

How to Terminate Benefits/Deductions When an Employee Terminates Employment

This lesson will show the Banner user how to terminate benefits/deductions when an employee terminates employment.

When an employee terminates employment with the University System their benefit selections need to be terminated. This is critical to prevent incorrect benefits from being established if employment with the University System is every reinstated. There are two forms that can meet this need, PDAEDN and PEAESCH. The PDAEDN form allows terminations on a deduction-by-deduction basis and PEAESCH allows all benefit selections to be termed at the same time.



Employee Benefit/Deduction Form (i.e. PDAEDN)

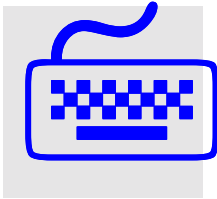
The Employee Benefit/Deduction Form maintains information about an employee's benefits/deductions, and/or taxes. The PDAEDN form allows you to create, maintain, and terminate benefits, deductions and taxes for an employee. It can be used to establish a deduction record or change an existing deduction record. (See Lesson 4 – Terminating a Benefit/Deduction)



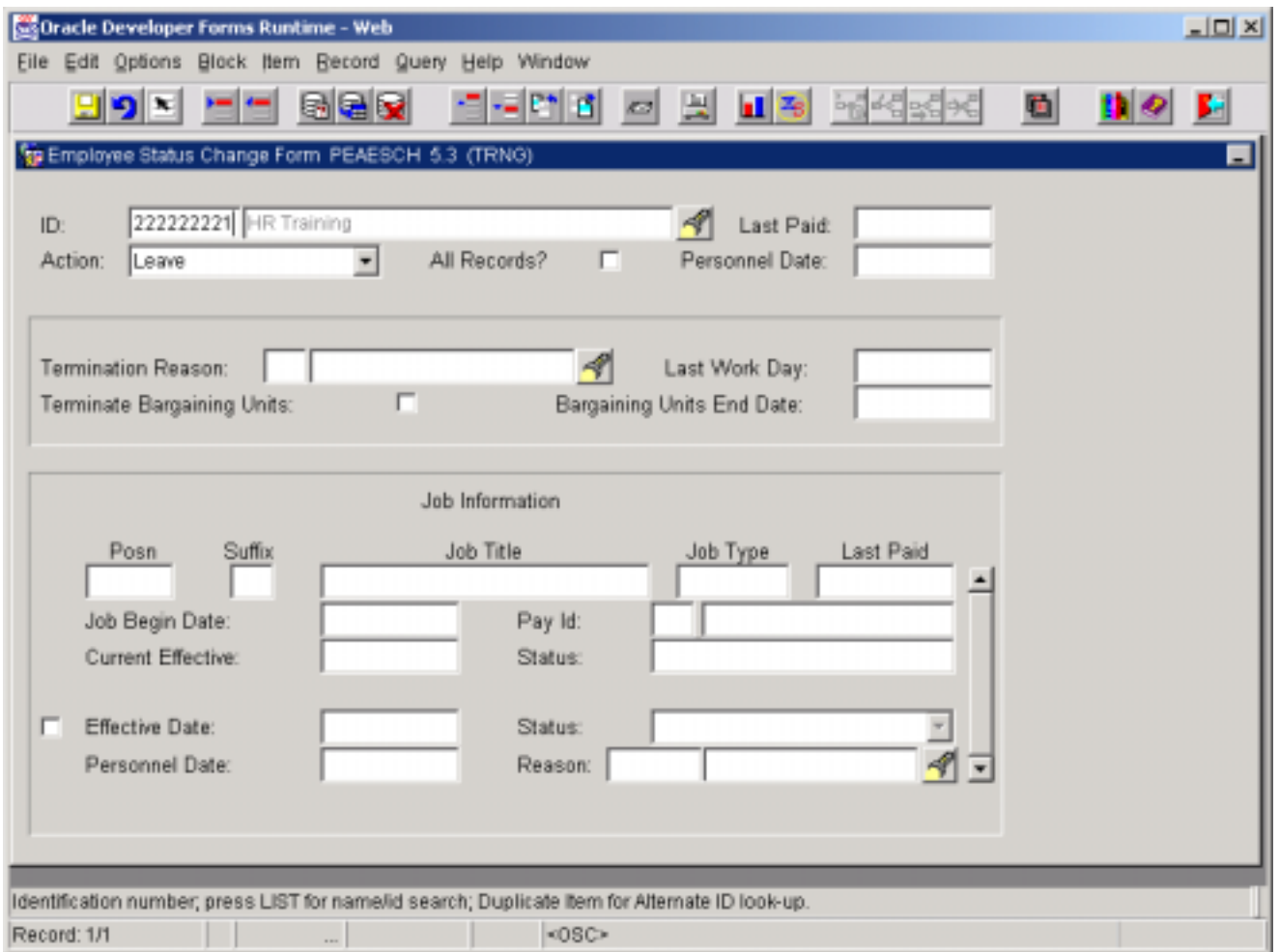
Employee Status Change Form (i.e. PEAESCH)

The Employee Status Change Form enables you to change an employee's status. This form can be used to terminate all deduction records that exist on the PDAEDN form.

