## **Benefits Vocabulary**

WORD/TERM	MEANING
Base Benefits	Core Benefits management tool in PeopleSoft. Allows enrollments to be stored and Payroll to access information to create deductions at the time of Payroll processing.
Benefits Administration	In PeopleSoft it allows the billing and self-enrolling of Benefits, but as HCA is the system of record for Health, Dental, Tobacco Surcharge, Spousal Surcharge, and Dependents we cannot use this functionality.
Benefit Record Number	Stored in Job Data, this will always be the employee's Company Code. Must be changed at time of hire from 0 to the Company Code.
Benefits System	Chosen in Job Data, in ctcLink we only use Base Benefits.
Benefit Program	Chosen either in Benefits enrollment screens or in Job Data, this tells the system what the employee is allowed to be enrolled into. Choices available in ctcLink are: SB1, SBA, SB2, and SB0.
Health Care Authority (HCA)	Considered the system of record for Dependent data, Medical enrollment, Dental enrollment, and the Tobacco and Spousal Surcharges.
Simple Benefits	In PeopleSoft Simple Benefits is where the Tobacco and Spousal Surcharge enrollments are stored. HCA delivers this enrollment information to PeopleSoft through an overnight process.
Pay1	HCA's system of record. Every night a global process is run in PeopleSoft that brings Pay1 data into PeopleSoft and loads enrollments.
MetLife	Life enrollments used to also be stored in Pay1 and delivered to PeopleSoft to be stored in Base Benefits, but in January of 2017 Life enrollments transitioned to MetLife, which in PeopleSoft is now a payroll deduction.
Savings Plans	In PeopleSoft, Savings Plans are 403(b) an 457 plans (often called voluntary deductions in Legacy). Any person working can opt into these plans. These enrollments are managed in PeopleSoft.
Spending Accounts	In PeopleSoft this encompasses HSA/Dependent Care/FSA. These enrollments are managed in PeopleSoft.
Retirement Enrollment	In PeopleSoft this includes programs managed by DRS and TIAA-CREF both. These enrollments are chosen at the time of hire, or upon reaching hour threshold eligibility.

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Disability Enrollment	In PeopleSoft this includes Basic (given to everyone in an SB1/SBA Benefit Program), and Optional (opted into by the employee).
Plan Type	This is how Benefits are divided into sub-categories, for instance 10 is Medical, 11 is Dental, 60 is Flex Spending. Within every Plan Type are usually multiple Benefit Plans.
Benefit Plan	Within a Plan Type, Benefit Plans outline a specific version of the Plan Type. For instance, Plan Types in Medical can be Uniform, Kaiser Classic, etc. There must be at least one Plan Type in every Benefit Plan.
Coverage Begin Date	When the employee starts to be associated with a specific Benefit Plan/Coverage Code. This should match the Deduction Begin Date.
Deduction Begin Date	This is when Payroll will start generating deductions against an employee's pay. Should match Coverage Begin Date.
Election Date	The Election Date is typically considered a system entry date for every benefit but Retirement.
Flat Deduction Override	The Flat Deduction Override is a custom field built to make the Spending Account screen easier to use for employees who are not paid year round.
Benefits Program Table	The core configuration that connects an employee to the proper deduction. The table itself contains every possible combination of coverage code to deduction inside a Benefit Program, and similarly ties those codes to costs and formulas.
Health Coverage Codes	Allow the admin to enroll the employee into a number that associates the employee's health coverage to a dependent combination (i.e. Family, Employee+Spouse, etc.).
Special Accumulators	Created and stored in Payroll configuration, these are mostly concerned with earn codes in Payroll and their effect on the accumulator (either they add to or subtract from it).
Benefit Plan Table	Associates the Benefit Plans with vendors. Vendors exist in HR, but they are created in Finance and synched to HR.
Benefit Rate Types	Delivered by PeopleSoft and most of these cannot be altered. We're currently only using Age Graded, Flat Rate, and Benefit Plan and Coverage Code.
Benefit Rates	Stored in tables together. Once a rate type is designated, a table can be created to store numbers (i.e. Medical, Dental, etc.).
Calculation Rules Table	Where calculation logic is built to hook into the Cost tab of the Benefit Program table.

