text

7. Click **Save and Close**.
8. On the Extract Definitions page, in the extract definition row that you just created, click the **Advanced Edit** icon.
9. On the Edit Extract Definition page, in the Hierarchy pane, click **Data Group**.
10. In the Data Groups section, click **Create**. You create a data group to link it with the benefits user entity. Complete these fields.

Field	Value
Name	BEN_DG
Tag Name	BEN_DG
User Entity	BEN_EXTRACT_JOINED_UE
Root Data Group	Select

11. Click **Save**.
12. In the Records section, click **Create** to add a new record to the data group. Complete these fields.

Field	Value
Sequence	10
Name	Benefits Record
Tag Name	Benefits_Record
Type	Detail Record
Process Type	Fast Formula

13. Click **Save**.

14. In the Extract Attributes section, click **Create** to add new attributes to the record you just created. You can add as many attributes, such as plan and coverage start date, to suit your requirements. Here are sample field values that you might enter to create the Person Full Name attribute.

Field	Value
Name	Person Full Name
Tag Name	Person_Full_Name
Short Code	per_f_nm
Output Label	Person Name
Start Date	1/1/00
Data Type	Text
Type	Database Item Group
Database Item Group	Person Full Name

15. Click **Save**.
16. In the Hierarchy pane, click **Extract Execution Tree**.
17. Click **Compile All Formula**. You need to click **Refresh** to see the current status. If the compile succeeds, you can see a green check mark beside the Status column.
18. Click **Validate** to check the completeness of the extract definition you created.
19. Click **OK**. You can also download the validation report to your device if necessary.
20. Click **Export XML Schema** to download the extract definition as an XSD file that you will use later to create an RTF report template.

Create a Layout Template Using the BI Publisher App

Ensure that you've installed the Oracle BI publisher desktop app from the Oracle Analytics Publisher Downloads page on the Oracle Technology Network website. Then, create a layout template using the Publisher add-on in Microsoft Word.

1. Open a new blank document in Word, and click the **Publisher** tab.
2. Click XML Schema to import the schema that you downloaded earlier.
3. Click **All Fields**. Then, make the required changes to the template; decide which fields you want to keep and remove the rest.
4. Save the layout template as an RTF file.

Prepare and Generate a Report

You generate a report in the Business Intelligence. But before you do that, you need to prepare the data by submitting an extract in the Data Exchange work area. Then, you use BI to generate the report.

1. Click **Navigator** > **My Client Groups** > **Data Exchange**.
2. In the Data Exchange work area, click **Submit Extracts**.

3. Select the extract that you built earlier.
4. In the page that appears, complete these fields:

Field	Value
Extract Instance Name	Provide a meaningful name that you can identify the report with. You need to identify the extract name especially when you apply the extract flow and view the report later.
Effective Date	Enter a date when the extract flow should be processed. For BEN_EXTRACT_JOINED_UE, the user entity will pull the data from the staged table after the effective date.
Carrier ID	Enter the relevant carrier ID. This field appears according to how you designed the main extract definition.

5. Click **Submit**.
6. On the View Extract Results page, click **Refresh** to see the status of the extract you submitted.
7. Click **Navigator** > **Tools** > **Reports and Analytics**.
8. On the Reports and Analytics page, click **Create** > **Report**.
9. Click **Cancel** to close the wizard.
10. Click **Select Data Model** (the magnifying lens icon).
11. In the Select Data Model window that appears, select the **globalReportsDataModel** data model that you can find in `Shared Folders/Human Capital Management/Payroll/Data Models`.
12. Select the data model, and click **OK**.
13. Click **Upload** and select the RTF template that you created earlier. Provide other details, such as a layout name, type, and locale, and click **Upload**.
14. Click **View Report**.
15. In the **flowInstanceName** field, enter the extract instance name that you provided in an earlier step to view the report.