PEAESCH Employee Status Change Form



1. From the main screen, type in PEAESCH.
2. The Employee Status Change Form, PEAESCH, will be displayed at the top of the screen.
3. Enter the ID of the employee whose deductions you are terminating.
4. Tab to the Action field and select Termination – this defaults to Leave.



Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Employee Status Change Form PEAESCH 5.3 (TRNG)

ID: 222222221 | HR Training | Last Paid: |

Action: Leave | All Records? | Personnel Date: |

Termination Reason: | Last Work Day: |

Terminate Bargaining Units: | Bargaining Units End Date: |

Job Information

Posn	Suffix	Job Title	Job Type	Last Paid

Job Begin Date: | Pay Id: |

Current Effective: | Status: |

Effective Date: | Status: |

Personnel Date: | Reason: |

Identification number; press LIST for name/id search; Duplicate item for Alternate ID look-up.

Record: 1/1 | ... | <OSC>

5. Tab across to the Personnel Date field. Insert the termination effective date for the employee.

The screenshot shows the Oracle Developer Forms Runtime - Web interface for the Employee Status Change Form (PEAESCH 5.3 (TRNG)). The form contains the following fields and sections:

- ID:** 222222221 | HR Training
- Action:** Terminate (dropdown menu)
- All Records?:**
- Personnel Date:** 26-SEP-2003
- Last Paid:** (empty field)
- Leave Reason:** (empty field)
- Leave Begin Date:** (empty field)
- Job Information Section:**
 - Posn: (empty field)
 - Suffix: (empty field)
 - Job Title: (empty field)
 - Job Type: (empty field)
 - Last Paid: (empty field)
 - Job Begin Date: (empty field)
 - Pay Id: (empty field)
 - Current Effective: (empty field)
 - Status: (empty field)
 - Effective Date: (empty field)
 - Status: (dropdown menu)
 - Personnel Date: (empty field)
 - Reason: (empty field)

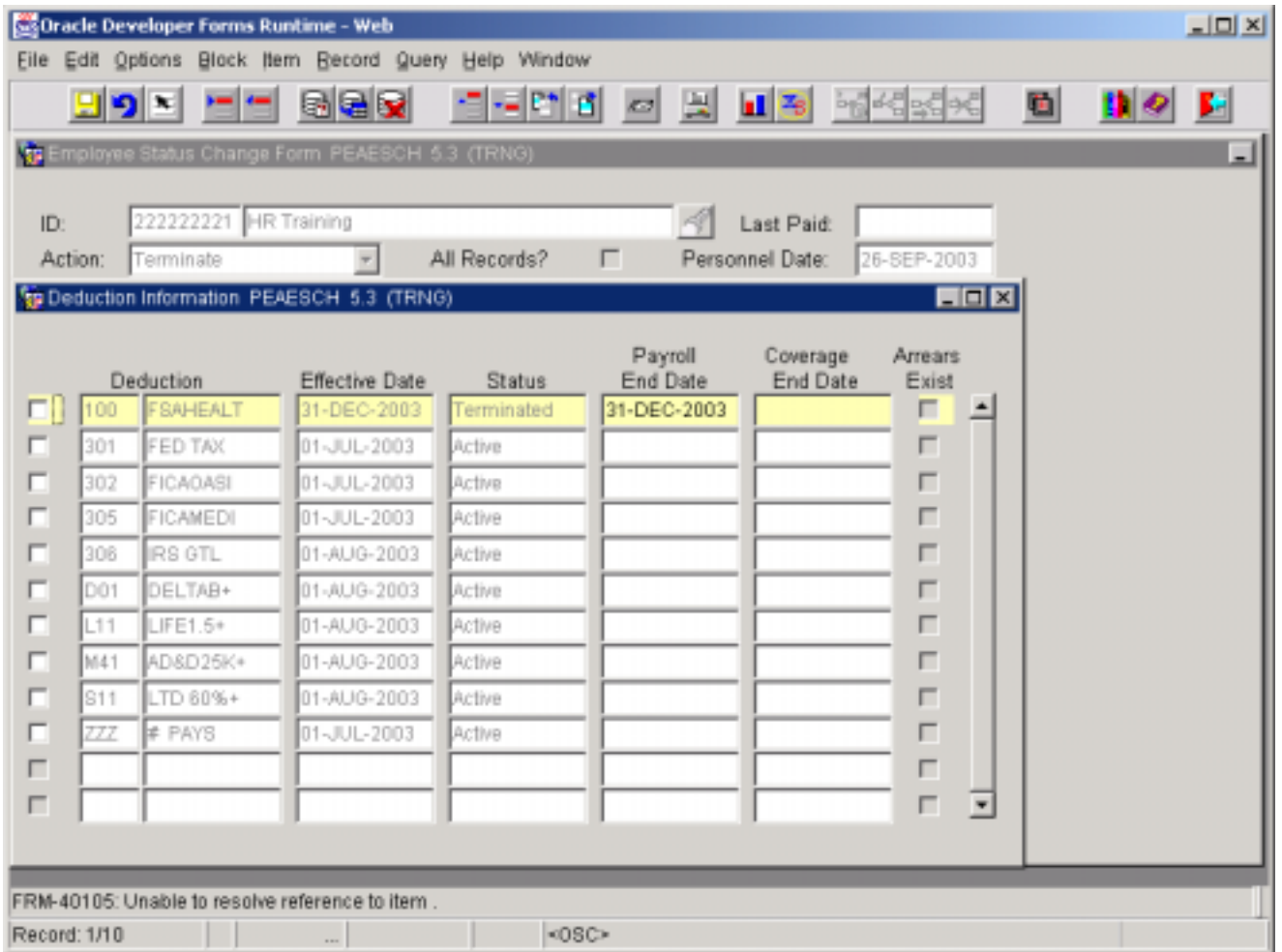
At the bottom of the form, there is a banner tip: "Identification number; press LIST for name/id search; Duplicate item for Alternate ID look-up." and a status bar showing "Record: 1/1" and "<OSC>".



