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.

W elcome 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

ICON KEY

🗁 Valuable information

🖳 Keyboard exercise

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

Lesson

4

Making Changes to Benefits/Deductions

This lesson will show the Banner user how to make changes to benefits/deductions using the Employee Benefit/Deduction Form. These changes may be necessary if employees have a change in status and request a change in their benefits by completing a benefits enrollment form (see Lesson 1 – Producing Enrollment Forms). A One Time Add/Replace transaction may also be necessary to change a benefit/deduction for a specific pay period. The user will also learn how to terminate benefits/deductions.
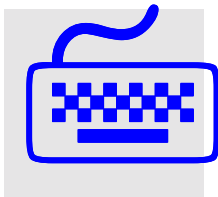
The Employee Benefit/Deduction Form maintains information about an employee's benefits, deductions, and/or taxes. This form relies heavily upon the rules established in the Benefit/Deduction Rule Form (PTRBDCA). An Employee Record (PEAEMPL) must be established for an employee before any deduction records 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.

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.

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.

PDADEDN   Employee Benefit/Deduction Form –
Making Changes to Benefits/Deductions

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 DEDN field, enter the deduction code of the deduction record you are making changes to (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 for that field. 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 change to the benefit is effective (typically the last day of a pay period). If no query date is entered, today's date will be populated.

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 be coded with the last day of the pay period in which you would like the deduction to be revised/terminated.

6. Select Next Block to be brought into the Deduction Information portion of the form. This block enables you to make changes to the employee's deduction record. Select Options, New Effective Date.

7. Enter the date on which your change is to become effective. This date must be later than the employee's last paid date. Hit OK.

- Note: If the deduction you are making a change to has not been pulled into a payroll cycle, you do not need to enter a new effective date.
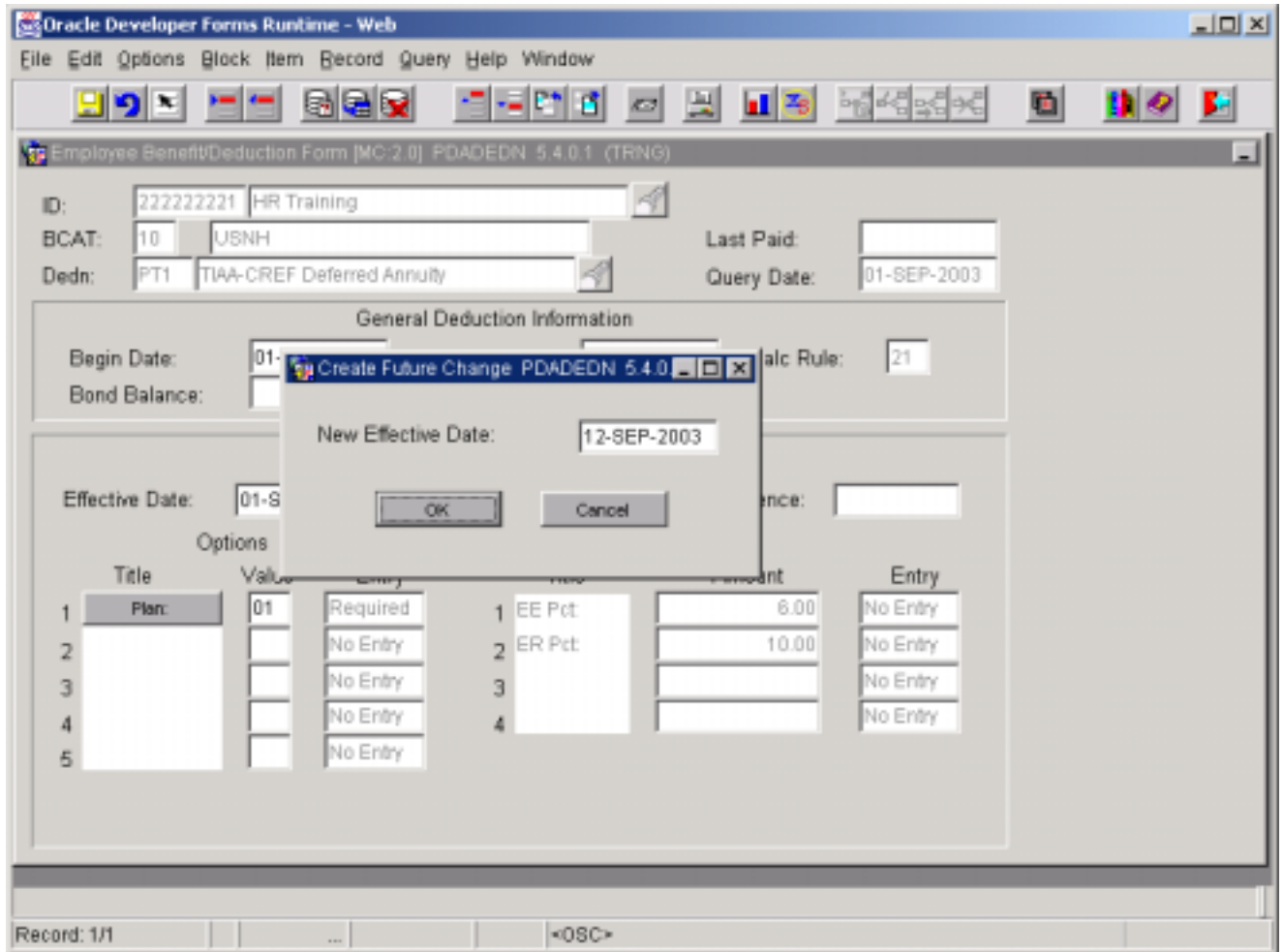
8. The date is now carried back into the Effective Date field.