Extract Benefits Data Using User Entities

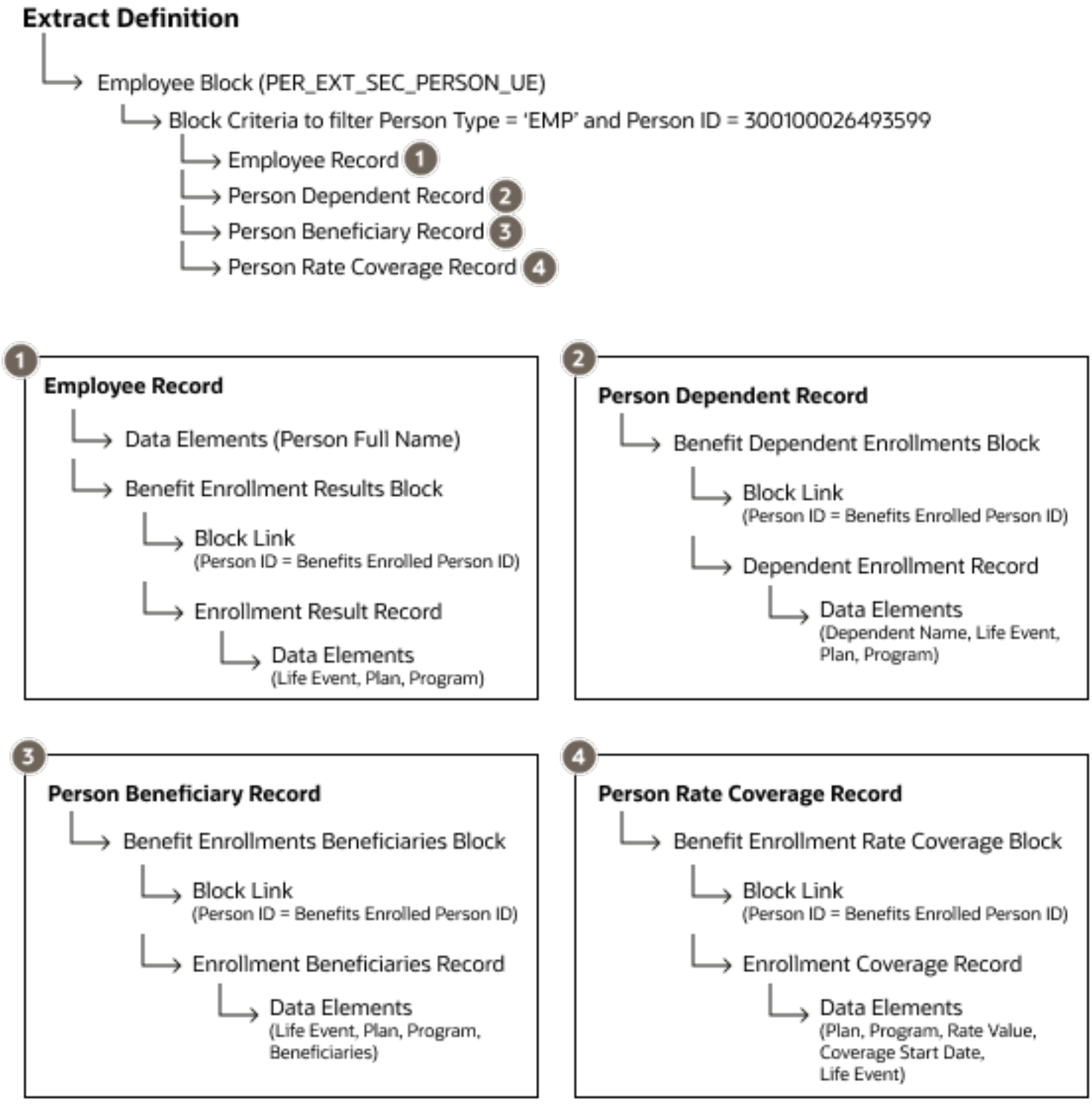
You can use delivered benefits user entities to extract benefits data.

1. *Create an extract definition using benefits user entities*.
2. *Create a layout template* using the BI Publisher app.
3. *Prepare the extract data and generate the report*.

Create Extract Definition Using Benefits User Entities

You create an extract definition using these benefits user entities - BEN_EXT_ENRT_RSLT_UE, BEN_EXT_ENRT_DPNT_UE, BEN_EXT_ENRT_BNF_UE, and BEN_EXT_ENRT_RTCVG_UE.

For the purpose of this procedure, let's use a sample extract definition. Here's a figure that illustrates the hierarchy of the extract definition.



Here's how you create the extract definition.

1. Click **Navigator** > **My Client Groups** > **Data Exchange**.
2. In the HCM Extracts section, click **Extract Definitions**.
3. In the Extract Definitions page, click **Create**.
4. In the Create Extract Definition window, complete these details. Leave the rest of the fields as is.

Field	Value
Name	A meaningful name for the extract definition, such as SIMPLE_BEN_EXTRACT_01
Type	HR Archive
Consumer	Report

5. Click **Save and Close**.
6. On the Extract Definitions page, in the row of the extract definition that you just created, click the **Advanced Edit** icon.
7. On the Edit Extract Definition page, in the Hierarchy pane, click **Data Group**. You create a data group to associate benefits user entities with the extract definition.
8. Create a root data group to represent the company employees; in the Data Groups section, click **Create**, and complete these fields:

Field	Value
Name	Employees
Tag Name	Employees
User Entity	PER_EXT_SEC_PERSON_UE. This is the user entity that represents employees.
Root Data Group	Select
Threading Database Item	Extract Person ID
Threading Action Type	Object actions

9. Click **Save**.
10. In the Data Group Filter Criteria section, click **Add**.
11. Click **Edit**. Use the conditions and operators to create this filter criteria:

```
Extract Person System Person Type = 'EMP' And Extract Person ID = 300100026493599
```

> **Note:** Use the Advanced option to enter the filter criteria directly. Include the quotation marks for EMP as it's a string data type. Don't include quotation marks for the person ID as it's a number type. The person ID is just an example in this procedure.

12. Use the same steps as above to create another data group (not a root data group) called Benefits Enrollment Results. Associate this data group with the BEN_EXT_ENRT_BNF_UE user entity.
13. Click **Save and Close**.
14. On the Edit Extract Definition page, you need to connect the Benefits Enrollment Results data group to the Employees parent data group. In the Data Groups section, click **Benefits Enrollment Results**.

15. In the Connect Data Groups section, click **Add**, then select **Employees** as the parent data group.
16. In the Parent Data Group Database Item list, select **Extract Person ID**.
17. In the Database Item list, select **Person ID**.
18. Click **Save**.
19. Select the **Employees** parent data group. You need to create a record for this group.
20. In the Records section, click **Create**.

