

(24C) Oracle Fusion Cloud HCM: Configure Benefits

Oracle Global Human Resources Cloud

DURATION

3 Days

MODULES

9 Lectures

COURSE CODE

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Course Overview

Learn To: Create benefit programs, plans, plan types and options Define life events and eligibility for the benefits that you create
Manage benefit rates and coverage

What You Will Learn

Overview of Benefits Configuration

- Common Questions
- Oracle Human Capital Management
- Configuring and Administering Benefits Overview
- Benefits Hierarchy and Structure
- Component Creation Sequence
- Key Points
- Practices

Preliminary Configuration, Effective Dates, and Session Dates

- Common Questions
- Preliminary Setup
- How Are Benefits Associated With An Employee?
- When Do You Need To Take Action?
- Modify A Worker's Benefits Relationships
- Create Year Periods
- Effective Dates
- Session Dates
- Key Points
- Practices

Manage Benefit Plan Types

- Common Questions
- Plan Type
- Review: Benefits Hierarchy and Structure
- Configure a Plan Type: Set The Name And Codes
- Configure a Plan Type: Set the Option Type
- Configure a Plan Type: Configure Grouping, Enrollment, and Extracts
- Key Points
- Practices

Manage Benefit Options

- Common Questions
- Benefit Options
- Review: Benefits Hierarchy and Structure
- Configure an Option: Set the Effective Start Date
- Configure an Option: Set the Name and Codes
- Configure an Option: If Needed, Create a Waive Option
- Configure an Option: Configure the Period of Enrollment
- Associate Plan Types with the Option
- Specify Allowable Dependents or Beneficiaries
- Key Points
- Practices

Create Benefit Plans

- Common Questions
- Benefit Plans
- Review: Benefits Hierarchy And Structure
- The Plan Configuration Roadmap: Steps 1-4
- The Plan Configuration Roadmap: Steps 5-8
- Ways to Create a Plan
- Method 1: Quick Create
- What Can You Specify When You Quick Create a Plan?
- Method 2: Quick Create From Program
- What Can You Specify When You Quick Create a Plan from Within a Program?
- Method 3: Plan Configuration Process
- Method 4: Integrated Microsoft Excel Workbook
- Step 1: Enter The Basic Details: Basic Settings
- Step 1: Enter The Basic Details: Availability And Options
- Step 2: Add Additional Configurations: Basic Settings
- Step 2: Add Miscellaneous Information
- Editing and Activating Plans
- Viewing Plans and Associated Objects
- Validating Plans

- Key Points
- Practices
- 6 Create Benefit Programs
- Common Questions
- Benefit Programs
- Review: Benefits Hierarchy And Structure
- The Program Configuration Roadmap: Steps 1-3
- The Program Configuration Roadmap: Steps 4-6
- Ways to Create a Program
- Method 1: Quick Create Program
- What Can You Specify When You Quick Create a Program?
- Method 2: Program Configuration Process
- Method 3: Integrated Microsoft Excel Workbook
- Step 1: Enter The Basic Details: Basic Settings (Part 1 Of 2)
- Step 1: Enter The Basic Details: Basic Settings (Part 2 Of 2)
- Step 1: Enter The Basic Details: Availability, Plan Types, And Plans
- Step 2: Add Additional Configurations: Reporting Groups, Organizations, Image, And Documents
- Editing and Activating Programs
- Viewing Programs and Associated Objects
- Validating Programs
- Key Points
- Practices
- 7 Configure Eligibility Criteria
- Common Questions
- What's It All About?
- How Do You Configure an Eligibility Profile?
- Eligibility Criteria
- Personal Eligibility Criteria
- Postal Code Ranges
- Service Areas
- Employment Eligibility Criteria
- Derived Factors Eligibility Criteria
- Other Eligibility Criteria
- Benefit Groups
- User-Defined Criteria
- Related Coverage Eligibility Criteria
- Labor Relations Eligibility Criteria
- Key Points
- Practice

Define Eligibility Profiles

- Common Questions
- Where And How Are Eligibility Profiles Used?
- Review: How Do You Configure an Eligibility Profile?
- Create the Eligibility Profile: Initial Settings