9. Tab to the field(s) that you want to change (example Plan) and make the appropriate changes.

10. Save.

11. If you are making changes to more than one benefit/deduction, rollback, refer to Step 3 and follow directions for the remaining deductions that need changing.

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.

PDADEDN   Employee Benefit/Deduction Form -
## One Time Add/Replace Information

One Time Add/Replace Information Window

On rare occasions, there is a need to process one-time adjustments for benefits/deductions. Banner has a One Time Add/Replace Window within the General Deduction Information Block of the Employee Benefit/Deduction Form (PDADEDN), which allows adjustments to be processed. With this feature, Banner provides the option to collect back contributions.
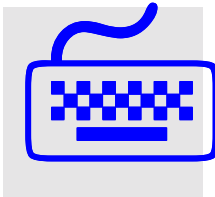
1. From the main screen, type in PDADEDN (Employee Benefit/Deduction Form).

2. Type in the employee's ID number. The employee's name, BCAT and BCAT description will populate automatically.

3. In the Deduction (Dedn) field, enter the deduction code of the deduction record you are making changes to (see PTRBDCA listing). The deduction description field will populate automatically.

4. Select Next Block to be brought to the General Deduction Information Block.

5. Select Next Block to be brought to the Deduction Information Block.

   - Note: This populates the rest of the record and is a very critical step that needs to take place before proceeding.

6. Select Previous Block to be brought back up to the General Deduction Information Block.

7. Under Options in the menu at the top of the screen, select Add/Replace.

   - Note: This option will display only if you follow steps 1 through 6.

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8. The One Time Add/Replace Information Form will be displayed. Select Add or Replace for the type of adjustment to be processed. The indicator defaults to Neither.

- Add should be selected if you are processing a one-time increase or decrease to the dollar amount of the normal deduction.

