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# PeopleSoft HCM 9.2: eBenefits

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## Alpha and Beta Draft Documentation Notice

# Contents



# Preface

## Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

### PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

### Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

**Note:** Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

### Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user’s guide provide general information about using PeopleSoft Applications.

## Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

## Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

| ***Typographical Convention*** | ***Description*** |
|---|---|
| **Bold** | Highlights PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call. |
| *Italics* | Highlights field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.<br><br>Italics also highlight references to words or letters, as in the following example: Enter the letter *O*. |
| Key+Key | Indicates a key combination action. For example, a plus sign ( +) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key. |
| `Monospace font` | Highlights a PeopleCode program or other code example. |
| . . . (ellipses) | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax. |

| *Typographical Convention* | *Description* |
|---|---|
| { } (curly braces) | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( \| ). |
| [ ] (square brackets) | Indicate optional items in PeopleCode syntax. |
| & (ampersand) | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.<br><br>Ampersands also precede all PeopleCode variables. |
| ⇒ | This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character. |

## ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

## Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America

- North America

### Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

## Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

# Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help acessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

# PeopleSoft HCM Related Links

PeopleSoft Information Portal on Oracle.com

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

HCM Abbreviations

## Contact Us

Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

## Follow Us

Get the latest PeopleSoft updates on Facebook.

Follow PeopleSoft on Twitter@PeopleSoft_Info.

## Chapter 1

# Getting Started with PeopleSoft eBenefits

## Understanding PeopleSoft eBenefits

These topics discuss:

- eBenefits components.
- eBenefits roles and security.

### eBenefits Components

eBenefits comprises self-service web transactions that interact with the PeopleSoft Human Resources (HR) system. Employees use eBenefits to review, add, and update their benefits information. This list summarizes the pages that employees use in eBenefits:

- The Self Service, Benefits page is the starting place for employees to access their eBenefits information.
- eBenefits Enrollment pages enable employees to communicate their benefit choices to the organization.
- eBenefits Health pages enable employees to review their health-related benefit information by navigating from summary level pages to more detailed information.
- eBenefits Savings pages enable employees to review their savings plan information by navigating from summary-level savings plan pages to more detailed information.
- eBenefits Insurances pages enable employees to review the life insurance information by navigating from summary level pages to more detailed information.
- eBenefits Dependents/Beneficiaries pages enable employees to review information about their dependents and beneficiaries by navigating from summary-level pages to more detailed information.
- eBenefits Flexible Spending Accounts pages enable employees to review information about their health or medical spending accounts by navigating from summary-level pages to more detailed information.
- eBenefits Life Event pages are designed for employees to enter information about a recent life event such as marriage, child birth, adoption, or divorce.
- eBenefits Life Event pages enable employees to upload Life Event documents for the type of life event being processed. Benefits administrators can then review and approve or reject the documents.

### eBenefits Roles and Security

Self-service transactions are targeted to specific roles, such as applicant, employee, faculty, manager, and optionee. These roles help determine:

- The transactions that an employee can access.
- The information that an employee can view.

User profiles determine default access to transactions. You create user profiles on the Maintain Security page in the User Profile component. You assign a role to each user profile.

Profiles are linked to permission lists. Permission lists identify the pages that users can access. To modify access to specific web pages for each role, you modify the permission list.

User profiles also control the data that each employee can access.

See product documentation for *PeopleTools: Security Administration* for more information.

## eBenefits Transactions

eBenefits transactions include:

- Benefits enrollment.
- Health plan information.
- Insurance information.
- Savings plan information.
- Flexible spending account information.
- Dependent and beneficiary information.
- Life events management.

## eBenefits Integrations

eBenefits integrates with the following PeopleSoft applications:

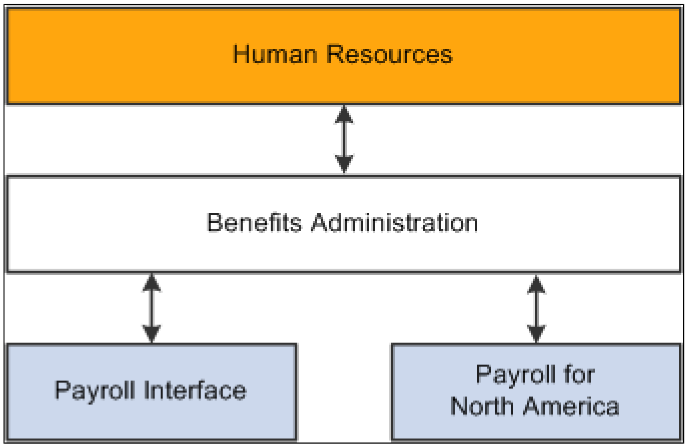
- Human Resources.
- Payroll Interface.
- Benefits Administration.

- Payroll for North America.

**Image: eBenefits integration flow with other PeopleSoft applications**

This example illustrates eBenefits integration flow with other PeopleSoft applications.




## eBenefits Implementation

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, and business process maps.

## Chapter 2

# Setting Up eBenefits

## Setting Up eBenefits

These topics describe how to:

- Use PeopleSoft eBenefits pages.
- Set up page display information.
- Set up uniform resource locators (URLs).
- Establish text catalog data.
- Set up dependent workflow.
- Set up Document Attachment Framework and related content definition.
- Set up suppliers.

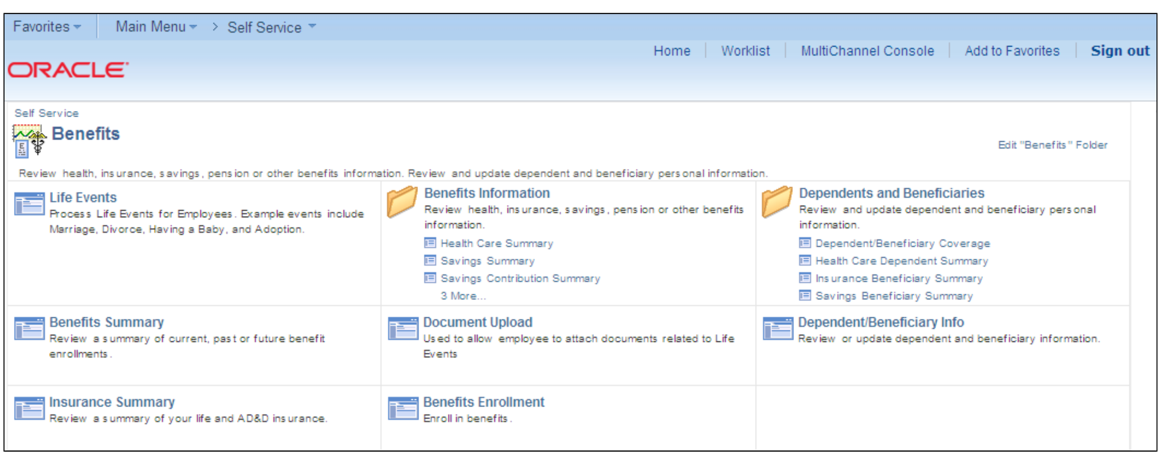
## Using PeopleSoft eBenefits Pages

The standard menu-driven navigation path for PeopleSoft eBenefits is the traditional PeopleSoft access method that users of PeopleSoft applications are familiar with. The Benefits page presents a simple user interface design for end users. You access it by selecting Self-Service,  Benefits.

The links that appear on the Benefits page depend on which collaborative applications have been purchased and whether the application has been selected on the Installation table.

**Image: The self-service Benefits page**

This example illustrates the self-service Benefits page.



# Setting Up Page Display Information

With the exception of text tables used by benefits enrollment, all controls for how and what the eBenefits pages display have been added to existing setup tables within the Manage Base Benefits business process in PeopleSoft HR.

Before implementing eBenefits, you must define the organization's benefit programs, plans, and plan types.

The fields that control how benefit plan information appears on the eBenefits plan summary and detail pages and on the enrollment form are located in one of the following pages or components:

- Benefit Program - Plan Type and Option at the plan level.
- Benefit Plan Table.
- Event Rules.

### Related Links

"Building Benefit Programs *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"
"Defining Benefit Plans *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"
"Defining Event Rules *(PeopleSoft HCM 9.2 Benefits Administration)*"

## Displaying Dependent and Beneficiary Information

The Collect Dep/Ben check box appears on these pages:

- Benefit Program - Plan Type and Option at the plan level.
- Event Rules.

### Benefit Program - Plan Type and Option

When the Collect Dep/Ben check box is selected on the Benefit Program-Plan Type and Option page, the system collects the information pertaining to dependents and beneficiaries and displays that information on the eBenefit Summary and eBenefit Detail Information pages.

### Event Rules

When the Collect Dep/Ben check box is selected on the Event Rules page, the system displays the dependent and beneficiary information on the eBenefits Enrollment pages.

For health plans on the enrollment form, the system collects elections at the plan level. The employee selects which dependents to cover under the plan by selecting a check box next to each individual's name. The system derives the coverage code based on the dependents that are selected.

When the check box is deselected, the system hides the dependent or beneficiary sections and does not collect dependent or beneficiary elections. For health plans on the enrollment form, the system collects elections at the coverage code level when the check box is deselected.

The Collect Dep/Ben field works with theIgnore Dep/Ben Edits field for the event rule. If theCollect Dep/Ben check box is selected, theIgnore Dep/Ben Edits check box should not be selected.

### Self-Service Group Box

To indicate that an employee can add new dependents through the eBenefits enrollment process, select Allow Dep/Ben Additions (allow dependent or beneficiary additions).

As the administrator, you can specify a certificate to be presented to the employee when he or she elects the specified plan type within eBenefits; enter this value in the Certification ID field.

### Dependent Workflow

Each time a user of eBenefits modifies dependent data, the benefits administrator can monitor certain fields. If a participant changes a particular field value, then you are notified via email. The Dependent Workflow page enables you to select which fields trigger an email to be sent to the benefits administrator.

See Setting Up Dependent Workflow.

### Related Links

"Building Benefit Programs *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"
"Defining Event Rules *(PeopleSoft HCM 9.2 Benefits Administration)*"

## Displaying Savings Plan Fund Allocations

The Collect Funds Allocations check box appears on three pages:

- Benefit Program Table - Program.
- Benefit Program Table - Plan Type and Option at the plan level.
- Event Rules.

### Benefit Program - Plan Type and Option

When the Collect Funds Allocations check box is selected on the Benefit Program-Plan Type and Option page, the system collects the information pertaining to savings plans and displays that information on the eBenefit Savings Summary and the Detail Information pages.

### Event Rules

When the Collect Funds Allocations check box is selected on the Event Rules page, the system displays the dependent and beneficiary information on the eBenefits Enrollment pages.

This field works in concert with the Ignore Investment Edits check box for the event rule. If theCollect Funds Allocations check box is selected, then theIgnore Investment Edits check box should be deselected.

## Suppressing Plan Type Information

The Show if no choice check box is located on the Benefit Program Table - Plan Type and Option page for all plan types.

This check box controls whether a plan type appears on the enrollment when the employee has no option to choose and cannot waive out of the option. A good example is paid vacation. Employees receive the benefit, but you don't display it on the enrollment form.

If the check box is selected, the system displays the plan type in the enrollment form summary. When the check box is deselected, the system does not display the plan type.

### Displaying Costs

The Cost Freq on Enrollment Form field is located on the Benefit Program Table - Benefit Program page at the program level. This field controls whether the annual costs or the per-period costs (deductions) appear on the enrollment form.

### Displaying Credits

The Show Credits on Enrollment Form check box is located on the Benefit Program Table - Benefit Program page at the program level. If selected, this check box specifies that the system display total cost and credits on the pages.

### Setting Up the Self-Service Plan Descriptions Field

When setting up benefit plans for health, disability, leave, or retirement benefit plan types, you can enter a description about the plan on the Benefit Plan Table that appears on the enrollment pages.

## Setting Up Uniform Resource Locators

The enrollment form and other benefit transaction pages are designed to display links to:

- Employee handbooks.
- Benefit provider websites.
- Service provider websites.

You enter the specific uniform resource locator (URL) address, description, and identifier on the URL table. When you have done this, enter only the identifying code in the Benefit Program, Vendor, and Benefit Plan tables.

The SPD URL ID field on the Benefit Plan Table page has priority over theGeneral Policy URL ID field in the Provider/Vendor Table - Policy Information page when the system displays one or the other next to the plan provider.

The following rules determine which URL appears next to the plan name on benefit plan review pages:

- If a URL identifier is associated with the SPD URL ID field on the Benefit Plan Table page, it is the link that appears on the benefit plan review page.
- If a URL identifier is associated with the General Policy URL ID field on the Provider/Vendor Table - Policy Information page and*no*SPD URL ID value is defined on the Benefit Plan Table page, it is the link that appears on the benefit plan review page.

The Authorized Providers URL ID value on the Provider/Vendor Table - Policy Information page is independent of the links listed previously. If a URL identifier is connected to theAuthorized Providers URL ID field, then that link appears on the Review page next to Find a Health Care Provider under the

Additional Information section. This link is for health plan types only; no link appears for the other plan types.

For the General Policy URL IDs andAuthorized Providers URL ID links to work, a group number is required on both the Provider/Vendor and Benefit Plan tables.

Oracle recommends that you use a prefix naming convention in the PeopleSoft application, such as the one shown here:

- Use *SPD* as a prefix when defining Summary Plan Description URL IDs (SMRYPLNDOC_URL_ID): SPD_AETNAPPO.
- Use *GEN* as a prefix when defining the General Policy URL ID (POLICY_URL_ID): GEN_AETNA.
- Use *PRV* as a prefix when defining the Authorized Providers URL ID (VENDOR_URL_ID): PRV_AETNA.

See product documentation for *PeopleTools: System and Server Administration* for more information.

### Setting Up Handbook Links

These URLs provide links to the enrollment handbook. A link to the entire handbook can exist and a link to each of the plan-type sections can exist.

Because the handbooks may vary by benefit program, the keys are benefit program and plan type. The URL identifiers are on the benefit program definition at both the program and plan-type levels.

One URL can exist for the entire handbook or separate URLs for each plan type.

### Setting Up General Policy Links

These URL identifiers provide links to the provider home pages or to a company intranet site. The fields are defined on the Provider/Vendor table.

### Setting Up Authorized Provider Links

These URL identifiers provide links to the provider's PCP finder and are applicable only for health plan types. The fields are defined on the Provider/Vendor table.

### Setting Up Summary Plan Description Links

These URL identifiers provide links to the plan summary plan descriptions (SPDs). The fields are defined on the Benefit Plan table.

## Establishing Text Catalog Data

eBenefits uses the text catalog to maintain the wording used on its self-service pages. Text blocks are a collection of paragraphs, sentences, phrases, and words that eBenefits uses when displaying the benefits enrollment and life event pages.

Use the Maintain Text Catalog page to update eBenefit text blocks. Enter HEB (eBenefits) as the object owner when searching for the available text catalog items. For life events, enter LE as the sub ID.

See "Configuring the Text Catalog *(PeopleSoft HCM 9.2: Application Fundamentals)*".

## Defining Text for Flexible Keys

For benefits enrollment pages, some page text is the same for all situations. Some of the text varies from benefit program to benefit program. Other text varies from plan type to plan type. Text can vary by plan type within benefit program, which can still vary by the type of event. To accommodate this, the system keys the text blocks by benefit program, plan type, and event class.

The system uses the following rules when matching text to a text block:

- The system looks for a match on the benefit program. It uses only those rows that match the benefit program or, lacking any rows that match the benefit program, uses the rows that do not have a benefit program.
- Within this set of rows, the system looks for a match on plan type. It uses only those rows that match the plan type or, lacking any rows that match the plan type, uses the rows that do not have a plan type.
- Within this set of rows, the system looks for a match on event class. It uses only the row that matches the event class or, lacking a match on event class, uses the row that does not have an event class.

