



USING BANNER: HR

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BENEFITS –



**Benefits**

## BENEFITS ADMINISTRATION

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# Benefits

*This interactive demonstration of Banner HR is designed to provide expert training of the process and steps for managing employees' benefits/deductions.*

**W**elcome to Banner HR – Benefits. These training sessions will explain SCT Banner Human Resources System Benefit/Deductions Administration. It will prepare you to use Banner HR to manage employees' benefits/deductions.

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## ICON KEY

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Valuable information



Keyboard exercise

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## How to Use This Manual

The “icon key” at left displays commonly used icons that appear through this documentation.



## Query Tools and Frequently Asked Questions

*This lesson will show the Banner user how to research information in Banner HR using query tools. Frequently asked questions are used to demonstrate the inquiry process as well as provide important information that users should know.*

**B**anner HR forms are not only used for entering information, they may also be accessed to query information from the system. The most common forms used to research benefit-related information are listed below.



### Forms

<i>PEAEMPL</i>	<i>Employee Form</i>
<i>NBAJOBS</i>	<i>Employee Jobs Form</i>
<i>PDAEDN</i>	<i>Employee Benefit/Deduction Form</i>
<i>PDIDLST</i>	<i>Employee Deduction Query Form</i>
<i>PEIDHIS</i>	<i>Employee Deduction History Form</i>
<i>PEIDTOT</i>	<i>Deduction/Benefit Year to date Totals Form</i>
<i>PHICHEK</i>	<i>Check Detail Inquiry Form</i>
<i>PHILIST</i>	<i>Pay Event List Form</i>
<i>PPAIDEN</i>	<i>Identification Form</i>



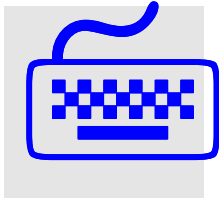
Banner Tip – Yellow Flashlight

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 to you. Double click on the appropriate selection and the selection will be brought back into the form.



Banner Tip – ‘Drilling Down ‘

*Any time you see the word Plan within a shaded box, you can click on the box 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.*



PEAEMPL

Employee Form

The Employee Form establishes employee information, including data on status, service dates, leave and benefit categories, leaves and terminations.

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Employee Form PEAEMPL 5.3.3 (BTRN)

ID: HRTRN01 HR Training

General Employee Information		Service Dates	
Employee Status:	Active	Current Hire:	01-JAN-2001
Employee Class:	10 PAT, PA, AA, EE (non-fed)>74%	Original Hire:	01-JAN-2001
Employee Group:	FLEX Flexible Benefits	Adjusted Svc:	01-JAN-2001
Leave Category:	EX Vacation/Sick Leave for Exempt	Seniority:	01-JAN-2001
Benefit Category:	10 USNH	First Work Day:	01-JAN-2001
FT/PT Status:	Full Time	Last Work Day:	

COA YCRA10 Organization Human Resource Office Ope

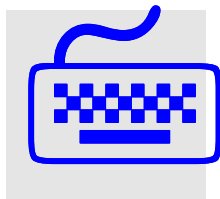
Home Department: Y YCRA10

Check Distribution: Y XSYSCM SYS Campus Address Distri

District/Division:

Employee Class; press LIST for valid codes.

Record: 1/1 <OSC>



NBAJOBS

## Employee Benefit/Deduction Form

The Employee Jobs Form maintains information on a job as defined for a specified employee, including position, job description, start and end dates, status, hours, and salary information.

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Employee Jobs Form NBAJOBS 5.4 (BTRN)

ID: HRTRN01 HR Training Last Paid:   
 Posn: UA0005 Suffix: 00 Query Date: 01-JUL-2003

General Job Information

Begin Date: 01-JUL-2003 End Date: Job Type: Primary

IPEDS Reporting Ind: ☒

COA: ☒ Accrue Leave: ☒ Civil Service: ☐ Probationary Information

Increase MM/DD: / Probationary Period:   
 Deferred Balance: 0.00 Probationary Begin Date:   
 Probationary End Date:

Encumbering Information

Salary Encumbrance: 50000.08 Contract Start:   
 Fringe Encumbrance: Contract End:   
 Total Encumbrance Hours: Total Contract Hours:

Job Begin Date; format 'DD-MON-YYYY'.