- Create the Eligibility Profile: Additional Settings
- Create the Eligibility Profile: Add Eligibility Criteria
- Eligibility Criteria: Sequence and Exclude
- How Do Eligibility Criteria Combine Within A Profile?
- How Do Eligibility Profiles Combine Within A Plan Or Program?
- How Do You Test An Eligibility Profile?
- Key Points
- Practice
- 9 Configure Eligibility
- Common Questions
- What's It All About?
- The Eligibility Hierarchy
- What Are the Components of Eligibility?
- Configure Eligibility Step 1: Select the Benefits Object
- Configure Eligibility Step 2: Specify the Participation and Waiting Period
- Configure Eligibility Step 3: Add Eligibility Profiles

Configure Eligibility Step 4: Add Allowable Dependents or Beneficiaries to Plans

- and/or Options
- Key Points
- Practice
- 10 Configure Life Events
- Common Questions
- What is a Life Event?
- Life Event Life Cycle
- What Do You Have To Do?
- Types of Life Events
- How Do You Create An Explicit Life Event? Step 1: Specify The Data Change That Triggers The Event
- How Do You Create An Explicit Life Event? Step 2: Create A New Life Event That Uses The Data Change
- How Do You Configure Other Life Events?
- How Do You Configure Other Life Events? General Information
- How Do You Configure Other Life Events? Additional Information
- Common Configurations
- Life Event Processing
- Key Points
- Practice

Collapse Life Events

- Common Questions
- Technical Challenge: Multiple Life Events In A Short Time
- Why Isn't Override Good Enough?
- How Do You Configure Collapsing Rules?
- 1-3. Configure The Collapsing Event Rule Header
- How Does Sequence Number Work?
- How Do You Set The Final Occurred On Date?

4-6. Add Selected Life Events, Specify A Resulting Event, And Select The Operator

- And What To Do With Collapsed Events
- How Do You Collapse Events?
- Key Points

Configure Enrollments

- Common Questions
- How Does Enrollment Work?
- Eligibility Life Events
- Enrollment Life Events
- The Enrollment Hierarchy
- Configure Enrollment: Programs
- Configure Enrollment: Plan Types Page 1
- Configure Enrollment: Plan Types Page 2
- Configure Enrollment: Plans
- Configure Enrollment: Options
- Configure Enrollment: Program Life Events
- Configure Enrollment: Plan Type Life Events
- Configure Enrollment: Plan Life Events
- Configure Enrollment: Option Life Events
- Key Points
- Practices
- 13 Certifications
- Common Questions
- What's It All About?
- Where Do You Manage Certifications?
- Add a Certification Requirement
- Add An Enrollment Certification
- Life Event Enrollment Certifications
- Where Do You Manage Restrictions?
- Benefit Amount Restrictions
- Plan or Option Sequence Restrictions
- Key Points
- Practice
- 14 Designations
- Common Questions
- Review: Specify Allowable Dependents or Beneficiaries for Options
- Review: Specify Allowable Dependents or Beneficiaries for Plans or Options in
- Plan
- How Do You Configure Designation?
- For Programs, Specify The Dependent Designation Level
- Configure Dependent Designations: Overview
- Configure Dependent Designations: Add Action Items
- Configure Dependent Designations: Add Certifications
- Configure Dependent Designations: Life Event Settings

- Configure Beneficiary Designations: Add Action Items
- Configure Beneficiary Designations: Add Restrictions
- Key Points
- Practice
- 15 Export and Import Plan Configurations
- Common Questions
- What's It All About: Exports?
- What Should You Do Before You Perform an Export?
- Perform the Export
- What Gets Exported?
- How Do You Check Your Export?
- What's It All About: Imports?
- Prepare the Target Environment
- Start the Import
- Specify the Required Mappings
- Possible Mappings
- Validate the Results
- Review the Results
- Key Points
- 16 Fast Formulas for Benefits
- Common Questions
- What's It All About?
- General Information About Formulas
- How Are Formulas Created?
- How Are Formulas Used? Examples
- Formula Types
- Who Can Modify Formulas?
- How Do You Test a Formula?
- Key Points
- 17 Benefit Rates and Elements
- Common Questions
- What's It All About?
- Standard Rates
- Variable Rate Profiles
- Additional Information for Variable Rate Profiles
- Variable Formulas
- Add a Rate to a Plan or Option in Plan
- 1: Create Any Required Elements And Set Their Options
- 2: Set Element Eligibility
- 3: Create Variable Rate Profiles or Variable Formulas
- 4: Create a Standard Rate (Page 1 of 3)
- 4: Create a Standard Rate (Page 2 of 3)
- 4: Create a Standard Rate (Page 3 of 3)
- What are Imputed Rates?
- How Do You Implement Imputed Rates?
- Key Points

