



Unsnarl the Snarl: Benefit Codes Or Unsnarl the Snarl without Snarling

Presented by: Evelyn Lovitz,
 Drexel University
 April 14, 2010
 Session ID 0322

Session Rules of Etiquette

- Please turn off your cell phone/pager
- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session

Thank you for your cooperation!

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Introduction

- Purpose of this session
 - Avoiding payroll errors because of incomplete analysis of new benefits and/or deductions entered into PTRBDCA.
- Why attend this session?
 - Gain a tool by which both the users and system administrator gain knowledge from the other.
 - The user(s) will learn how deductions are treated by Banner for HR and payroll.
 - The system administrator(s) will learn what functional questions need to be answered that will satisfy Banner's Rules for processing deductions correctly.

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- Using a mockup of a form designed by Drexel and stepping through it one section at a time.
- Moving from a section of the form to the equivalent form of PTRBDCA with discussion of Banner terms vs. functional terms.
- Questions



The Benefit/Deduction Request Form

- Page 1



UNIVERSITY OF THE DISTRICT OF COLUMBIA

Human Resources System Administration

Recruitment Information Service Request

I. Requester Information:

Name	[]
Capital Charge	[]

Recruitment Information Service Request

Recruitment Information Service Request

II. Requester Information:

Requester Name	Requester Title	Requester Department
[]	[]	[]

III. Requester Information:

Requester Name	Requester Title	Requester Department
[]	[]	[]

IV. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

V. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

VI. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

VII. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

VIII. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

IX. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

X. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XI. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XII. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XIII. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XIV. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XV. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XVI. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XVII. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XVIII. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XIX. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XX. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XXI. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XXII. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XXIII. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XXIV. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XXV. Requester Details:

Requester Name	Requester Title	Requester Department
[]	[]	[]

XXVI. Requester Details:

Request

- **PTRBDCA Base Record**

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- PTRBDCA Option Definition of Options and Amounts

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- PTRBDCA Option Definition of Plans

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Banner Rule Form PTRBDCA

- PTRBDCA Option Included Benefit/Deduction

The screenshot shows the Oracle Banner Rule Form PTRBDCA. The 'Benefit or Deduction Code' table is empty. The 'Tax Method' and 'Employee or Employer Indicator' tables are also empty. The 'Activity Date' is set to 01/01/2008. The status bar at the bottom indicates 'FORM 0322: Query returned no records to be returned. Record 1/1. List of Values. <ESC>'.

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Benefit/Deduction Request Form

- Page 3

The screenshot shows the Banner Rule Form PTRBDCA, Page 3. It contains several tables for 'Benefit/Deduction Request Form'. The 'Benefit or Deduction Code' table is empty. The 'Tax Method' and 'Employee or Employer Indicator' tables are also empty. The 'Activity Date' is set to 01/01/2008. The status bar at the bottom indicates 'FORM 0322: Query returned no records to be returned. Record 1/1. List of Values. <ESC>'.

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Banner Rule Form PTRBDCA

- PTRBDCA Option Excluded Earnings and
—Excluded Benefit/Deduction

The screenshot shows the Oracle Banner Rule Form PTRBDCA. The 'Excluded Earnings' table is empty. The 'Benefit or Deduction Code' table is also empty. The 'Activity Date' is set to 01/01/2008. The status bar at the bottom indicates 'FORM 0322: Query returned no records to be returned. Record 1/1. List of Values. <ESC>'.

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Banner Rule Form PTRBDCA

- PTRBDCA Option Labor Distribution Overrides

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Banner Rule Form PTRBCAT

- PTRBCAT - Benefit Category Rule

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Benefit/Deduction Request Form

- Page 4 & 5

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Banner Rule Form PTRBDCA

- **PXAREPT Tax Reporting Rule**

The screenshot shows the Oracle Banner Rule Form PTRBDCA for the PXAREPT Tax Reporting Rule. The form is titled "Banner Rule Form PTRBDCA" and includes the following sections:

- Tax Report Code:** A dropdown menu with "PX" selected.
- Tax Code:** A dropdown menu with "1" selected.
- Benefit or Deduction Code:** A dropdown menu with "1" selected.
- Deduction Amount Indicator:** A dropdown menu with "1" selected.
- Form Code:** A dropdown menu with "1" selected.
- Identification Code:** A dropdown menu with "1" selected.

Banner Rule Form PTRBDCA

- **PTRBDPG – Benefit/Deduction Grouping Rule**

The screenshot shows the Oracle Banner Rule Form PTRBDCA for the PTRBDPG – Benefit/Deduction Grouping Rule. The form is titled "Banner Rule Form PTRBDCA" and includes the following sections:

- Primary Group:** A dropdown menu with "Health" selected.
- Secondary Group:** A dropdown menu with "Dental Insurance" selected.
- Secondary Group Associated Benefits Deductions Setup:** A section with checkboxes for "Display Employer Amounts", "Include in Open Enrollment", "Benefit or Deduction", and "Display Employer Amounts".

Summary

- Use a structured form for the users to fill out when requesting a new BDCA or a change to an existing BDCA.
- Use Drexel's form as a starting point.
 - Modify to encompass your institution's use of PTRBDCA.

Questions & Answers

- Any questions?

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Thank You!

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**Please complete the online class evaluation form
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