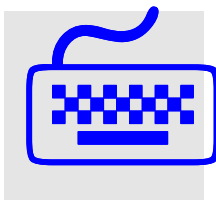- Replace should be selected if you would like to replace the entire deduction amount that would normally be taken in the specified payroll with the amount entered on this form.
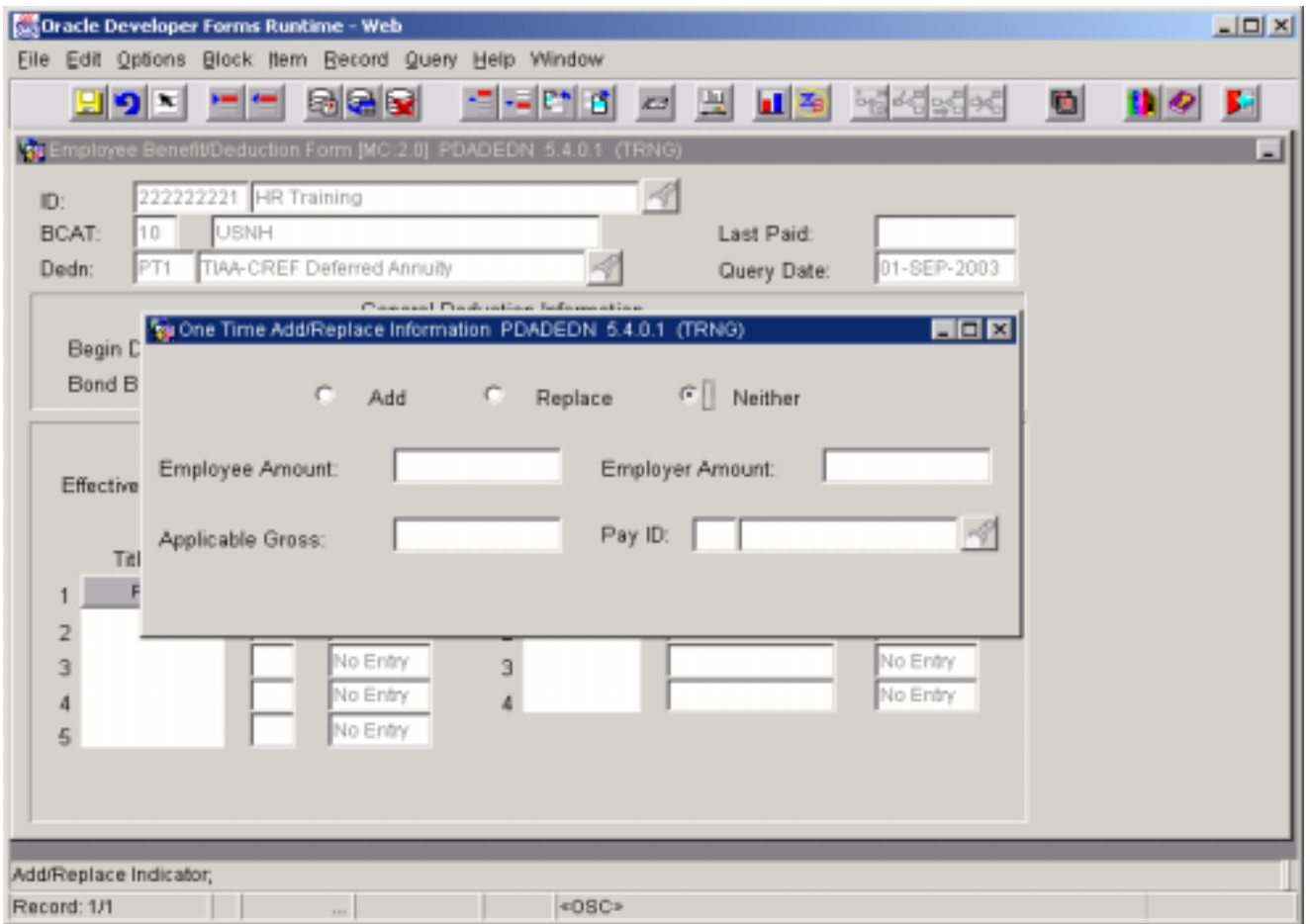
9. Enter the dollar amount of the one-time change to the employee's deduction and/or the one-time change to the employer's deduction.

10. Enter the one-time applicable gross pay amount by which the employee's year-to-date applicable gross for this deduction should be increased or decreased. Enter a positive number for increases and a negative number for decreases. Leave the Applicable Gross field blank if Replace was selected.

11. Enter the Pay ID of the payroll in which this deduction override should be taken (either B1 or B2).

12. Save

PDADEDN Employee Benefit/Deduction Form - Terminating a Benefit/Deduction

Terminating a Benefit/Deduction

Benefits/deductions may need to be terminated as a result of open enrollment or when an employee experiences a change of status (See Lesson 1 – Producing Enrollment Forms). The Employee Benefit/Deduction Form (PDADEDN) identifies the status of each benefit/deduction for employees and needs to be updated accordingly.

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 Dedn field, enter the deduction code of the deduction record you are terminating (see attached PTRBDCA listing). The deduction description field will populate automatically.

4. Tab to the Query Date. The date entered should be the last day of the pay period that the deduction is being termed in.

   - Example – Employee would like to terminate PT1 effective 9/21/2003 – the date coded as the effective date is the last day of the pay period, which is 9/26/2003.

