USING BANNER: HR

BENEFITS -

Benefits
Benefits

This interactive demonstration of Banner HR is designed to provide expert training of the process and steps for managing employees' benefits/deductions.

Welcome to Banner HR - Benefits. These training sessions will explain SCT Banner Human Resources System Benefit/Deductions Administration. It will prepare you to use Banner HR to manage employees’ benefits/deductions.

How to Use This Manual

The “icon key” at left displays commonly used icons that appear through this documentation.

<table>
<thead>
<tr>
<th>ICON KEY</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🗂️</td>
<td>Valuable information</td>
</tr>
<tr>
<td>📝</td>
<td>Keyboard exercise</td>
</tr>
</tbody>
</table>
Producing Enrollment Forms

This lesson will show the Banner user how to generate a USNH Benefits Enrollment Form. Benefits Enrollment Forms are produced for all new hires as well as employees who experience a qualified change of status.

There is a need to produce individualized benefits enrollment forms for benefits eligible employees when they are hired. Benefits enrollment forms are also produced for an employee when they experience a qualified change of status – see USNH web site (examples include marriage, divorce, the birth or adoption of a child, or a significant change in the cost of a child’s care). The user/submitter must identify the employee by their ID number and their benefit category to produce the form. The appropriate benefit category will allow the core benefit selections to be displayed.

Form Names (i.e. PZRBENE)

Banner uses the Job Process Submission Control Rule Form (GJAPCTL) for manual job submission. PZRBENE is the job that allows for production of an individualized benefits enrollment form. Multiple individualized benefits enrollment forms can be produced on the same job if the same Rate and Employee Coverage Dates apply for all employees.

Banner Tip – Yellow Flashlight

Any time you see a yellow flashlight displayed next to a field, you can click on the flashlight and you will be brought to a table with selections available for that field. Double click on the appropriate selection and the selection will be brought back into the form.
1. From the main screen, type in PZRBENE (Job Process that creates individualized Benefits Enrollment Forms).

2. The Process PZRBENE, Benefits Enrollment Form, will be displayed at the top of the screen.
3. Select Next Block to be brought down into the Printer Control portion of the screen. Type in the name of the printer where you want the form to be printed. This form cannot be printed on 'local' printers – a shared printer must be selected. If you are unsure of the printer name, double click in the Printer field and make a printer selection by double clicking on the appropriate printer name.

• The job will automatically spool to the printer.

*Banner Tip – Field colored in ‘Blue’*

If you see a 'blue' field in Banner this means information related to that field is stored and can be viewed by the user. Click in the field and you will be brought to a table with eligible selections for that field. Double clicking on the appropriate selection will populate the field with the selection.
4. Select Next Block to be brought down into the Parameter Values section of the form. A list of parameter descriptions will default in. Tab to the Values field to enter the corresponding values based on the following information. Values are case-sensitive and need to be entered with capital letters.

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 Run Type</td>
<td>I (for Individual)</td>
</tr>
<tr>
<td>02 ID and BCAT separated by a space</td>
<td>EE’s ID space BCAT (example: 123456789 10)</td>
</tr>
</tbody>
</table>

**NOTE:**

- If multiple employee benefits enrollment forms are required, press F6 or select Record from the toolbar and then select Insert, which will insert a new line. Type in 02 and the Parameter’s description will default in. Tab to enter the employee’s ID, press the spacebar and enter the appropriate BCAT. This process can be followed for multiple employees as long as the Rate and Employee Coverage Dates are the same.

- The appropriate BCAT (Benefit Category) may be found by accessing the Banner HR PEAEMPL Form for the employee(s).

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>03 Group BCATs</td>
<td>Leave Blank</td>
</tr>
<tr>
<td>04 Leave Status Code(s)</td>
<td>Leave Blank</td>
</tr>
<tr>
<td>05 Rate Effective Date</td>
<td>Date rates became effective typed as mm-dd-yyyy</td>
</tr>
<tr>
<td>06 Employee Coverage Date</td>
<td>Date employee eligible for coverage typed as mm-dd-yyyy (for new hires the first day of the month following employment)</td>
</tr>
<tr>
<td>07 Track Form Creation (Y or N)</td>
<td>N or Leave Blank</td>
</tr>
</tbody>
</table>

5. Select Next Block to be brought down into the Submission Section of the Form. If you want to save parameters, place a check mark in the Save Parameters Box by clicking on the box or using the spacebar. Save Parameters means that the next time you run this Job, the current information on the screen will default in.
6. Select Save. You will receive a confirmation statement that reads, “Saving current parameter values as user level defaults – OK”.

7. Click on OK. You will receive a Sequence Number in the bottom left-hand corner of the screen. Record this number – it will be used for tracking the job.

8. The Benefits Enrollment Form will spool directly to your printer.

9. Confirm that information is correct before distributing the form to the employee.
10. If you need to review information generated from the job, PZRBENE, you can select Options within the header menu at the top of the screen and then select Review Output. The Sequence Number, which you previously recorded in #7, will default in the number field. If the job has not finished running, you will receive a message at the bottom of the screen stating, “There is no saved output for the Process Name/Number in the database.” Once the job has completed, double click on the File Name to view the available files for that job. If the job number did not default in when you selected Review Output, you can either:

- Type in the Job Number and hit enter, or
- Double click on the number field and the file names will be listed.

Each job will contain the following files - .lis, .ps, and .log extensions

- .lis  Total Forms Produced for this Individual Run
- .ps  The “Form” before it is merged with the overlay – this can be viewed to discuss with employee but may be difficult to follow
- .log  Listing of information pertaining to the job PZRBENE