

PeopleSoft v9.2 Benefits Administration

Human Capital Management (HCM)

PeopleSoft Benefits Administration Agenda

Developed for implementation team members and functional end users, PeopleSoft Benefits Administration v9.2 training quickly introduces students to the set-up considerations, configuration, and transactional processing components of the Benefits Administration 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

- Describing the Base Benefits Foundation Tables and Benefit Programs
- Describing the Benefits Administration Process
- Describing the Benefits Administration Components Within the Benefit Program Table
- Describing Sources of Information About Benefit Administration

Setting Up Automated Benefits Programs

- Describing the Benefit Administration Course Activity Scenario Overview
- Activating Benefits Administration
- Determining the Benefits Administration Start Date
- Identifying the Benefit Program Fields Activated with Benefits Administration

Setting Up Eligibility for Automated Benefits Programs

- Defining Benefit Eligibility Rules
- Setting Up Employee Eligibility Criteria
- Using Configurable Parameters
- Identifying Employee Eligibility Overrides

Setting Up Events for Automated Benefit Programs

- Defining Events in Benefits Administration
- Identifying Benefits Administration Actions
- Identifying Event Classes
- Defining Event Rules

Creating an Automated Benefit Program

- Defining an Automated Benefit Program
- Defining Plan Type and Options for a Program
- Defining Costs and Credits for a Program

Setting Up Health Plans

- Defining Eligibility Based on Employees' Geographic Location
- Creating Eligibility Criteria at the Benefit Option Level
- Defining Event Processing Rules for Health Plans
- Controlling the Display of Plan Types and Options

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Setting Up Life Insurance and Disability Plans

- Defining Life Insurance and Disability Plans
- Setting Up Event Rules for Life Insurance and Disability Plans
- Cloning an Event Rule

Setting Up Savings Plans

- Defining Savings Plans
- Defining Savings Plan Event Rules

Setting Up Flexible Spending Accounts

- Defining Flexible Spending Account Plans
- Defining Event Rules for Flexible Spending Accounts

Reviewing Employee Records in Benefits Administration

- Reviewing the Benefits Administration Process
- Defining a Default Benefit Program
- Describing the Difference Between Base Benefits and Benefits Administration Enrollments
- Reviewing Employees' Benefits Elections

Examining the Benefits Administration Process

- Explaining the Benefits Administration Process
- Identifying Process Statuses at Each Phase of the Benefits Administration process
- Identifying Benefits Administration Processing Records
- Describing Each Phase of the Benefits Administration Process

Using Cross Plan Validation

- Explaining Cross Plan Validation Functionality
- Setting Up Cross Plan Validation in a Benefit Program
- Creating Domestic Partner or Nonqualified Dependent Benefit Plans
- Using eBenefits for Enrollment

Using eBenefits with Benefits Administration

- Explaining eBenefits Functionality
- Defining eBenefits Setup
- Configuring Life Events

Describing Multiple Jobs with Benefits Administration

- Defining Multiple Jobs
- Setting Benefit Record Numbers For Employees
- Specifying Multiple Job Processing Options
- Setting Multiple Job Options for Eligibility Rules
- Defining Multiple Job Options for Geographic Location
- Reviewing Eligibility with Multiple Jobs
- Calculating Benefits Deductions for Multiple Jobs
- Reviewing Processing Results