USING BANNER: HR

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.
Enrolling Employees in Core Benefits

This lesson will show the campus human resources offices how to enroll new employees in their core benefit selections. Users should refer to Lesson 1, Producing Enrollment Forms before beginning this Lesson.

Employees are enrolled in their core benefits based upon selections made to their individualized enrollment forms which employees return to their campus human resources offices. The following are considered core benefits: medical, dental, life, AD&D and long term disability insurance. Flexible Spending Accounts (FSA) are also coded with core benefit selections. Each campus human resources office is responsible for establishing the deductions.

Before Beginning!
Before an employee's benefits can be coded, they must be established on the following: Identification Form (PPA ID E N); Employee Form (PEA E MPL); and Employee Jobs Form (NBA JO BS).

In addition, “Five Basics” Deductions Setup
The Payroll Department will be establishing the employee's “Five Basics” which include Federal Tax (301), FICA OASDI (302), FICA Medicare (305), IRS Group Term Life (306) and Number of Pays (ZZZ). These must be established before enrolling an employee in their core benefit selections. If these “Five Basics” have not been established, please contact the System Payroll Office before continuing.

Employee Benefit/Deduction Setup Form (i.e. PDABDSU)
The Employee Benefit/Deduction Setup Form is sometimes referred to as the Quick Setup Form. It displays all benefits/deductions that are defined for the employee's benefit class on the Benefit Category Rule Form (PTRBCA T) and designated for quick setup. Benefits are set up on a window of the PDABDSU form.

This form cannot be used for updates or deletions of data. The Employee Benefit/Deduction Form (PDA D E D N) is used for subsequent maintenance of this information.

Based on the ID, the System displays values in the remaining fields in the key block including the Employee Name and Benefit Category. The Default Begin Date should represent the effective date of the coverage (the first of the month following date of hire for new hires).

The system-generated begin date can be overridden for all of the employee's benefits/deductions that have a user-specified begin date.
1. From the main screen, type PDABDSU (Employee Benefit/Deduction Setup Form) in the Direct Access field.

   • NOTE: This form cannot be used for updates or deletions of data. The Employee Benefit/Deduction Form (PDADEDN) is used for subsequent maintenance of this information.

2. Type in the employee’s ID number.

3. Tab over to the Default Begin Date field. Enter the appropriate date (the first of the month following date of hire for new hires) and select Next Block to move into the body of the form. If you enter this date and don’t allow the system date to default, you will not have to code the begin date on each deduction.

![Image of the PDABDSU Employee Benefit/Deduction Setup Form interface]
4. Place a check mark in the Setup field next to each benefit selection requested by the employee on their Benefits Enrollment Form.

- NOTE: Under Setup Status, you will note the message Possible Preclusion displays. This Preclusion prevents an employee from being enrolled in more than one benefit (for example, two medical or two dental plans) at the same time.
5. Once all benefits to be established have been checked, proceed by selecting Establish Selected Benefits/Deductions from the Options menu at the top of the screen.

6. Enter the appropriate begin date (if you need to override what has defaulted in) for the first benefit listed by hitting tab to move across the screen. If applicable, enter the appropriate Plan level (1P=Individual; 2P=Two Person; FM=Family). You will automatically be moved back to the Code field.

If the employee has selected an FSA, you will need to enter an END DATE in addition to establishing the deduction with the per pay period amount and the annual limit. The end date must represent the last day of the calendar year (i.e., 31-Dec-2003). You may get to the end date field by pressing tab past the begin date field.
Banner Tip – ‘Drilling Down’

Any time you see the word Plan within a shaded box, you can click on the box 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.

7. If there is more than one benefit listed, arrow down to the next benefit and enter the appropriate begin date by hitting tab to move across the screen. If applicable, enter the Plan level (1P=Individual Coverage, 2P=Two Person Coverage and FM=Family Coverage) or for Flexible Spending Accounts (Dedn 100 and 101) enter the employee per pay amount (EE Ppamt) and Annual Limit (An Limit). Again, for medical and dental deductions, annualized employee and employer premium totals will populate under the Amounts column.

Tab to move back to the Code field.
8. An AD&D $25,000 deduction must be established any time a life insurance option (other than waived for premium conversion) has been selected. You will not see this option on the enrollment form; YOU MUST remember to select the deduction on the PDABDSU form.

9. Using the arrow down key on your keyboard set up each benefit deduction.

10. Save.

11. If you would like to see all of an employee’s benefits displayed at the same time, access the Employee Deduction Query Form, PDIDLST. This form will list deductions based upon the Query Date inserted.

   • NOTE: For FSA deductions (100 and 101) an End Date must always be coded. This end date should reflect the last day of the calendar year.