



8.0 Banner HR/Payroll Enhancements

**Benefit and Deduction Combined Limit
Processing
FMLA
Other Enhancements**

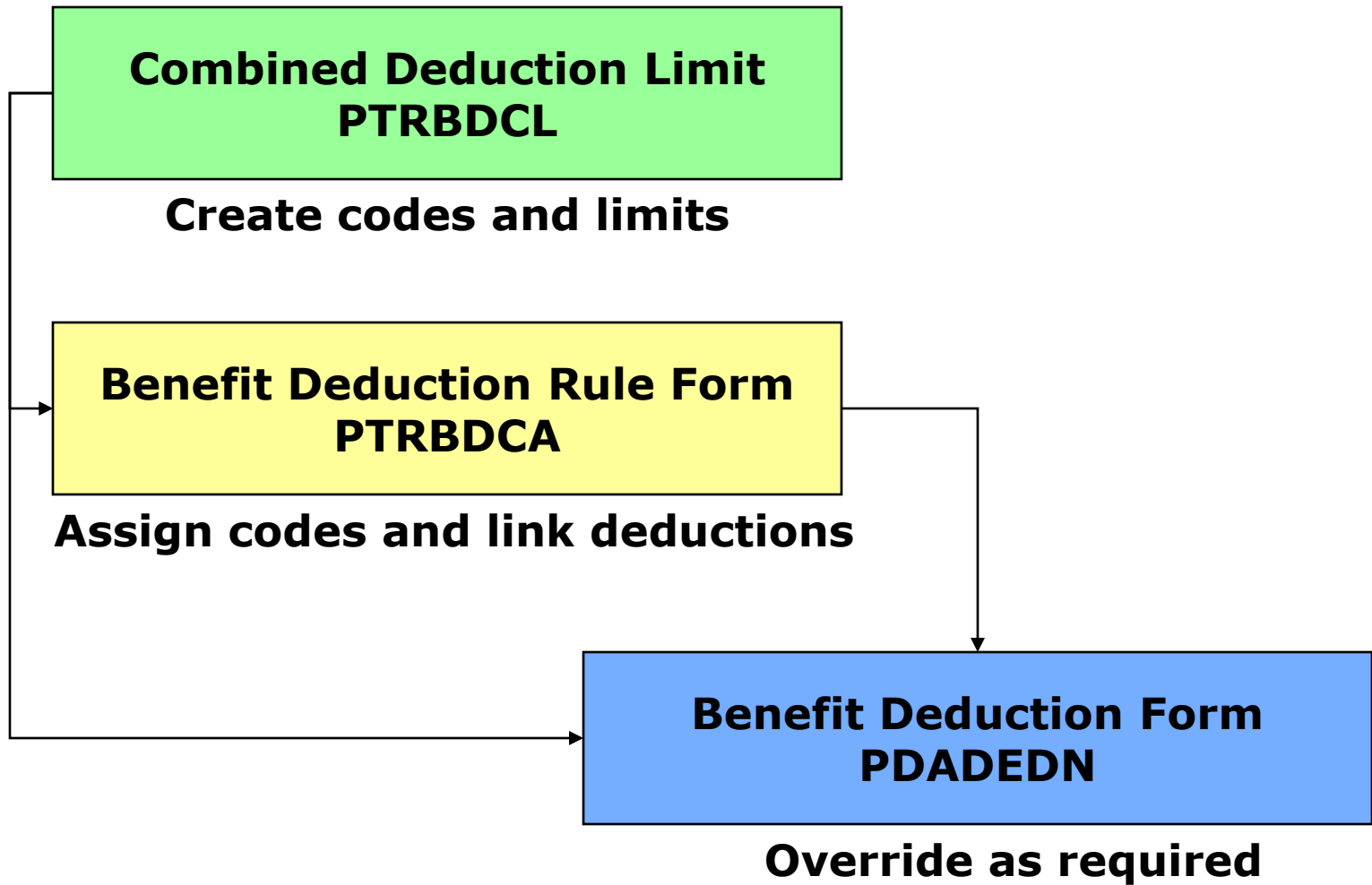
**Sue Jennings
1:00 pm to 2:00 PM
August 7, 2009**



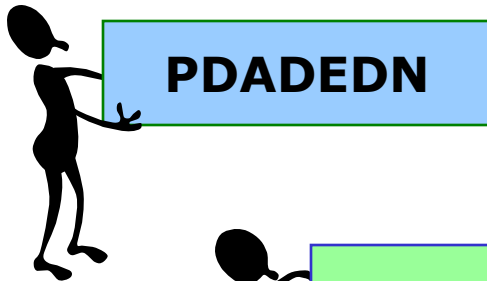
Meeting Goals

- **Introductions**
- **Review how the new combined limit functionality will work**
- **Review the enhancements in FLMA tracking**
- **Review the other miscellaneous enhancements**
- **Questions**