- Practices
- 18 Calculation Methods
- Common Questions
- What's It All About?
- Calculation Methods
- Calculation Methods: Flat Amount
- Calculation Methods: Multiple Of
- Additional Configurations
- Processing Information
- Extra Inputs
- Partial Month Determination
- How Are Rates Communicated? Communicated Rate Frequency
- How Are Rates Communicated? Defined Rate Frequency
- How Are Rates Communicated? Value Passed to Payroll
- Key Points
- Practice
- 19 Variable Rate Profiles
- Common Questions
- What's It All About?
- How Does It Work?
- What If You Have Multiple Eligibility Criteria?
- Creation Sequence
- Create a Variable Rate Profile: Header Information
- Create a Variable Rate: Calculation Method
- Create a Variable Rate: Rounding, Limits, and Ultimate Limits
- Add the Variable Rate to a Standard Rate
- Key Points
- Practices
- 20 Benefits Plan Coverage
- Common Questions
- What's It All About?
- How Do You Create A Coverage?
- Select The Plan, Option, And Calculation Method
- Calculation Methods: Flat Amount
- Calculation Methods: Flat Range
- Calculation Methods: Multiple of Compensation
- Calculation Methods: Additional Options
- Variable Coverage Profiles
- Configure a Variable Coverage Profile
- Annual Values And Ultimate Limits
- Add Variable Coverage Profiles to Coverages
- Limit Coverage for a Program
- Key Points
- Practices
- 21 Flex Credits
- Common Questions

- What's It All About?
- What Are Flex Credits?
- How Do Flex Credits Work?
- Configure Programs To Use Flex Credits
- Unrestricted Programs
- Implement A Flex Credit Plan
- 1: Create a Flex Credits Plan Type
- 2: Create A Flex Credit Shell Plan
- 3: Add Programs to the Plan
- 4: Specify The Rates
- 5: Add Credit Pools for Programs, Plans in Program, and/or Options in Plan
- Credits Provided
- Spending Options
- Excess Credits
- Configure Rollovers
- Rollover Example
- Key Points
- Practices

Configure Enrollment Display Options

- Common Questions
- What's It All About?
- Review: Display Options for Plan Types and Rates
- Configure Plan Type Grouping Display
- Configure Plan Type Grouping Display: Rate Column Display
- Configure Plan Type Grouping Display: Plan Dependency Rules
- Configure Plan Type Grouping Display: Mutually Exclusive Plans
- Create An Authorization
- Self-Service Configuration: Page 1 of 2
- Self-Service Configuration: Page 2 of 2
- Alerts
- Deep Links for Benefits
- Key Points
- Practices
- 23 Configure Plan Comparison
- Common Questions
- What's It All About?
- How Is It Built?
- Use The Plan Comparison Values Page To Create Your Values
- Create a Template Type Group and Template Types
- Create a Category Group and Categories
- Create an Option Group and Options
- Create a Feature Value Group and Feature Values
- Create a Plan Comparison Template: Basic Details
- Create a Plan Comparison Template: Highlights
- Create a Plan Comparison Template: Feature Groups and Features

- Create a Plan Comparison Template: Features
- Add Plans to Your Plan Comparison Template
- Configure Each Plan: Details, Costs, and Highlights
- Configure Each Plan: Feature Values
- Get the Template Id
- Add the Comparison to the UI
- Test the Results
- Key Points
- Practices
- 24 Vacation and Sick Time Sell Plans
- Common Questions
- What's It All About?
- How Do You Do It?
- Configure Absence Management
- Create a Vacation or Sick Time Sell Plan
- Create User Values
- Create the Standard Rate for Your Plan
- Create the Coverage for Your Plan
- Key Points
- 25 Lookups
- Common Questions
- What's It All About?
- Lookup Configuration Level
- Person Factors Lookups
- Process Name Lookups
- Regulations Lookups
- Health Care Services and Primary Care Physician
- Certification Lookups
- Key Points
- 26 Information Resources
- Information Resources
- Oracle Help Center
- My Oracle Support
- Oracle Cloud Customer Connect
- Oracle University
- Oracle Partner Community