



File Name	View Employee Event Detail.doc
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View Employee Event Detail

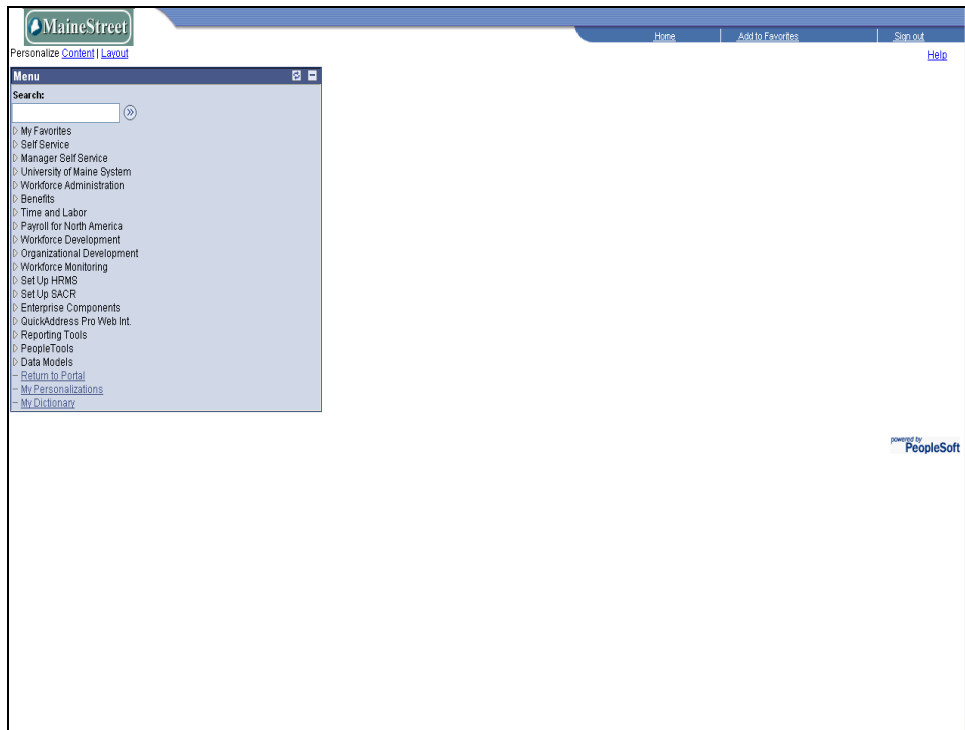
Concept



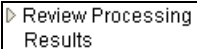

Use this procedure to view a detailed account of the benefit plan and election options that are processed by Benefits Administration for a selected participant.

The data for this component are updated as a participant moves through each phase of the Open Enrollment or Event Maintenance process. Updates occur each time the BAS process runs. You can view this information at any time.

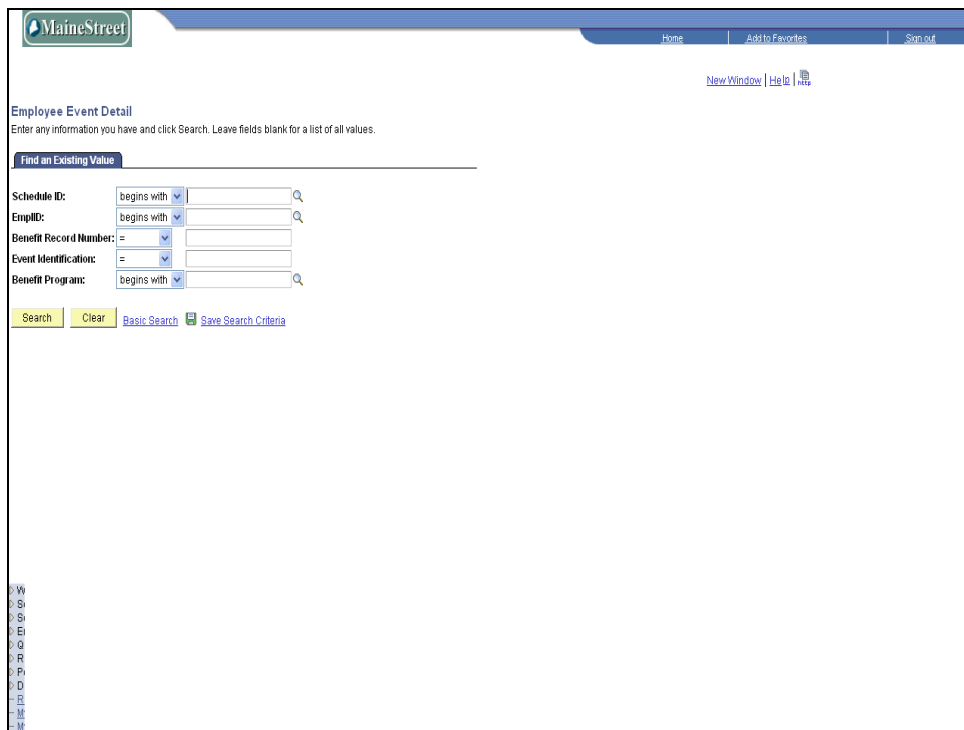


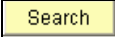

Navigation



Step	Action
1.	Click the Benefits link. 
2.	Click the Manage Automated Enrollment link. 
3.	Click the Review Processing Results link. 
4.	Click the Employee Event Detail link. 