For life event pages, the system keys the text blocks based on the life event type. If a life event type is left blank for a text catalog entry, the text block will be applicable to all life event types.

## Identifying Field Lists

This is a list of the fields on the following tables: W3EB_TEXT, W3EB_TEXT_EFFDT, and W3EB_TEXT_MSGID

- Text ID − A character field that uniquely identifies the text block. Life event welcome and exit pages contain default text IDs Welcome and Print which can be modified.
- Language Code − The language for this text block.
- Description − A description of this text block.
- Effective Date − The date on which this text block takes effect.
- Benefit Program − A distinct benefit program or blank.
- Plan Type − A distinct plan type or blank.
- Event Class − An event class or blank.
- Life Event Type − The type of life event or blank.
- Text − A long field containing the text block itself. The text can include up to five substitution variables.

## Setting Up Delivered Text and Effective Dating

This text is effective-dated, which allows it to be changed from one plan year to the next. The delivered text has an effective date of January 1, 1900 (1/1/1900) and is defined as system data in the HCM database. You should use a later effective date when you add new text entries. Any configured text should use a later date.

### Setting Up Enrollment Form Technical Information

Inside the enrollment form, the system uses a common function to access the text blocks. The format of this function is:

```
GetText(&TextID, &PlanType, &TextArea, &Sub1, &Sub2, &Sub3, &Sub4, &Sub5)
```

The parameters are:

&TextID − A character string that uniquely identifies the text string.

&PlanType − The plan type. 01 is used for the event picker, summary, and other non-plan type pages.

&TextArea − For situations in which the function returns the text.

&Sub1,2,3,4,5 − Up to five character fields that hold substitution variables. The function updates the text with the substitution values.

The calling function supplies the &TextID, &PlanType, and &Sub parameters.

On return, the calling function takes the text returned in &TextArea and puts it into HTML areas on the page.

The function does not have to supply the benefit program or event class because these values can be derived from the event itself and they do not change.

# Setting Up Dependent Workflow

An employee can modify characteristics about a dependent at any time on the Dependent/Beneficiary Personal Information page.

An administrator can configure the Dependent Workflow page to trigger a notification of changes within eBenefits for validating both a benefits certification and dependent data.

## Page Used to Set Up Dependent Workflow

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Dependent Workflow | W3EB_DEP_WF | Set Up HRMS, Product Related, eBenefits, Dependent Workflow | Identify which fields from the Dependent/Beneficiary Personal Information page trigger an email to the administrator. |

## Dependent Workflow Page

Use the Dependent Workflow page (W3EB_DEP_WF) to identify which fields from the Dependent/Beneficiary Personal Information page trigger an email to the administrator.

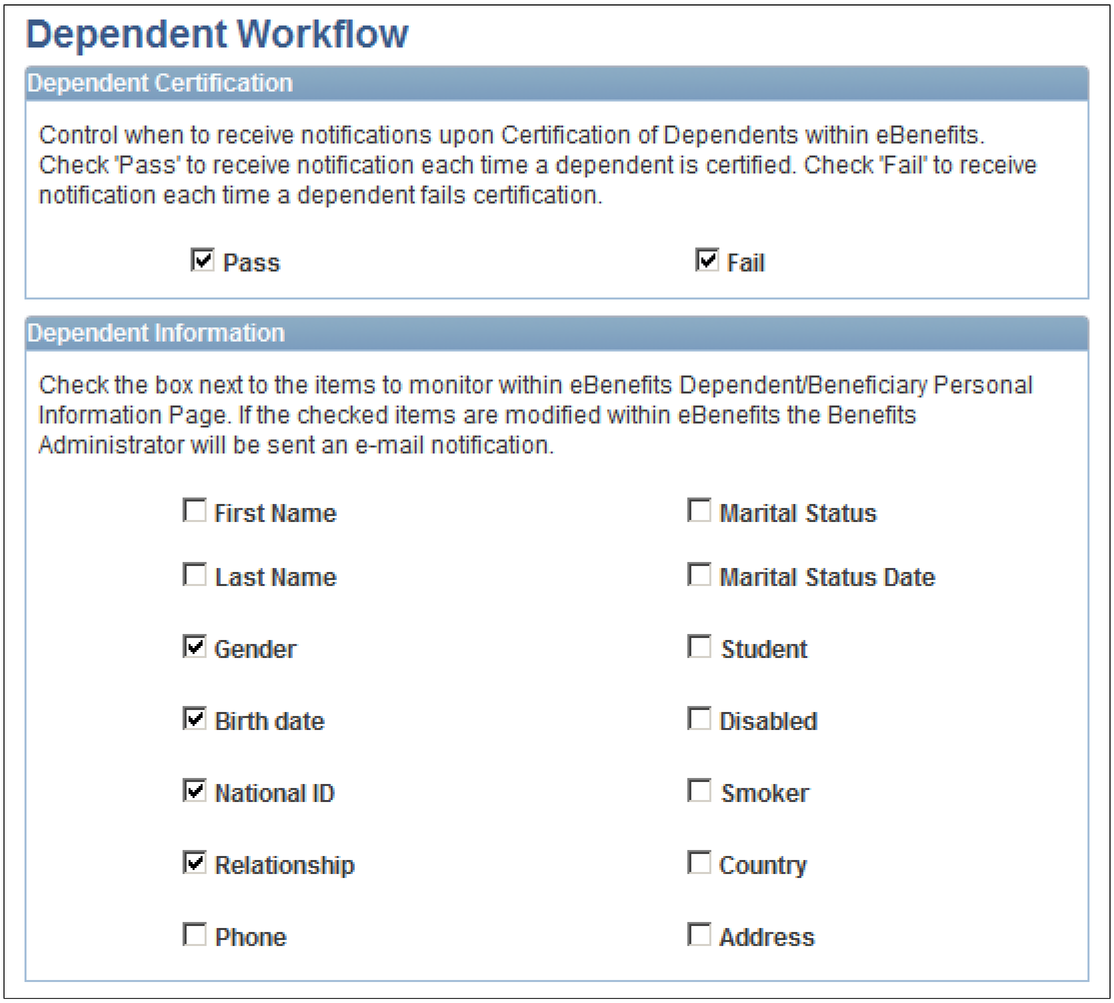
 

**Navigation**

Set Up HRMS, Product Related, eBenefits, Dependent Workflow

**Image: Dependent Workflow page**

This example illustrates the fields and controls on the Dependent Workflow page.




## Setting Up Document Attachment Framework

An employee can upload life event documents to Peoplesoft eBenefits using the HR Attachment Framework. Based on the type of life event being processed, the system displays the list of documents to be uploaded.

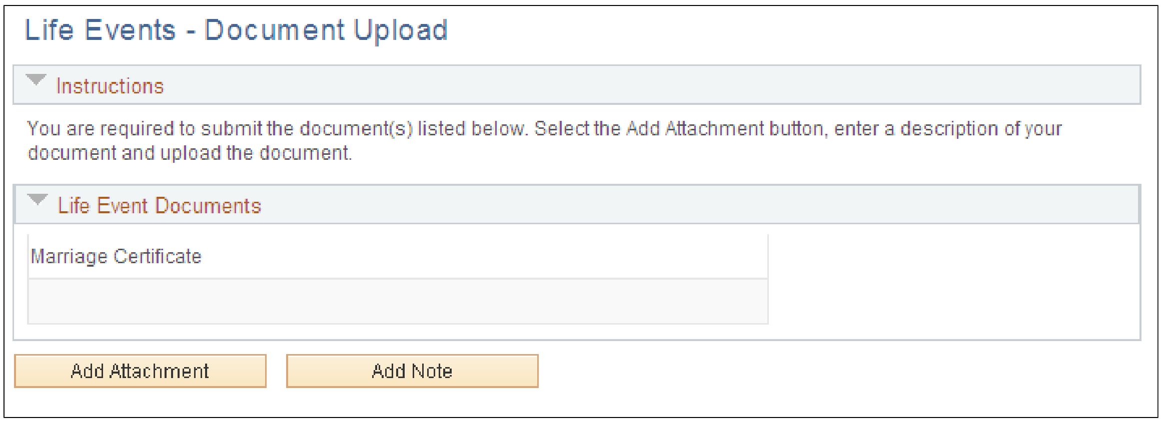
## Page Used to Upload Life Event Documents

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Life Events — Document Upload | HR_ATT_DD_HDR | Self Service, Benefits, Document Upload, Document Upload | Upload life event documents. |

## Life Events — Document Upload Page

**Image: Life Events — Document Upload Page**

This example illustrates the Life Events — Document Upload page.




## Document Attachment Framework Setup

The following set up is required for the instructions on the Life Events - Document Upload page:

| ***Object Type*** | ***Name*** |
|---|---|
| Text ID | ATT_HEADER_INSTR |
| Object Owner | HEB |
| sub ID | LE |

The following setup is required for the Attachment Framework:

- Define Authorizations
- Define Authorization Entries
- Define Attachments
- Configure Keys
- Maintain Definitions

| ***Authorization ID*** | ***Authorization Options*** |
|---|---|
| BN_EDITATT | View and edit attachments |
| BN_VIEWATT | View attachments |

| ***Authorization Entry*** | ***Description*** |
|---|---|
| BN_ADOPTCERT | Adoption Certificate |
| BN_BIRTHCERT | Birth Certificate |
| BN_MARCERT | Marriage Certificate |

| ***Configuration ID*** | ***Description*** |
|---|---|
| BN_CERT | Certificates |

| ***Context Key*** | ***Configuration ID*** |
|---|---|
| Life Event Type | BN_CERT |

| ***Authorization Entry*** | ***Life Event Type*** |
|---|---|
| BN_ADOPTCERT | Adoption |
| BN_BIRTHCERT | Birth |
| BN_MARCERT | Marriage |

# Setting Up Suppliers

This section provides an overview of how to set up suppliers and describes how to

- Activate the supplier.
- Define supplier FTP parameters.
- Define carrier reporting schedules.

## Pages Used to Set Up Suppliers

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Merchant Profile | MERCHANTID | Set Up HRMS, Common Definitions, Supplier Administration, Merchant Profile | Activate the supplier. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Define FTP Parameters | BN_M_SUPPLIER_FTP | Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Define FTP Parameters, Define FTP Parameters | Define supplier FTP parameters, such as FTP address and password, that the system needs to communicate with the supplier. |
| Define Carrier Rpt Schedule | BN_M_SCHEDULE | Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Define Carrier Rpt Schedule, Define Carrier Rpt Schedule | Define carrier reporting schedule information that the system needs to send the correct information to the supplier. |

## Understanding How to Set Up Suppliers

eBenefits integrates with eBenX, which enables companies to use eBenX benefits data management and distribution services to distribute benefit enrollment data to their benefit providers.

To set up eBenX as a supplier:

1. Activate eBenX as a supplier using the Merchant Profile page.
2. Enter the supplier's FTP information on the Define Supplier FTP Parameters page.
3. Create a schedule for sending data to the supplier using the Define Carrier Rpt Schedule page.

## Merchant Profile Page

Use the Merchant Profile page (MERCHANTID) to activate the supplier.

**Navigation**

Set Up HRMS, Common Definitions, Supplier Administration, Merchant Profile

Select the Merchant Enabled check box.

If this check box is deselected, you won't be able to transmit data to the supplier.

See product documentation for *PeopleTools: System and Server Administration* for more information.

## Define FTP Parameters Page

Use the Define FTP Parameters page (BN_M_SUPPLIER_FTP) to define supplier FTP parameters, such as FTP address and password, that the system needs to communicate with the supplier.

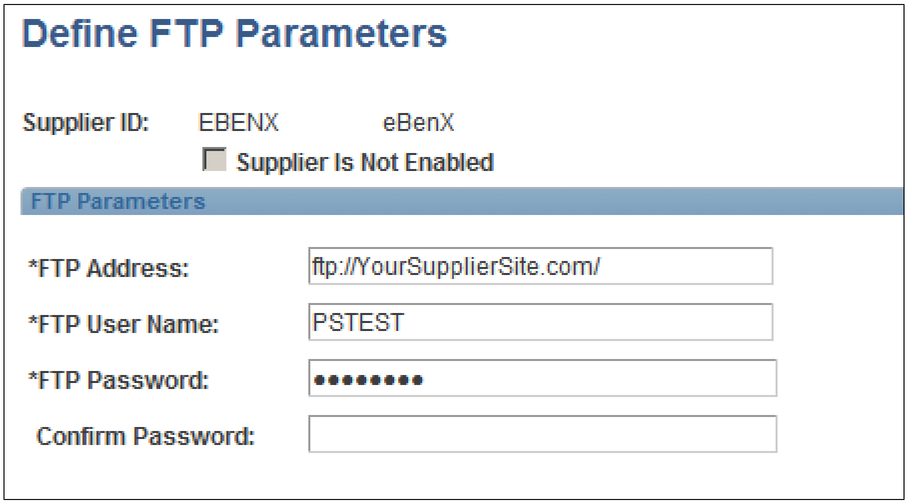
 

**Navigation**

Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Define FTP Parameters, Define FTP Parameters

**Image: Define FTP Parameters page**

This example illustrates the fields and controls on the Define FTP Parameters page.




| | |
|---|---|
| **Supplier ID** | Displays the identification number that the system assigned to the supplier when the supplier was entered in the Merchant Profile page. |
| **Supplier Enabled** | Select to indicate whether you can transmit data to the supplier. If you deselect this check box, you must access to the Merchant Profile page and select the Merchant Enabled check box. |
| **FTP Address** | Enter the supplier's FTP address. |
| **FTP User Name** | Enter your logon name. The eBenX representative will provide this information. |
| **FTP Password** | Enter the password that is assigned to you to access the supplier's site. The eBenX representative will provide this information. |

## Define Carrier Rpt Schedule Page

Use the Define Carrier Rpt Schedule page (BN_M_SCHEDULE) to define carrier reporting schedule information that the system needs to send the correct information to the supplier.

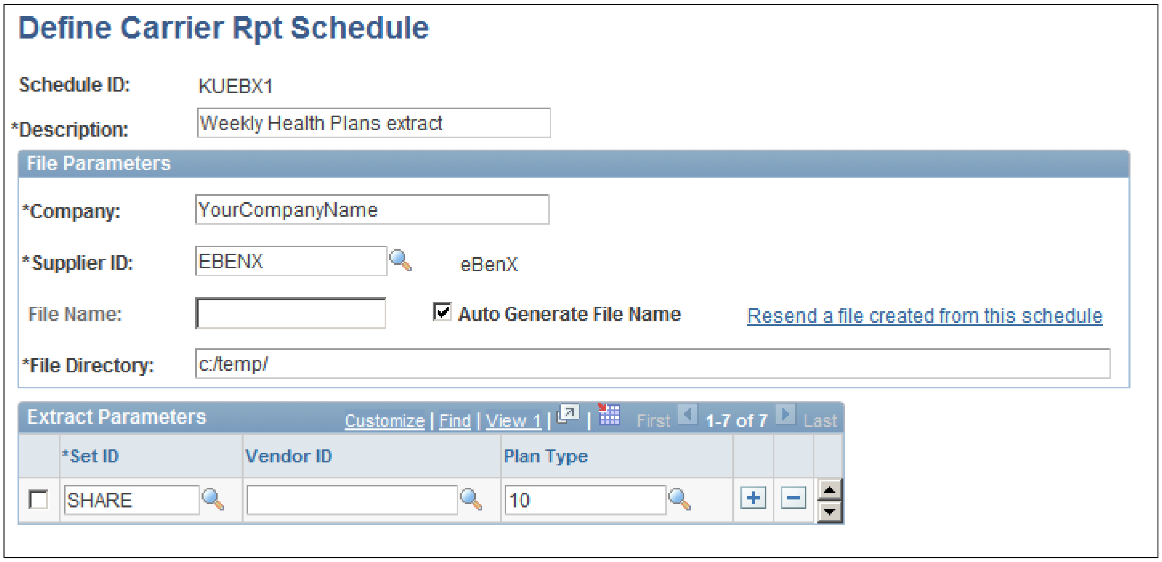
 

### Navigation

Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Define Carrier Rpt Schedule, Define Carrier Rpt Schedule

### Image: Define Carrier Rpt Schedule page

This example illustrates the fields and controls on the Define Carrier Rpt Schedule page.




