

PeopleSoft Training Activity Sheet

BA1: BENEFITS ADMINISTRATION

For use in training. Last updated November 2, 2016.

Activity 1: Process a New Hire

Directions: Use On-Demand Event Maintenance to process a New Hire.

Scenario: Human Resources has hired a new employee, EID «Activity_1_2_3_4__Class_1».

Your Tasks:

1. Use the On-Demand Event Maintenance page to **Schedule/Prepare** the new hire job event.
2. **Enter Elections:** Add a dependent spouse and select the medical, dental, and vision plans that will include the employee plus his/her spouse, click OK.
3. **Validate and Finalize** the new hire event for this employee.
4. Click **Save**.

Activity 2: Life Event

Directions: Add a Life Event to the BAS Activity table and use On-Demand Event Maintenance to process that Life Event.

Scenario: Your sample employee, EID «Activity_1_2_3_4__Class_1» had a new child. The child was born on 11/15/2016, and needs to be added as a dependent to the employee's benefit plans.

Your Tasks:

1. Add the birth life event to the **BAS Activity Table** (continue to use the same sample employee).
2. Use the On-Demand Event Maintenance page to **Schedule/Prepare** the birth life event.
3. **Enter Elections:** Add a dependent child and change the medical, dental, and vision plans to plans that will include the employee, his spouse, and new child, click OK.
4. **Validate and Finalize** the birth event for this employee.
5. Click **Save**.

Activity 3: 403(b) Event

Directions: Enroll an employee in a Savings Plan by adding a 403(b) Plan Type to the Savings Plans screen.

Scenario: Your sample employee, EID «Activity_1_2_3_4__Class_1» has decided to opt-into a savings plan. Enroll this employee into a savings plan effective 11/01/2016.

Your Tasks:

1. Add the 403(b) **Plan Type** to the **Savings Plans** screen (continue to use the same sample employee).
2. Enter the **Coverage Begin Date** and **Deduction Begin Date** as 11/1/2016.
3. Enter the **Benefit Plan**.
4. Enter an **Investment Amount** and **Investment Option** of your choice.
5. Click **Save**.

Activity 4: Voluntary Plan

Directions: Enroll an employee into a Voluntary Plan using the Create General Deductions page.

Scenario: Your sample employee, EID «Activity_1_2_3_4_Class_1» has decided to start contributing \$100 a month to the American Fidelity After -Tax Disability voluntary plan. Enroll this employee into the plan.

Your Tasks:

1. Navigate to **Main Menu > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions** and search/find your employee.
2. If existing general deductions already exist, add a new row in the General Deductions area. Since this employee has no existing general deductions, you can fill in the blank fields.
3. Select the **Deduction Code** (American Fidelity Disability AT) and enter the **Effective Date** (date the deduction should begin).
4. **Change the Calculation Routine** to Flat Amount.
5. **Enter the amount** (\$100.00) to be deducted each month in the Flat/Addl Amount field.
6. Click **Save**.

Activity 5: 10-month Employee (July/August)

Directions: Update the frequency deductions are taken for benefits using the Override Deductions (Employee) page.

Scenario: In Activity 4, you added an American Fidelity After - Tax Disability voluntary plan. We need to now modify the frequency of the deductions. Deductions are taken 10 months, employees do not make deductions for this benefit in July and August.

Your Tasks:

1. Navigate to **Main Menu > SDCOE Custom > Payroll > Processes > Override Deductions (Employee)**.
 2. If existing general deductions already exist, add a new row in the Deduction Override Settings area. Since this employee has no existing general deductions, you can fill in the blank fields.
 3. Select the **Plan Type** (00 – General Deduction), **Deduction Code** (American Fidelity Disability AT) and enter the **Deduction Class** (A- After - Tax).
 4. **Uncheck** the July and August boxes.
 5. Click **Save**.
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Activity 6: Benefit Deduction Adjustment

Directions: Make a benefit deduction adjustments on Paysheet > By Payline.

Scenario: EID «EEs_enrolled_in_Medical_with_paylines_» did not have employee or employer medical deductions taken in the previous month. You need to use the One-Time Deductions tab of the paysheet to enter these adjustments in the next months on-cycle payroll processing.

Your Tasks:

1. Navigate to **Main Menu > Payroll for North America > Payroll Processing USA > Update Paysheets > By Payline** and search/find your employee.
2. Add a row to the payline.
3. Click the One-Time Deductions tab and verify that the **OK to Pay** checkbox is checked.
4. Select the **Plan Type** for the deduction adjustment. *For this scenario, use **Medical**.*
5. Select the **Benefit Plan**. *Select the Medical plan in which this employee has been enrolled.*
6. Select the **Deduction Code** and **Deduction Class**. Be sure to select Before or After tax when entering the **employee's** deduction adjustment.
7. Select the appropriate **One-Time Code**. Override takes the flat amount entered instead of the regular monthly deduction, Addition takes the flat amount entered in addition to the regular monthly deduction, and Refund will refund the flat amount entered.
8. **Enter the amount** of the employee's medical adjustment in the Flat/Addl Amount field.
9. Click **Save**.
10. Add a new row and **repeat Steps 3-8 for the employer's** medical deduction adjustment. Be sure to select **Deduction Class of Nontaxable** in Step 5.

Activity 7: Terminate Benefits

Directions: Use the On-Demand Event Maintenance page to terminate an employee's benefits.

Scenario: Human Resources has terminated EID «EEs_enrolled__Activity_7» now you need to terminate the employee's benefits.

Your Tasks:

1. Use the On-Demand Event Maintenance page to **Schedule/Prepare** the termination event.
2. **Force Finalize** the termination.
3. **Validate and Finalize** the termination event for this employee.
4. Review benefit records to ensure they have been set to terminated.

Challenge Question

Q: What makes Activities 2 and 3 different from Activities 1 and 7?
