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 Voluntary Benefits

This lesson will show the Banner user how to enroll employees in voluntary benefits.

The Employee Benefit/Deduction Form maintains information about an employee's benefits, deductions, and/or taxes. This form relies heavily upon the rules established in the Benefit/Deduction Rule Form (PTRBDCA). An Employee Record (PEAEMPL) must be established for an employee before any deduction records can be added for that employee.

The PDADEDN form allows you to create, maintain, and terminate benefits, deductions, and taxes for an employee. It can be used to establish a deduction record or change an existing deduction record. This lesson will describe how to establish a deduction record for voluntary deductions.

Employee Benefit/Deduction Form (PDADEDN)
The Employee Benefit/Deduction Form maintains information about an employee's benefits, deductions and/or taxes. This form relies heavily upon the rules established in the Benefit/Deduction Rule Form (PTRBDCA). An Employee Record (PEAEMPL) must be established for an employee before any deduction records can be added.

ZZZ Benefit Deduction
The ZZZ deduction is established to determine the number of pays for the employee. This number of pays will be used to divide the annual cost of the benefit deductions by the number of pays for a per pay period deduction amount. It is imperative that the number of pays on the NBAJOBS record match the number of pays on the PDADEDN ZZZ deduction. A report will be generated and run before each pay to use as an audit. The Campus Human Resource offices will be responsible to monitor the NBAJOBS number of pay record to the PDADEDN ZZZ deduction.
Employee Benefit Deduction Setup Form (PDABDSU)

Some of the more common benefit/deductions have been included on the PDABDSU form. Before establishing a benefit, you can check the PDABDSU form to determine if the deduction can be established on this form. Please refer to Lesson 2 Enrolling Employees in Core Benefits for instructions on using the PDABDSU form. If PDABDSU is not the appropriate form, then use PDADEDN.

PDADEDN  Employee Benefit/Deduction Form – Enrolling in a Voluntary Benefit/Deduction

1. From the main screen, type in PDADEDN (Employee Benefit/Deduction Form).

2. Type in the employee’s ID number. The employee’s name, BCAT and BCAT description will populate automatically.
3. In the Deduction field, enter the deduction code of the deduction record you are establishing (see attached PTRBDCA listing). The deduction description field will populate automatically.

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 to you. Double click on the appropriate selection and the selection will be brought back into the form.
4. Tab to the Query Date. The date you enter should be the day that the benefit/deduction will be effective (typically the first of the month). If no query date is entered, today's date will be the default.
5. Select Next Block to move into the General Deduction Information Block. The Begin Date will populate based on the Query Date in the header of the form. This date can be overridden and should contain the date the benefit becomes effective (typically the first of the month).
6. Select Next Block to be brought into the Deduction Information portion of the form. Again, the Effective Date will automatically be populated from the Begin Date field in the General Deduction Information Block.

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 applicable, select appropriate Plan Level (example, PT1: Plan 01 = 6% EE contribution, 10% ER). The Amount Field in the next column will populate with information relative to that deduction.

![Image of Employee Benefit/Deduction Form]

**8.** Save.

**9.** If multiple voluntary deductions need to be established, roll back to be able to enter in a new Deduction code and follow the same steps.