2 Days

PeopleSoft Base Benefits - U.S. Rel 9.2 NEW

This PeopleSoft Base Benefits - U.S. Rel 9.2 training gives you the tools to manage your employee benefit programs. It enables you to set up your basic benefits system architecture and manually enroll employees and their dependents into the benefits system.

Course Details

Course Outline

Business Process Overview

- Describing How Base Benefits Fits Into PeopleSoft HCM
- Describing the Phases of the Benefits Process
- Describing the Relationship Between Benefit Tables and Employee Data
- Describing the PeopleSoft Human Resources Base Benefits Components

Setting Up Payroll Deductions

- Setting Up Payroll Deduction Codes for Benefit Plans
- Determining Deduction Classifications
- Specifying Deduction Tax Effects
- Determining Settings for Specific Processing
- Specifying the Frequency of Benefit Deductions

Setting Up Benefit Plans, Health Plans, and Benefit Programs

- Identifying Health Plan Components
- Adding a Plan Provider
- Setting Up a Benefit Plan and a Health Plan
- Defining Coverage Codes
- Establishing Rate Types and Rates for a Benefit Plan
- Adding a Health Plan to a Benefit Program

Setting Up Life Insurance Plans

- Identifying Life Insurance Plan Components
- Defining a Life Insurance Plan
- Defining Coverage Rates
- Defining Calculation Rules
- Adding a Life Insurance Plan to a Benefit Program

Setting Up Disability Plans

- Identifying Disability Plan Components
- Setting Up a Formula
- Creating a Disability Plan
- Establishing Coverage Rates Based on Length of Service
- Adding a Disability Plan to a Benefit Program

(USA) Setting Up Savings Plans

- Identifying Savings Plan Components
- Defining a Savings Plan
- Setting Up the Service Step Table
- Setting Up Savings Plan Limits
- Setting Up Age 50 Catch-up Contributions
- Adding a Savings Plan to a Benefit Program

(CAN) Setting Up Pension Plan

- Identifying Pension Plan Components
- Setting Up Pension Plan
- Adding a Pension Plan to a Benefit Program

Setting Up Leave Plans

- Identifying Leave Plan Components
- Defining Leave Plans
- Establishing Earnings Codes for Leave Categories
- Adding a Leave Plan to a Benefit Program

Setting Up Spending Accounts

- Identifying Spending Account Plan Components
- Creating and Defining FSA and HSA Plans
- Adding a Spending Account Plan to a Benefit Program

Adding New Employees, Dependents, and Beneficiaries

- Identifying the Pages Used to Hire an Employee
- Viewing Job Related Information for an Employee
- Setting Up Dependent and Beneficiary Data

Enrolling Employees

- Assigning Employees to Benefit Programs
- Enrolling Employees in Benefit Plans
- Viewing Employee Benefit Enrollments
- Overriding Deduction Information

Calculating Deductions

- Setting Up Tables Used to Calculate Deductions
- Calculating Deductions
- Viewing Calculated Deductions Online
- Confirming Deduction Amounts

Processing Leave Accruals

- Processing Leave Accruals
- Viewing Employee Leave Accrual Balances Online

Changing Benefit Programs and Employee Enrollments

- Running the Benefit Program Report
- Creating a New Benefit Program using the Benefit Program Clone Utility
- Changing Employee Enrollments in Benefit Plans

(USA) Managing HIPAA Regulations

- Designating a Health Insurance Portability and Accountability Act (HIPAA) Plan
- Processing HIPAA Certificates

Using eBenefits Self Service Functionality with Base Benefits

- Explaining Self-Service Benefits Functionality

- Setting Up eBenefits
- Configuring the Life Event pages

Describing Multiple Jobs Within Benefits

- Describing Multiple Jobs
- Grouping Jobs with Benefit Record Numbers
- Identifying Primary Jobs
- Calculating Benefit Deductions for Multiple Jobs

Who Should Attend

- Developer
- Functional Implementer
- Reports Developer
- System Analysts

Pre Requisite

1. Able to run processes and reports.
2. Understanding of basic navigation and PeopleSoft concepts.
3. Use of control tables to enforce business rules.

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