PeopleSoft Base Benefits - U.S. Rel 9.2 Ed 2

PeopleSoft

DURATION	MODULES	COURSE CODE
2 Days	**16 Lectures**	**—**

Course Overview

The PeopleSoft Base Benefits training covers the activities and functions required to set-up and administer PeopleSoft Human Resources Base Benefits. You'll explore the structure and setup of benefit plans, benefit programs, and payroll deductions. This training is based on the PeopleSoft Human Resources Base Benefits Rel 9.2, HCM Update Image 15.

What You Will Learn

Module 1: Course Introduction

- Lesson 1: Course Overview
- Learning Objectives
- Course Agenda
- Lesson 2: Business Process Overview
- How PeopleSoft Human Resources Base Benefits Fits into PeopleSoft HCM
- Phases of the Benefits Process
- Relationship Between Benefit Tables and Employee Data
- Base Benefits Components
- Sources of Information About PeopleSoft HR Base Benefits

Module 2: Payroll Deductions

- Lesson 3: Setting Up Payroll Deductions
- Setting Up Payroll Deduction Codes for Benefit Plans
- Determining Deduction Classifications
- Specifying Deduction Tax Effects
- Settings for Specific Processing
- Frequency of Benefit Deductions
- Activity 1: Setting Up Payroll Deductions

Module 3: Benefit Plans and Health Plans

- Lesson 4: Setting Up Benefit Plans, Health Plans, and Benefit Programs
- Health Plan Components
- Adding a Plan Provider
- Setting Up a Benefit Plan and Health Plan
- Defining Coverage Codes
- Setting Up Benefit Rate Types
- Establishing Rates for a Benefit Plan
- Activity 2: Defining Health Plans
- Adding a Health Plan to a Benefit Program
- Activity 3: Creating a Benefit Program

Module 4: Life Insurance Plans

- Lesson 5: Setting Up Life Insurance Plans
- Life Insurance Plan Components
- Defining a Life Insurance Plan
- Coverage Rates
- Calculation Rules
- Adding a Life Insurance Plan to a Benefit Program
- Activity 4: Setting Up Life Insurance Plans

Module 5: Disability Plans

- Lesson 6: Setting Up Disability Plans
- Disability Plan Components
- Setting Up a Formula
- Creating a Disability Plan
- Coverage Rates Based on Length of Service
- Adding a Disability Plan to a Benefit Program
- Activity 5: Setting Up Disability Plans

Module 6: Savings and Pension Plans

- Lesson 7: (USA) Setting Up Savings Plans
- Savings Plan Components
- Defining a Savings Plan
- Service Step Table Setup
- Savings Plan Limits
- Age 50 Catch-Up Contributions
- Adding a Savings Plan to a Benefit Program
- Activity 6: Setting Up a Savings Plan
- Lesson 8: (CAN) Setting Up Pension Plans
- Pension Plan Components
- Setting Up Pension Plans
- Adding a Pension Plan to a Benefit Program

- Activity 7: Setting Up an Executive Pension Plan

Module 7: Leave Plans

- Lesson 9: Setting Up Leave Plans
- Leave Plan Components
- Defining a Leave Plan
- Establishing Earning Codes for Leave Categories
- Adding a Leave Plan to a Benefit Program
- Activity 8: Setting Up a Vacation Leave Plan

Module 8: Flexible Spending and Health Savings Accounts

- Lesson 10: Setting Up Spending and Savings Accounts
- Components of FSA and HSA Plans
- Creating and Defining FSA and HSA Plans
- Health FSA Carryover Setup
- Adding FSA Plans to a Benefit Program
- Activity 9: Setting Up Flexible Spending Accounts

Module 9: Employee and Dependent Setup

- Lesson 11: Adding New Employees, Dependents, and Beneficiaries
- Pages Used to Hire an Employee
- Viewing Job-Related Employee Information
- Setting Up Dependent and Beneficiary Data
- Activity 10: Adding Dependent and Beneficiary Data

Module 10: Employee Enrollment

- Lesson 12: Enrolling Employees
- Assigning Employees to Benefit Programs
- Activity 11: Assigning Employees to Benefit Programs
- Enrolling Employees in Benefit Plans
- Viewing Employee Benefit Enrollments
- Activity 12: Enrolling Employees
- Overriding Deduction Information

Module 11: Deduction Calculations

- Lesson 13: Calculating Deductions
- Tables Used to Calculate Deductions
- Activity 13: Assigning Pay Calendars
- Activity 14: Creating and Linking Pay Run ID
- Calculating Deductions in PeopleSoft Payroll Interface
- Activity 15: Calculating Deductions
- Viewing Calculated Deductions Online
- Activity 16: Viewing Calculated Deductions

- Confirming Deduction Amounts

Module 12: Leave Accrual Processing

- Lesson 14: Processing Leave Accruals
- Running Leave Accrual Process
- Viewing Employee Leave Accrual Balances Online
- Activity 17: Running Leave Accrual Process

Module 13: Changing Benefits and Employee Enrollments

- Lesson 15: Managing Benefit Programs and Employee Enrollments
- Generating Benefit Program Reports
- Activity 18: Generating Benefit Program Report
- Creating New Benefit Programs Using the Clone Utility
- Activity 19: Cloning a Benefit Program
- Updating Employee Enrollments in Benefit Plans
- Activity 20: Updating Employee Benefit Records

Module 14: USA Affordable Care Act (ACA) Compliance

- Lesson 16: Managing ACA Regulations
- ACA Employer Shared Responsibility Provision
- Managing ACA Regulations in Benefits
- Setting Up ACA Eligibility Tables
- Activity 21: Associating Company to ACA Common ID
- Recording ACA Eligibility Data for Employees
- Activity 22: Recording ACA Data for an Employee
- ACA Consent Processing
- ACA Safe Harbor Codes and Relief Groups

Module 15: eBenefits Self-Service

- Lesson 17: Using eBenefits Self-Service
- Self-Service Benefits Functionality
- Setting Up eBenefits
- Using PeopleSoft Fluid UI for Self-Service Benefits
- Viewing and Updating Benefit Information
- Managing Life Events
- (USA) Form 1095-C Consent
- Activity 23: Configuring and Using eBenefits

Module 16: Advanced Topics

- Appendix A: Multiple Jobs within Benefits
- Managing Multiple Jobs
- Grouping Jobs with Benefit Record Numbers
- Primary Jobs for Benefits

- Calculating Benefit Deductions for Multiple Jobs
- Additional Resources