Record: 1/1 <OSC>

# BENEFITS ADMINISTRATION

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

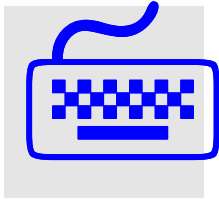
Employee Jobs Form NBAJOBS 5.4 (BTRN)

ID: HRTRN01 HR Training Last Paid:   
 Posn: UA0005 Suffix: 00 Query Date: 01-JUL-2003

Job Detail Information NBAJOBS 5.4 (BTRN)

Effective Date: 01-JUL-2003 Pay Plan  
 Personnel Date: 01-JUL-2003 Group: 2004 Grade: 27  
 Status: Active Table: P0 Step: 0  
 Title: INFORMATION TECHNOLOGIST V  
 Job FTE: 1  
 Appt %: 100.00 Compensation  
 Encumbrance Hrs: Rate: 190.840000  
 Encumbrance Ind: System Calculated Hours per Pay: 10  
 Assign Salary: 1908.40  
 Hours per Day: 1.00 Factor: 26.2  
 Pays: 26.2  
 Employee Class: P1 Professional/Admin/Tech Annual Salary: 50000.00  
 Change Reason:   
 Employer Code: USNH Univ System of New Hampsh

Personnel Change Date; Format 'DD-MON-YYYY':  
 Record: 1/1 <OSC>



PDAEDN

## Employee Benefit/Deduction Form

The Employee Benefit/Deduction Form maintains information about an employee's benefits, deductions and/or taxes. This form relies heavily upon the rules established in the Benefit/Deduction Rule Form (PTRBDCA). An employee Record (PEAEMPL) must be established before any deduction records can be added for that employee.

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Employee Benefit/Deduction Form [MC:2.0] PDAEDN 5.4.0.1 (BTRN)

ID: HRTRN01 HR Training

BCAT: 10 USNH

Dedn: A11 Cigna HMO+

Last Paid:

Query Date: 01-JUL-2003

General Deduction Information

Begin Date: 01-JUL-2003 End Date: Calc Rule: 91

Bond Balance:

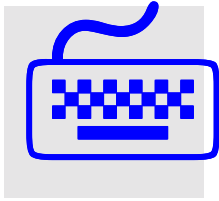
Deduction Information

Effective Date: 01-JUL-2003 Status: Active Reference:

Options			Amounts		
Title	Value	Entry	Title	Amount	Entry
1 Plan:	2P	Required	1 EE Amnt:	615.00	No Entry
2		No Entry	2 ER Amnt:	7037.76	No Entry
3		No Entry	3		No Entry
4		No Entry	4		No Entry
5		No Entry			

Deduction Begin Date; format DD-MON-YYYY.

Record: 1/1 <OSC>



## PDIDLST

## Employee Deduction Query Form

The Employee Deduction Query Form lists the deductions established for a specified employee.

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Employee Deduction Query Form: PDIDLST 5.3 (TRNG)

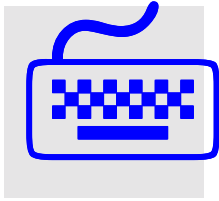
ID: 222222222 Suzie Smith

Query Date: 01-JUL-2003

Dedn Code	Desc	Effective Date	Options #1	#2	Stat	Begin Date	End Date	Activity Date
301	FED TAX	01-NOV-2001	S	1	A	01-NOV-2001		07-NOV-2002
302	FICAOSI	01-NOV-2001			A	01-NOV-2001		07-NOV-2002
305	FICAMEDI	01-NOV-2001			A	01-NOV-2001		07-NOV-2002
PT6	TIAA ARC	01-JAN-2003			A	01-JAN-2003		07-NOV-2002
PTD	TIAA DEF	01-DEC-2002	12		A	01-DEC-2002		07-NOV-2002
SWZ	PREMMAN	01-DEC-2002			A	01-DEC-2002		07-NOV-2002
VR0	RLSTR LIF	01-JAN-2003			A	01-JAN-2003		07-NOV-2002
Y12	HIGH RET	01-DEC-2002			A	01-DEC-2002		07-NOV-2002
ZZZ	# PAYS	01-DEC-2002		26	A	01-DEC-2002		07-NOV-2002

