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

Presented by: Evelyn Lovitz,
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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!

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.**

Agenda

- **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.**
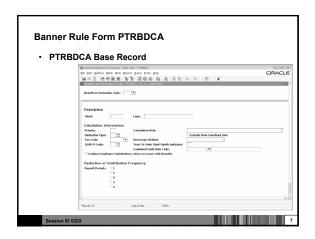- **Questions**

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The Benefit/Deduction Request Form

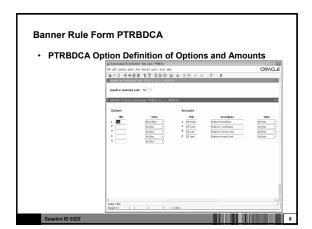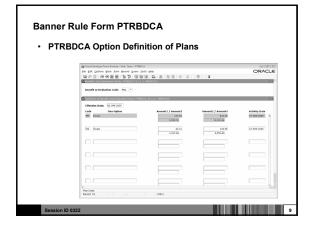
Benefit/Deduction Request Form

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Banner Rule Form PTRBDCA

- **PTRBDCA Base Record**

Banner Rule Form PTRBDCA

- **PTRBDCA Option Definition of Options and Amounts**

Banner Rule Form PTRBDCA

- **PTRBDCA Option Definition of Plans**

Benefit/Deduction Request Form

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Banner Rule Form PTRBDCA

• **PTRBDCA Option Precluded Benefit/Deduction**

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Banner Rule Form PTRBDCA

• **PTRBDCA Option Associated Benefit/Deduction**

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Banner Rule Form PTRBDCA

- **PTRBDCA Option Included Benefit/Deduction**

Benefit/Deduction Request Form

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Banner Rule Form PTRBDCA

- **PTRBDCA Option Excluded Earnings and**
  — **Excluded Benefit/Deduction**

Banner Rule Form PTRBDCA

- **PTRBDCA Option Labor Distribution Overrides**

Banner Rule Form PTRBDCA

- **PTRBCAT - Benefit Category Rule**

Benefit/Deduction Request Form

- **Page 4 & 5**

Banner Rule Form PTRBDCA

- **PXAREPT Tax Reporting Rule**

Banner Rule Form PTRBDCA

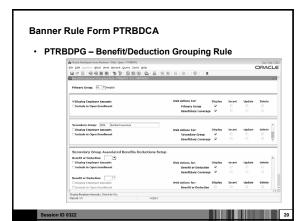- **PTRBDPG – Benefit/Deduction Grouping Rule**

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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