**Schedule ID**

Displays the unique identification code that is assigned to this schedule. It can be up to six characters long.

**Company**

Enter the name of your company. This information is included in the header section of the files that are sent to the supplier.

**Supplier ID**

Select the supplier ID from the list of valid options.

**File Name**

The name of the file sent to the supplier. You can create your own name or have the system generate a name for you.

When creating your own name, make sure that it is a name that helps you easily identify the contents. If you run the Carrier Interface Schedule process more than once using the same name and directory, a sequence number is placed in front of the file name. For example, if you send a file with the name eBenX twice, the first and second file names will be eBenX.txt and 2eBenX.txt, respectively.

To have the system generate a name, leave *File Name* blank and select*Auto Generate File Name.*

**Auto Generate File Name**

Select to create a file name for yourself. When you select this check box, the File Name field becomes unavailable for entry. The system creates the name using the following format: <Schedule ID name>_YYYY-MM-DD-HH.MM.SS.txt.

| | |
|---|---|
| **Resend a file created from this schedule** | This link appears only if a file was created by this schedule. Click it to display the Resend File page. |
| **File Directory** | Enter the name of the directory located on the application server where the extract file is to be stored. |
| **Extract Parameters** | This group box enables you to select only the information that you want to extract from the BN_SNAP files for this supplier. You can enter more than one row of parameters. |
| **Set ID** | If you want enrollment information for a specific setID, select a setID from the list of available options. You must enter at least one setID. |
| **Vendor ID** | If you want enrollment information for a specific benefit provider, select a vendor ID from the list of available options. If you want information for all benefit providers, leave this field blank. |
| **Plan Type** | If you want enrollment information for a specific benefit plan type, select a plan type from the list of available options. If you want information for all plan types, leave this field blank. |

Chapter 3

# Enrolling in eBenefits

## Understanding the eBenefit Enrollment Process

Use the eBenefits enrollment pages to:

- Communicate to employees their benefit choices.
- Communicate additional information that is necessary to process the benefits enrollment through the Benefits Certification form.
- Notify HR of employees' benefit elections.

### Communicate Benefit Choices

The enrollment process begins when the system creates an enrollment event and notifies the employee of the event. You can link to the Benefits Enrollment page from the Benefits page. From the Benefits Enrollment page, you can then access the Enrollment Summary page, where employees review eligible benefit elections, and link to all plan-type pages where elections can be made.

Information about an individual's current coverage comes from the base benefit tables. The system does not use the event date when pulling current coverage. It uses the deduction begin date on the BAS_PARTIC_PLAN rows. This date has been adjusted for grace and waiting periods. Using this date gives a more accurate current election and more closely matches what the background process considers current.

Information about new coverage comes from the employee's election or the default coverage. If the BAS_PARTIC_PLAN row has an election, either entered by the employee or pre-entered by the system, the system uses that entry as the basis for formatting the new coverage. If no entry exists, the system goes to the BAS_PARTIC_OPTN rows to find the default value. If no election and no default exist, the system displays the phrase *No Coverage.*

The plan-types (medical, vision, savings, and so on) appear in the top row of the Coverage and Election Summary section. One multiline entry exists for every plan type in the event. The plan types are listed in order based on the display plan sequence value in the benefit program definition. The name of the plan type comes from the long name in the Translate table.

For all plan types, the system always shows the plans available and indicates whether the option of waiving coverage is available. However, you can modify the setup tables so that the system suppresses the plan types if the employees have no choice available.

---

**Note:** Calculation amounts that appear on the benefit enrollment pages are only estimated amounts. These amounts are estimated based on the event date and do not take the pay period date into account; actual amounts are calculated in batch for each pay period.

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**Note:** Because the system validates the relationship of a person to an employee, you cannot perform a benefit enroll for a dependent unless their relationship is defined as a qualified dependent relationship type.

---

See "Setting Up Dependent Relationships *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*".

### Communicate Additional Information

The benefits administrator can decide whether a benefit plan has certain criteria that an employee needs to meet prior to enrolling. If so, a Benefits Certification appears when the employee clicks the EDIT button. The Benefits Certification contains a series of statements or questions presented to the employee. The administrator assigns a value for each certificate ID defined, and decisions are made regarding the participant's benefits based on the resulting scores. When you view the Enrollment Summary section of the Benefits Enrollment page, you can select a benefit plan in which to enroll.

See "Setting Up Benefits Certifications *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*".

### Notify Human Resources of Elections

After any plan-type election has been made, the employee is returned to the Enrollment Summary page to continue the selection process, and the process is repeated for each available benefit. After completing all elections, employees submit their choices and a notification is sent to the HR administrator.

## Pages Used to Enroll in Benefits

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Benefits Enrollment - Open Enrollment - Information | W3EB_ENR_INFO | Self Service, Benefits, Benefits Enrollment<br><br>Click the Information icon on the Benefits Enrollment page. | View enrollment information. After your initial enrollment, the only time you can change your benefit choices is during open enrollment or a qualified family status change. This page provides you with additional information about your enrollment. |
| Benefits Enrollment - Open Enrollment | W3EB_ENR_SELECT | Self Service, Benefits, Benefits Enrollment<br><br>Click the Select button on the Benefits Enrollment page. | View enrollment information and information about an enrollment event. The enrollment process is initiated when eligibility and event rules have been processed to produce a list of valid benefit choices. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Benefits Enrollment - Open Enrollment (summary) | W3EB_ENR_SUMMARY | Click the Select button on the Benefits Enrollment page. | Review benefit plan elections. This page displays which benefit options are open for edits. All of your benefit changes are effective as of the date of the benefit change event. Your enrollment is not complete until you submit your choices to the Benefits Department. |
| Benefits Enrollment - Medical | W3EB_ENR_1X_ELECT | Click the Edit button for a Medical plan on the Benefits Enrollment - Open Enrollment pages. | Review or elect health ( medical) plan-type benefits. |
| Benefits Enrollment - Medical (summary) | W3EB_ENR_1X_SMRY | Click the Overview of All Plans link on the Benefits Enrollment - Medical page. | View all plans, coverage levels, and costs condensed into a single grid. |
| Benefits Enrollment - Life<br><br>Benefits Enrollment - Supplemental Life<br><br>Benefits Enrollment - Dependent Life<br><br>Benefits Enrollment - AD and D<br><br>Benefits Enrollment - Dependent AD and D | W3EB_ENR_2X_ELECT | • Click the Edit button for a Life plan on the Benefits Enrollment - Open Enrollment pages.<br><br>• Click the Edit button for a Supplemental Life plan on the Benefits Enrollment - Open Enrollment pages.<br><br>• Click Edit button for a Dependent Life plan on the Benefits Enrollment - Open Enrollment pages.<br><br>• Click Edit button for an AD and D plan on the Benefits Enrollment - Open Enrollment pages.<br><br>• Click Edit button for a Dependent AD and D plan on the Benefits Enrollment - Open Enrollment pages. | Enroll dependents in life insurance plans. |
| Benefits Enrollment - Long Term Disability<br><br>Benefits Enrollment - Short Term Disability | W3EB_ENR_357X_ELCT | • Click the Edit button for a Long-Term Disability plan on the Benefits Enrollment - Open Enrollment pages.<br><br>• Click the Edit button for a Short-Term Disability plan on the Benefits Enrollment - Open Enrollment pages. | Use the disability pages to enroll in disability benefits. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Benefits Enrollment - 401(k)<br><br>Benefits Enrollment - Profit Sharing<br><br>Benefits Enrollment - Employee Stock Purchase | W3EB_ENR_4X_ELECT | • Click the Edit button for a 401(k) plan on the Benefits Enrollment - Open Enrollment pages.<br><br>• Click the Edit button for a Profit Sharing plan on the Benefits Enrollment - Open Enrollment pages.<br><br>• Click the Edit button for an Employee Stock Purchase plan on the Benefits Enrollment - Open Enrollment pages. | Enroll in savings plan benefits. |
| Benefits Enrollment - Leave Plans | W3EB_ENR_357X_ELECT | Click the Edit button for an leave plan on the Benefits Enrollment - Open Enrollment pages. | Enroll in leave plan benefits. |
| Flex Spending Health<br><br>Flex Spending Dependent Care | W3EB_ENR_6X_ELECT | Click the Edit button for a flexible spending account plan on the Benefits Enrollment - Open Enrollment pages. | Enroll in FSA plan benefits. |
| Flex Spending Health ( worksheet)<br><br>Flex Spending Dependent Care (worksheet) | W3EB_ENR_6X_WKSHT | Click the Worksheet link on the Flex Spending Health or Flex Spending Dependent Care page. | Estimate per-pay-period contributions. |
| Benefits Enrollment - Pension Plan | W3EB_ENR_8X_ELECT | Click the Edit button on any Pension line on the Benefits Enrollment - Open Enrollment pages. | Enroll in pension plan benefits. |
| Benefits Enrollment - Vacation Buy<br><br>Benefits Enrollment - Vacation Sell | W3EB_ENR_9X_ELECT | Click the Edit button for a vacation buy or sell plan on the Benefits Enrollment - Open Enrollment pages. | Enroll in vacation plan benefits. |
| Submit Benefit Choices | W3EB_ENR_SUBMIT | Click the Submit button on the Benefits Enrollment - Open Enrollment or Benefit Enrollment Summary page. | Submit your benefit choices to the system. |
| Submit Confirmation | W3EB_ENR_CONFIRM | Click the Submit button on Submit Benefit Choices page. | Confirm that your benefit choices have been submitted to the system. |

## Related Links

Suppressing Plan Type Information

## Chapter 4

# Reviewing Benefit Information

## Reviewing and Editing Health Plan Information

Employees enter the health plan pages from the Benefits Summary page by clicking any health plan link that they want to review, such as medical, dental, vision, and so on. Each of these pages displays more detailed information about the specific plan type, and includes links to provider pages, employee handbooks, and dependent information pages.

These topics assume that the employee has completed the enrollment process and is accessing the Health Plan pages to review health plan information.

### Pages Used to Review and Edit Health Plan Information

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Health Care Summary | W3EB_GRID | Self Service, Benefits, Benefits Information, Health Care Summary, Health Care Summary | Review health plan coverage. |
| Medical<br><br>Dental<br><br>Vision<br><br>Domestic Partner Medical | W3EB_HEALTH_PLANS | • Select Medical on the Health Care Summary page.<br>• Select Dental on the Health Care Summary page.<br>• Select Vision on the Health Care Summary page.<br>• Select Domestic Partner Medical on the Health Care Summary page. | Use the Medical page to review medical plan coverage. Use the Dental page to review dental plan coverage. Use the Vision page to review vision plan coverage. Use the Domestic Partner Medical page to review domestic partner medical plan coverage. |
| Health Care Dependent Summary | W3EB_DEPSMRYBYNM | Self Service, Benefits, Dependents and Beneficiaries, Health Care Dependent Summary, Health Care Dependent Summary | Review dependents covered under health plans. |

#### Related Links

Understanding the eBenefit Enrollment Process

# Reviewing Insurance Plan Information

This section assumes that the employee has completed the enrollment process and is accessing insurance plan pages to review insurance plan information or to modify his or her beneficiary allocations.

Pages displaying employee insurance plans are presented in a manner that enables the user to navigate from summary level pages to more detailed information by clicking the appropriate insurance plan links.

## Pages Used to Review Insurance Plan Information

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
| --- | --- | --- | --- |
| Insurance Summary | W3EB_GRID | Self Service, Benefits, Insurance Summary, Insurance Summary | Display summary information about all insurance plan types for which you are enrolled. This page includes links to plan-type detail pages and a link to the enrollment page. |
| Life<br><br>Supplemental Life<br><br>AD and D<br><br>Dependent AD and D<br><br>Dependent Life<br><br>Supplemental AD and D | W3EB_LIFEADD_MAIN | Click Type of Benefit link for the appropriate insurance on the Insurance Summary page. | Use the Life page to display information about your life insurance plan and access associated plan beneficiaries. Use the Dependent Life page to review dependent life insurance information. Use the Dependent Life AD/D page to review dependent AD/D insurance information. |
| Change Current Beneficiaries and Allocations | W3EB_LFE_CHG_ALLOC | Click Edit button on the appropriate insurance page. | View and update allocation information. |
| Short-Term Disability<br><br>Long-Term Disability | W3EB_DISAADD_MAIN | Click Type of Benefit link for the appropriate disability insurance on the Insurance Summary page. | Use the disability pages to display information about your disability insurance plan. |
| Insurance Beneficiary Summary | W3EB_LIFINSALLBYNM | Self Service, Benefits, Dependents and Beneficiaries, Insurance Beneficiary Summary, Insurance Beneficiary Summary | Review beneficiary insurance information and allocations. |

# Reviewing Savings Plan Information

Savings plan pages enable employees to access information about their savings plans. They can view information about their benefit selections, and then make any changes that are allowed by an organization's program rules.

## Pages Used to Review Savings Plan Information

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Savings Summary | W3EB_GRID | Self Service, Benefits, Benefits Information, Savings Summary, Savings Summary | Review summary information about savings plans. |
| 401(k)<br><br>Profit Sharing<br><br>Employee Stock Purchase<br><br>Pension Plan | W3EB_VIEWSAVINGS | Click a Type of Benefit savings plan link on the Savings Summary page. | Review information about your savings plan, review covered beneficiaries, and change fund allocations |
| Change Current Savings Plan Contributions | W3EB_SAVPLAN1 | Click the Edit button in the Current Contributions section of the savings plan page. | Change current plans contributions. |
| View Savings Allocations<br><br>Change Current Fund Allocations | W3EB_SAVEVWFUND | • Click Fund Allocations on the savings plan pages.<br><br>• Click Change Current Fund Allocations on the savings plan pages. | Review savings plans fund allocations and access pages that enable changes to fund allocations. |
| Change Current Fund Allocations | W3EB_SAVPLAN3_WRK | Click the Change Current Fund Allocations link on the Fund Allocations page. | Change fund allocations. |
| Savings Contribution Summary | W3EB_VWALLSAVCONTR | Self Service, Benefits, Benefits Information, Savings Contribution Summary, Savings Contribution Summary | View savings contributions for all plans. |
| Change Current Beneficiaries and Allocations | W3EB_SAVPLAN4_WRK | Click the Edit button in the Covered Beneficiaries section of the specific savings plan page. | Change savings plan beneficiary allocations. |

# Calculating Pension Estimates

Employees use the Pension Estimates self-service transaction page to calculate and view their pension benefit estimates. They can create separate estimates to illustrate how different retirement dates could affect the pension benefit amount.

This section discusses how to enter pension estimate parameters.

**Note:** Only customers who have licensed PeopleSoft Pension Administration can access the transactions described in this section.