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 for that field. Double click on the appropriate selection and the selection will be brought back into the form.

6. Select Next Block TWICE to be brought down into the Job Information section of the form.
7. Select Options from the tool bar, Employee Deduction Information. Deduction Information will be displayed.



8. Place a check mark next to the Benefits/Deductions to be terminated.

- NOTE: The Benefits Department is responsible for terminating the core and voluntary benefit deductions ONLY – not payroll deductions.

The screenshot shows the Oracle Developer Forms Runtime - Web interface. The main form is titled 'Employee Status Change Form: PEAESCH 5.3 (TRNG)'. It contains fields for ID (222222221), HR Training, Last Paid, Action (Terminate), All Records? (checkbox), Personnel Date (26-SEP-2003), and a 'Deduction Information' table.

The 'Deduction Information' table has the following columns: Deduction, Effective Date, Status, Payroll End Date, Coverage End Date, and Arrears Exist. The table contains the following data:

	Deduction	Effective Date	Status	Payroll End Date	Coverage End Date	Arrears Exist
<input type="checkbox"/>	100 FSAHEALT	31-DEC-2003	Terminated	31-DEC-2003		<input type="checkbox"/>
<input type="checkbox"/>	301 FED TAX	01-JUL-2003	Active			<input type="checkbox"/>
<input type="checkbox"/>	302 FICA0ASI	01-JUL-2003	Active			<input type="checkbox"/>
<input type="checkbox"/>	305 FICAMEDI	01-JUL-2003	Active			<input type="checkbox"/>
<input type="checkbox"/>	306 IRS GTL	01-AUG-2003	Active			<input type="checkbox"/>
<input checked="" type="checkbox"/>	D01 DELTAB+	01-AUG-2003	Active	26-SEP-2003		<input type="checkbox"/>
<input checked="" type="checkbox"/>	L11 LIFE1.5+	01-AUG-2003	Active	26-SEP-2003		<input type="checkbox"/>
<input checked="" type="checkbox"/>	M41 AD&D25K+	01-AUG-2003	Active	26-SEP-2003		<input type="checkbox"/>
<input checked="" type="checkbox"/>	S11 LTD 80%+	01-AUG-2003	Active	26-SEP-2003		<input type="checkbox"/>
<input type="checkbox"/>	ZZZ # PAYS	01-JUL-2003	Active			<input type="checkbox"/>
<input type="checkbox"/>						<input type="checkbox"/>
<input type="checkbox"/>						<input type="checkbox"/>

At the bottom of the form, there is a checkbox labeled 'Check to terminate the deduction.' and a status bar showing 'Record: 9/10' and '<OSC>'.

9. The Payroll End Date should populate. If not, enter the last day of the pay period that the employee is terminating in. For example, if an employee is terminating 23-Sep-2003, you would code 26-Sep-03 as the Payroll End Date. This is very important.