Field	Value
Next Data Group	Benefits Enrollment Results
Sequence	10
Name	Employee Record
Tag Name	Employee_Record
Type	Header Record
Process Type	Fast Formula

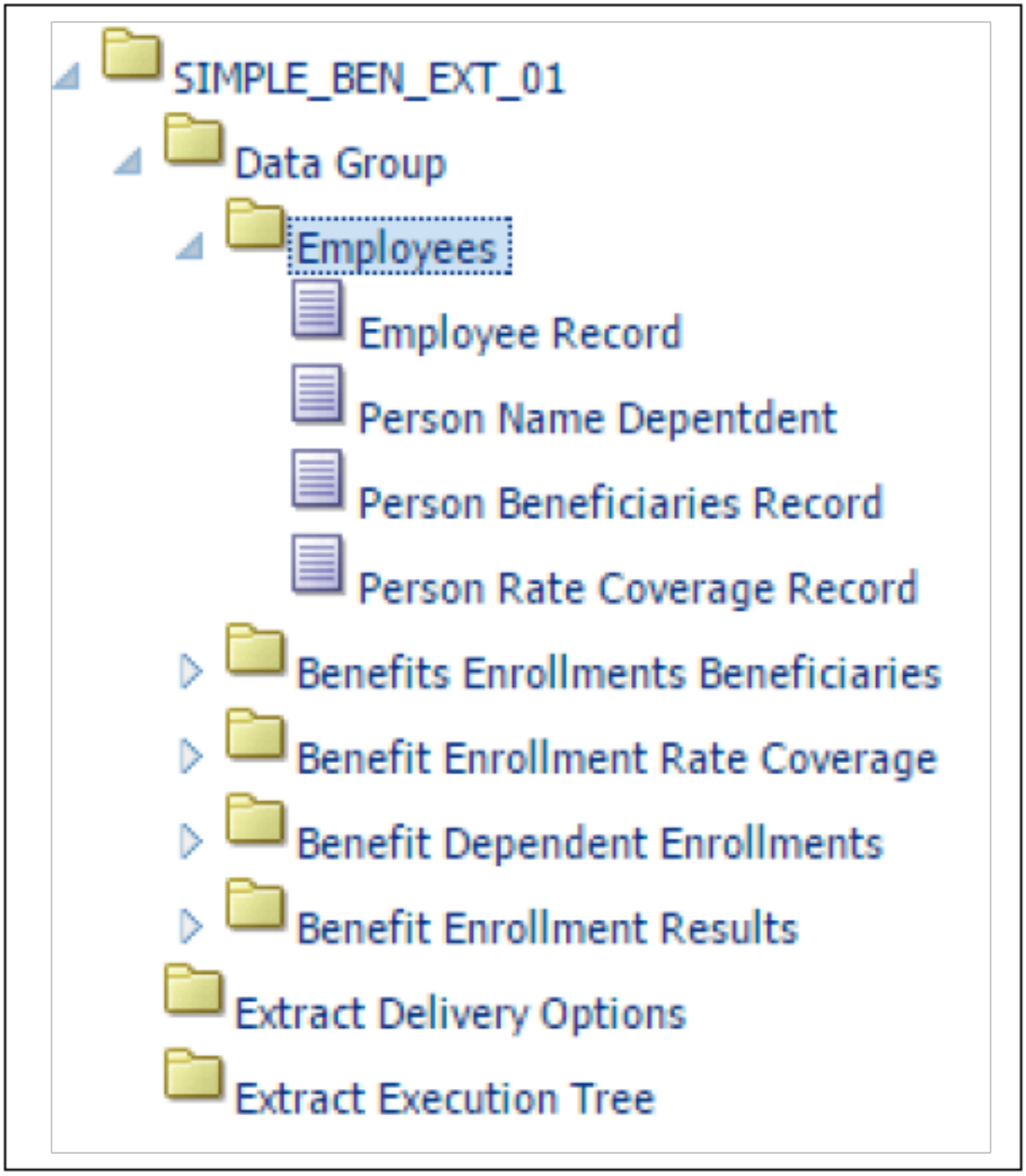
21. Click **Save**.
22. Use the steps in this procedure to create these additional data groups and link them to relevant user entities, as shown in this table.

Data Group	User Entity
Benefits Enrollments Beneficiaries	BEN_EXT_ENRT_BNF_UE
Benefit Enrollment Rate Coverage	BEN_EXT_ENRT_RTCVG_UE
Benefit Dependent Enrollments	EN_EXT_ENRT_DPNT_UE

23. Use the steps in this procedure to connect the data groups you created in the previous step, with the Employees parent data group.

24. Create these additional records in the Employee data group. Ensure that you set each record's next data group to the corresponding Benefit Extract child data group.
    - Person Name Dependent Record
    - Person Beneficiaries Record
    - Person Rate Coverage Record

    Your setup so far should look similar to this diagram.



25. For the employee data group record, you need to configure the Person Full Name extract attribute. In the Hierarchy pane, expand the **Employees** data group, and select **Employee Record**.

26. In the Extract Attributes section, click **Create**. Complete these fields.

Field	Value
Name	Person Full Name
Short code	`fullname`
Data Type	Text
Type	Database Item Group
Database Item Group	Person Full Name
Output Label	Person Full Name
Output Column	1

27. Create a record for the Benefits Enrollment Results data group. Use this table to provide values to key fields.

Field	Value
Next Data Group	Leave empty.
Type	Detail Record
Process Type	Fast Formula

Likewise, create records for the other data groups you created.

28. Use the steps in this procedure to create relevant extract attributes for each record.
29. In the Hierarchy pane, click **Extract Execution Tree**.
30. Click **Compile All Formula**. You need to click **Refresh** to see the current status. If the compile succeeds, you can see a green check mark beside the Status column.
31. Click **Validate** to check the completeness of the extract definition you created.
32. Click **OK**. You can also download the validation report to your device if necessary.
33. Click **Export XML Schema** to download the extract definition as an XSD file that you will use later to create an RTF report template.

