



Functional Course

PeopleSoft v9.2 Benefits Administration

Human Capital Management (HCM)

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 Eligibility for Automated Benefits Programs (cont'd)

- 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

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