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.
Query Tools and Frequently Asked Questions

This lesson will show the Banner user how to research information in Banner HR using query tools. Frequently asked questions are used to demonstrate the inquiry process as well as provide important information that users should know.

Banner HR forms are not only used for entering information, they may also be accessed to query information from the system. The most common forms used to research benefit-related information are listed below.

<table>
<thead>
<tr>
<th>Forms</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PE A E M PL</td>
<td>Employee Form</td>
</tr>
<tr>
<td>NBA JOBS</td>
<td>Employee Jobs Form</td>
</tr>
<tr>
<td>PDA D E D N</td>
<td>Employee Benefit/ Deduction Form</td>
</tr>
<tr>
<td>PD ID L ST</td>
<td>Employee Deduction Query Form</td>
</tr>
<tr>
<td>PE ID H IS</td>
<td>Employee Deduction History Form</td>
</tr>
<tr>
<td>PE ID T OT</td>
<td>Deduction/ Benefit Year to date Totals Form</td>
</tr>
<tr>
<td>PH IC H E K</td>
<td>Check Detail Inquiry Form</td>
</tr>
<tr>
<td>PH IL IST</td>
<td>Pay Event List Form</td>
</tr>
<tr>
<td>PPA ID E N</td>
<td>Identification Form</td>
</tr>
</tbody>
</table>
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.

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.
The Employee Form establishes employee information, including data on status, service dates, leave and benefit categories, leaves and terminations.
The Employee Jobs Form maintains information on a job as defined for a specified employee, including position, job description, start and end dates, status, hours, and salary information.
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 before any deduction records can be added for that employee.
Employee Deduction Query Form

The Employee Deduction Query Form lists the deductions established for a specified employee.
The Employee Deduction History Form displays a record of changes made to the Employee Deduction Form.
The Deduction/Benefit Year to Date Total Form displays Year to Date deduction information during a specified year. Converted data from January – June 2003 will populate in the month of June.
The Deduction/Benefit Year to Date Total Form displays Year to Date deduction information during a specified year.
PHILIST

Pay Event List Form

If you were to drill down on the flashlight on PHICHEK you would be navigated to this form - PHILIST. Double click on the pay event you wish to view and you will taken back to PHICHEK.
### Check Detail Inquiry Form PHICHEK 5.3 (TRNG)

- **ID**: 654321789 Suzanne A Smith
- **Year**: 2001
- **Pay ID**: 01
- **Pay No**: 23
- **Sequence No**: 0

#### Summary
- **Gross Amount**: 1846.16
- **Disposition**: Complete
- **Deductions**: 707.29
- **Net Amount**: 1138.87
- **UI Weeks**: 
- **UI Exception Indicator**: 

### Deductions Information PHICHEK 5.3 (TRNG)

<table>
<thead>
<tr>
<th>Empr</th>
<th>Deductions</th>
<th>Employee Amt</th>
<th>Employer Amount</th>
<th>Applicable Gross</th>
</tr>
</thead>
<tbody>
<tr>
<td>A11</td>
<td>Cigna HMO+</td>
<td>8.00</td>
<td>444.46</td>
<td>1846.16</td>
</tr>
<tr>
<td>D01</td>
<td>Delta Basic+</td>
<td>7.66</td>
<td>8.95</td>
<td>1846.16</td>
</tr>
<tr>
<td>L21</td>
<td>Life Insurance 3X Salary+</td>
<td>3.07</td>
<td>4.90</td>
<td>1846.16</td>
</tr>
<tr>
<td>M41</td>
<td>AD&amp;D $25,000+</td>
<td>0.00</td>
<td>0.15</td>
<td>1846.16</td>
</tr>
<tr>
<td>PF6</td>
<td>Fidelity ARC</td>
<td>0.00</td>
<td>18.46</td>
<td>1846.16</td>
</tr>
</tbody>
</table>

Record: 9?  ...  <OSC>
The Identification Form enables you to enter basic biographic/demographic data about anyone associated with the institution.
FREQUENTLY ASKED QUESTIONS

Please feel free to contact Tricia at tricia.sowa@unh.edu with additions to this document.

1. FAQ: What is the name of the Quick Set Up Form?

The Employee Benefit/Deduction Set Up Form (PDABDSU) is also known as the Quick Set Up Form. This form displays all benefits/deductions that are defined for the employee's class on the Benefit Category Rule Form (PTRBCAT) and designated for quick set up. Benefits are set up on a window of the PDABDSU form.

2. FAQ: What is the difference between PDADEDN and PDABDSU?

The PDABDSU Form can be used when enrolling employees in their core benefits. Additionally, a select number of voluntary benefits are also displayed on this form. Once a benefit/deduction has been established, all future coding will occur on the PDADEDN Form. PDADEDN is also used to enroll employees in their benefit/deductions that are not included on the PDABDSU Form.

3. FAQ: Where can I go to see deduction totals for an employee?

The PEIDTOT Form will display totals by deduction for each employee. Converted data for January - June 2003 will be displayed in the month of June.

4. FAQ: How can I see what an employee currently has for deductions?

The Form PDIDLST can be used to access current deduction information. Using the current date in the Query Date field will show active current deductions.

5. FAQ: I forgot to add in a deduction for an employee; what do I do?

You can go back to the PDABDSU form or PDADEDN to add the deduction. If a payroll has already been processed, you may need to process a One Time Adjustment, which is accessed through the PDADEDN form.

6. FAQ: What is the name of the report used to generate an enrollment form and how is the form produced?

The job PZRBENE is run for individual benefits enrollment form production. Refer to instructions in Lesson 1 for specific instruction.
7. **FAQ: HELP! Who do I call?**

First, call the help desk at 2-4242. They will log in the call and your specific question and direct you to the contact person who can assist you. Frequently Asked Questions will be added to the Project FRESH web site for your reference.

8. **FAQ: What is the function of the ZZZ deduction?**

The ZZZ deduction is established to indicate the number of pays for that employee. The annualized cost of the benefit is divided by the ZZZ deduction for a per pay deduction amount.

9. **FAQ: What do I do if changes are made to NBAJOBS Number of Pays and the ZZZ deduction on PDADEDN no longer matches?**

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.

10. **FAQ: If an employee only has a complementary job, what should their ZZZ record be?**

It should always be 26.

11. **FAQ: How do I code core benefits?**

Refer to Lesson 1 of Advanced Benefits Training, Producing Enrollment Forms and Enrolling Employee in Core Benefit Selections.

12. **FAQ: What will the live instance be and how do I access it?**

BPRD is the Banner Finance instance and will be the instance for Banner HR also. Banner is an integrated product.

13. **FAQ: What form should I use when an employee terminates employment and all benefits must be terminated?**

You should use the PEAESCH - Employee Status Change Form.

14. **FAQ: When terminating a deduction, what date should I be coding for the end date?**

The end date coded should always be the last day of the pay period that the deduction is being terminated. Payroll will publish these dates, which are listed on PTRCALN, Payroll Calendar Rule Form.