PeopleSoft Benefits Administration Rel 9.2

Duration: 5 Days

What you will learn

This PeopleSoft Benefits Administration Rel 9.2 training will teach you how to establish and maintain automated benefits programs in PeopleSoft Benefits Administration. Interact with expert Oracle University instructors through hands-on learning.

Learn To:

Establish and maintain automated benefits programs.

Manage eligibility and event requirements.

Establish validations across plan types.

Manage employee enrollment.

Process open enrollment and on-going event maintenance.

Set up eBenefits to process enrollments and life events.

Benefits to You

Save time and effort by automating benefits enrollment and monitoring events that can make employees eligible to change their benefit elections.

Set Up Automated Benefit Programs

Define eligibility rules based on factors such as age, status, employee type, job or group of jobs, duration of service, company and pay. Define event rule parameters that control how and when an event is processed. Establish validation across plan types, and set up PeopleSoft eBenefits to process enrollments via life events self-service

Manage Employee Benefits

Enroll employees automatically into benefit plans and create employee communications such as enrollment forms and confirmation letters. Process an open enrollment and perform event maintenance. Run an eligibility snapshot, review event coordination and troubleshoot errors.

Related Training

Required Prerequisites

Thorough understanding of Benefits control tables

Experience with enrolling employees into benefit programs and plans

Suggested Prerequisites
Basic understanding of payroll processing

Intro to PeopleSoft/HR/Benefits Accelerated - Canada Rel 9.2

Intro to PeopleSoft/HR/Benefits Accelerated - US Rel 9.2 NEW

PeopleSoft Base Benefits - Canada Rel 9.2

PeopleSoft Base Benefits - U.S. Rel 9.2

Practical experience with open enrollment & benefits process

Administering and manage open enrollment

Establishing validations across plan types

Managing employee benefits with multiple events

self-service

and multiple jobs

Processing Event Maintenance

Running the Snapshot eligibility process

Describing Benefits Administration

Setting up automated benefit programs with eligibility and event rules

Enrolling employees automatically into benefit plans

Course Topics

Reviewing the Benefits Business Process
Identifying the differences between Base Benefits and Benefits Administration
Explaining the Base Benefits Process
Identifying the Base Benefits Foundation Tables
Describing the Base Benefits Building Blocks

Defining a Benefit Program and Listing the Benefit Program Records
Describing the Components that make up a Benefits Adminstration Program
Explaining Flexible Credits
Defining Cross-Plan Validation

Setting Up Automated Benefits Programs
Activating Benefits Administration
Determining the Benefits Administration Start Date
Identifying the 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
Examining Default Methods
Setting Up Event Rules for Open Enrollment

Creating an Automated Benefit Program Table
Building 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

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

Defining Credits
Defining Flexible Credits
Identifying Earning Codes and Programs Used for Flexible Credits
Setting Up Program General Credits
Setting Up Plan Type General Credits
Setting Up Option-Based Credits
Reviewing Employee Additional Pay Data

Setting Up Savings Plans
Defining Savings Plan Event Rules

Setting Up Flexible Spending Accounts
Defining a Conbtribution Frequency and Annual Limits

Defining Event Rules for Flexible Spending Accounts

Setting Up Vacation Buy and Sell Plans
Setting Up Vacation Buy and Sell Deductions
Describing the Impact of Vacation Buy and Sell Plans on Leave Accrual Balances
Defining Earnings Codes for Vacation Buy and Sell
Viewing Employee Vacation Benefit Enrollment
Reviewing Eligibility Rules for Vacation Buy and Sell

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

Preparing for Open Enrollment
Creating Pay Calendars
Reviewing the Base Benefits Audit Report
Defining Benefits Administration Processing Groups
Setting Up an Open Enrollment Definition
Creating Benefits Administration Processing Schedules

Examining 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

Running Open Enrollment
Identifying Open Enrollment Steps
Defining the Run Control Options for the Benefits Administration Process
Producing Benefits Enrollment Statements, Reprocessing Open Enrollment, and Reprinting Statements
Viewing Benefits Processing Records for Employees
Performing Employee Election Entry
Printing Confirmation Statements
Finalizing Open Enrollment
Preparing for Next Year's Open Enrollment

Using Cross Plan Validation
Setting Up Cross Plan Validation in a Benefit Program
Creating Domestic Partner or Non-Qualified Dependent Benefit Plans

Preparing and Running the Event Maintenance Process
Reviewing Event Classes and Identifying Event Triggers
Defining Benefit Statuses and Actions
Defining Event Classes
Defining and Updating Event Rules
Triggering Events for Event Maintenance
Identifying Event Maintenance Process Phases
Validating Elections and Finalizing Event Maintenance
Processing On-Demand Event Maintenance

Running the Snapshot Process

Defining the Snapshot Event Class
Defining the Snapshot Event Rules
Defining the Snapshot Definition
Defining the Snapshot Schedule
Running the Snapshot Process

Coordinating Multiple Events and Benefits Administration Troubleshooting
Coordinating Event Maintenance and Open Enrollment
Coordingating Multiple Benefits Events
Troubleshooting Errors in Benefits Administration

Using eBenefits with Benefits Administration
Explaining eBenefits Functionality
Definig eBenefits Setup
Defining Life Events Configuration
Using eBenefits for Enrollment

Using 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
Setting Multiple Job Options for Geographic Location
Reviewing Eligibility with Multiple Jobs
Calculating Benefits Deductions for Multiple Jobs
Reviewing Processing Results