Related Topics

- Overview of Extracting Benefits Data Using User Entities in HCM Extracts

Get a List of Database Items for Benefits User Entities

You might need to reference delivered database items (DBI) when you extract benefits data. You can search for database items in the Fast Formulas page when you create or edit a formula.

1. On the Home page, click the **Fast Formulas** quick action under the My Client Groups tab.
2. Click **Actions** > **Create**.
3. Provide the necessary supporting information for the fast formula you want to create, and click **Continue**.

4. In the Database Items tab, use the following table to search for database items for a specific benefits user entity.

User Entity	Search for ...
BEN_EXTRACT_JOINED_UE	BEN_EXT_
BEN_EXT_ENRT_RSLT_UE	BEN_EXT_RSLT_
BEN_EXT_ENRT_DPNT_UE	BEN_EXT_DPNT_
BEN_EXT_ENRT_BNF_UE	BEN_EXT_BNF_
BEN_EXT_ENRT_RTCVG_UE	BEN_EXT_RTCVG_

Guidelines for Extracting Benefits Data Using HCM Extracts

Consider these key guidelines before you extract benefits data.

Aspect	Details
Extract type	When you create an extract definition, ensure that you select **Benefits Carrier** from the Extract Type list.
Option Type	You select the option type on the Manage Plan Types page. Make sure that the option type of the plan type that you're using to create an extract definition is one of these types. • Health Coverage • Spending Account • Life Insurance Coverage Other types aren't supported at this time.
Extract Plan Type Names	You need to enter the name of the extract plan type correctly when you create or edit the plan type. See the related links section in this topic for a full list of valid extract names.
Extract Option Names	You need to enter the extract option name correctly when you create or edit the option. See the related links section in this topic for a full list of valid extract names.
Benefits Extract Plan Code	You need to enter the correct plan code on the Additional Configuration step when you create or edit a plan. The plan code is an identification code provided by the carrier, such as UHCORCL001.
Lookup value mapping	Make sure that you map the required lookup values accurately in the Mapping tab on the Manage Plan Carriers page.
Extracts data for terminated employees	The data for terminated participants and their dependents won't be included in the extracts after the extract process runs for the second time after the employee's termination date.

Aspect	Details
Contacts (dependents)	You need to map the contact lookup accurately. For example, if you need to include the contact's marital status in the extract, the mapping value should be True, and shouldn't have a NULL value.
Participant or dependent address	Ensure that addresses are categorized accurately. For example, if there is no address that's marked as Home, or if there are several addresses that are marked as Home, the addresses won't be included in the extract.
Data Groups	Create a PER_EXT_SEC_PERSON_UE (Person) data group and select it as the root data group. The following benefits data groups are available: • BEN_EXT_ENRT_RSLT_UE (Enrollment Results) • BEN_EXT_ENRT_DPNT_UE (Dependents) • BEN_EXT_ENRT_BNF_UE (Beneficiaries) • BEN_EXT_ENRT_RTCVG_UE (Rates and Coverage)
Sequence of extract records	After you create the data groups, ensure that you sequence the data groups to identify which data group the application processes next: • Person • Dependents • Beneficiaries • Enrollments • Rates and coverage

Related Topics

- Valid Extract Names
- Define Extracts

Configure Benefits for Extracting Data

This topic covers how to set up benefit plan carriers and offerings so that you can then generate and transmit enrollment data extracts. You extract benefits enrollment information into a single XML file for each benefits carrier.

To configure the benefits data extract, you complete these tasks in the Plan Configuration work area:

1. Create the plan carrier and configure extract settings.
2. Add the benefits extract plan type name.
3. Add the benefits extract plan code.
4. Add the benefits extract option name.

Creating Plan Carrier

Set up carrier data and configure extract options in the Plan Configuration work area that apply whenever you run the extract for that carrier.

1. In the Tasks panel drawer, click **Manage Plan Carriers** to open the Manage Plan Carriers page. On the Mapping tab, you can view the mapping of lookup codes to the lookup value that you transmit to carriers. Edits to mapping values affect all plan carriers that use the lookup.
2. On the Search Results toolbar, click the **Create** button.
3. Enter the carrier information. In the **Active** field, select **Active**.
4. Enter the extract options.

   The following table provides comments to help you with your extract field entries and selections.

Field	Comments
Extract Type	Select whether to run a full extract or extract only the changes since the previous extract. Generally, you run a full extract after an enrollment period closes and enrollments are completed. You run subsequent extracts on a periodic or scheduled basis, in either full or changes only mode.
Output File Name	Obtain the value that you enter here from the extract file recipient.
Processing Frequency	A common practice is to schedule your extracts to run after your regular payroll runs. You might want to set the processing frequency accordingly.
Processing Type	By default, all extracts have the same format, regardless of which carrier receives the extract. You can contract with Oracle's partner, BenefitsXML, to have a carrier's extract data transformed and delivered to the carrier, according to its specifications. For more information about BenefitsXML, see http://www.benefitsxml.com. If you don't use this partner, you can transform and deliver the extract data file directly to each of your plan carriers, according to their specifications.
Upload Custom Layout	This button is available if you select the **Custom layout** processing type. o Specify the layout for the individual carrier. For details, see the Benefits Extract: User-Defined Layout topic

5. Enter the file transfer details, which you obtained from the extract file recipient. You can transmit extract files directly to the recipient. Alternatively, you can transmit extract files to the Oracle cloud, using its file transfer details, and have your recipient download its extract from there.