10. Select Save. Please note the confirmation message in the bottom left hand corner of the screen.

The screenshot shows the Oracle Developer Forms Runtime - Web interface. The main window is titled "Employee Status Change Form - PEAESCH 5.3 (TRNG)". It contains several input fields: ID (222222221), HR Training, Last Paid, Action (Terminate), All Records? (checkbox), and Personnel Date (26-SEP-2003). Below this is a sub-window titled "Deduction Information - PEAESCH 5.3 (TRNG)" which displays a table of deductions.

	Deduction	Effective Date	Status	Payroll End Date	Coverage End Date	Arrears Exist
<input type="checkbox"/>	100 FSAHEALT	31-DEC-2003	Terminated	31-DEC-2003		<input type="checkbox"/>
<input type="checkbox"/>	301 FED TAX	01-JUL-2003	Active			<input type="checkbox"/>
<input type="checkbox"/>	302 FICAQASI	01-JUL-2003	Active			<input type="checkbox"/>
<input type="checkbox"/>	305 FICAMEDI	01-JUL-2003	Active			<input type="checkbox"/>
<input type="checkbox"/>	308 IRS GTL	01-AUG-2003	Active			<input type="checkbox"/>
<input checked="" type="checkbox"/>	D01 DELTAB+	01-AUG-2003	Active	26-SEP-2003		<input type="checkbox"/>
<input checked="" type="checkbox"/>	L11 LIFE1.5+	01-AUG-2003	Active	26-SEP-2003		<input type="checkbox"/>
<input checked="" type="checkbox"/>	M41 AD&D25K+	01-AUG-2003	Active	26-SEP-2003		<input type="checkbox"/>
<input checked="" type="checkbox"/>	S11 LTD 60%+	01-AUG-2003	Active	26-SEP-2003		<input type="checkbox"/>
<input type="checkbox"/>	ZZZ # PAYS	01-JUL-2003	Active			<input type="checkbox"/>
<input type="checkbox"/>						<input type="checkbox"/>
<input type="checkbox"/>						<input type="checkbox"/>

At the bottom of the screen, a status bar displays the message: "FRM-40400: Transaction complete: 4 records applied and saved." Below this, it shows "Record: 9/10" and a "<OSC>" button.

11. If you would like to verify that the deductions have been terminated, go back to the main screen and access the Employee Deduction Query Form (PDIDLST).
12. Enter the ID of the Employee.
13. Tab and enter the Query Date, which should be equal to the current date.
14. Select Next Block. The STAT field on the form should be updated for the appropriate benefit/deduction.

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Employee Deduction Query Form: PDIDLST 5.3 (TRNG)

ID: 222222221 HR Training

Query Date: 01-SEP-2003

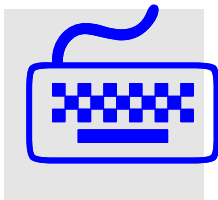
Dedn Code	Desc	Effective Date	Options #1	Options #2	Stat	Begin Date	End Date	Activity Date
301	FED TAX	01-JUL-2003	S	0	A	01-JUL-2003		28-MAY-2003
302	FICA OASI	01-JUL-2003			A	01-JUL-2003		28-MAY-2003
305	FICA MEDI	01-JUL-2003			A	01-JUL-2003		28-MAY-2003
306	IRS GTL	01-AUG-2003			A	01-AUG-2003		28-MAY-2003
D01	DELTA B+	01-AUG-2003	1P		A	01-AUG-2003	26-SEP-2003	04-JUN-2003
D01	DELTA B+	26-SEP-2003	1P		T	01-AUG-2003	26-SEP-2003	04-JUN-2003
L11	LIFE 1.5+	01-AUG-2003			A	01-AUG-2003	26-SEP-2003	04-JUN-2003
L11	LIFE 1.5+	26-SEP-2003			T	01-AUG-2003	26-SEP-2003	04-JUN-2003
M41	AD&D 25K+	01-AUG-2003			A	01-AUG-2003	26-SEP-2003	04-JUN-2003
M41	AD&D 25K+	26-SEP-2003			T	01-AUG-2003	26-SEP-2003	04-JUN-2003
S11	LTD 60%+	01-AUG-2003			A	01-AUG-2003	26-SEP-2003	04-JUN-2003
S11	LTD 60%+	26-SEP-2003			T	01-AUG-2003	26-SEP-2003	04-JUN-2003
ZZZ	# PAYS	01-JUL-2003		26	A	01-JUL-2003		28-MAY-2003

FRM-40200: Field is protected against update.

Record: 3/15 ... <OSC>

PDADEDN

Employee Benefit Deduction Form



For instruction, refer to Lesson 4, Terminating a Benefit Deduction.