## Pages Used to Set Up and Calculate Pension Estimates

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Self Service Calc Defaults | PA_SSV_DEFAULTS2 | Set Up HRMS, Product Related, Pension, Self Service Calc Defaults, Self Service Calc Defaults | Define parameters for the Estimate Pension self-service transaction. |
| Pension Estimates | PA_I_ESTIMATE | Self Service, Benefits, Benefits Information, Pension Estimates, Pension Estimates | Enter information to run the Estimate Pension calculation. |
| Pension Plan Estimates - Payment Options Summary | PA_I_RESULTS | After you have calculated the estimated pension, click Accept on the Disclaimer page. | Display a summary of the plans for which you qualify. This page appears only if you are eligible for more than one plan. |
| Pension Plan Estimates − Payment Options Details | PA_I_RESULTS_PLAN | Click the link on the Payment Options Summary page. | Display a list of all the estimated benefit payment options for a specified plan. If you are eligible only for one plan, the system bypasses the Pension Estimates - Payment Options Summary page and directly accesses the user to the Pension Plan Estimates − Payment Options Details page. |
| Optional Forms Description | PA_I_OPFORM_DISP | Click the Descriptions of Options for Forms of Payment link on the Pension Estimates - Payment Options Details page. | Display a description of the payment options the company has defined for the available pension plans. |

## Self Service Calculation Defaults Page

Use the Self Service Calc Defaults page (PA_SSV_DEFAULTS2) to define parameters for the Estimate Pension self-service transaction.

### Navigation

Set Up HRMS, Product Related, Pension, Self Service Calc Defaults, Self Service Calc Defaults

**Image: Self Service Calc Defaults page (1 of 3)**

This example illustrates the fields and controls on the Self Service Calc Defaults page.

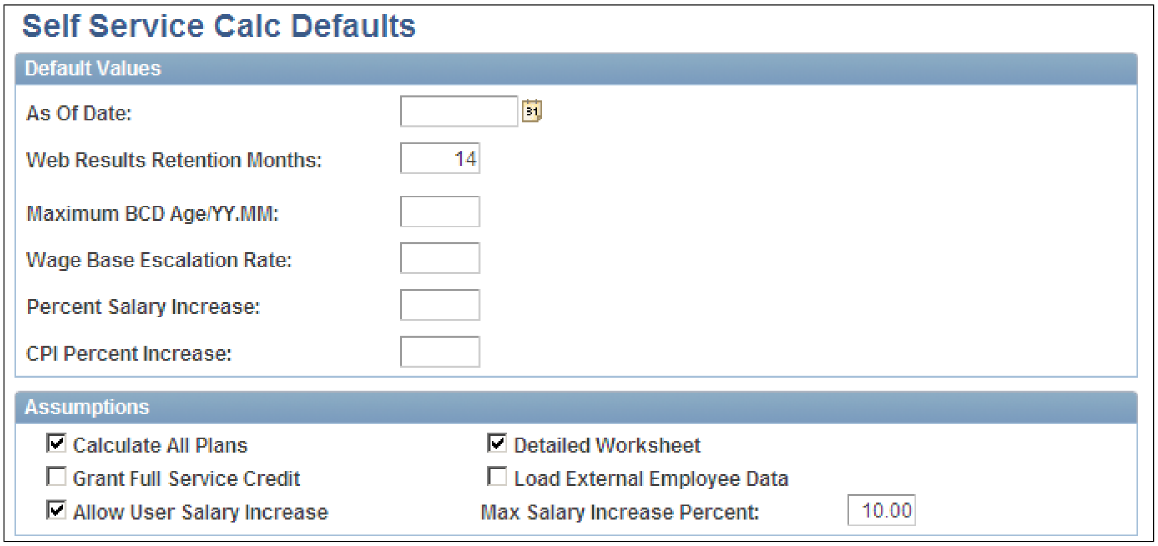



**Image: Self Service Calc Defaults page (2 of 3)**

This example illustrates the fields and controls on the Self Service Calc Defaults page (2 of 3).

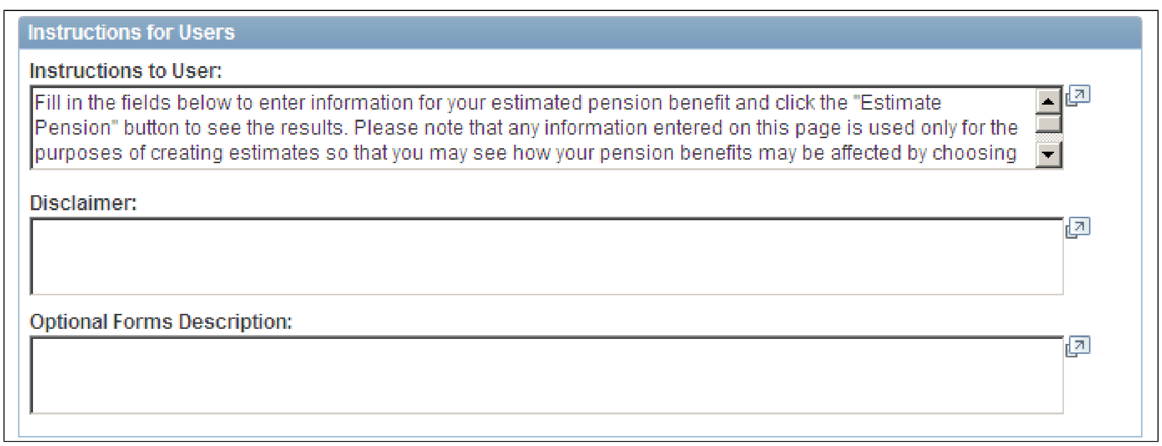
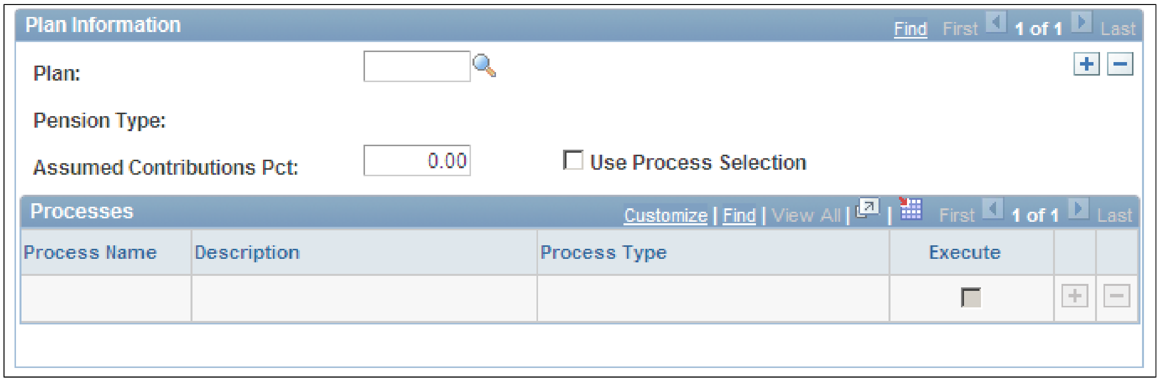


**Image: Self Service Calc Defaults page (3 of 3)**

This example illustrates the fields and controls on the Self Service Calc Defaults page (3 of 3).




## Default Values

**As Of Date**

Because your plan rules are effective-dated, you need to enter an as of date for the rules. If you are reproducing a past estimate, this date ensures that you use only the data that was available at the time.

**Web Results Retention Months**

Enter the number of months that you want the database to retain the user's calculation results. Every time the user runs this Estimate Pensions calculation, it replaces the previous calculation results.

**Maximum BCD Age/YY.MM (maximum benefit commencement date age)**

Enter the maximum BCD age in YY.MM format.

**Wage Base Escalation Rate**

Enter the wage base escalation rate. The wage base escalation rate is the assumed rate of increase in the taxable wage base. This is used for Social Security calculations and it can also affect other calculation components, depending on the plan rules.

**Percent Salary Increase**

Enter the salary increase percentage. The salary increase percentage is the assumed rate of increase in periodic earnings.

**CPI Percent Increase (consumer price index percent increase)**

Enter the CPI percent increase. The CPI percent increase is the assumed rate of increase in the CPI-W table. This is used for Social Security benefit increases.

## Assumptions

**Calculate All Plans**

Select to have the system use all pension plans that have been defined in your Pensions Administration system.

**Detailed Worksheet**

Select to preserve intermediate results for reporting purposes.

| | |
|---|---|
| **Grant Full Service Credit** | Select to have the calculation give the employee full credit for all the service that was forfeited because of a withdrawal of contributions. |
| **Load External Employee Data** | Select to have the the system run your own process to bring relevant employee data into the calculation linkage, where it is available to all the pension functions. |
| **Allow User Salary Increase** | Select to enable the user to select his or her own projected salary increase for use in the Estimate Pension calculation. |
| **Maximum Salary Increase Percent** | If you selected the Allow User Salary Increase check box, enter a maximum salary increase percent limit. |

## Instructions for Users

| | |
|---|---|
| **Instructions to User** | Enter any instructions that you want the user to read. These instructions appear at the top of the Estimate Pension page. |
| **Disclaimer** | Enter information that appears to the user at the top of the Disclaimer page. |
| **Optional Forms Description** | Enter payment descriptions that users access by clicking the Descriptions of Options for Forms of Payment button on the Pension Plan Estimate - Eligible Plans page. |

## Plan Information

| | |
|---|---|
| **Plan** | Enter the pension plans that your organization wants to make available to the users of the Estimate Pensions calculation. Only eligible plans appear to the user. |
| **Pension Type** | Displays the pension type. |
| **Assumed Contributions Pct (assumed contributions percentage)** | Enter the assumed contributions pct. When the calculation projects contributions, the system applies this percentage to projected earnings to arrive at future contribution amounts. |
| **Use Process Selection** | Select to single out specific processes to run. Scroll to the desired plan and select this check box. Then select the Execute box for each process you want to run. If you select a process that depends on values obtained from previous processes, be sure that you run those previous processes as well. |

## Plan Information - Processes

| | |
|---|---|
| **Process Name** | The process name is the name that your organization has assigned to the specific process; the description follows. |
| **Process Type** | The process type tells you how your organization defined the processing rules; you can disregard this field. |

**Execute** Select for every process that you want to run.

# Reviewing Flexible Spending Account Information

This section assumes that the employee has completed the enrollment process and is accessing FSA plan pages to review plan information. Pages displaying employee FSA plans enable the user to navigate from summary level pages to more detailed information by clicking the appropriate plan links.

*Flexible spending accounts* (FSAs) are plans that enable employees to save money on out-of-pocket health or dependent care expenses by enabling them to pay with pretax dollars. Two types of accounts exist:

- Health Care Spending Account (HCSA). Employees can elect to contribute money on a pretax basis to this type of account and later reimburse themselves for certain qualifying medical expenses.
- Dependent Care Spending Account (DCSA). Employees contribute pretax dollars into this account and use it to reimburse themselves for day care expenses.

## Pages Used to Review FSA Account Information

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Flexible Spending Accounts | W3EB_FSA_ACCT_LIST | Self Service, Benefits, Benefits Information, Flexible Spending Accounts, Flexible Spending Accounts | Review flexible spending accounts activity. |
| Flexible Spending Account Review | W3EB_FSA_ACCT_DTLS | Click any Spending Account link on the Flexible Spending Accounts page. | Review details of flexible spending accounts. |
| Flexible Spending Account Claim Details | W3EB_FSA_CLAIM_DTL | Select any Detail link under Claim History on the Flexible Spending Account Review page. | Review details of flexible spending accounts. |
| Flexible Spending Account Payment Details | W3EB_FSA_CLAIMPYMT | Click a link under Claim History on the Flexible Spending Account Review page. | Review details about FSA claim payments. |
| Flexible Spending Account Payment Details | W3EB_FSA_PYMTCLAIM | Click the Detail link under Payment History on the Flexible Spending Account Review page. | Review details about FSA payments. |

# Reviewing Dependent and Beneficiary Information

Dependent/beneficiary pages that are specific to a given plan type are discussed in their respective topics. Employees use these pages to view and edit information about their dependents and beneficiaries.

## Pages Used to Review Dependent and Beneficiary Information

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Dependent and Beneficiary Coverage Summary | W3EB_DEPBEN_SUM | Self Service, Benefits, Dependents and Beneficiaries, Dependent/Beneficiary Coverage | Display summary dependent/ beneficiary benefit information. |
| Dependent and Beneficiary Information | W3EB_PERS_DTA_SMRY | Self Service, Benefits, Dependent/Beneficiary Info, Dependent and Beneficiary Information | Display a summary of dependent and beneficiary personal information. |
| Dependent/Beneficiary Personal Information | W3EB_DEPBEN_DETAIL | Click any name in the information section of the Dependent and Beneficiary Summary pages. | Review and update detailed dependent and beneficiary personal information. |

## Chapter 5

# Managing Life Events

## Understanding Life Events

Life Events transactions can streamline the life event process for employees by enabling them to update personal data and then change their benefit enrollments, all from one self-service transaction. Peoplesoft eBenefits, by default, delivers four major life event transactions that have immediate impact on benefits enrollment of an employee:

- Getting married
- Giving birth to a child
- Adopting a child
- Getting divorced

In addition to the out-of-the-box life events, benefits administrators can create other life events based on the requirements of their organization. To create a life event, benefits administrators can:

- Define a life event template and then create action items that form part of the template.
- Clone an existing life event to create a new life event with similar requirements.

## Defining Life Event Rules

These topics provide overview and setup information for life event rules.

Use the Life Event Rules (W3EB_LE_RULES) component to set up life event rules.

### Page Used to Define Life Event Rules

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Life Event Rules | W3EB_LE_RULES | Set Up HCM, Product Related, eBenefits, Life Event , Life Event Rules, Life Event Rules | Set up rules that control how data and information is processed for life events such as changes in marital status, birth, or adoption. |

### Understanding Life Event Rules

Life Event Rules enable organizations to control what an employee can perform on a life event. By default, Peoplesoft eBenefits supports four Life Event Types: Marriage, Birth, Adoption, and Divorce.

Customers can add new life event types and define a set of rules for each life event type according to the practices established by the organization.

Life event rules enable organizations to control whether an employee can automatically update the HR database while processing a life event, based on the practices established by the organization.

The following table summarizes how the HR database is updated using the life event rules that are defined on the Life Events Rules page, what applications are selected on the Installation table, and other flags that are set in the HR database.

| ***Update to HR Database*** | ***Requirement*** |
| --- | --- |
| Create BAS_ACTIVITY trigger | • Benefits Administration is selected on the Installation Table.<br>• The employee has at least one job managed by PeopleSoft Benefits Administration as of the life event effective date.<br>• Allow Event Creation is selected on the Life Event Rules page.<br>• The employee enters the transaction within the period described by the Maximum Days to Notify parameter. |
| Create COBRA_ACTIVITY trigger | If an employee is managed by PeopleSoft Base Benefits, a COBRA activity is triggered when:<br>• COBRA Administration is selected on the Installation Table.<br>• Benefits Administration is not selected on the Installation Table.<br>• Proof Requiredis not selected on the Life Events Rules page.<br>If the employee is managed by PeopleSoft Benefits Administration, a COBRA Activity is triggered when:<br>• Benefits Administration is selected on the Installation page.<br>• The employee has at least one job managed by PeopleSoft Benefits Administration as of the Life Event effective date.<br>• Proof Required is not selected on the Life Event Rules page.<br>• Allow Event Creation is selected on the Life Event Rules page.<br>• A COBRA action code is entered on the Life Event Rules page.<br>• The Benefits Administration event finalizes. |
| Employee's marital status is updated in the PERS_DATA_ EFFDT table | • For marital status change only.<br>• Proof Required is not selected on the Life Event Rules page. |

| ***Update to HR Database*** | ***Requirement*** |
| --- | --- |
| Current spouse's marital status is changed to Divorced and relationship is changed to Ex Spouse in the DEPENDENT_ BENEF table | • The Life Event Type is *Divorce.*<br>• Proof Required is not selected on the Life Event Rules page. |

**Note:** If you have purchased PeopleSoft eProfile or PeopleSoft eProfile Manager Desktop and have set up the Workflow Configuration for self-service transactions, setting these life event rules will override the rules that you set for the marital status transaction on the Workflow Configuration page.