Field	Comments
Host	The name of the server to which you transmit the recipient's extract files.

Field	Comments
Remote Folder	Path on the host to the location where your transmission places the extract file.
User Name	Part of the sign-in credentials required for your transmission to access the host.
Password	Part of the sign-in credentials required for your transmission to access the host.

6. Click **Save and Close** to return to the Manage Plan Carriers page.

Adding Benefits Extract Plan Type Name

Complete these steps in the Plan Configuration work area to identify each type of plan included in the extract file for the recipient.

1. In the Tasks panel drawer, click **Manage Plan Types** to open the Manage Plan Types page.
2. Search for and click the plan type, for example, Medical.
3. On the Plan Type Definition section **Actions** menu, select **Update**.
4. Enter the valid benefits extract plan type name, for example, Health.
5. Click **Save and Close** to return to the Manage Plan Types page.

See the guidelines topic for more info on the valid option types to use for the plan type that you want to include in the extract.

Adding Benefits Extract Plan Code

Complete these steps in the Plan Configuration work area to link the plan to the extract file recipient.

1. In the Tasks panel drawer, click **Manage Benefits Plan Details** to open the Manage Benefits Plan Details page.
2. Search for and click the plan that you want to link to the extract file recipient.
3. Click **Next** to open the Edit Plan Additional Configuration page.
4. On the Configuration Details section **Actions** menu, select **Update**.
5. Enter the benefits extract plan code, which the extract file recipient provided to you for this specific plan.
6. Click **Save and Close** to return to the Plans tab.

Adding Benefits Extract Option Name

Complete these steps in the Plan Configuration work area to identify each option included in the extract file for the recipient.

1. In the Tasks panel drawer, click **Manage Benefit Options** to open the Manage Benefit Options page.
2. Search for and click the participant option, for example, Participant Only.
3. On the Basic Details section **Actions** menu, select **Update**.
4. Enter the valid benefits extract option name, for example, Employee Only.
5. Click **Save and Close** to return to the Manage Benefit Options page.

Next Steps

After you complete the previous tasks, you're ready to generate and transmit the extract data. The details of this process are covered in the Generating and Transmitting Benefits Data Extract for Plan Carriers: Procedure topic.

Related Topics

- Valid Extract Names
- Generate and Transmit Benefit Extracts
- Guidelines for Extracting Benefits Data Using HCM Extracts
- Example of a Custom Layout for Benefits Extract

Valid Extract Names

Oracle partner BenefiX provides valid extract names that you can enter for benefits plan types and options. You can add values to this list, as required.

Benefit Extract Plan Type Names

Valid benefits extract names for plan types:

- 24 Care
- Dental
- Dental Capitation
- Exclusive Provider Organization
- Health
- Health Maintenance Organization
- Hearing
- Long Term Care
- Long Term Disability
- Mail Order Drug
- Major Medical
- Medicare Risk
- Mental Health
- Point of Service
- Preferred Provider Organization
- Prescription Drug
- Preventative Care
- Short Term Disability
- Utilization Review

- Vision

Benefits Extract Option Names

Valid benefits extract names for options

- Children Only
- Dependents Only
- Employee and Children
- Employee and Five or More Dependents
- Employee and Four or More Dependents
- Employee and One Dependent
- Employee and One or More Dependents
- Employee and Spouse
- Employee and Three Dependents
- Employee and Three or More Dependents
- Employee and Two Dependents
- Employee and Two or More Dependents
- Employee Only
- Family
- Individual
- Not Applicable
- Spouse and Children
- Spouse Only
- Two Party
- Employee and Domestic Partner
- Domestic Partner and Children
- Domestic Partner Only
- Employee and Spouse or Domestic Partner
- Child or Children of a Domestic Partner

Example of a Custom Layout for Benefits Extract

An implementor or developer can create a custom layout to transform the format of extracted benefits enrollment data to match the specifications of a particular carrier.

This topic provides:

- Descriptions of the tags that you require to create the custom layout
- Table aliases and a sample custom layout

The custom layout becomes the default layout for the plan carrier after you upload it to the plan carrier's extract options.

The following code shows the structure of the XML tags in the custom layout.

```
<Layout
 <Table
 Record Type
 <Field
 Name
 Source
 Width
 Padding
 Field>
 Table>
 <Table
 <Field
 Name
 Source
 Width
 Padding
 Field>
 -----------
 More fields
 -----------
 Table>
 <Table
 -----------
 More tables
 -----------
 Table>
Layout>
```

The data source for a field on the custom layout can be a:

- Column on the benefits extract staging tables
- Column on one of the other tables listed in the Source tag description
- Constant into which you enter the exact value

Tip: To identify table column names, you can use the data model query builder in Oracle BI Publisher. Search for the table name and view the columns.

XML Tag Descriptions

This section describes each XML tag and lists its attributes, elements (subtags), and parent tags.

Layout

Description: Root tag.

Attributes: None

Elements (Subtags)	Parent Tag
Table	None

Table

Description: Specifies the database table from which to extract the data.

Attributes: 1. tableName: Supported values = {BEN_EXTRACT_REQ_DETAILS,BEN_EXTRACT_REQUEST, DUAL,PER_ALL_PEOPLE_F,PER_PERSONS,PER_ALL_ASSIGNMENTS_M,PER_PEOPLE_LEGISLATIVE_F,BEN_PL_F,BEN_PL_TYP_F

Elements (Subtags)	Parent Tag
1. RecordType 2. Field: See Field tag description	Layout

Record Type

Description: Specifies how to delimit or lay out the data in the extract file.

