

# PeopleSoft v9.2 Foundations

## Human Capital Management (HCM)

# PeopleSoft Base Benefits Agenda

Developed for implementation team members and functional end users, PeopleSoft Base Benefits v9.2 training quickly introduces students to the set-up considerations, configuration, and transactional processing components of the Base Benefits module. Through scenarios, real-world experiences from implementers, and hands-on activities, students gain an understanding of how to establish process and report on transactions.

## Prerequisites:

- PeopleSoft v9.2 Foundations (HCM)

## Business Process Overview

- Base Benefits and PeopleSoft HCM
- Benefits Process Phases
- Relationship Between Benefit Tables and Employee Data
- PeopleSoft HR Base Benefits Components

## Set Up Payroll Deductions

- Set Up Payroll Deduction Codes for Benefit Plans
- Determine Deduction Classifications
- Specify Deduction Tax Effects
- Settings for Specific Processing
- Specify Frequency of Benefit Deductions

## Set Up Benefit Plans, Health Plans and Benefit Programs

- Identify Health Plan Components
- Add Plan Provider
- Set Up Benefit Plan and Health Plan
- Define Coverage Codes
- Establish Rate Types and Rates for Benefit Plan
- Add Health Plan to Benefit Program

## Set Up Life Insurance Plans

- Identify Life Insurance Plan Components
- Define Life Insurance Plan
- Define Coverage Rates
- Define Calculation Rules
- Add Life Insurance Plan to Benefit Program

## Set Up Disability Plans

- Identify Disability Plan Components
- Set Up Formula
- Create Disability Plan
- Establish Coverage Rates
- Add Disability Plan to Benefit Program

## Set Up Savings Plans (US)

- Identify Savings Plan Components
- Define Savings Plan
- Set Up the Service Step Table
- Set Up Savings Plan Limits
- Set Up Age 50 Catch-up Contributions
- Add Savings Plan to Benefit Program

## Set Up Leave Plans

- Identify Leave Plan Components
- Define leave Plans
- Establish Earnings Codes for Leave Categories
- Add Leave Plan to Benefit Program

## Set Up Spending Accounts

- Identify Spending Account Plan Components
- Create and Define FSA and HSA Plans
- Add Spending Account Plan to Benefit Program

## Add New Employees, Dependents, and Beneficiaries

- Identify Pages Used to Hire Employee
- View Job Related Information for Employee
- Set Up Dependent and Beneficiary Data

## Enroll Employees

- Assign Employees to Benefit Programs
- Enroll Employees in Benefit Plans
- View Employee Benefit Enrollments
- Override Deduction Information

## Calculate Deductions

- Set Up Tables Used to Calculate Deductions
- Calculate Deductions
- View Calculated Deductions Online
- Confirm Deduction Amounts

## Process Leave Accruals

- Process Leave Accruals
- View Employee Leave Accrual Balances Online

## Change Benefit Programs and Employee Enrollments

- Run Benefit Program Report
- Create New Benefit Program using Benefit Program Clone Utility
- Change Employee Enrollments in Benefit Plans

## (USA) Managing HIPAA Regulations

- Designate Health Insurance Portability and Accountability Act (HIPAA) Plan
- Process HIPAA Certificates