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5. Select Next Block to move into the General Deduction Information Block. The Begin Date will populate with the effective date of the benefit/deduction.
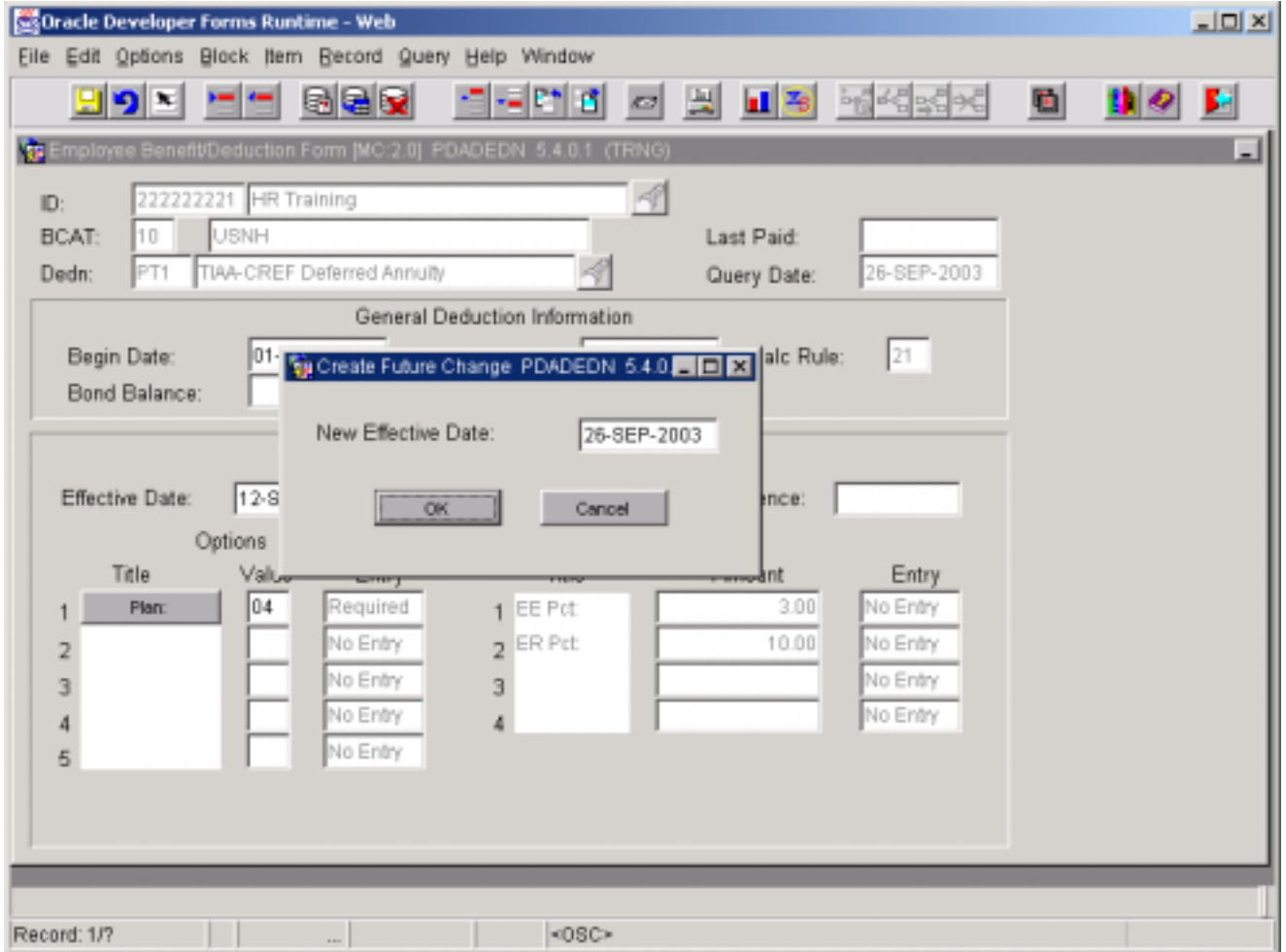

7. Select Next Block to be brought into the Deduction Information portion of the form. This block enables you to terminate the deduction record.