Attributes: Supported values: FIXEDWIDTH, CSV

Note: Anything other than CSV is delimited as FIXEDWIDTH by default.

Elements (Subtags)	Parent Tag
None	Table

Field

Description: Corresponds to one column in the extracted document. Source the text in this column from a database table, an SQL function, or a constant.

Attributes: None

Elements (Subtags)	Parent Tag
1. Name 2. Source 3. Width 4. Padding	Table

Name

Description: Name of the field

Attributes: None

Elements (Subtags)	Parent Tag
None	Field

Source

Description: Specifies the source of data for the current field.

- If the source is a table, the value passed is the column name.
- If multiple tables are involved, use a fully qualified column name.

The list of allowed tables includes the table aliases.

SQL functions in place of column names: Values in this tag are treated as column names if the type is set to TABLE. The column name is used directly while constructing a query, so an SQL function can be used on a column.

- Example 1

```
<Source type="TABLE">GENDER_FLAG</Source>
```

- Example 2

```
<Source type="TABLE">DECODE(GENDER_FLAG,'F',1,2)</Source>
```

Attributes:

1. type:
    - Supported values = {TABLE, CONSTANT}
        - TABLE specifies that the data comes from a database table.
        - CONSTANT specifies that the data is given in the value column of this tag.
2. table: Use this tag only if the intended column isn't from the table given in the tableName attribute of this Table tag. If this tag isn't used, the column is searched for in the table given in tableName.
    - Supported values:
        - {BEN_EXTRACT_REQ_DETAILS
        - PER_ALL_PEOPLE_F
        - PER_PERSONS
        - PER_ALL_ASSIGNMENTS_M
        - PER_PEOPLE_LEGISLATIVE_F
        - BEN_PL_F
        - BEN_PL_TYP_F
        - BEN_OPT_F
        - BEN_PGM_F

Elements (Subtags)	Parent Tag
None	Field

Width

Description: Specifies the intended width of this field in the extract file. The number passed is the number of character spaces on the file.

Attributes: Supported values are positive integers.

Elements (Subtags)	Parent Tag
None	Field

Padding

Description: Specifies the alignment of data in each column.

Attributes: Supported values: {LEFT, RIGHT}

Elements (Subtags)	Parent Tag
None	Field

Table Aliases

Allowed Table	Alias
BEN_EXTRACT_REQ_DETAILS	REQ
PER_ALL_PEOPLE_F	PEO
PER_PERSONS	PER
PER_ALL_ASSIGNMENTS_M	ASG
PER_PEOPLE_LEGISLATIVE_F	LEG
BEN_PL_F	PLN
BEN_PL_TYP_F	TYP
BEN_OPT_F	OPT
BEN_PGM_F	PGM

Sample XML Layout

```
<?xml version="1.0" encoding="utf-8"?>
<Layout>
<Table tableName="DUAL">
 <RecordType>FIXEDWIDTH</RecordType>
 <Field>
 <Name>"Record Type"</Name>
 <Source type="CONSTANT">001</Source>
 <Width>3</Width>
 <Padding>Left</Padding>
 </Field>
</Table>
<Table tableName="BEN_EXTRACT_REQ_DETAILS">
 <RecordType>CSV</RecordType>
 <Field>
 <Name>"Last Name"</Name>
 <Source type="TABLE">LAST_NAME</Source>
 <Width>25</Width>
 <Padding>Left</Padding>
 </Field>
 <Field>
 <Name>"First Name"</Name>
 <Source type="TABLE">FIRST_NAME</Source>
 <Width>50</Width>
 <Padding>Left</Padding>
 </Field>
 <Field>
 <Name>"Filler"</Name>
 <Source type="CONSTANT">XXXXXXXXXX</Source>
 <Width>10</Width>
 <Padding>None</Padding>
 </Field>
 <Field>
 <Name>"Plan Name"</Name>
 <Source type="TABLE">PLAN</Source>
 <Width>70</Width>
 <Padding>Left</Padding>
 </Field>
 <Field>
 <Name>"Coverage Start Date"</Name>
 <Source type="TABLE">COVERAGE_START_DATE</Source>
 <Width>15</Width>
 <Padding>Left</Padding>
 </Field>
 <Field>
 <Name>"SSN"</Name>
 <Source type="TABLE">NATIONAL_IDENTIFIER</Source>
 <Width>12</Width>
 <Padding>Left</Padding>
 </Field>
 <Field>
 <Name>"Gender"</Name>
 <Source type="TABLE">DECODE(GENDER_FLAG,'F',1,2)</Source>
 <Width>1</Width>
 <Padding>Left</Padding>
 </Field>
 <Field>
 <Name>"Person Number"</Name>
 <Source type="TABLE" table="PER_ALL_PEOPLE_F">PERSON_NUMBER</Source>
 <Width>30</Width>
 <Padding>Left</Padding>
 </Field>
 <Field>
 <Name>"Country of Birth"</Name>
```

```
<Source type="TABLE" table="PER_PERSONS">COUNTRY_OF_BIRTH</Source>
<Width>30</Width>
<Padding>Left</Padding>
</Field>
<Field>
<Name>"Assignment type"</Name>
<Source type="TABLE" table="per_all_assignments_m">assignment_type</Source>
<Width>30</Width>
<Padding>Left</Padding>
</Field>
<Field>
<Name>"Legislation code"</Name>
<Source type="TABLE" table="per_people_legislative_f">LEG.LEGISLATION_CODE</Source>
<Width>30</Width>
<Padding>Left</Padding>
</Field>
<Field>
<Name>"Legislation code"</Name>
<Source type="TABLE" table="ben_pl_f">PLN.PL_ID</Source>
<Width>30</Width>
<Padding>Left</Padding>
</Field>
</Table>
<Table tableName="DUAL">
<RecordType>FIXEDWIDTH</RecordType>
<Field>
<Name>"Record Type"</Name>
<Source type="CONSTANT">999</Source>
<Width>3</Width>
<Padding>Left</Padding>
</Field>
<Field>
<Name>"Record Type"</Name>
<Source type="SYSTEM">RECORDCOUNT</Source>
<Width>3</Width>
<Padding>Left</Padding>
</Field>
</Table>
</Layout>
```

