8.0 Banner HR/Payroll Enhancements

Benefit and Deduction Combined Limit Processing
FMLA
Other Enhancements

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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

- Combined Deduction Limit
  PTRBDCL
  Create codes and limits

- Benefit Deduction Rule Form
  PTRBDCA
  Assign codes and link deductions

- Benefit Deduction Form
  PDADEDN
  Override as required
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 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
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

PDADEDN

**Options**

<table>
<thead>
<tr>
<th>Title</th>
<th>Value</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan:</td>
<td>10</td>
<td>Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No Entry</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No Entry</td>
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<tr>
<td></td>
<td></td>
<td>No Entry</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No Entry</td>
</tr>
</tbody>
</table>

**Amounts**

<table>
<thead>
<tr>
<th>Title</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emp Pay:</td>
<td>100.00</td>
</tr>
<tr>
<td>Empr Pay:</td>
<td>200.00</td>
</tr>
<tr>
<td>EmplPrev:</td>
<td>300.00</td>
</tr>
<tr>
<td>EmprPrev:</td>
<td>400.00</td>
</tr>
</tbody>
</table>

**Combined Limit**

<table>
<thead>
<tr>
<th>Rule Code</th>
<th>Description</th>
<th>Employee Limit</th>
<th>Employer Limit</th>
<th>Combined Limit</th>
<th>Applicable Gross Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST01</td>
<td>Test Code 01</td>
<td></td>
<td>300.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

PDADEDN
Overrode default code to OVER50
New Calculation Rules

• 16 Flat Amount by Employee with Employer Share
  – Deduction amount entry is done on PDADLEDN

• 28 Percent of Gross by Employee with Employer Share
  – Deduction amount entry is done on PDADLEDN

• 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 PDRDEEDN.

- 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 has 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 FMLA 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
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/Extension to 10
  - Email to 128
- House number has been added to addresses
- Phone numbers now have a country code
Questions?
Contact Information

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