## Life Event Rules Page

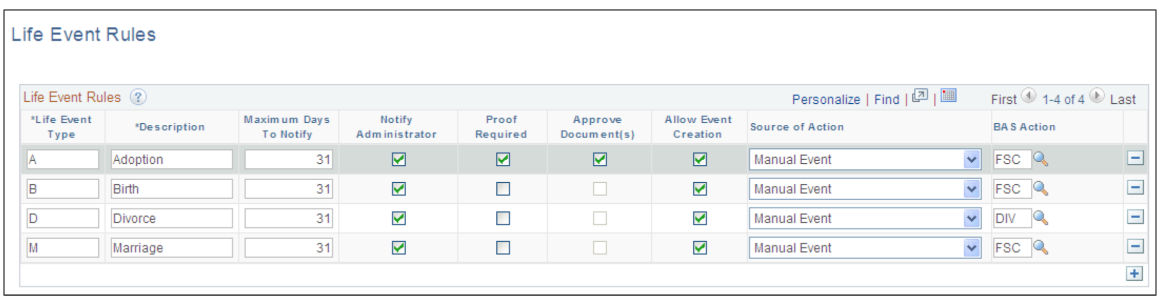
Use the Life Event Rules page (W3EB_LE_RULES) to set up life event rules that affect how data and information is processed for changes in marital status, birth, or adoption.

**Navigation**

Set Up HCM, Product Related, eBenefits, Life Event, Life Event Rules, Life Event Rules

**Image: Life Event Rules page**

This example illustrates the fields and controls on the Life Event Rules page. You can find definitions for the fields and controls later on this page.




**Life Event Type**

Specify the life event type. Four different types of life events are available by default - Adoption, Birth, Divorce, and Marriage. You can modify existing life event types or define new life event types according to your organization's needs.

**Maximum Days To Notify**

Specify the maximum number of days that can elapse between the date of the event and the date that the transaction is entered by the employee through the self-service transaction. Exceeding this time period does not prevent the employee from entering basic information, but a BAS Activity trigger will not be created even if Allow Event Creation is selected. If the employee enters the event after the maximum days allowed, the system displays a message on a self service page notifying the employee that his or her benefit elections cannot be changed.

**Notify Administrator**

Select to send an e-mail to the benefits administrator when this type of life event occurs informing him or her of the event.

Additionally, if Proof Required is selected for an event, the administrator is automatically notified of the event regardless of the setting of Notify Administrator.

**Proof Required**

Select to indicate whether this type of life event requires proof before it is processed. If this field is selected, the HR database is not updated, BAS Activity and Cobra Activity triggers are not generated, and the administrator is notified of the event by e-mail.

**Approve Document(s)**

Select to enable the benefits administrator to approve, deny, or push back the uploaded life event documents. The employee can proceed to benefits enrollment only after the benefits administrator approves the document(s).

**Allow Event Creation**

This field is available if Benefits Administration is selected on the Installation table and Proof Required is not selected. A BAS Activity trigger is created only if the employee has at least one job managed by Benefits Administration as of the life event effective date.

Selecting this field indicates that you want the system to trigger a BAS Activity for this type of life event and allows the employee to change benefit election through the eBenefit election pages.

**Source of Action**

This field is available and is required if Benefits Administration is selected on the Installation table and Allow Event Creation is selected. For a BAS Activity trigger to be created, you must enter *Manual* in the field.

**BAS Action**

This field is available and required if Benefits Administration is selected on the Installation table and Allow Event Creation is selected. Enter a BAS action code that is appropriate for this life event. Typically, this is *FSC* - Family Status Change.

**COBRA Action**

This field is available if both COBRA Administration andBenefits Administration are selected on the Installation table. This field is used only when the life event is for an employee managed by PeopleSoft Benefits Administration,Create Event is selected, and the resulting Benefits Administration event should create a COBRA Activity trigger when it finalizes.

## Configuring A Life Event

Configuring a life event includes:

- Defining a life event template.
- Creating action items that form part of the template.

These topics provide an overview of life event templates and life event action items, and discuss how to:

- Define a life event template.
- Identify life event action items that form part of the template.
- Define sub-steps for an action item.
- Specify dependent action items for an action item.

## Understanding A Life Event Template

A template corresponds to a life event category. You can define a life event template and then specify action items that form part of the template, based on your business requirements. For example, you can define an Adoption Event template and specify action items that need to be processed to complete the adoption life event. Employees can then use the available life event template to process their life events.

Use the Template (W3EB_LE_LIST) component to set up life events.

## Understanding Life Event Action Items

Action items constitute the steps that an employee needs to perform, in order to complete a life event. Customers can define and group action items to configure a life event based on their business needs.

You can assign the order of action items within a life event, indicate whether an action item is required or not, define parent and child (subsidiary) action items, and specify a dependent relationship to indicate if an action item can be started only after completing another item.

Use the Action Item (W3EB_LE_ITEM02) component to set up life event action items.

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**Note:** In addition to defining a life event template and creating action items for the template manually, you can also duplicate an existing life event with similar action items by cloning a life event. You can select the *Life Event Template* type to clone, and then modify the cloned life event to suit the business needs. For more information, see "Cloning Benefit Programs, Coverage Formulas, Eligibility Rules, Event Rules, or Life Event Templates *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*".

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## Pages Used to Configure Life Event Templates and Action Items

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Template | W3EB_LE_LIST | Set Up HCM, Product Related, eBenefits, Life Event, Template, Template | Define life event templates. |
| Action Item | W3EB_LE_ITEM02 | Set Up HCM, Product Related, eBenefits, Life Event, Action Item, Action Item | Create action items that define the steps an employee will perform to record and complete a life event. |
| Child Action item | W3EB_LE_ITEM_SEC | Select the Child Action Item link on the Action Item page. | Create sub-steps for a life event action item. |

| **Page Name** | **Definition Name** | **Navigation** | **Usage** |
|---|---|---|---|
| Dependent Action Item | W3EB_LE_DEPEND_SEC | Select the Dependent Action Item link on the Action Item page. | Specify which life event action items must be completed by the employee prior to completing this action item. |

## Template Page

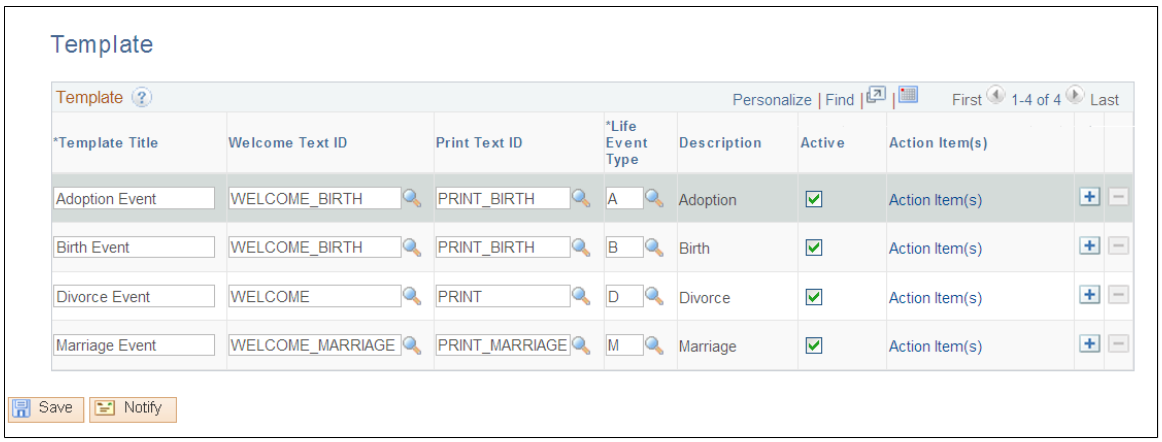
Use the Template page (W3EB_LE_LIST) to define a life event template.

**Navigation**

Set Up HCM, Product Related, eBenefits, Life Event, Template, Template

**Image: Template page**

This example illustrates the fields and controls on the Template page. You can find definitions for the fields and controls later on this page.




**Template Title**

Enter a description for the life event template. The template title is the high level key you will use to create action items for a life event. Action items define the transactions a user may need to process to record a life event change, such as updating marital status, changing benefits enrollment, or uploading a life event document.

The template title will also be displayed as the header of the Life Event component.

**Welcome Text ID**

Specify the text to be displayed on the Welcome page of the Life Event component. Text IDs and the corresponding text are maintained in the Text Catalog.

**Note:** Only those text IDs where the owner ID is equal to *HEB* and the sub ID is equal to *LE* on the Text Catalog are available for selection.

| | |
|---|---|
| **Print Text ID** | Specify the text to be displayed on the completion and exit page of the Life Event component. |
| **Life Event Type** | Specify a life event type for each template. The HCM application provides Marriage, Birth, Adoption, and Divorce life events by default. In addition, you can create other life events specific to your organization using the Life Event Rules table. |
| **Description** | Displays the description for the selected life event type. |
| **Active** | Select whether this template is active or inactive. Only active templates will be available for selection on the Event Category page, and hence included in the life event selection menu available to employees to process their life events.<br><br>For more information, see: Setting Up the Life Event Selection Menu |
| **Action Item(s)** | Select this link to access the Action Item component to create a list of transaction pages that should be part of the life event template. Action items are the various tasks a user may need to complete to record a life event change. |

## Action Item Page

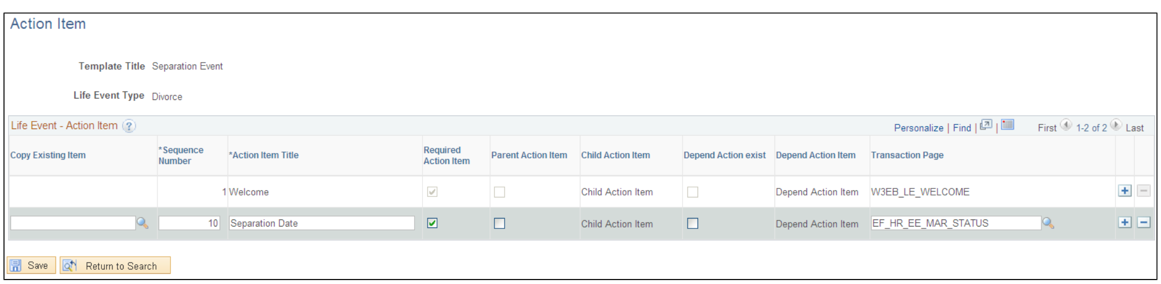
Use the Action Item page (W3EB_LE_ITEM02) to create action items. Action items are the steps to be processed by an employee to record and complete a life event.

**Navigation**

Set Up HCM, Product Related, eBenefits, Life Event, Action Item, Action Item

**Image: Action Item page**

This example illustrates the fields and controls on the Action Item page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Copy Existing Item** | Copy an existing action item for reuse. To copy, select the action item from a list of all action items that have been created for other templates. This will copy all the fields from the selected action item with the exception of the Depend Action Exist and the Depend Action Item fields. |

The Copy Existing Item field is available only when you are managing a template created by your organization.

**Sequence Number**

Enter the order in which the list of action items, or pagelets, should appear in the Life Event component navigation in self service. The action items are listed in the increasing order of sequence number. When an action item is identified as a parent action item and has child action items associated with it, the sequence number of the parent action item must be lesser than that of the child action items.

**Action Item Title**

Enter the name of the action item. These titles will appear as links on the left-hand side navigation tree in the employee self service home page for this life event type.

**Required Action Item**

Select to indicate that the user is required to complete this transaction in order to save and complete the life event. If not selected, the user may complete the action item, but completing it is not mandatory in order to complete the life event.

**Parent Action Item**

Select to indicate that this action item has sub-steps. The parent action item serves as a heading that groups the child items. When you select this check box, the Transaction Page field is no longer available for the parent action item.

**Child Action Item**

Select this link when the Parent Action Item check box has been selected to open the Child Action Item page and enter the sequence numbers and transaction page information for each child item. Child items appear as subset items of a parent item. Child item sequence numbers must be greater than that of the parent item.

**Depend Action Exist**

Select this check box to indicate that the user must complete another task prior to the current task. For example, an employee may need to enter a child's birth date before being eligible to change benefit elections. This check box is not available until at least one other action item has been defined for this template.

**Depend Action item**

Select this link to open the Dependent Action Item page and select from a list of other action items you have identified for this template. The link and valid options are not available until at least one other action item has been defined for this template with a sequence number lower than this action item. The dependency item you select here must be completed by the user prior to completing this action item.

**Transaction Page**

Enter the transaction page that the user will access to perform this action item.

For more information about transaction/application pages and related content, see:*PeopleTools: PeopleSoft Applications User's Guide*

For more information about developing and deploying action items, see: *PeopleTools: Portal Technology*

## Child Action Item Page

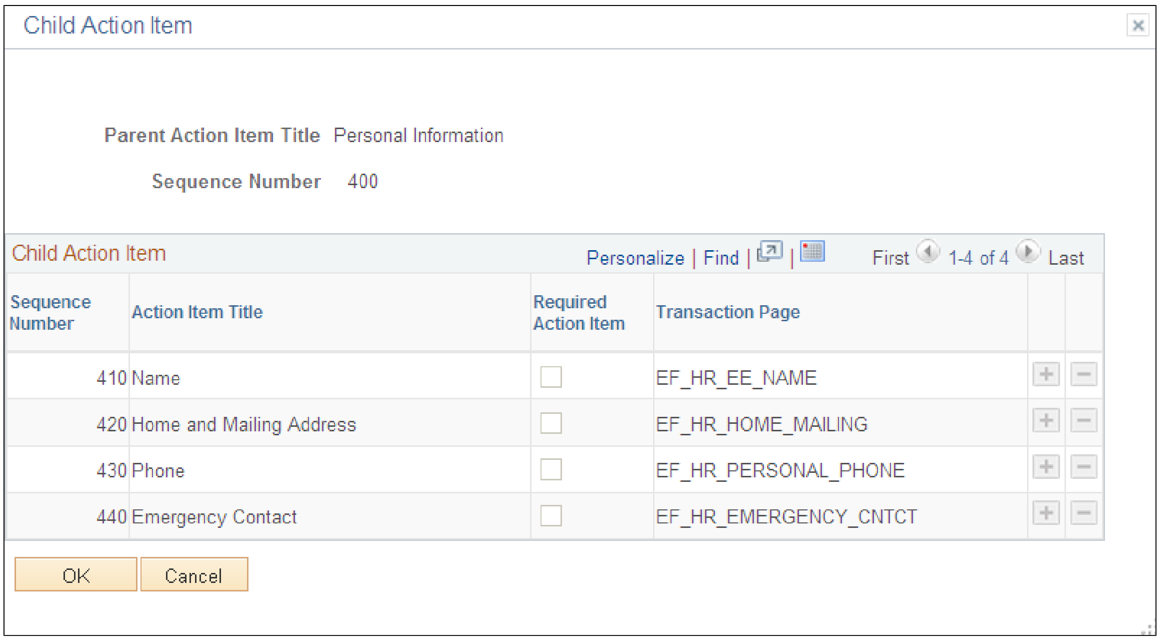
Use the Child Action Item page (W3EB_LE_ITEM_SEC) to define sub-steps of a life event action item. Child item sequence numbers should have a number greater than the parent item.

