



USING BANNER: HR

BENEFITS –



Benefits

BENEFITS ADMINISTRATION




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.

ICON KEY

 Valuable information

 Keyboard exercise

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 PDAEDN 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 (PDAEDN)

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

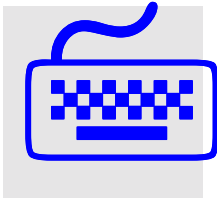
The ZZZ deduction is established to determine the number of pays for the employee. This number of pays will be used to divide the annual cost of the benefit deductions by the number of pays for a per pay period deduction amount. It is imperative that the number of pays on the NBAJOBS record match the number of pays on the PDAEDN 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 PDAEDN 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 PDAEDN.

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



1. From the main screen, type in PDADEN (Employee Benefit/Deduction Form).
2. Type in the employee's ID number. The employee's name, BCAT and BCAT description will populate automatically.

BENEFITS ADMINISTRATION

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Employee Benefit/Deduction Form [MC:2.0] PDAEDN 5.4.0.1 (TRNG)

ID: 22222221 HR Training

BCAT: 10 USNH

Dedn: [] []

Last Paid: []

Query Date: []

General Deduction Information

Begin Date: [] End Date: [] Calc Rule: []

Bond Balance: []

Deduction Information

Effective Date: [] Status: [] Reference: []

Options			Amounts		
Title	Value	Entry	Title	Amount	Entry
1	[]	[]	1	[]	[]
2	[]	[]	2	[]	[]
3	[]	[]	3	[]	[]
4	[]	[]	4	[]	[]
5	[]	[]			

Deduction Code; press LIST or COUNT QUERY HITS for valid values.

Record: 1/1 ... <OSC>

- 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.

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Employee Benefit Deduction Form [MC:2.0] PDAEDN 5.4.0.1 (TRNG)

ID: 222222221 HR Training

BCAT: 10 USNH Last Paid:

Dedn: PT1 TIAA-CREF Deferred Annuity Query Date:

General Deduction Information

Begin Date: End Date: Calc Rule: 21

Bond Balance:

Deduction Information

Effective Date: Status: Reference:

Options			Amounts		
Title	Value	Entry	Title	Amount	Entry
1	<input type="text"/>	<input type="text"/>	1	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	2	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	3	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	4	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>			

Query Date; format DD-MON-YYYY.

Record: 1/1 <OSC>



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.

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Employee Benefit/Deduction Form [MC:2.0] PDAEDN 5.4.0.1 (TRNG)

ID: 222222221 HR Training

BCAT: 10 USNH Last Paid:

Dedn: PT1 TIAA-CREF Deferred Annuity Query Date: 01-SEP-2003

General Deduction Information

Begin Date: End Date: Calc Rule: 21

Bond Balance:

Deduction Information

Effective Date: Status: Reference:

Options			Amounts		
Title	Value	Entry	Title	Amount	Entry
1 Plan			1		
2			2		
3			3		
4			4		
5					

Identification Number, press LIST for name/id search; Duplicate Item for Alternate ID look-up.

Record: 1/1 <OSC>

- 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).

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Employee Benefit/Deduction Form [MC:2.0] PDAEDN 5.4.0.1 (TRNG)

ID: 222222221 HR Training

BCAT: 10 USNH Last Paid:

Dedn: PT1 TIAA-CREF Deferred Annuity Query Date: 01-SEP-2003

General Deduction Information

Begin Date: 01-SEP-2003 End Date: Calc Rule: 21

Bond Balance:

Deduction Information

Effective Date: Status: Reference:

Options			Amounts		
Title	Value	Entry	Title	Amount	Entry
1 Plan			1		
2			2		
3			3		
4			4		
5					

FRM-40350: Query caused no records to be retrieved.

Record: 1/1 <OSC>

- 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.

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Employee Benefit Deduction Form [MC:2.0] PDAEDN 5.4.0.1 (TRNG)

ID: 222222221 HR Training

BCAT: 10 USNH Last Paid:

Dedn: PT1 TIAA-CREF Deferred Annuity Query Date: 01-SEP-2003

General Deduction Information

Begin Date: 01-SEP-2003 End Date: Calc Rule: 21

Bond Balance:

Deduction Information

Effective Date: 01-SEP-2003 Status: Active Reference:

Options			Amounts		
Title	Value	Entry	Title	Amount	Entry
1 Plan:		Required	1 EE Pct:		No Entry
2		No Entry	2 ER Pct:		No Entry
3		No Entry	3		No Entry
4		No Entry	4		No Entry
5		No Entry			

Effective Date; format DD-MON-YYYY.

Record: 1/1 <OSC>



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.

- 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.

Oracle Developer Forms Runtime - Web
 File Edit Options Block Item Record Query Help Window

Employee Benefit Deduction Form [MC:2.0] PDAEDN 5.4.0.1 (TRNG)

ID: 222222221 HR Training
 BCAT: 10 USNH Last Paid:
 Dedn: PT1 TIAA-CREF Deferred Annuity Query Date: 01-SEP-2003

General Deduction Information
 Begin Date: 01-SEP-2003 End Date: Calc Rule: 21
 Bond Balance:

Deduction Information
 Effective Date: 01-SEP-2003 Status: Active Reference:

Options			Amounts		
Title	Value	Entry	Title	Amount	Entry
1 Plan	01	Required	1 EE Pct	6.00	No Entry
2		No Entry	2 ER Pct	10.00	No Entry
3		No Entry	3		No Entry
4		No Entry	4		No Entry
5		No Entry			

FRM-40400: Transaction complete: 2 records applied and saved.
 Record: 1/1 <OSC>

- Save.
- 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.