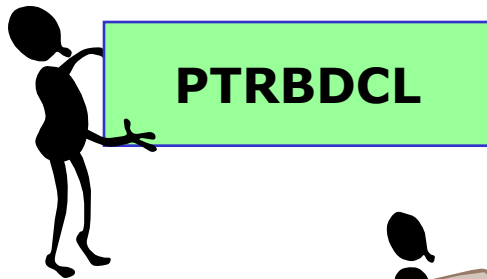
Forms Involved



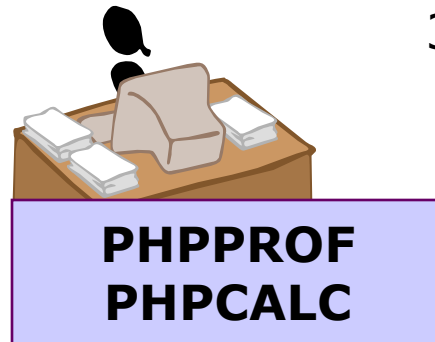
How it Works



1. Grabs the limit code on the deduction



2. Checks out the limit amounts



3. Calculates with information from rule forms

Combined Deduction Limit: PTRBDCL

- Create a code and description
- Employee Limit
- Employer Limit
- Combined Limit
- Applicable Gross Limit

Benefit/Deduction Combined Limit Rules PTRBDCL 8.0 (BAN8)

Combined Limit Rule Code	Description	Employee Limit	Employer Limit	Combined Limit
403VR50	403 over 50 Catch Up	20,000.00		49,900.00
403REG	403 Retirement	5,000.00	3,000.00	7,000.00
CATCHUP	Catch Up Contributions	5,500.00		
SAFEHARB	Elective Deferrals Safe Harbor	11,500.00		
SIMPLE	Elective Deferrals Simple 401K	16,500.00	.00	.00
TEST01	Test Code 01		300.00	

Benefit/Deduction Rule Form PTRBDCA

- Optional entry for the limit code
- Required entry to link the benefit/deduction codes to be involved in the limits on PTRBDCL

Benefit or Deduction Code: LAF	
Description	
Short: AMERFIDA	Long: American Fidelity Assurance Co
Calculation Information	
Priority: 72	Calculation Rule: 11 Flat Amount with Plan
Deduction Type: 15	<input checked="" type="checkbox"/> Exclude from Overload Jobs
Tax Code:	Arrearage Method: No Arrears
1099-R Code:	Year-To-Date Start Month Indicator:
	Combined Limit Rule Code: TEST01 Test Code 01

Assign Limits

- Assign limit code on PTRBDCA or PDADEDN
- If you override the limit code on PDADEDN, you must override the code on all linked records (benefit deduction codes are linked on PTRBDCA)

Employee Benefit/Deduction Form PDAEDN

Deduction
Add or Replace and Arrears
Excluded Payroll ID
Premium History

Begin Date: 01-AUG-2009
End Date:
Calculation Rule: 11
 Bond Balance:

Effective Date: 01-AUG-2009
 Status: Active
 Reference:

Options			Amounts		
	Title	Value	Entry	Title	Amount
1	Plan:	10	Required	1 Emp Pay:	100.00
2			No Entry	2 Empr Pay:	200.00
3			No Entry	3 EmplPrev:	300.00
4			No Entry	4 EmprPrev:	400.00
5			No Entry		

Combined Limit Rule Code	Description	Employee Limit	Employer Limit	Combined Limit	Applicable Gross Limit
TEST01	Test Code 01		300.00		

Override Functionality

PTRBDCL

Created a code of UNDER50

- set employee limit
- set employer limit
- set applicable gross limit

Created a code of OVER50

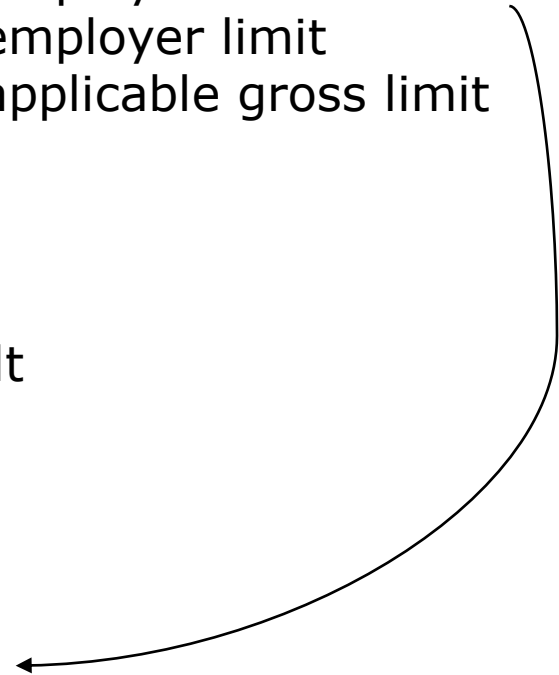
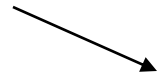
- set different employee limit
- set different employer limit
- set different applicable gross limit

PTRBDCA

Assigned code of UNDER50 to default

PDAEDN

Overrode default code to OVER50



New Calculation Rules

- 16 Flat Amount by Employee with Employer Share
 - Deduction amount entry is done on PDADEDN
- 28 Percent of Gross by Employee with Employer Share
 - Deduction amount entry is done on PDADEDN
- 29 Percent of Gross (each plan) with Combined Limits -Employer Match
 - Deduction code and percentage is set up on PTRBDCA

Changed Processes

- New Pay Period Proof Process (PHPPROF) error condition:

All deductions to be included in the combined limit calculation must have the same combined limit rule code on PDRDEDN.