**Navigation**

Select the Child Action Item link on the Action Item page.

**Image: Child Action Item page**

This example illustrates the fields and controls on the Child Action Item page.




**Sequence Number**
Enter the order in which the child action items should be listed within the action item. The sequence number of the child action items must be greater than that of the parent action item.

**Action Item Title**
Enter the name of the action item. These titles will appear as pagelet links on the left-hand side navigation tree in the employee self service home page for this life event type.

**Required Action Item**
Select to indicate that the user is required to complete this transaction in order to save and complete the life event. When deselected, the user has the option to complete this task but does not need to in order to complete the event.

**Transaction Page**
Specify the transaction pagelet that the user will access to perform this action item.

## Dependent Action Item Page

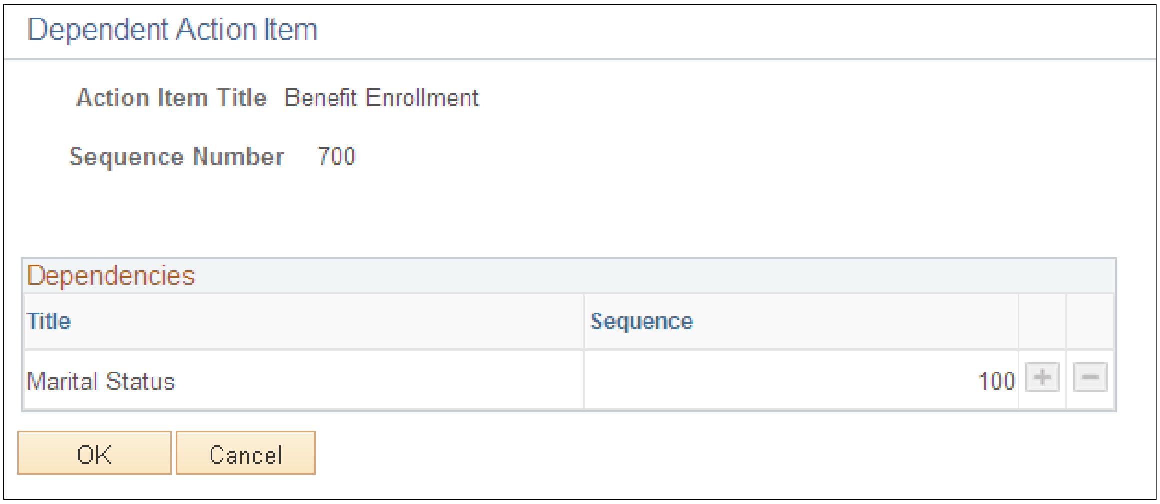
Use the Dependent Action Item page (W3EB_LE_DEPEND_SEC) to indicate if another action item must be completed by the user prior to processing this action item. The action item can be processed only after completing the action item on which it is dependent.

**Navigation**

Select the Dependent Action Item link on the Action Item page.

**Image: Dependent Action Item page**

This example illustrates the fields and controls on the Dependent Action Item page. In this example, the Marital Status action item must be completed before starting Benefit Enrollment.




| | |
|---|---|
| **Title** | Select the action item which the current action item is dependent on. |
| **Sequence** | Indicates the sequence number of the selected action item. |

# Setting Up the Life Event Selection Menu

This topic discusses how to set up the Employee Self Service Life Event Selection menu.

The Employee Self Service Life Event Selection menu is the menu available to employees on the Life Event main page. You can define life event categories and link life event templates to each category, to set up the employee self service life event selection menu. The life event categories define the menu groups and the templates linked to them define the menu items. Employees can then select which life event to process from the available menu.

PeopleSoft eBenefits provides one category *EMPL* (Employee) by default, but you can define other categories relevant to your organization.

To set up the life event selection menu, use the Event Category (W3EB_LE_EVT_CAT) page.

## Page Used to Define the Life Event Selection Menu

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Event Category | W3EB_LE_EVT_CAT | Set Up HCM, Product Related, eBenefits, Life Event, Event Category, Event Category | Create life event categories for the employee self service life event selection menu. |

## Event Category Page

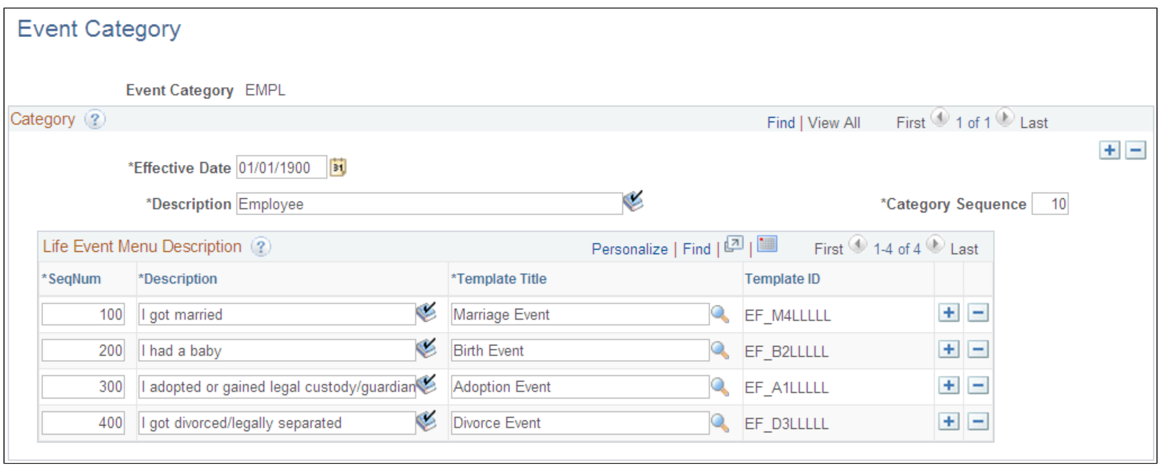
Use the Event Category page (W3EB_LE_EVT_CAT) to set up event categories that define the employee self service life event selection menu.

**Navigation**

Set Up HCM, Product Related, eBenefits, Life Event, Event Category, Event Category

**Image: Event Category page**

This example illustrates the fields and controls on the Event Category page.




**Category Sequence**

Enter the order in which the event categories should appear on the employee self service life event home page. The categories will be displayed on the home page based on the increasing order of the sequence number.

**SeqNum**

Enter a number to determine the order in which a life event should be displayed within the category, in the self service selection menu.

**Description**

Enter a description for the life event change that the user needs to perform. The life event home page displays these descriptions as radio buttons from which a user selects the required life event.

**Template Title**

Select from a list of active life event templates that have action items defined.

**Note:** A template associated with an event category cannot be modified or made inactive.

The same template may be used for multiple life event descriptions.

# Creating Life Event Descriptive Pages

These topics describe how to create life event descriptive pages.

## Understanding Life Event Descriptive Pages

Create life event descriptive pages to guide employees through the action items (pages) that they will need to complete for a self-service life event. After selecting a life event on the Life Event main page, the employee needs to follow a vertical pagelet containing action items to process the event. You can create the following life event descriptive pages:

- A Welcome page to include a greeting, a brief description of the steps involved in this event, and any additional information the employee may want to read before proceeding to the actual event.
- A custom Exit page to conclude the life event.

## Page Used to Create Life Event Descriptive Pages

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Maintain Text Catalog | HR_SSTEXT_TEXT | Set Up HCM, Product Related, eBenefits, Maintain Text Catalog, Maintain Text Catalog | Create life event descriptive pages. |

## Maintain Text Catalog Page

Use the Maintain Text Catalog page (HR_SSTEXT_TEXT) to create the descriptive pages. The Maintain Text Catalog page provides the flexibility to present custom instructions to the employees.

**Navigation**

Set Up HCM, Product Related, eBenefits, Maintain Text Catalog, Maintain Text Catalog

**Image: Maintain Text Catalog Page**

This example illustrates the fields and controls on the Maintain Text Catalog page. You can find definitions for the fields and controls later on this page.


## Field and Control Definitions

| | |
|---|---|
| **Description** | Enter the description for the text ID displayed on the life event descriptive page.<br><br>The text ID identifies a life event descriptive page. Different text IDs can be created for different life events. For example, you can set up a custom welcome text ID for Marriage and a different welcome text id for Birth. Additionally, you can modify the default text IDs for the welcome page (Welcome) and the exit page (Print). |
| **Effective Date** | Select a date from which the descriptive page is active. |

### Context Keys and Text

| | |
|---|---|
| **Life Event Type** | Select the life event type for which the descriptive page is being created. If the life event type is left blank, the text that you enter will be applicable to all life event types.<br><br>In the descriptive text box, enter the custom text to be displayed to the employee on the life event page. |

For more information about Text Catalog, see: Establishing Text Catalog Data

# Configuring the Employee Enrollment Summary Statement

These topics describe how to configure the Employee Enrollment Summary Statement.

## Understanding the Enrollment Summary Statement

After an employee completes a life event, a new Benefit Preliminary Enrollment Summary Statement report will be generated.

This report provides a summary of the employee's benefit election data and enables the employee to view the new elections after a life event change. The enrollment statement displays four main sections - the personal information, dependent information, investment, and dependent/beneficiary sections. You can configure the report to display or hide any of the four sections using the Enrollment Statement Controls setup page. The Enrollment Statement Controls setup page enables you to display or hide sections based on the life event type.

## Page Used to Configure the Employee Enrollment Summary Statement

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Enrollment Statement Controls | W3EB_SMRY_CNTRL | Set Up HCM, Product Related, eBenefits, Enrollment Statement Controls, Enrollment Statement Controls | Configure the preliminary benefit enrollment summary statement. |

## Enrollment Statement Controls Page

Use the Enrollment Statement Controls page (W3EB_SMRY_CNTRL) to configure the Benefit Preliminary Enrollment Summary Statement.

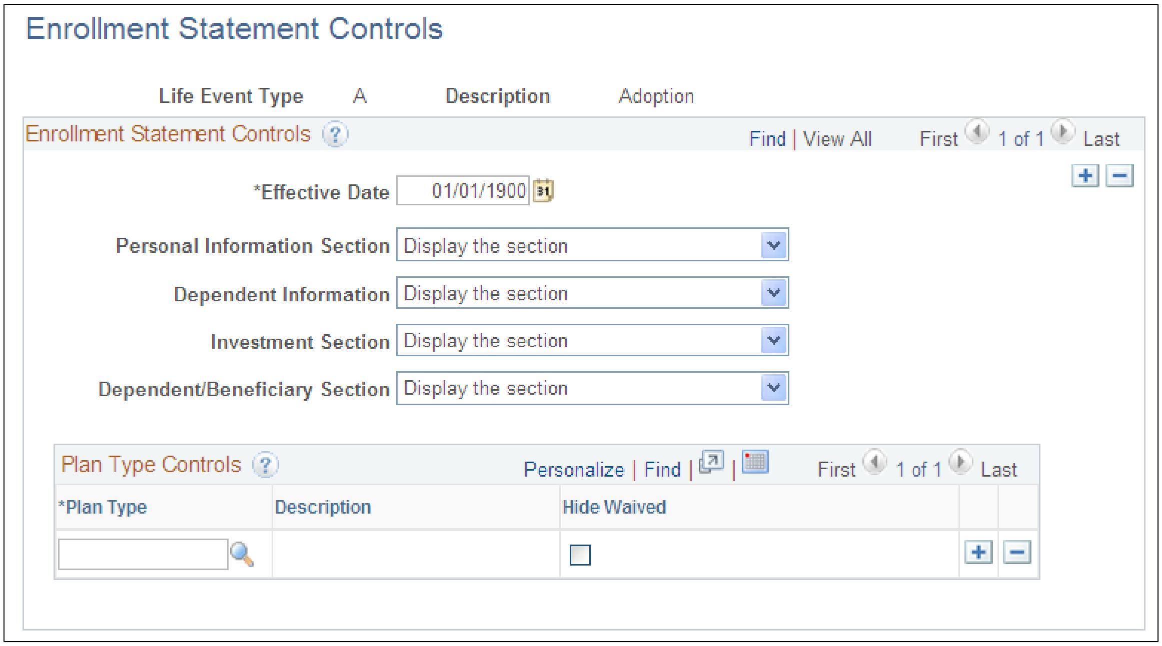
 

**Navigation**

Set Up HCM, Product Related, eBenefits, Enrollment Statement Controls, Enrollment Statement Controls

**Image: Enrollment Statement Controls Page**

This example illustrates the fields and controls on the Enrollment Statement Controls page. You can find definitions for the fields and controls later on this page.




## Field and Control Definitions

### Enrollment Statement Controls

| | |
|---|---|
| **Effective Date** | Select the effective date from which the enrollment statement controls take effect. |
| **Personal Information Section** | Select to always display or always hide this section in all reports. |
| **Dependent Information** | Select to always display this section, hide this section in all reports, or hide this section only when the employee does not have dependent or beneficiary information recorded in the system. |
| **Investment Section** | Select to always display this section or to hide this section when no investment allocations have been specified. |
| **Dependent/Beneficiary Section** | Select to always display this section or to hide this section when there are no dependents or beneficiaries enrolled under this employee’s benefit package. |

### Plan Type Controls

| | |
|---|---|
| **Plan Type** | Select a specific benefit plan type to be excluded from the Enrollment Summary Statement when an employee has opted to waive coverage. |
| **Hide Waived** | Select to exclude the plan from the Enrollment Summary report when coverage is waived. |

## Understanding Life Event Processing

Employees process a self service life event when there is a change in their benefits enrollment as a result of a life event, for example, change in marital status, child birth or adoption.

To process a life event, select your life event from the list of available life events. An activity guide process guides you through the required sub-steps or action items to complete the life event. An activity guide pagelet lists all action items within the life event. The status of each action item in the activity guide pagelet changes as you navigate through the item. Buttons available on each action item page enables easy navigation through the items, as well as to stop processing a life event temporarily and continue at a later point, or to cancel/delete the life event. When you complete a life event, the activity guide pagelet provides a visual indication that all the action items are complete.

You can perform the following activities while processing a life event:

- Upload documents required to process the life event. Based on the type of the employee life event being processed, the system displays the required document type(s) to be uploaded.
- Change benefits enrollment.
- Review your benefits election and go back to previous steps to make additional changes if necessary.

These topics describe how to process the following out-of-the-box life events:

- Marriage
- Child birth
- Adoption
- Divorce

**Note:** By default, four life events — Marriage, Child birth, Adoption, and Divorce are available out-of-the-box. Life events available to you will vary depending on the life events defined by your organization based on your business needs. Additionally, the action items within each life event may also vary depending on the modifications made to them by your organization.

## Processing the Marriage Event

Employees begin the Marriage life event process by navigating to the Life Events page and then selecting the marriage transaction.

After the employee accesses the transaction, the system displays the Change Status Date page on which the employee needs to enter the date of the marital status change. The Change Status Date page indicates the maximum number of days after the life event within which the employee needs to complete the self service life event. A series of pages that direct the employee through the life event process will be displayed. Rules that are set on the Life Event Rules page and the Action Items for the marital status change transaction determine which pages will be displayed by the system.