Deduction Code;

Record: 1/9 ... <OSC>



## PEIDHIS

## Employee Deduction History Form

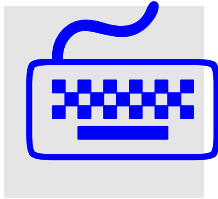
The Employee Deduction History Form displays a record of changes made to the Employee Deduction Form.

The screenshot shows the Oracle Developer Forms Runtime - Web window. The title bar reads "Oracle Developer Forms Runtime - Web". The menu bar includes "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Help", and "Window". The toolbar contains various icons for file operations, editing, and navigation. The main form is titled "Employee Deduction History Form PEIDHIS 5.3 (BTRN)".

The form contains the following fields and controls:

- ID: 012528880 Patricia L Sowa
- Dedn: 101
- Status: A
- Effective Date: 01-SEP-2003
- Ref No.:
- Option 1: ☐ Amount 1: 250.00
- Option 2: ☐ Amount 2: 2500.00
- Option 3: ☐ Amount 3:
- Option 4: ☐ Amount 4:
- Option 5: ☐
- Arrear Balance:
- Add/Replace
- Indicator: ☐
- Capture Date/Time: 03-JUN-2003 14:57:54
- Pay ID:
- User Id: TSONA
- Employee Amount:
- Employer Amount:
- Applicable Gross:
- Deleted: ☒ Arrear Status: ☐
- Open Enrollment: N
- Begin Date: 01-SEP-2003
- End Date:

The status bar at the bottom shows "Record: 1/?" and "<OSC>".



## PEIDTOT

## Deduction/Benefit Year to Date Totals Form

The Deduction/Benefit Year to Date Total Form displays Year to Date deduction information during a specified year. Converted data from January – June 2003 will populate in the month of June.

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Deduction/Benefit Year to Date Totals Form PEIDTOT 5.3 (TRNG)

ID: 654321789 Suzanne A Smith

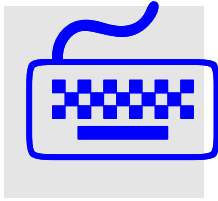
Deduction: 100 FSA - Health Care Year: 2002 01-JAN-2002 to 31-DEC-2002

Employer: USNH Univ System of New Han ☒ Calendar ☐ Fiscal ☐ Plan

Month	Employee Amt	Employer Amt	Applicable Gross	Yearly Totals
JUN	500.11	0.00	0.00	Employee: 500.11
SEP	0.00	0.00	1846.15	Employer: 0.00
NOV	0.00	0.00	3692.30	Appl Gross: 5538.45
Qtr1:				Life to Date Totals
Qtr2:	500.11	0.00	0.00	Employee: 653.99
Qtr3:	0.00	0.00	1846.15	Employer: 0.00
Qtr4:	0.00	0.00	3692.30	Appl Gross: 12923.06

Press Clear Form/Rollback for next query.

Record: 1/3 <OSC>



## PHICHEK

## Deduction/Benefit Year to Date Totals Form

The Deduction/Benefit Year to Date Total Form displays Year to Date deduction information during a specified year.

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Check Detail Inquiry Form PHICHEK 5.3 (TRNG)

ID: 654321789 Suzanne A Smith

Year: 2001 Pay ID: B1 Pay No: 23 Sequence No: 0

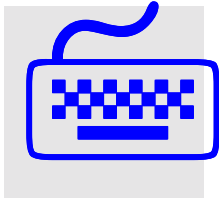
Gross Amount: 1846.16 Disposition: 70 Complete

Deductions: 707.29

Net Amount: 1138.87 UI Weeks: UI Exception Indicator:

Documents			
Number	Type	Amount	Date
115	Check	1138.87	09-NOV-2001

Record: 1/1 <OSC>



## PHILIST

## Pay Event List Form

If you were to drill down on the flashlight on PHICHEK you would be navigated to this form – PHILIST. Double click on the pay event you wish to view and you will taken back to PHICHEK.