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Limit Table	Some benefits are subject to IRS limits and those limits are defined in the Limit Table.
Dependent Rule	Needs to exist to complete configuration in the Benefit Program Table, but since we don't manage Dependents in PeopleSoft this rule ID is just a placeholder.
Coverage Formula Table	Hooks into the Disability Plan Table so that the Disability Plan knows how to calculate the rate used for coverage.
PrePay Mapping	Configuration that is local in setup but global in principle. PrePay deductions are differentiated from the normal payroll deductions by the prefix 900. Only deductions in this table can be used for PrePay by a college.
PrePay Calendars	Fully local, the college itself will determine the ID Number and Description of each calendar. Determines which deductions and when are going to be prepaid by specific populations.
DRS Calendars	Custom configuration used to support requirements laid out by the Department of Retirement Systems. These calendars are placed in an employee's Job Data, but must first be configured to be used. DRS Calendars run on a fiscal year.
Benefits Eligibility checkbox	Custom configuration item that is maintained in the Faculty Workload module within the Campus pillar. It determines which part time faculty contracts contribute towards the FTE calculation that in turn determines the benefit eligibility over time at a college for part time faculty members.
Benefits Eligibility screen	Pulls information from Faculty Workload and Job Data to return FTE from both locations (and summed) over one or many Terms.
Term	How the Campus pillar divides time periods for classes. For instance 2191 is 2019, Winter. 1 = Winter, 3 = Spring, 5 = Summer, 7 = Fall. The first three digits are the year abbreviated.
HCA Benefits Data	Screen mimics functionality from legacy to provide a comparison between HCA billing data and payroll data. For a Company, Coverage Year, and Month it will display the following: Billing Details, Billing Summary, and Discrepancies.
PTF LTD Report	Allows a user to run the report to figure out who among PTF employees needs entries created in Update ABBR to allow Optional LTD to process correctly.

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Update ABBR	Screen in PeopleSoft that allows the admin to associate an Annual Benefits Base Rate to a Job Record without changing Compensation in Job Data.
PTF Eligibility Report	Lists employees in various states of eligibility and highlights people who may need evaluation for a change in status.
HCA Average Cost	A payroll deduction paid on the A payroll, this is paid to the HCA and represents the monthly fee the college owes per employee.
PTF YRQ History Detail Report	Looks at a range of quarters and returns pay and FTE information about the employees, as well as Benefit Program.
DRS Transaction	Screen that allows the Benefits Admin to see the contents of the DRS transmittal per employee, either the current transmittal or a history of what has been transmitted.
DRS Redistribution	Will only execute for employees who have a DRS Calendar, and a Contract Begin and End Date in Job Data. Redistribution is a locally run process and will only execute when the contract End Date falls within the applicable Pay Period being processed. This attributes money earned by the employee to the period of time the work was performed.
Query	A report in PeopleSoft that can be created or run to return subsets of information. Can be either Public or Private. Security setup for Query is unique to Query.
Benefits Auto Enrollment (E-188)	Run by central Payroll. This does a laundry list of things but some highlights are: it enrolls people into the correct retirement age bracket plan, enrolls the HCA Avg Cost deduction on hire, and terminates Benefits on separation if no action has been taken manually.
Outbound HCA Insurance (I-032)	Run by central Payroll. This creates a data file of employee medical and long-term disability deductions along with the employer average cost contributions and sends it to the Health Care Authority.
Bio/Demo Data to HCA (I-093)	Run by central Payroll. This creates the HCA Demographics Data file, and only changes are reported.
Inbound HCA Billing (I-088)	Run by central Payroll. This is a semi-monthly interface from HCA into PeopleSoft and is used to populate the new HCA Benefits page(s). It mimics Legacy reports CR5605, CR5610A and CR5610B.
Inbound HCA Enrollment (I-092)	Run by central Payroll. This is a daily, changes only file sent from HCA with demographic, enrollment and dependent data. Any change, to demographic, enrollment data or dependent data, would cause an employee to be included on the daily file with all data.

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DRS Transmittal (I-024)	Run by central Payroll. This creates an extract file for transmission to the Department of Retirement Systems containing a summarized report of retirement deductions, contribution and employment data for all colleges. It sends the file to the Department of Retirement Systems.
Outbound MetLife Remit (I-120)	Run by central Payroll. This creates a data file of employee life insurance deductions and sends it to MetLife.
Inbound MetLife Billing (I-119)	Run by central Payroll. MetLife sends a new billing file for optional employee life insurance premiums each pay period. The file contains new enrollments and/or employee premium changes.
HCA W2 Data Load (SI-229)	Run by central Payroll. This file is generally produced on the 5th of January. The process populates W2 Boxes 12DD (HCA provided value), 12W (HSA) & 14 (health, tobacco, spousal amounts). These balances will be posted to the YTD balance for the appropriate deduction of the reporting year by running this process once a year.
Flexible Med Benefit Elig (I-029)	Run by central Payroll. This creates a data file of employees participating in the flexible spending account program and sends it to Navia Benefits.
Flex Medical Benefits Remittance (I-030)	Run by central Payroll. This creates a data file of employee flexible spending account deductions and sends it to Navia Benefits.
Dependent Care Deduction Report (I-022)	Run by central Payroll. This creates a data file of employee dependent care deductions and sends it to Navia Benefits.
Liberty Mutual Deductions (I-033)	Run by central Payroll. This creates a data file of employee Liberty Mutual deductions and sends it to Liberty Mutual.
TIAA-CREF Retirement Interface (I-041)	Run by central Payroll. This creates a data file of employee retirement deductions and employer contributions and sends it to TIAA.
Health Equity Deduction (I-089)	Run by central Payroll. This creates data file of employee health saving account deductions and sends it to Health Equity.
Update PrePay Balances	Run by central Payroll. As it says, this updates the PrePay Balances so that the running balances are correct in payroll screens.