How You Process Changes-Only Extracts

Changes-only extracts can be dynamic in nature. You need to consider the sequence of the tasks that you complete to extract only the changed data.

For the changes-only option to work accurately, you must have a baseline. You establish a baseline when you transmit an extract. The extract process uses the baseline from the previous extract with a transmitted status. Subsequent extracts include only changes.

When you configure plan carriers, you can select a transmission type of Manual. Manual transmission overrides any actual transmission to an FTP or SFTP site, and marks the extracted file as Transmitted. A transmit action initiates the Generate and Transmit Benefits Extract process. You can view the details of the process in the Monitor Process Request section in the Evaluation and Reporting work area. The process generates two files: a log file, and a text file that contains the actual xml that was generated using the staged data.

The effective date that you enter when you submit the extract process determines which enrollments to include. When you first run the extract process, you typically select the process type as Full. When you run the process subsequently, it

identifies and extracts the enrollments with only the changes made between the effective date of the previous process and this process.

> **Note:** You cannot run an extract process for an effective date that's before or on the effective date of the previous process.

Generate and Transmit Benefit Extracts

You can extract benefits enrollment information into a single XML file for each benefits carrier and transmit it to the carrier. This topic covers how to generate and transmit the extract file.

> **Note:** If a carrier provides more than one plan, the single extract contains information related to all plans provided by that carrier. Example: Four different carriers provide ten plans. You run four separate extracts, one for each carrier.

To generate and view the extract, you complete these tasks in the Evaluation and Reporting work area.

1. Submit the extract request.
2. View and transmit the extract details.

Prerequisites

You must first configure your plan carriers, or extract recipients, and add the relevant extract data to the appropriate plan types, plans, and options. The details of this process are covered in the Configuring Benefits Data Extract for Plan Carriers: Procedure topic.

Submitting Extract Request

To run and monitor extracts, in the Evaluation and Reporting work area:

1. In the Tasks panel drawer, click **Extract Benefits Data** to open the Extract Benefits Data page.
2. On the Search Results toolbar, click **Submit**.
3. Enter the extract request options.

Field	Comments
Extract Type	For a particular carrier, you can select whether to run a full extract or extract only the changes since you ran the previous extract. o Generally, you run a full extract after an enrollment period closes and enrollments are completed. o You run subsequent extracts on a periodic or scheduled basis, in either full or changes only mode. Common practice is to schedule your extracts to run after your regular payroll runs.
Transmit	You can transmit the extract as part of the extract request, or after the requested extract completes and before or after you view the extract details.

4. Click **Submit** to submit your process and return to the Extract Benefits Data page.

Viewing and Transmitting Extract Details

You can view, query, and download extracted records for a specific extract run after it completes. You can also transmit the extract after the requested extract completes and before or after you view the extract details.

1. In the Search Results section of the Extract Benefits Data page, click the **Request ID** for the most recent extract request for the plan carrier.
2. Review, query by example, and download to a spreadsheet the extracted data, as appropriate.
3. Click **Done** to return to the Extract Benefits Data page.
4. In the Search Results section, click the **Transmit** icon button for the most recent extract request.

Related Topics

- Configure Benefits for Extracting Data

Example of Processing Change-Only Extract Runs

Here's a high-level example of processing extracts to pick up only changes that occurred between two process runs.

1. Create a benefits carrier and associate it with the required benefits plans.
2. Hire 2 employees. Let's call them Employee 1 and Employee 2 for the purpose of this example.
3. Enroll both the employees in the benefits plans that you associated with the carrier.
4. Run a full extract process with an effective date of today.
5. After the process completes, hire another employee, Employee 3. Enroll Employee 3 in the benefit plans that you associated with the carrier.
6. Make changes to Employee 1's enrollments.
7. Wait for a day, and then run the extract process using the changes-only option, with an effective date of today.
8. Review the 2 files (the log file and the text file) to verify the extract data.

How You Can Handle SFTP Issues When Transmitting Extracts

Benefits supports the SFTP transmission type only. If you have issues with SFTP, you can try the temporary FTP workaround that's in this topic. Otherwise, you might need to log a service request (SR) with My Oracle Support to open the required ports so that the extract file can pass through.

You can select the SFTP transmission type in the File Transfer Details when you create or edit a plan carrier. If you have issues transmitting the data file through SFTP, as a temporary workaround, use FTP instead of SFTP, and port 21 instead of 22, to see if the file transmission completes successfully. Sign in details remains the same.

If the temporary work-around doesn't work, try transmitting the file to your Oracle cloud SFTP server using the account details you were provided.

Field	Value
Host	cloud.sftp.oracle.com
Port	2021
Username and password	Your company contact should have these credentials.