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Pay Event List Form: PHILIST 5.4 (TRNG)

ID: 654321789 Suzanne A Smith

Year	Pay Id	No	Seq No	Event Type	Disp
2002	B1	23	0	C Original	60
2002	B1	21	0	C Original	30
2002	B1	20	0	C Original	40
2002	B1	19	0	C Original	70
2001	B1	23	0	C Original	70
2001	B1	22	0	C Original	20
2001	B1	21	0	C Original	70
2001	B1	20	0	C Original	70
2001	B1	15	0	C Original	70

History Date	Gross	Net
08-NOV-2002	0.00	0.00
11-OCT-2002		
27-SEP-2002	0.00	0.00
13-SEP-2002	0.00	0.00
09-NOV-2001	1846.16	1138.87
26-OCT-2001		
12-OCT-2001	1846.15	62.25
28-SEP-2001	1846.15	62.26
20-JUL-2001	1846.15	368.17

Year.

Record: 7/15

<OSC>

# BENEFITS ADMINISTRATION

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Check Detail Inquiry Form PHICHEK 5.3 (TRNG)

ID: 654321789 Suzanne A Smith

Year: 2001 Pay ID: B1 Pay No: 23 Sequence No: 0

Gross Amount: 1846.16 Disposition: 70 Complete

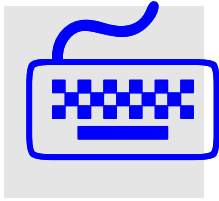
Deductions: 707.29

Net Amount: 1138.87 UI Weeks: UI Exception Indicator:

Deductions Information PHICHEK 5.3 (TRNG)

Empr	Deductions	Employee Amt	Employer Amount	Applicable Gross
A11	Cigna HMO+	8.00	444.46	1846.16
D01	Delta Basic+	7.66	8.85	1846.16
L21	Life Insurance 3 X Salary +	3.07	4.90	1846.16
M41	AD&D \$25,000+	0.00	.15	1846.16
PF6	Fidelity ARC	0.00	18.46	1846.16

Record: 9/? <OSC>



PPAIDEN

## Identification Form

The Identification Form enables you to enter basic biographic/demographic data about anyone associated with the institution.

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Identification Form PPAIDEN 5.3.3 (TRNG)

Generate ID:

ID: 222222221 HR Training

Current Identification

ID: 222222221 SSN/SIN/TFN: 222222221

Name Type:

Person Name Information

Last Name: Training

First Name: HR

Middle Name:

Prefix:

Suffix:

Pref. First Name:

Non-Person Name Information

Name:

Current identification number; overtype to change; DUP REC for Maintenance Info


Record: 1/1 ... <OSC>


## BENEFITS ADMINISTRATION

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Identification Form PPAIDEN 5.3.3 (TRNG)

Generate ID: 

ID: 22222221 HR Training 

**Biographic Information PPAIDEN 5.3.3 (TRNG)**

Date of Birth: 01-JAN-1945 Age: 58

**Ethnicity:** 5 White-nonhispanic

**Gender:** ☐ Male ☒ Female ☐ Not Available

**Marital Status:** ☐

**Citizenship:** 01 U.S. Citizen

**Deceased Ind:** ☐ Date: Age:

Non-Person Name Information

Name:

Date of Birth.


Record: 1/1 <OSC>


# BENEFITS ADMINISTRATION

Oracle Developer Forms Runtime - Web


File Edit Options Block Item Record Query Help Window

Identification Form PPAIDEN 5.3.3 (TRNG)

Generate ID: 

ID: 222222221 HR Training 


Address Information PPAIDEN 5.3.3 (TRNG)

Type: CM Contact (Local) Mailing 

Address: Dunlap Center






Seq # 1


City: Campus-System Office

State/Province: ZIP/PC: USNH 


County:

Nation:


Phone:     Type: 

From 28-MAY-2003 To 

☐ Inactive

Source: 

User: TSOVA

Delivery: 