8. Select Options from the menu at the top of the screen.

9. Select New Effective Date.
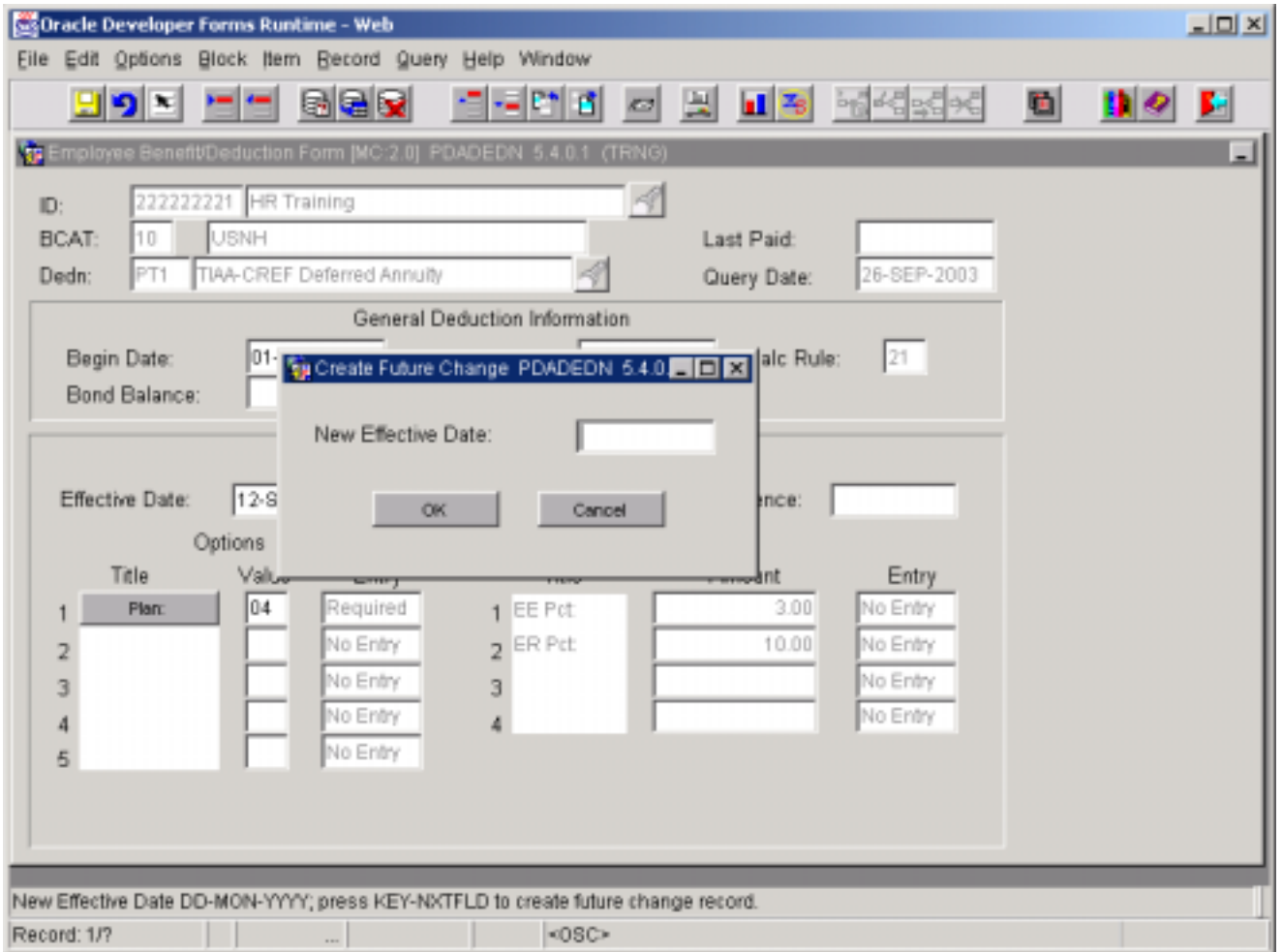
10. Enter the date of termination for the benefit/deduction. This date should always be the last day of a pay period.

11. Select OK.

12. The date is now carried back into the Effective Date field.

13. Tab to the Status field and select Terminated.

14. Save. You should see that the General Deduction Information field is now populated with an End Date.

15. If you need to terminate more deductions, rollback, refer to Step 3 of Terminating a Benefit/Deduction, and repeat the procedure.