

## 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

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### 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 will 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!

SUNGARD HIGHER EDUCATION Benefits/Deduction Rule Form (PTRBDCA) Calculation Rule Matrix												
Calculation Rule		Employee Deduction Form (PDAD00N)				Benefit/Deduction Rule Form (PTRBDCA)						
Code	Description	Amount	Amount	Amount	Amount	Option	Option	Option	Option	Option	Option	Option
		1	2	3	4	1	2	3	4	5	6	7
10	Full Annual Health Insurance	Employee Amount	Employer Amount	Employee Amount	Employer Amount							
11	Full Annual Health Insurance with Cash Plan	Employee Amount	Employer Amount	Employee Amount	Employer Amount	Plan Code						
12	Full Annual Health Insurance with Life Insurance	Employee Amount	Employer Amount	Employee Amount	Employer Amount							

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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

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## An Example — Child Support

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### 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:
  - Child support garnishments
    - 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 codes
  - This works well for states with no mandate on how much income tax withholding is allowed

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- 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 code
  - Modifications can also be made to allow for more accurate calculation when multiple child support garnishment codes exist on the same employee

- **PTVBDDY**
  - Creation of a new Benefit Type allows for multiple child support garnishment codes to be combined in the calculations
- **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

Type Code	Description	Activity Date
24	Foreign Pension State Tax (04/15)	24 JUN 2008
25	Life Insurance (04/15)	25 JUN 2008
26	Disability Insurance (04/15)	27 MAY 1976
50	Canadian Federal Income Tax	23 APR 1981
51	Canadian Income Tax	23 APR 1981
52	Canadian Employment Insurance	16 AUG 1983
53	Canadian Registered Pension Plan Contribution	27 APR 1982
54	Canadian Taxable Dividends or Benefits	27 APR 1982
55	Canadian Union Cash	23 APR 1981
56	Canadian Charitable Contribution	27 APR 1982
57	Canadian Retirement to a Deferred Profit-Sharing Plan	27 APR 1982
58	Canadian Employment Insurance	16 AUG 1983
59	Canadian Personal Periodic Income Tax	16 AUG 1983
60	California Labor Sponsored Fund (or Qualifier PHS)	27 MAY 2008
61	California PHS Deduction	27 APR 1982
62	California PHS All General Deduction	27 APR 1982
63	California PHS Reduced Energy Deduction	27 APR 1982
64	California PHS Investment	27 APR 1982
65	California PHS Insurance	27 APR 1982
66	California PHS Service Award	27 APR 1982
67	California PHS Employee Additional Contribution	27 APR 1982
68	Other Special Deduction	26 JUN 2008

### Wage Garnishments — Child Support

[illegible]

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### Wage Garnishments — Child Support

[illegible]

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### Wage Garnishments — Child Support

[illegible]

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## Wage Garnishments — Child Support

Oracle Developer Forms Routine: Wage - Open - PPSACALC

File Edit Options Block Item Record Query Tools Help

PS Form: PPSACALC (Wage - Open - PPSACALC)

Tax Code: CHS0000 Child Support Low Income: Starting Point: CHS CURRENT

Filing Status: [?] (Press Child Support (Monthly))

Calculation Steps

Step	Operator	Operand	Type	Amount	Range Low	Range High	Comment
1	+		N				Subtotal Reduce
2	+		N	5000			Maximum garnishment limit
3	+		N				Get child support deduction amount
4	+		N				The last three steps determine the lower of the two and the calculated amount.

Graduated Tax Table

Over	Not Over	Amount	Plus Percent	Over

Operator valid values are V, N, F, T, W for Employee(R).

Record 1015

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## Wage Garnishments — Child Support

Oracle Developer Forms Routine: Wage - Open - PPSBCCA

File Edit Options Block Item Record Query Tools Help

PS Form: PPSBCCA (Wage - Open - PPSBCCA)

Benefit or Deduction Code: CHS [?]

Description

Short: [?] Long: [?] (Press Child Support #1)

Calculation Information

Priority: [?] Calculation Rule: [?] (All Taxes & Con. From SAC)

Deduction Type: [?] Exclude From Overhead Jobs: [?]

Tax Code: CHS0000 Amortization Method: [?] (No Amount)

1099-R Code: [?] Year-to-Date Start Month Indicator: [?] Combined Cash Rule Code: [?]

☐ Continue Employer Contributions when on Leave with Benefits

Deduction or Contribution Frequency

Payment Period: [?] [?] [?] [?]

Short Description

Record 101

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## Wage Garnishments — Child Support

Oracle Developer Forms Routine: Wage - Open - PPSBCCA

File Edit Options Block Item Record Query Tools Help

PS Form: PPSBCCA (Wage - Open - PPSBCCA)

Benefit or Deduction Code: CHS [?]

Definition of Options and Amounts PPSBCCA 9.2 (C000)

Options

1	Title	Entry
1	Period	Fixed Entry
2		No Entry
3		No Entry
4		No Entry
5		No Entry

Amounts

1	Title	Description	Entry
1			No Entry
2		Child Support amount	Fixed Entry
3			No Entry
4			No Entry

Option 1 Title

Record 101

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## Wage Garnishments — Child Support

Benefit or Deduction Code	Activity Date
TAXA/REF Payment Annuity	23-MAR-2009

Earning Code	Activity Date
DEFB Deferred Pay amount	23-MAR-2009

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## 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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## Wage Garnishments — Child Support Arrears

Step	Type	Amount	Range Low	Range High	Comment
1	Calc	204.1700			Total child support current year

Over	Net Over	Amount	Plus Percent	Over

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### Wage Garnishments — Child Support Arrears

[illegible][illegible]

### Wage Garnishments — Child Support Arrears

[illegible]

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### Wage Garnishments — Child Support Arrears

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## Wage Garnishments — Child Support Arrears

The screenshot shows the 'Benefit or Deduction Code' form in the Oracle Developer Forms Runtime. The form is titled 'Child Support Arrears'. It includes fields for 'Short' (Child Support Arrears) and 'Long' (Child Support Arrears). The 'Calculation Information' section shows 'Priority' set to 1, 'Deduction Type' set to 'Child Support', 'Year Code' set to '2009', and '1099-R Code' set to '1'. The 'Calculation Rule' is set to 'All Taxes & Can. Periods'. The 'Arrangement Method' is set to 'Include from Overhead Jobs'. The 'Year-to-Date Short Month Indicator' is set to 1. The 'Combined Limit Rule Code' is set to 1. The 'Deduction or Contribution Frequency' section shows 'Payroll Periods' with options for 'Q1', 'Q2', 'Q3', 'Q4', and 'Q5'. The 'Read Description' button is visible at the bottom.

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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

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**Thank You!**

**Steven Sullivan**  
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