



PeopleSoft v9.2 HCM

Instructor Demonstration Agenda

Benefits Administration

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PeopleSoft HCM Instructor Demonstration Agenda

Purpose: This instructor demonstration provides a high-level overview of design, configuration and set-up aspects of the Benefits Administration module in PeopleSoft HCM.

Benefits Administration (2 Days)

Day 1*:

9:00 – 12:00

Course Overview

- Agenda

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

12:00 – 1:00 Lunch Break

1:00 – 4:00

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

- ✔ 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

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

Day 2*:

9:00 – 12:00

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 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

12:00 – 1:00 Lunch Break

1:00 – 4:00

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 with Benefits Administration

- Explaining eBenefits Functionality
- Defining eBenefits Setup
- Configuring Life Events
- Using eBenefits for Enrollment

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

**There will be a 10 minute break in the morning and afternoon at instructor discretion.*