

PeopleSoft Refresher Activity Sheet

BA1: BENEFITS ADMINISTRATION

For use in training. Last updated November, 2015.

Activity 1

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

Scenario: Find an existing employee who's already enrolled in benefits at the employee only level. Once an employee is identified, add a marriage event effective 11/15/2015 and add the spouse as dependent to the employee's benefit plans.

Your Tasks:

1. Navigate to the **Current Benefits Summary** screen and search a sample employee
2. Add the marriage life event to the **BAS Activity Table**
3. Use the On-Demand Event Maintenance page to **Schedule/Prepare** the marriage event
4. **Enter Elections:** Add a dependent spouse and change the medical, dental, and vision plans to plans that will include the employee his/her spouse, and click OK
5. **Validate and Finalize** the birth event for this employee
6. Double check the enrollments on the **Health Benefits** screen

Activity 2

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

Scenario: Find an existing employee who's already enrolled in benefits at the employee family level. Once an employee is identified, add a Divorce event effective 11/10/2015 and terminate the spouse as dependent to the employee's benefit plans.

Your Tasks:

1. Navigate to the **Current Benefits Summary** screen and search a sample employee
2. Add the divorce life event to the **BAS Activity Table**
3. Use the On-Demand Event Maintenance page to **Schedule/Prepare** the divorce event
4. **Enter Elections:** Remove the spouse as a dependent from all health plans, and click OK
5. **Validate and Finalize** the divorce event for this employee
6. Double check the enrollments changed on the **Health Benefits** screen

Activity 3

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

Scenario: Be creative. Create unique scenario using a current employee and follow the steps in Activity 1 & 2

Activity 4

Directions: Enroll an employee in a Savings Plan by adding a 403(b) event to the BAS Activity Table and use On-Demand Event Maintenance to process that savings plan change event.

Scenario: An existing employee who's already enrolled in benefits has decided to opt-into a savings plan. Enroll this employee into a savings plan effective 11/01/2015.

Your Tasks:

1. Navigate to the **Current Benefits Summary** screen and search a sample employee
 2. Add the 403(b) Change administrative event to the **BAS Activity Table** (continue to use the same sample employee)
 3. Use the On-Demand Event Maintenance page to **Schedule/Prepare** the saving plan change event
 4. **Enter Elections:** Select a Savings Plan and enroll the employee by filling out the necessary fields, click OK
 5. **Validate and Finalize** the savings plan change event for this employee
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Activity 5

Directions: Un-enroll an employee in a Savings Plan by adding a 403(b) event to the BAS Activity Table and use On-Demand Event Maintenance to remove the savings plan.

Scenario: Find an existing employee who's already enrolled in a 403(b), 457 or 403 (b) Roth. Once an employee is identified, add a 403(b) event effective 11/01/2015. Un-enroll the employee from a savings plan effective 11/01/2015.

Your Tasks:

1. Navigate to the **Current Benefits Summary** screen and search a sample employee
 2. Add the 403(b) Change administrative event to the **BAS Activity Table** (continue to use the same sample employee)
 3. Use the On-Demand Event Maintenance page to **Schedule/Prepare** the saving plan change event
 4. **Enter Elections:** Select a Savings Plan and un-enroll the employee by filling out the necessary fields, click OK
 5. **Validate and Finalize** the savings plan change event for this employee
 6. Click **Save**
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Activity 6

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

Scenario: An existing employee has decided to start contributing \$100 a month to the voluntary plan of your choice. Enroll this employee into the plan.

Your Tasks:

1. Navigate to *MM > 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. If this employee has no existing general deductions, you can fill in the blank fields
3. Select the **Deduction Code** and enter the **Effective Date** (date the deduction should begin)
4. **Change the Calculation Routine** to Flat Amount
5. **Enter the amount** to be deducted each month in the Flat/Addl Amount field
6. Click **Save**

Activity 7

Directions: Un-enroll an employee from a Voluntary Plan using the Create General Deductions page.

Scenario: An existing employee has decided to waive a voluntary plan. Un-enroll this employee into the plan.

Your Tasks:

1. Navigate to *MM > Payroll for North America > Employee Pay Data USA > Deductions > **Create General Deductions*** and search/find an employee currently enrolled in a voluntary plan
 2. Find the row that contains the deduction you want to stop
 3. Add a row in the **Deduction Details** area
 4. Enter the **Effective Date** and the **Deductions End Date**(date the deduction should stop)
 5. Remove the **Flat/Addl Amount**.
 6. Click **Save**
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Activity 8

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

Scenario: In activity 6, you added and voluntary plan. We need to now modify the frequency of the deductions. Deductions are taken 10 months, employees do not make contributions for this benefit in July and August.

Your Tasks:

1. Navigate to *MM > SDCOE Custom > Payroll > Processes > Override Deductions (Employee)*(continue to use the same sample employee)
 2. Select the **Plan Type** (00), leave **Benefit Plan** blank, **Deduction Code** , and **Ded Class** (B)
 3. Uncheck **July and August**
 4. Click **Save**
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Activity 9

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

Scenario: Find an existing employee who's already enrolled in benefits, and terminate them effective 11/25/2015. Human Resources has terminated this employee and now you need to terminate the employee's benefits.

Your Tasks:

1. Navigate to the **Current Benefits Summary** screen and search a sample employee
2. Navigate to the employee's job data record *MM > Workforce Administration > Job Information > Job Data* and **enter the termination** as of 11/25/2015
3. Use the On-Demand Event Maintenance page to **Schedule/Prepare** the termination event
4. **Force Finalize** the termination
5. **Validate and Finalize** the termination event for this employee
6. Review benefit records to ensure they have been set to terminated