- The Payroll Calculation Process (PHPCALC) will check to see if the combined amounts have reached the maximum amounts.

These are the calculation rules considered by the combined limit functionality.

- 11* Flat Amount (with plan)
- 16* Flat Amount by Employee with Employer Share
- 21* Percent of Gross each plan
- 28* Percent of Gross by Employee with Employer Share
- 29* Percent of Gross (each plan) with Combined Limits – Employer Match

Other Changes

- The Benefit Deduction Mass Change Process (PDPBDMC) will now insert or update the Combined Limit on PDADEDN.
- The combined limit code as been added to the Benefit/Deduction Mass Change Rule Form (PTRBDMC)
- The combined limit field has been added to the Employee Deduction History Form (PEIDHIS)

Reason for the Change to FMLA from US Dept. of Labor

- The Final Regulations implement two important new military family leave entitlements for eligible specified family members:
- (1) Up to 12 weeks of leave for certain qualifying exigencies arising out of a covered military member's active duty status, or notification of an impending call or order to active duty status, in support of a contingency operation, and
- (2) Up to 26 weeks of leave in a single 12-month period to care for a covered service member recovering from a serious injury or illness incurred in the line of duty on active duty. Eligible employees are entitled to a combined total of up to 26 weeks of all types of FMLA leave during the single 12-month period.

New Set Up for FMLA Tracking

- PTRINST: Installation Rule Form
 - The tracking units indicator must be set to hours to use the import payroll history option.
 - Two new fields:
 - Service Year Type
 - Institution Year MM and DD

Changes to PEAFMLA

- New Leave History tab
 - Track changes to the Leave Event record
- Entry of multiple comments
 - Track User ID, Date, and Time entered for each entry
- For leave taken to care for a family member belonging to the Military,
 - Name of the individual
 - Type of Care
 - Relationship to the employee
 - Receipt of military documentation

More Changes to PEAFMLA

- Modified tracking to allow specific tracking of extended leave for up to 26 weeks in a 12 month period (site defined service year)

Import FMLA Leave From Payroll Records

- Options Menu in Leave History Window
 - Import Payroll History option has been added to the Options menu, of the Leave
 - Imports hours reporting during FLMA leave dates
- New field on PTREARN: Earnings Code Rules Form
 - FMLA Usage Hours indicator on the (PTREARN) where you can specify earning codes to be imported

Changes to PEIFMLA FMLA Status Inquiry Form

- Tab navigation has been added to the form
- Two new fields,
 - Status and Comments Exist

PTRBREL

Beneficiary Relationship Rules Form

- A relationship code has been added to PEAFMLA to track the relationship between the employee and the Military Service member being cared for.
- PTRBREL checks for the use of that code upon delete. If you attempt to delete a relationship code on PTRBREL, the following message will be displayed: **ERROR* Relationship Code exists on Beneficiary records.*

Other changes

- PTVFREA: FMLA Leave Reason Validation Form
- PTVFMST: FMLA Status Validation Form
 - A new edit has been added so that you cannot delete a value that had been used on PEAFMLA.

Electronic Personnel Action Form Changes

You can now use Electronic Personnel Action forms to update the multiple ethnicity fields on PPAIDEN.

More Forms with Tab Navigation

- Position Description Form PAAPDES
- Position Requirements Form PAAPREQ
- Position Definition Form NBAPOSN
- Employee FMLA Information PEAFMLA
- Employee Class Rules Form PTRECLS
- Benefit Category Rules Form PTRBCAT
- Installation Rules Form PTRINST
- Fringe Charge Back Rules Form NTRFBLD

General Changes for Internationalization

- Additional Identification Table (GORADID)
- Fields have been expanded
 - First name and Middle initial to 60 characters
 - Address to 75/City to 50
 - Area code to 6/Telephone to 12/Extention to 10
 - Email to 128
- House number has been added to addresses
- Phone numbers now have a country code

Current Identification					Alternate Identification					Address					Telephone					Biographical					E-mail					Emergency Contact					Additional Identification				
ID Type	Description		Additional Identification		Activity Date		User																																
PLUS	Id from Legacy System		D323456723		06-AUG-2009		JENNINGSS																																

Questions?



Strata Information Group

Contact Information

**Strata Information Group
3935 Harney Street, Suite 230
San Diego, California 92110
619-296-0170
www.sigcorp.com**

**Sue Jennings, Sr. Consultant
314-920-1079
jennings@sigcorp.com**