

# PeopleSoft Benefits Administration Rel 9.2 Ed 2

PeopleSoft

DURATION

**5 Days**

MODULES

**12 Lectures**

COURSE CODE

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## Course Overview

This PeopleSoft Benefits Administration Rel 9.2 training covers the creation and use of automated benefits programs. Learn to create eligibility and event rules, manage employee enrollment, process open enrollment, and perform ongoing event maintenance.

## What You Will Learn

### Module 1: Course Introduction

- Lesson 1: Course Overview
- Agenda
- Lesson 2: Business Process Overview
- Differences Between Base Benefits and Benefits Administration
- Base Benefits Process
- Base Benefits Foundation Tables and Benefit Programs
- Benefits Administration Process
- Benefits Administration Components Within the Benefit Program Table
- Sources of Information About Benefits Administration
- Review

### Module 2: Automated Benefits Programs Setup

- Lesson 3: Setting Up Automated Benefits Programs
- Benefits Administration Course Activity Scenario Overview
- Activating Benefits Administration
- Determining Benefits Administration Start Date
- Benefit Program Fields Activated with Benefits Administration
- Review
- Lesson 4: Setting Up Eligibility for Automated Benefits Programs
- Defining Benefit Eligibility Rules
- Setting Up Employee Eligibility Criteria

- Using Configurable Parameters
- Identifying Employee Eligibility Overrides
- Activity 1: Setting Up Eligibility Rules
- Review
- Lesson 5: Setting Up Events for Automated Benefit Programs
- Defining Events in Benefits Administration
- Benefits Administration Actions
- Event Classes
- Defining Event Rules
- Activity 2: Adding Event Rules
- Review

### Module 3: Automated Benefit Program Creation

- Lesson 6: Creating an Automated Benefit Program
- Defining an Automated Benefit Program
- Plan Types and Options
- Defining Costs and Credits for a Program
- Activity 3: Modifying an Automated Benefit Program
- Review

### Module 4: Health Plans

- Lesson 7: Setting Up Health Plans
- Setting Up Health Plans
- Activity 4: Setting Up Medical and Dental Plans
- Eligibility Based on Geographic Location
- Activity 5: Setting Up a Geographic Location
- Eligibility Criteria at the Benefit Option Level
- Event Processing Rules for Health Plans
- Controlling the Display of Plan Types and Options
- Activity 6: Setting Up Eligibility and Event Rules
- Activity 7: Adding Health Plans to the Benefit Program Table
- Review

### Module 5: Life Insurance and Disability Plans

- Lesson 8: Setting Up Life Insurance and Disability Plans
- Life Insurance and Disability Plans
- Event Rules for Life Insurance and Disability Plans
- Cloning Event Rules
- Activity 8: Setting Up Life Insurance and Long-Term Disability Plans
- Review

### Module 6: Defining Credits

- Lesson 9: Defining Credits
- Flexible Credits

- Earning Codes and Programs Used for Flexible Credits
- Program General Credits
- Activity 9: Adding Program General Credits
- Plan Type General Credits
- Activity 10: Adding a Plan Type-Based General Credit
- Option-Based Credits
- Activity 11: Setting Up Option-Based Credits
- Reviewing Employee Additional Pay Data
- Review

## Module 7: Savings and Flexible Spending Accounts

- Lesson 10: Setting Up Savings Plans
- Defining Savings Plans
- Savings Plan Event Rules
- Activity 12: Setting Up a Savings Plan
- Review
- Lesson 11: Setting Up Flexible Spending Accounts
- Flexible Spending Account (FSA) Plans
- Event Rules for FSA Plans
- Activity 13: Setting Up FSA Plans
- Review

## Module 8: Vacation Buy and Sell Plans

- Lesson 12: Setting Up Vacation Buy and Sell Plans
- Vacation Buy and Sell Deductions
- Vacation Buy and Sell Plan Definitions
- Impact on Leave Accrual Balances
- Earnings Codes for Vacation Buy and Sell
- Viewing Employee Vacation Benefit Enrollment
- Review

## Module 9: Reviewing Employee Records

- Lesson 13: Reviewing Employee Records in Benefits Administration
- Benefits Administration Process Overview
- Defining a Default Benefit Program
- Differences Between Base Benefits and Benefits Administration Enrollments
- Reviewing Employee Benefits Elections
- Review

## Module 10: Preparing for Open Enrollment

- Lesson 14: Preparing for Open Enrollment
- Creating Pay Calendars
- Reviewing Base Benefits Audit Report
- Defining Benefits Administration Processing Groups

- Activity 14: Adding a BAS Group ID and Updating Employee Records
- Setting Up an Open Enrollment Definition
- Activity 15: Setting Up an Open Enrollment Definition
- Creating Benefits Administration Processing Schedules
- Activity 16: Creating a Benefits Administration Processing Schedule
- Review

## Module 11: Benefits Administration Process

- Lesson 15: Examining the Benefits Administration Process
- Explaining the Benefits Administration Process
- Process Statuses at Each Phase
- Benefits Administration Processing Records
- Describing Each Phase of the Process
- Review

## Module 12: Running Open Enrollment

- Lesson 16: Running Open Enrollment
- Open Enrollment Steps Overview
- Run Control Options for the Benefits Administration Process
- Activity 17: Running the Benefits Administration Process
- Activity 18: Hiring an Employee After Open Enrollment Begins
- Activity 19: Adding New Participants to the Open Enrollment Schedule
- Reviewing Processing Results
- Activity 20: Running and Analyzing the Eligible Participants Report
- Producing Benefits Enrollment Statements
- Reprocessing Open Enrollment and Reprinting Statements
- Viewing Benefits Processing Records for Employees
- Performing Election Entry
- Activity 22: Performing Election Entry
- Activity 23: Entering Participant Elections
- Activity 24: Validating Participant Elections
- Activity 25: Correcting Errors and Rerunning Benefits Administration
- Printing Confirmation Statements
- Activity 26: Generating Confirmation Statements
- Responding to Participant Changes
- Activity 27: Changing Elections
- Finalizing Open Enrollment
- Activity 28: Finalizing Open Enrollment
- Preparing for Next Year's Open Enrollment
- Review