

Difficult Benefits Setup? Try PXACALC!

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Introduction

- Benefits and deductions in Banner HR
- —Going beyond the basics
- · PXACALC It's not just for taxes
 - —Complex calculations that a standard calculation rule cannot accomplish
 - Garnishments
 - · Grossed-up reimbursements for benefits
 - Benefits with complex income thresholds
 - Calculations that include amounts pulled in from other benefit/deduction codes

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Banner HR Baseline Benefit/Deduction Calculation Rules

Baseline Benefit/Deduction Calculation Rules

- 27 calculation rules delivered with Banner HR 8.x
 - -3 calculation rules were added with Banner HR 8.0 to support Combined Annual Limit processing and easier setup for benefit/deduction codes with both employee and employer contributions
 - In most cases these calculation rules with work with the most common benefits and deductions

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Baseline Benefit/Deduction Calculation Rules

- 27 calculation rules delivered with Banner HR 8.x
 - —The Calculation Rule Matrix is your guide!



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Baseline Benefit/Deduction Calculation Rules

- What to do when none of the 27 delivered calculation rules work?
- · Get creative!
 - —Use calculation rule 60 and set up your benefit as a "tax"
 - PXACALC can be used for many things other than taxes, such as garnishments



An Example — Child Support

Setting Up a Garnishment on PXACALC

- · Delivered garnishment calculation rules
 - —Federal and state tax levies
 - —Student loans
 - —Child support
- Setting up garnishments that are more complex than the delivered calculation rules allow
 - —Child support with state-mandated income tax withholding
 - Multiple child support garnishments for the same employee

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Wage Garnishments — Child Support

- Delivered calculation rules generally work for:
 - - Use calculation rule 60
 - Set the Tax Code on PTRBDCA to "CHILDSUP"
 - The CHILDSUP tax code is defined on PXACALC, with options for the percent of gross to garnish, and arrears
 - Exclude any allowed deductions, and all non-cash earn
 - —This works well for states with no mandate on how much income tax withholding is allowed

Wage Garnishments — Child Support

- · Some states mandate that the child support garnishment is based on the employee's federal tax withholding being calculated as Single with 1 exemption
 - —This requires modifications to the delivered CHILDSUP tax
 - Modifications can also be made to allow for more accurate calculation when multiple child support garnishment codes exist on the same employee

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Wage Garnishments — Child Support

• PTVBDTY

—Creation of a new Benefit Type allows for multiple child support garnishment codes to be combined in the

PXAFSTA

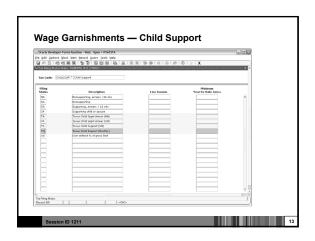
Creation of new child support filing status codes allows you to customize the child support garnishment calculation

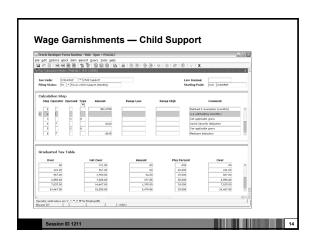
PXACALC

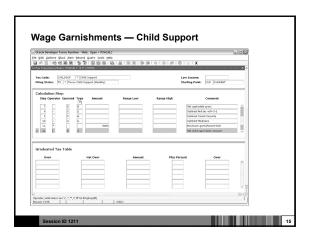
-New calc rules (based on the delivered CHILDSUP calc rules) can include other child support garnishments in the calculation, as well as support state-mandated calculation of income tax withholding

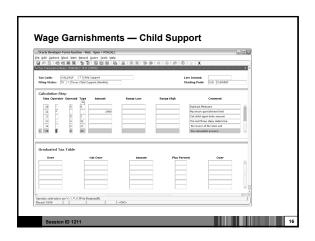
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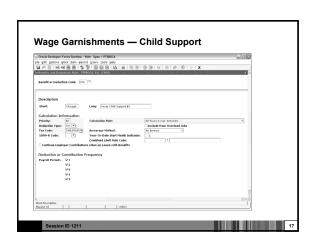
Wage Garnishments — Child Support

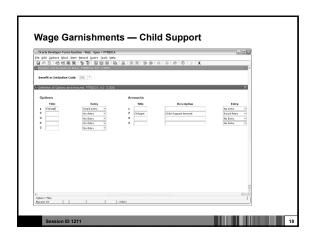


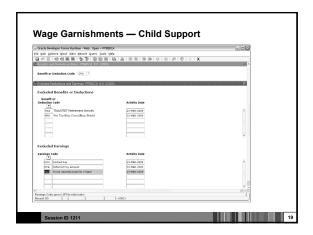








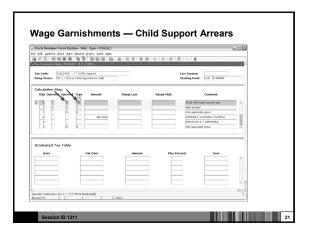


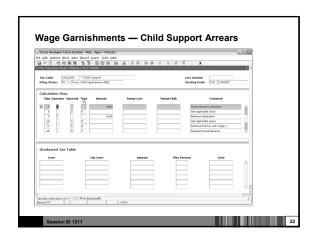


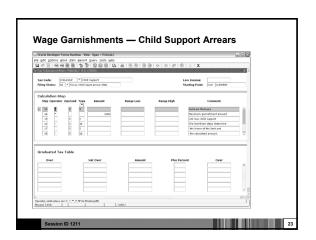
Wage Garnishments — Child Support Arrears

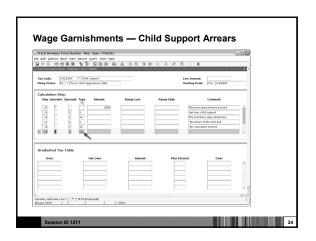
- Child support arrears required including the non-arreared child support garnishments
 —This was accomplished by creating an additional calc rule specifically for arrears on PXACALC
 - The benefit/deduction type for child support defined on PTVBDTY allows the total child support deduction amount to be included in the arrears calculation

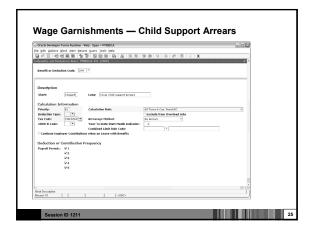
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Summary

- · When none of the delivered calculation rules work, don't give up!
- Consider using PXACALC to write a custom rule
- Detailed documentation on PXACALC is in the Banner HR User Guide and Online Help
- · Resources are available to help
 - -SunGard Higher Education Commons
 - —SunGard Higher Education Customer Support Center/Action Line
 - —SunGard Higher Education Professional Services

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Questions & Answers

Provide business card for documentation on setting up these benefit/deduction codes by e-mail

Thank You!

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