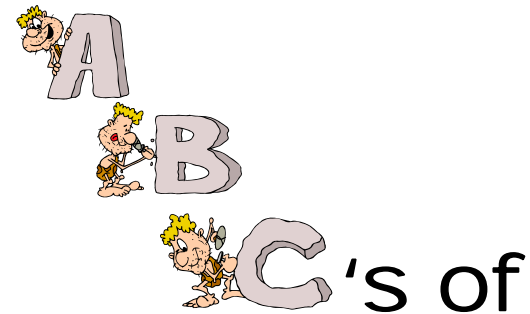




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's of
PeopleSoft
Benefits
Administration

ABC's of PeopleSoft Benefits Administration

- **Topics**
 - Overview
 -  **A**dvantages
 -  **B**ooby traps
 -  **C**ollaboration
 - Q & A



Overview of PeopleSoft Benefits Administration

- Simplifies open enrollment and life event maintenance through automated eligibility processing
- Event maintenance enables you to monitor personnel status changes or events



Overview at Stanislaus County

- Converted from Legacy to PeopleSoft on v. 7.0 in December 1998, upgraded to version 8 SP1 in November 2002 and recently upgraded to v. 8.9.
- Went live originally with Benefits Administration, COBRA, Benefits Billing, FMLA and Retro Benefits Deduction Processing.
- Went live on eBenefits March 2008 with Savings and Life Beneficiary Changes along with Summary views. Will be implementing Life Events by summer 2008.
- Services a population of 5000 employees and 125 COBRA participants.

Advantages

- Reviewing the ROI to support the implementation of Benefits Administration
 - Reduced headcount by 50%. **Reduced cost with increased productivity!**
 - Vendor interaction went from spreadsheet to interface file. **Reduces manual errors and better efficiency!**
 - Reduced the time and labor required to prepare open enrollment. **Greater efficiency and lower cost!**



Advantages

- All eligibility was determined manually by a benefits employee. Now BenAdmin automatically determines eligibility and the appropriate options for the employee. **Greater efficiency!**
- Moved from a manual to automated Flex credit process. **Reduced manual labor!**



Advantages

- COBRA
 - All Cobra enrollments were handled manually via spreadsheet (35 per month). **Now Cobra enrollment is produced automatically.**
 - Billing for Cobra/LOA did not exist, and bills were not prepared. **Now billing statements are automatically generated for Cobra and LOA participants (150 per month).**



Advantages

- FMLA
 - FMLA processing was tracked manually via spreadsheet (100 requests per month). **Now FMLA eligibility is verified automatically when request is entered.**



Advantages

- Retro Benefit Deductions
 - Retro benefit deductions were handled through payroll manually (30 per month). **Now retro benefits processing is done automatically.**



Advantages

- eBenefits
 - Savings contribution changes (50 per month) and life beneficiary changes (20 per month) were keyed by benefits dept after a form was submitted. **Now employee is able to make their own changes online and system is updated automatically.**
 - Employees called the benefits dept for enrollment and/or policy information or waited for a confirmation statement. **Now they can view information online.**





Booby Traps

- Challenges which we had to address to assure success
 - Working with HR
 - Use of Correction Mode by HR
 - Employees with Multiple Jobs
 - Working with Payroll
 - A positive paycheck is created for flex credits only even if they have no hours being reported.





Booby Traps

➤ COBRA

- At open enrollment, the Cobra enrollment forms pick up the rates based on the event date not the effective date.
- Require thorough understanding of how overage processing works





Booby Traps

➤ FMLA

- Must have one year's payroll history if using payroll hours for eligibility.
- Track intermittent FMLA requires notification from department's payroll and then keyed into module manually.
- An open intermittent leave needs to be closed before a full FMLA can be keyed.





Booby Traps

➤ Benefits Billing

- Lesson Learned: Naming convention for billing calendars - Begin with the year, not the month. (ex. 0701- January 2007)
- Leave of Absence Billing Consideration - there will be an enrollment record for all plans including those waived, and billing process will try to calculate a rate on a waived plan.





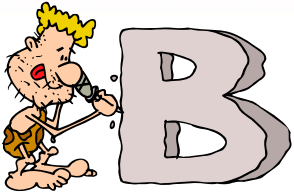
Booby Traps

➤ Retro Benefit Deductions

- Stanislaus Co. chooses to run this process on an individual rather than a population basis.

➤ Must have a BenAdmin Champion

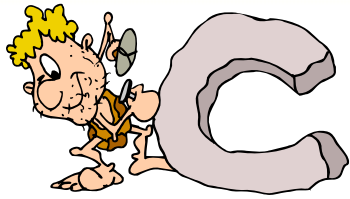
- Table set-up has to be meticulous.
- Understanding how HR affects you and how you affect Payroll.
- Stanislaus Co. chooses to audit the BAS Activity entries prior to running Ben Admin



Booby Traps

- BenAdmin Owner needs to be a 'Funcno-Tech'
 - Error messages are sometimes difficult to decipher.
 - You have to be a 'Sherlock Holmes'. Must be hands-on and put the time in testing and auditing to get the experience required to be successful.
 - May need technical intervention if Ben Admin process fails.

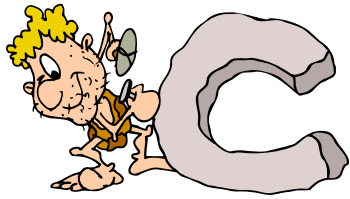




ollaboration is key

- Collaboration was critical between other Business Process areas and Benefits because each module's functionality is so intertwined.
 - Critical that HR staff has familiarity with what fields in Job and Personal Data are used in eligibility processing in Benefits Administration.
 - Critical that HR staff understand that any HR action may have a downstream affect on benefits processing. Ongoing communication and training is key.





ollaboration is key

- Critical that Benefits staff has familiarity with HR fields.
- Critical that Benefits staff has familiarity with set-up table values that affect Payroll.



Summary

- **Benefits Administration is a powerful product!**
- Benefits Administration requires **meticulous set-up, dedicated monitoring** and **collaboration** between HR and Payroll.
- You must be **hands on** and put in the time in testing and auditing to get the experience required to be successful.

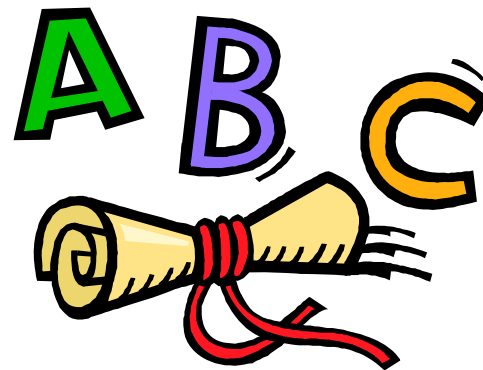
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Wrap-Up

- Questions and Answers



Thank You!



Follow-up



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