Activity Date: 28-MAY-2003


Record: 1/1 ... List of Valu... <OSC>

Oracle Developer Forms Runtime - Web


File Edit Options Block Item Record Query Help Window

Identification Form PPAIDEN 5.3.3 (TRNG)

Generate ID: 

ID: 222222221 HR Training 


Address Information PPAIDEN 5.3.3 (TRNG)

Type: PM Permanent Mailing 

Address: 555 Smith Street


Seq # 1

City: Durham

State/Province: NH ZIP/PC: 03824 

County:

Nation:


Phone:     Type: PM

From 04-JUN-2003 To

☐ Inactive

Source:

User: TSOVA

Delivery: 

Activity Date: 04-JUN-2003

Record: 2/2 ... List of Valu... <OSC>



# FREQUENTLY ASKED QUESTIONS

**Please feel free to contact Tricia at [tricia.sowa@unh.edu](mailto:tricia.sowa@unh.edu) with additions to this document.**

1. **FAQ:** What is the name of the Quick Set Up Form?

The Employee Benefit/Deduction Set Up Form (PDABDSU) is also known as the Quick Set Up Form. This form displays all benefits/deductions that are defined for the employee's class on the Benefit Category Rule Form (PTRBCAT) and designated for quick set up. Benefits are set up on a window of the PDABDSU form.

2. **FAQ:** What is the difference between PDAEDN and PDABDSU?

The PDABDSU Form can be used when enrolling employees in their core benefits. Additionally a select number of voluntary benefits are also displayed on this form. Once a benefit/deduction has been established all future coding will occur on the PDAEDN Form. PDAEDN is also used to enroll employees in their benefit/deductions that are not included on the PDABDSU Form.

3. **FAQ:** Where can I go to see deduction totals for an employee?

The PEIDTOT Form will display totals by deduction for each employee. Converted data for January – June 2003 will be displayed in the month of June.

4. **FAQ:** How can I see what an employee currently has for deductions?

The Form PDIDLST can be used to access current deduction information. Using the current date in the Query Date field will show active current deductions.

5. **FAQ:** I forgot to add in a deduction for an employee; what do I do?

You can go back to the PDABDSU form or PDAEDN to add the deduction. If a payroll has already been processed you may need to process a One Time Adjustment, which is accessed through the PDAEDN form.

6. **FAQ:** What is the name of the report used to generate an enrollment form and how is the form produced?

The job PZRBENE is run for individual benefits enrollment form production. Refer to instructions in Lesson 1 for specific instruction.

7. **FAQ: HELP!** Who do I call?

First, call the help desk at 2-4242. They will log in the call and your specific question and direct you to the contact person who can assist you. Frequently Asked Questions will be added to the Project FRESH web site for your reference.

8. **FAQ:** What is the function of the ZZZ deduction?

The ZZZ deduction is established to indicate the number of pays for that employee. The annualized cost of the benefit is divided by the ZZZ deduction for a per pay deduction amount.

9. **FAQ:** What do I do if changes are made to NBAJOBS Number of Pays and the ZZZ deduction on PDAEDN no longer matches?

It is imperative that the number of pays on the NBAJOBS record match the number of pays on the PDAEDN ZZZ deduction. A report will be generated and run before each pay to use as an audit.

10. **FAQ:** If an employee only has a complementary job, what should their ZZZ record be?

It should always be 26.

11. **FAQ:** How do I code core benefits?

Refer to Lesson 1 of Advanced Benefits Training, Producing Enrollment Forms and Enrolling Employee in Core Benefit Selections.

12. **FAQ:** What will the live instance be and how do I access it?

BPRD is the Banner Finance instance and will be the instance for Banner HR also. Banner is an integrated product.

13. **FAQ:** What form should I use when an employee terminates employment and all benefits must be terminated?

You should use the PEAESCH – Employee Status Change Form.

14. **FAQ:** When terminating a deduction, what date should I be coding for the end date?

The end date coded should always be the last day of the pay period that the deduction is being terminated. Payroll will publish these dates, which are listed on PTRCALN, Payroll Calendar Rule Form.