## Pages Used to Process the Marriage Event

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Welcome | W3EB_LE_WELCOME | Self Service, Benefits, Life Events<br><br>Select the I got married radio button on the Life Events page. Enter the date of marital status change on the Change Status Date page to navigate to the Welcome page. | Read the instructions on the Welcome page to initiate your Marriage life event. This page contains custom information about the life event. |
| Marital Status Change | HR_EE_MAR_STATUS | From the Welcome page, click Next at the top-right of the activity guide pagelet.<br><br>Alternatively, click the Marital Status link on the navigation pagelet at the left. | Enter changes in marital status and submit the changes. |
| Life Events — Document Upload | HR_ATT_DD_HDR | From the Marital Status Change page, click Next.<br><br>Alternatively, click Document Upload on the navigation pagelet. | Upload a proof document, for example, marriage certificate for the life event, or enter a note relevant to the marriage event. |
| Benefits Summary | W3EB_GRID | From the Life Events — Document Upload page, click Next.<br><br>Alternatively, click Benefit Summary on the navigation pagelet. | Review current benefits. |
| Name Change | HR_EE_NAME | From the Benefits Summary page, click Next.<br><br>Alternatively, click Personal Information, Name on the navigation pagelet. | Enter name change information. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Home and Mailing Address | HR_HOME_MAILING | From the Name Change page, click Next.<br><br>Alternatively, click Personal Information, Home and Mailing Address on the navigation pagelet. | Enter valid home and mailing addresses. |
| Phone Numbers | HR_PERSONAL_PHONE | From the Home and Mailing Address page, click Next.<br><br>Alternatively, click Personal Information, Phone on the navigation pagelet. | Enter valid phone numbers. |
| Emergency Contacts | HR_EMERGENCY_CNTCT | From the Phone Numbers page, click Next.<br><br>Alternatively, click Personal Information, Emergency Contact on the navigation pagelet. | Enter emergency contact information. |
| Add/Review Dependent/ Beneficiary | W3EB_DEPBEN_RVW | From the Emergency Contacts page, click Next.<br><br>Alternatively, click Dependent and Beneficiary on the navigation pagelet. | Update dependent/beneficiary information. |
| W-4 Tax Information | PY_IC_W4_DATA | From the Add/Review Dependent/Beneficiary page, click Next.<br><br>Alternatively, click Pay and Compensation, W4 Tax Information on the navigation pagelet. | Review and change tax information. |
| Direct Deposit | PY_IC_DD_LIST | From the W-4 Tax Information page, click Next.<br><br>Alternatively, click Pay and Compensation, Direct Deposit on the navigation pagelet. | Review direct deposit information. |
| Benefit Enrollment | W3EB_LE_ENROLL | From the Direct Deposit page, click Next.<br><br>Alternatively, click Benefit Enrollment on the navigation pagelet. | Start benefits enrollment and enroll for available benefits.<br><br>**Note:** A dependency relationship is defined on the Marital Status Change action item and benefit enrollment. Hence, benefits enrollment will be available only if you have updated and submitted the martial status. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Benefits Election Review | W3EB_LE_CONFIRM | From the Benefit Enrollment page, click Next.<br><br>Alternatively, click Benefit Election Review on the navigation pagelet. | Review benefits election. Click Print to generate a preliminary Benefits Enrollment Summary Statement containing your personal information and information about dependent/ beneficiary enrollment, benefits elections, and investment choices.<br><br>Go back to any previous steps and make additional changes before completing the benefits enrollment. |
| Event Completion and Exit | W3EB_LE_PRINT | From the Benefits Election Review page, click Next.<br><br>Alternatively, click Event Completion and Exit on the navigation pagelet. | Complete and exit the life event. View confirmation of the life event process completion. Additionally, view custom information about any additional tasks that you need to do related to this life event.<br><br>When you click Complete, the system verifies whether all the required action items have been completed and displays an error message if any are incomplete. |

See product documentation for *PeopleTools: Workflow Technology* for related information.

# Processing the Child Birth Event

Employees begin the Child Birth transaction by navigating to Life Events and then selecting the I had a baby radio button. The system displays the Change Status Date page on which the employee needs to enter the date of child birth.

**Note:** An employee can also add a new spouse and other dependents from the life event for Marriage.

After the employee accesses the transaction, the system displays a series of pages that direct the employee through the life event process. Rules that are set on the Life Event Rules page and the Action Items for the Child Birth transaction determine which pages will be displayed by the system.

## Pages Used to Process the Child Birth Event

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
| --- | --- | --- | --- |
| Welcome | W3EB_LE_WELCOME | Self Service, Benefits, > Life Events<br><br>Select the I had a baby radio button on the Life Events page. Enter the date of child birth on the Change Status Date page to navigate to the Welcome page. | Read the instructions on the Welcome page to initiate your child birth event. This page contains custom information about the life event. |
| Birth Date | W3EB_BRTH_ADPT_DT | From the Welcome page, click Next at the top-right of the activity guide pagelet.<br><br>Alternatively, click the Birth Date link on the navigation pagelet at the left. | Enter the date of child birth and submit. |
| Life Events — Document Upload | HR_ATT_DD_HDR | From the Birth Date page, click Next.<br><br>Alternatively, click Document Upload on the navigation pagelet. | Upload a proof document, for example, birth certificate for the life event, or enter a note relevant to the event. |
| Benefits Summary | W3EB_GRID | From the Life Events — Document Upload page, click Next.<br><br>Alternatively, click Benefit Summary on the navigation pagelet. | Review your current benefits. |
| Dependent and Beneficiary Coverage Summary | W3EB_DEPBEN_SUM | From the Benefits Summary page, click Next.<br><br>Alternatively, click Dependent/Beneficiary Coverage on the navigation pagelet. | Review summary information about dependent/beneficiary benefits. |
| Add/Review Dependent/ Beneficiary | W3EB_DEPBEN_RVW | From the Dependent and Beneficiary Coverage Summary page, click Next.<br><br>Alternatively, click Update Dependent and Beneficiary on the navigation pagelet. | Update dependent/beneficiary information. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| W-4 Tax Information | PY_IC_W4_DATA | From the Add/Review Dependent/Beneficiary page, click Next.<br><br>Alternatively, click Pay and Compensation, W4 Tax Information on the navigation pagelet. | Review and change W-4 tax information. |
| Direct Deposit | PY_IC_DD_LIST | From the W-4 Tax Information page, click Next.<br><br>Alternatively, click Pay and Compensation, Direct Deposit on the navigation pagelet. | Review and change direct deposit information. |
| Benefit Enrollment | W3EB_LE_ENROLL | From the Direct Deposit page, click Next.<br><br>Alternatively, click Benefit Enrollment on the navigation pagelet. | Start benefits enrollment and enroll for available benefits.<br><br>**Note:** A dependency relationship is defined on the Birth Date action item and benefit enrollment. Hence, benefits enrollment will be available only if you have updated and submitted the birth date. |
| Benefits Election Review | W3EB_LE_CONFIRM | From the Benefit Enrollment page, click Next.<br><br>Alternatively, click Benefit Election Review on the navigation pagelet. | Review benefits election. Click Print to generate a preliminary Benefits Enrollment Summary Statement containing your personal information and information about dependent/ beneficiary enrollment, benefits elections, and investment choices.<br><br>Go back to any previous steps and make additional changes before completing the benefits enrollment. |
| Event Completion and Exit | W3EB_LE_PRINT | From the Benefits Election Review page, click Next.<br><br>Alternatively, click Event Completion and Exit on the navigation pagelet. | View confirmation of the child birth event completion. Additionally, view custom information about any additional tasks that you need to do related to this life event.<br><br>When you click Complete, the system verifies whether all the required action items have been completed and displays an error message if any are incomplete. |

# Processing the Adoption Event

Employees begin the Adoption transaction by navigating to Life Events and then selecting the I adopted or gained legal custody/guardianship of a child radio button. The system displays the Change Status Date page on which the employee needs to enter the date of adoption.

After the employee accesses the transaction, the system displays a series of pages that direct the employee through the adoption process. Rules that are set on the Life Event Rules page and the Action Items for the Adoption transaction determine which pages will be displayed by the system.

## Pages Used to Process the Adoption Event

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Welcome | W3EB_LE_WELCOME | Self Service, Benefits, > Life Events<br><br>Select the I adopted or gained legal custody/guardianship of a child radio button on the Life Events page. Enter the date of adoption on the Change Status Date page to navigate to the Welcome page. | Read the instructions on the Welcome page to initiate the adoption event. This page contains custom information about the life event. |
| Adoption Date | W3EB_BRTH_ADPT_DT | From the Welcome page, click Next at the top-right of the activity guide pagelet.<br><br>Alternatively, click the Adoption Date link on the navigation pagelet at the left. | Enter the date of adoption and submit. |
| Life Events — Document Upload | HR_ATT_DD_HDR | From the Adoption Date page, click Next.<br><br>Alternatively, click Document Upload on the navigation pagelet. | Upload a proof document, for example, adoption certificate, or enter a note relevant to the event.<br><br>When you upload a document, a notification is sent to the Benefits Administrator to approve the document. After the document is approved, you will receive an e-mail notification to return to the Adoption event to continue benefits enrollment. |
| Benefits Summary | W3EB_GRID | From the Life Events — Document Upload page, click Next.<br><br>Alternatively, click Benefit Summary on the navigation pagelet. | Review your current benefits. |

| **Page Name** | **Definition Name** | **Navigation** | **Usage** |
|---|---|---|---|
| Dependent and Beneficiary Coverage Summary | W3EB_DEPBEN_SUM | From the Benefits Summary page, click Next.<br><br>Alternatively, click Dependent/Beneficiary Coverage on the navigation pagelet. | Review summary information about dependent/beneficiary benefits. |
| Add/Review Dependent/ Beneficiary | W3EB_DEPBEN_RVW | From the Dependent and Beneficiary Coverage Summary page, click Next.<br><br>Alternatively, click Update Dependent and Beneficiary on the navigation pagelet. | Update dependent/beneficiary information. |
| W-4 Tax Information | PY_IC_W4_DATA | From the Add/Review Dependent/Beneficiary page, click Next.<br><br>Alternatively, click Pay and Compensation, W4 Tax Information on the navigation pagelet. | Review and change W-4 tax information. |
| Direct Deposit | PY_IC_DD_LIST | From the W-4 Tax Information page, click Next.<br><br>Alternatively, click Pay and Compensation, Direct Deposit on the navigation pagelet. | Review and change direct deposit information. |
| Benefit Enrollment | W3EB_LE_ENROLL | From the Direct Deposit page, click Next.<br><br>Alternatively, click Benefit Enrollment on the navigation pagelet. | Start benefits enrollment and enroll for available benefits.<br><br>**Note:** A dependency relationship exists between the Adoption Date action item and benefit enrollment. Hence, benefits enrollment will be available only if you have updated and submitted the adoption date. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Benefits Election Review | W3EB_LE_CONFIRM | From the Benefit Enrollment page, click Next.<br><br>Alternatively, click Benefit Election Review on the navigation pagelet. | Review benefits election. Click Print to generate a preliminary Benefits Enrollment Summary Statement containing your personal information and information about dependent/ beneficiary enrollment, benefits elections, and investment choices.<br><br>Go back to any previous steps and make additional changes before completing the benefits enrollment. |
| Event Completion and Exit | W3EB_LE_PRINT | From the Benefits Election Review page, click Next.<br><br>Alternatively, click Event Completion and Exit on the navigation pagelet. | View confirmation of the adoption event completion. Additionally, view custom information about any additional tasks that you need to do related to this life event.<br><br>When you click Complete, the system verifies whether all the required action items have been completed and displays an error message if any are incomplete. |

# Processing the Divorce Event

Employees begin the Divorce transaction by navigating to Life Events and then selecting the I got divorced/legally separated radio button. The system displays the Change Status Date page on which the employee needs to enter the date of divorce.

After the employee accesses the divorce transaction, the system displays a series of pages that direct the employee through the life event process. Rules that are set on the Life Event Rules page and the Action Items for the Divorce transaction determine which pages will be displayed by the system.

## Pages Used to Process the Divorce Event

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Welcome | W3EB_LE_WELCOME | Self Service, Benefits, > Life Events<br><br>Select the I got divorced/ legally separated radio button on the Life Events page. Enter the date of divorce on the Change Status Date page to navigate to the Welcome page. | Read the instructions on the Welcome page to initiate the divorce event. This page contains custom information about the life event. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Marital Status Change | HR_EE_MAR_STATUS | From the Welcome page, click Next at the top-right of the activity guide pagelet.<br><br>Alternatively, click the Marital Status link on the navigation pagelet at the left. | Enter the date of divorce and the changed marital status. |
| Life Events — Document Upload | HR_ATT_DD_HDR | From the Marital Status Change page, click Next.<br><br>Alternatively, click Document Upload on the navigation pagelet. | Upload a proof document for the life event, or enter a note relevant to the event. |
| Benefits Summary | W3EB_GRID | From the Life Events — Document Upload page, click Next.<br><br>Alternatively, click Benefit Summary on the navigation pagelet. | Review your current benefits. |
| Name Change | HR_EE_NAME | From the Benefits Summary page, click Next.<br><br>Alternatively, click Personal Information, Name on the navigation pagelet. | Enter name change information. |
| Home and Mailing Address | HR_HOME_MAILING | From the Name Change page, click Next.<br><br>Alternatively, click Personal Information, Home and Mailing Address on the navigation pagelet. | Enter home and mailing address changes. |
| Phone Numbers | HR_PERSONAL_PHONE | From the Home and Mailing Address page, click Next.<br><br>Alternatively, click Personal Information, Phone on the navigation pagelet. | Enter valid phone numbers. |
| Emergency Contacts | HR_EMERGENCY_CNTCT | From the Phone Numbers page, click Next.<br><br>Alternatively, click Personal Information, Emergency Contact on the navigation pagelet. | Enter emergency contact information. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Add/Review Dependent/ Beneficiary | W3EB_DEPBEN_RVW | From the Emergency Contacts page, click Next.<br><br>Alternatively, click Dependent and Beneficiary on the navigation pagelet. | Update dependent/beneficiary information. |
| W-4 Tax Information | PY_IC_W4_DATA | From the Add/Review Dependent/Beneficiary page, click Next.<br><br>Alternatively, click Pay and Compensation, W4 Tax Information on the navigation pagelet. | Review and change W-4 tax information. |
| Direct Deposit | PY_IC_DD_LIST | From the W-4 Tax Information page, click Next.<br><br>Alternatively, click Pay and Compensation, Direct Deposit on the navigation pagelet. | Review and change direct deposit information. |
| Benefit Enrollment | W3EB_LE_ENROLL | From the Direct Deposit page, click Next.<br><br>Alternatively, click Benefit Enrollment on the navigation pagelet. | Start benefits enrollment and enroll for available benefits.<br><br>**Note:** A dependency relationship is defined on the Marital Status Change action item and benefits enrollment. Hence, benefits enrollment will be available only if you have updated and submitted the marital status. |
| Benefits Election Review | W3EB_LE_CONFIRM | From the Benefit Enrollment page, click Next.<br><br>Alternatively, click Benefit Election Review on the navigation pagelet. | Review benefits election. Click Print to generate a preliminary Benefits Enrollment Summary Statement containing your personal information and information about dependent/ beneficiary enrollment, benefits elections, and investment choices.<br><br>Go back to any previous steps and make additional changes before completing the benefits enrollment. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Event Completion and Exit | W3EB_LE_PRINT | From the Benefits Election Review page, click Next.<br><br>Alternatively, click Event Completion and Exit on the navigation pagelet. | View confirmation of the divorce event completion.<br><br>When you click Complete, the system verifies whether all the required action items have been completed and displays an error message if any are incomplete. |

# Approving Life Event Documents

These topics describe how to approve or reject life event documents uploaded by employees.

## Understanding Document Approval

Employees upload required life event documents when processing their life events. During life event setup, if Approve Document(s) is marked as required on the Life Event Rules table, then the Benefits Administrator will be notified when an employee uploads a document for this event. The document has to be approved before the employee proceeds to enroll benefits. The Approve Document Upload page enables the Benefits Administrator to approve life event documents. The page lists all life event documents that require approval. The Benefits Administrator can review and then approve or deny the documents.