When you configure the plan carrier to manually transmit the XML data instead of transmitting it with FTP or SFTP, the transmission ignores the FTP or SFTP host username and password. Because these are required fields, you must still enter some sample values. If you don't use the Manual option, the file transmission has a status of transmission failed. This is because the process tries to send the file using the host credentials.

Remember, the Generate and Transmit benefits extract process generates both the log and output files. The output file holds the xml extract data. Each time the process runs, an output file is generated.

How You Can Use a Formula To Add More Data to Benefits Extracts

You can use the Benefits Extract Custom Data Rule formula type to include additional information to a benefit extract output file.

Compile and refresh the formula using the Manage Fast Formulas task. When you create or edit a benefits plan carrier, you set the formula to use in the Formula Name field in the Extract Options section. After you run the Extract Benefits Data process, check the `<UserArea>` section in the output file to confirm that the formula has returned values as you expected.

Create a Report Using Benefits Carrier Extract Data Model

You can create your own report with values based on the most recent benefits extract using the Reports and Analytics work area. Use the Benefits Carrier Extract data model, which you can find in this folder path: **`Shared Folders/Human Capital Management/Benefits/Enrollment/Data Model`**.

These attributes in the data model correspond to the respective country names:

- BEN_EXTRACT_REQ_DETAILS.EXT_ATTRIBUTE5 as WORK_COUNTRY
- BEN_EXTRACT_REQ_DETAILS.EXT_ATTRIBUTE6 as HOME_COUNTRY

Here's how you create the report.

1. Create your report, selecting the relevant parameters and the required master attributes.
2. Add the relevant table details.
3. Save the report under the **`Shared Folder/Custom`** folder.

4. Verify that the report opens up correctly with the parameters that you selected for the previous extract process.
5. On the Manage Plan Carriers page, update the plan carrier using these values.

Field	Value
Publishing Type	BI Publisher
Report Type	Enter the path of the report, for example: `/Custom/AetnaCarrierReport.xdo`

> **Note:** The benefits extract process uses the value in the Output File Name field when it generates the report file. This file isn't an XML file.

6. Verify the Generate and Transmit Benefits Extract log file in the Evaluation and Reporting work area, on the Extract Benefits Data tab. You can download and open the output file or manually send it to the carrier.

Benefits Extract Processes

You extract benefits data using 2 processes:

Process	Details
Extract Benefits Data	This process loads the extract data in a staging table. The log file for this process documents any errors occurred while extracting benefits data and loading it in the staging table.
Generate and Transmit Benefits Extract	This process uses the staged data to generate an XML file. The log file for this process documents any errors occurred while the process generated the XML file.

Benefits Data Attributes in a Full Extract Output File

A full file extracts these benefits data attributes during every run.

- Plan
- Coverage Amount Approved
- Coverage Start Date
- Coverage End Date
- Plan Carrier
- Date of Death
- Base Salary
- Dependent Full Time Student
- Dependent Relationship Type

- Employee Post Tax Cost
- Employee Pre Tax Cost
- Employee Total Cost
- Email
- Employee ID
- Request Identifier
- FSA Annual Target FSA Plan Year
- Grade
- Job
- Home Address Line 1
- Home Address Line 2
- City
- Home Phone
- State
- Postal Code
- Country
- Level Coverage End Date
- Level Coverage Start Date
- Level Name
- Marital Status Middle Name
- National Identifier
- Original Date of Hire
- Parent Request ID
- Provider ID
- Provider Name
- Provider Start Date
- Provider Detail ID
- Student Status
- Suffix
- Termination Date
- Tobacco User
- Transaction Code
- Work Address Line One
- Work Address Line Two
- Work City
- Phone

- Work State
- Work Postal Code
- Work Country
- Organization Identifier
- Marital Status Start Date
- Department Name
- Type of Coverage
- Employment Level
- Job Code
- Location Code
- Bargaining Unit
- Person Number

Examples of Benefits Extract Runs

This topic lists different ways in which you can process extracts to accommodate different benefits scenarios.

Scenario	Recommendation
Carrier requires full data extract	Submit the Extract Benefits Data process to run with the Extract Type set to **Full**. You set this in the Extract Benefits Data tab of the Evaluation and Reporting work area. Before you submit these type of extracts, ensure that person's enrollment in the carrier's plan isn't suspended. Also ensure that a person's enrollment designations for the carrier's plan aren't suspended.
Carrier requires only data changes in extract	Submit the Extract Benefits Data process to run with the Extract Type set to **Changes Only**. You set this in the Extract Benefits Data tab of the Evaluation and Reporting work area. Before you submit the process, ensure that a person's enrollment in the carrier's plan isn't in the future. Also, ensure that the changes-only extract process doesn't include future dated changes. Also ensure that a person's enrollment designations for the carrier's plan aren't suspended.
An employee was incorrectly enrolled in the wrong dental plan. You reopen the life event in the Enrollment work area. Then, you select the correct plan and review the coverage start date to ensure that the employee is enrolled with the correct past date.	Verify the participant enrollments in the Enrollment work area. Run another extract in the Evaluation and Reporting work area and verify that the output file contains the correct participant data.
Due to incorrect setup, the wrong life event ran for an employee that affected the employee's enrollment in the carrier's	At this point, the employee is no longer enrolled in the carrier's plan. Also, the next extract doesn't show any enrollments details for the employee.

Scenario	Recommendation
plan. You back out the life event in the Enrollment work area.	You can view the extract output file to confirm that the employee's benefits data doesn't exist in the file. Unprocessed life events act the same way. When the life event is set to unprocessed, the participant's enrollment ends. When you run the next benefits extract, you won't see the person's enrollment details in the output file.