## Page Used to Approve Life Event Documents

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Approve Document Upload | W3EB_APPR_SUMMARY | Benefits, Approve Document Upload, Approve Document Upload | Approve or reject life event documents uploaded by employees. |

## Approve Document Upload Page

Use the Approve Document Upload page (W3EB_APPR_SUMMARY) to approve required life event documents uploaded by employees.

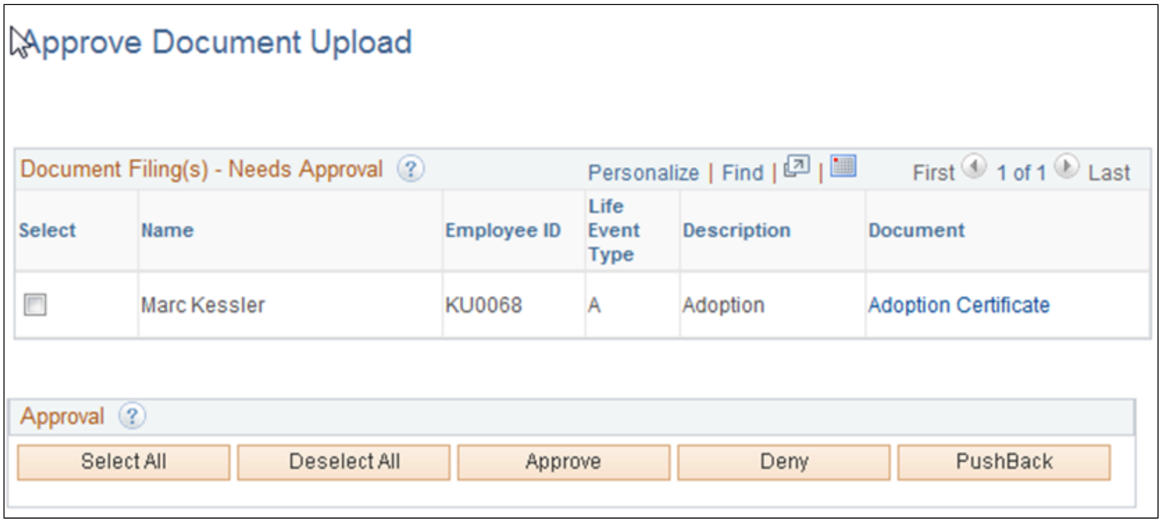
 

**Navigation**

Benefits, Approve Document Upload, Approve Document Upload

**Image: Approve Document Upload page**

This page enables the Benefits Administrator to approve required life event documents uploaded by employees.




# Field and Control Definitions

## Document Filing(s) - Needs Approval

| | |
|---|---|
| **Select** | Select the documents to be processed from the list. |
| **Name** | This field displays the name of the employee. |
| **Employee ID** | This field displays the employee ID. |
| **Life Event Type** | This field indicates the life event type. |
| **Description** | This field contains the description for the life event. |
| **Document** | Click the link to review the life event document. |

## Approval

| | |
|---|---|
| **Select All** | Select all documents pending approval. |
| **Deselect All** | Deselect all documents pending approval. |
| **Approve** | Approve selected documents. |
| | On approval, an e-mail notification will be sent to the employee. An entry for the employee will be inserted in the BAS_ ACTIVITY table. This allows the employee to start the benefits enrollment process within the life event. |

| | |
|---|---|
| **Deny** | Deny selected documents.<br>On denial, an e-mail notification will be sent to the employee. The employee will have to upload a new document for approval. |
| **Push Back** | If more than one approver need to approve a document, click this button to push it back to the previous approver to review again. |

# Maintaining Life Events

These topics describe how to maintain life events.

## Understanding Life Event Maintenance

When an employee starts processing a life event using self-service, an instance of the event is stored in the system so that the employee can continue the event later. When the event is completed, the instance is deleted. If an employee started a life event unintentionally, and had not deleted or canceled the event, the Benefits Administrator can delete the event using the Manage Life Event Instance page.

**Note:** The Manage Life Event Instance page is only for the use of the Benefits Administrator for maintenance purposes. Before deleting any life event using this page, ensure that the event is not required and is not in use.

## Page Used to Maintain Life Events

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Manage Life Event Instance | W3EB_LE_INSTANCE | Benefits, Manage Life Event Instance, Manage Life Event Instance | Manage life events created by employees. |

## Manage Life Event Instance Page

Use the Manage Life Event Instance page (W3EB_LE_INSTANCE) to delete life events that are not required.

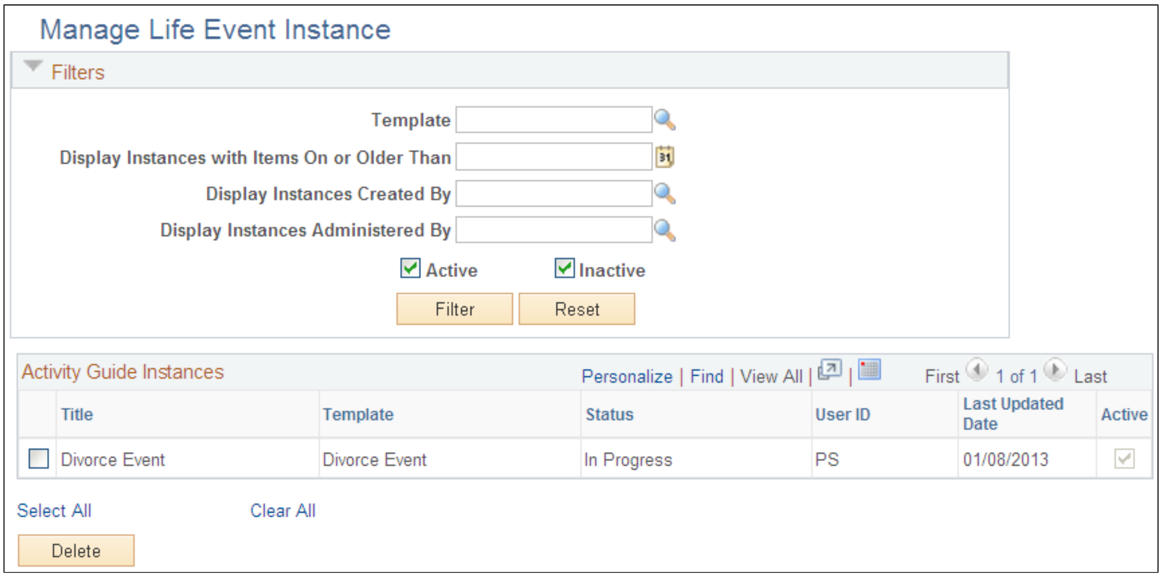
 

**Navigation**

Benefits, Manage Life Event Instance, Manage Life Event Instance

**Image: Manage Life Event Instance page**

This page enables the Benefits Administrator to manage life events in progress.




## Field and Control Definitions

### Filters

**Template**

Select the template on which the life events to be filtered are based on.

**Display Instances with Items On or Older Than**

Enter a date to filter life events with event dates on or before the specified date.

**Display Instances Created By**

Select to filter life events created by a specific employee.

**Display Instances Administered By**

Select to filter life events administered by a specific Benefits Administrator.

**Active**

Select to include active life events in the filter.

**Inactive**

Select to include inactive life events in the filter.

**Filter**

Click to filter life events based on the specified criteria.

**Reset**

Reset the fields to create a new filter.

### Activity Guide Instances

**Title**

Title of the life event.

| | |
|---|---|
| **Template** | Template on which the life event is based. |
| **Status** | Status of the life event. |
| **User ID** | User ID of the employee who created the life event. |
| **Last Updated Date** | Date on which the life event was last updated. |

## Chapter 6

# Working with Suppliers

## Integrating eBenefits with eBenX

This section provides an overview of eBenX integration and discusses how to send enrollment data.

### Pages Used to Send Enrollment Data

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Run Carrier Reporting Schedule | BN_M_RUN_CNTL | Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Run Carrier Reporting Schedule | Extract and send data to a supplier. |
| Resend File | BN_M_REFTP_FILE | Click theResend a file created from this schedule link on the Define Carrier Rpt Schedule page. | Resend a file created from this schedule. |

### Understanding eBenX Integration

Integrating with eBenX enables companies to use the eBenX benefits data management and distribution services to distribute benefit enrollment data to their benefit providers.

To send enrollment data to eBenX:

1. Set up eBenX.
2. Run the Carrier Interface process located in the Manage Base Benefits business process.

   This process writes your most current enrollment data to four records: BN_SNAP_PER, BN_SNAP_JOB, BN_SNAP_PLAN, BN_SNAP_HIST.
3. Run the Carrier Interface Report process within eBenefits.

See Setting Up Suppliers.

### Sending Enrollment Data

Use this procedure to send enrollment data.

#### Sending Data to Suppliers

To send data to a supplier:

1. Run the Carrier Interface process in the Manage Base Benefits business process.
2. Run the Carrier Reporting Schedule process.

   This process uses the parameters defined on the Define Carrier Rpt Schedule page to collect the appropriate information and write it to a text file. The system then uses the FTP parameters entered on the Define Supplier FTP Parameters page to send the data to the supplier.

### Resending Data to Suppliers

If a supplier does not receive a file, you might need to send the file again. The Resend page enables you to select a file from a list of previously sent files for a particular schedule and send it again.

If you don't see the file listed, two things might have happened:

- The file was deleted.
- The name of the directory was changed on the Define Carrier Rpt Schedule page.

---

**Important!** Resend File assumes that the Process Scheduler and Application Server are on the same machine. If they are not on the same machine, the application cannot find the file.

---

### Understanding Integration Points

When sending enrollment information to eBenX, the system uses a background publish process called Supplier_Carrier_Interface.

To research the technical details of any integration point used by PeopleSoft applications, refer to the online Interactive Services Repository on the My Oracle Support website.

## Run Carrier Reporting Schedule Page

Use the Run Carrier Reporting Schedule page (BN_M_RUN_CNTL) to Extract and send data to a supplier.

**Navigation**

Set Up HRMS, Common Definitions, Supplier Administration, Carrier Report, Run Carrier Reporting Schedule

**Image: Run Carrier Reporting Schedule page**

This example illustrates the fields and controls on the Run Carrier Reporting Schedule page.


| | |
|---|---|
| **Enrollment Reporting Snapshot** | This group box specifies the date on which the Enrollment Reporting Snapshot process was last run and the as of date entered for that run. These dates are taken from the BN_SNAP_HIST_TBL table. If the BN_SNAP_HIST_TBL or BN_SNAP table is empty, a message appears in this group box stating that the table is empty and the remaining fields and buttons are unavailable. |
| **Carrier Interface Schedule** | This group box enables you to select a schedule ID. You create schedules using the Define Carrier Interface Schedule page. |

## Resend File Page

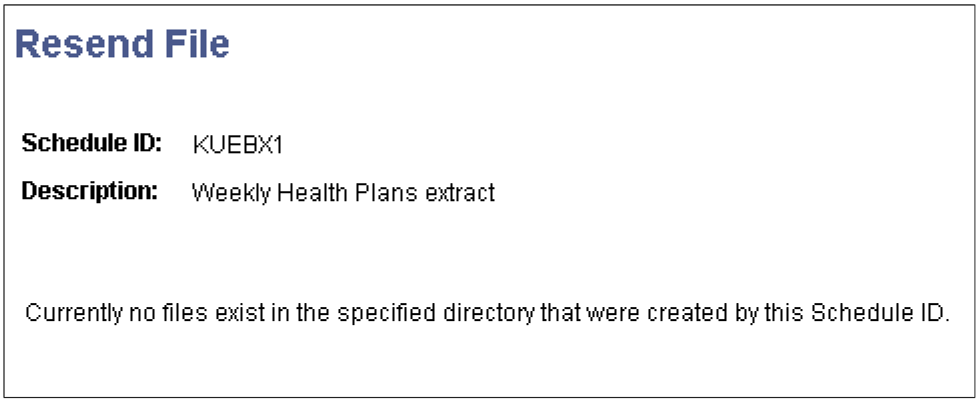
Use the Resend File page (BN_M_REFTP_FILE) to resend a file created from this schedule.

**Navigation**

Click the Resend a file created from this schedule link on the Define Carrier Rpt Schedule page.

**Image: Resend File page**

This example illustrates the fields and controls on the Resend File page.




| | |
|---|---|
| **File Name** | Displays the name of the file created by the extract process. |
| **Run Date** | Displays the date and time that the file was transmitted to the supplier. |
| **Pub/Sub Timestamp** | Displays the date and time on which the report ran. |
| **Select** | Select if you want to send this file again. |
| **Resend File** | Click this link to send the file. |

## Chapter 7

# eBenefits Delivered Workflow

## Delivered Workflow for PeopleSoft eBenefits

This section discusses PeopleSoft eBenefits workflow.

## Dependent

This section lists the components of dependent workflow.

### Description

| ***Information Type*** | ***Description*** |
|---|---|
| Event Description | Dependent enrollments. |
| Action Description | The system notifies the benefits administrator of dependent enrollments. |
| Notification Method | Worklist. |

### Workflow Objects

| ***Information Type*** | ***Description*** |
|---|---|
| Event | W3EB_DEP_WF |
| Workflow Action | Automatic |
| Role | Benefits administrator |
| Notification Form | Worklist |
| Business Process | Benefits WF Dependents Notification CI |
| Business Activity | Find dependent enrollments. |
| Business Event | Notification |

## Document Approval

This section lists the components of the document approval workflow.

## Description

| ***Information Type*** | ***Description*** |
|---|---|
| Action Description | 1. The system sends an e-mail notification to the Benefits Administrator when an employee uploads a life event document.<br>2. The Benefits Administrator approves or denies the document uploaded by the employee.<br>3. The system sends an e-mail notification to the employee when the Benefits Administrator approves the document, and allows the employee to start benefits enrollment for the life event process. |
| Notification Method | Worklist. |

## Events and Templates

The following events and generic templates are used to generate e-mail notifications for the document approval workflow:

| ***Event*** | ***Prerequisites*** | ***Template Name*** | ***Description*** | ***Recipients*** |
|---|---|---|---|---|
| Route for Approval | • Proof required is selected on the Life Event Rules table.<br>• Approve Documents is selected on the Life Event Rules table.<br>• Employee uploads a document. | HC_HEB_AWAITING | Notifies that the document is awaiting approval. | Benefits Administrator |
| On Final Approval | Benefits Administrator approves the document uploaded by the employee. | HC_HEB_APPROVED | Notifies that the document was approved. | Employee |
| On Final Denial | Benefits Administrator denies the document uploaded by the employee. | HC_HEB_DENIED | Notifies that the document was denied. | Employee |

## Workflow Events

| ***Event*** | ***Object Name*** | ***Description*** |
|---|---|---|
| Route for Approval | Participant | Approver (e-mail notification will be sent to the Benefits Administrator) |
| | Template Name | HC_HEB_DOC_AWAITING |
| | Menu Name | Administer Base Benefits |
| | Approval Component | W3EB_APPR_SUMMARY |
| | Menu Action | Update |
| On Final Approval | Participant | Requestor (e-mail notification will be sent to the employee) |
| | Template Name | HC_HEB_DOC_APPROVED |
| | Menu Name | W3EB_MENU |
| | Approval Component | W3EB_ATTACH |
| | Menu Action | Update |
| On Final Denial | Participant | Requestor (e-mail notification will be sent to the employee) |
| | Template Name | HC_HEB_DOC_DENIED |
| | Menu Name | W3EB_MENU |
| | Approval Component | W3EB_ATTACH |
| | Menu Action | Update |