Procedure



Step	Action
5.	Enter the desired information into the EmplID field.
6.	Click the Search button. 
7.	Click an entry in the Event Date column. 

Process Document

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Participant

Plan Type

Option and Cost

Sched ID: ALL All UMS Employees

EmpID: 0099999 Colleen Forhelp Benefit Rcd#: 0

Event Information

ID: 24 Empl Rcd#: 0 Date: 10/01/2008

Status: Closed to Processing Effseq: 0

Class: FSC Family Status Change Priority: 300

Source: Manual Event Multi-Activity Indicator

Eligibility Information

Empl Rcd#: 0 COBRA Action:

Addr Effdt: 08/01/1985

Job Effdt: 07/01/2007 Effseq: 2

Processing Information

Benefit Program: UP2 UMS Part-time FT Benefits Address Eligibility Changed

Process Status: Finalized - Enrolled Multi-Job Indicator Changed

Status Date: 10/01/2008 Job Eligibility Changed

Process Indicator: Normal Processing Event Out of Sequence

Election Source: Online Event Disconnected

Excess Credit: Cash Available through Self Service

Option Notify: 10/01/2008 Election Rcvit:

Confirm Notify: 10/01/2008 Confirm Rcvit:

Finalize/Apply Defaults Suppress Forms: Print Both Empl Print Days: 0

Empl Rcd#	Event	Effseq	Prv Job	Incl Eln	Incl Ded	Eligibility Source
08/01/1985						ADDRESSES
0 07/01/2007		2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JOB

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Participant | Plan Type | Option and Cost



Step	Action
8.	<p>The Participant page enables you to view event, eligibility, and processing information about an employee.</p> <p>The Event Information group box displays the event's ID (event ID), Status (event status), Class (event class), Source (event source), Date (event date), Effseq (event effective sequence), and Priority (event priority).</p> <p>The system displays a Status code that indicates whether the participant event is Open for Processing, Closed for Processing, or Void.</p> <p>If the event originated from (or is associated with) a Job, Union code, or Address (state or postal code) change, it will display effective sequence (Effseq) here.</p> <p>The Priority field determines the order of processing for events that occur for the same benefit record number on the same event date, but which have different event classes.</p> <p>The system will display the Source of the event: whether it was triggered by a change to an employee's address, union code, or job information, a passive event, or the insertion of a manual event.</p> <p>When the system selects the Multi-Activity Indicator check box, it means that this participant event is the result of a situation where the system located multiple activity records from BAS Activity table that had the same benefit record number, event date, and event class and merged them into a single participant event.</p>
9.	<p>The Eligibility Information group box displays information the system uses for determining eligibility for the event.</p> <p>The Empl Rcd# is the employment record number of the address, job, and union code records used for eligibility.</p> <p>If the event is associated with an action that may make the employee eligible for COBRA coverage, the system will display that action code in COBRA Action field.</p> <p>If the event originated from (or is associated with) an Address (state or postal code) change, the system will display the Effdt (effective date) and identifies the Effseq (effective sequence) of that event (or set of events).</p> <p>If the event originated from (or is associated with) a Job, or Union code, the system will display the Effdt (effective date) and identifies the Effseq (effective sequence) of that event (or set of events).</p>

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Step	Action
10.	<p>The Processing Information group box displays information about the current processing status of this participant event.</p> <p>Benefit Program: Displays the Benefit Program for which the employee is eligible</p> <p>Process Status: Displays the event processing status</p> <p>Assigned - event successfully assigned to Schedule and is ready for next step in processing</p> <p>Assigned Error - event was not successfully assigned to a Schedule and/or Benefit Program (i.e. eligible for 2 Ben Programs)</p> <p>Assigned None - event not assigned to Schedule and/or Benefit Program</p> <p>Prepared - Event is ready for printing of enrollment form and/or data entry</p> <p>Prep Error - event encountered error while preparing options</p> <p>Prep None - based on event rules, the event did not prepare any options</p> <p>Notified - Enrollment form has been printed OR employee has accessed Self-Service Benefits Enrollment</p> <p>Entered - Data Entry has been done OR changes have been submitted via Self-Service Benefits Enrollment.</p> <p>Election Error - Error message generated while processing data entry (i.e. Proof Required)</p> <p>Finalized - Prep None - event successfully finalized without any options prepared or processed</p> <p>Finalized - Prog None - event did not have any options to prepare using eligibility rules</p> <p>Finalized - Enrolled - event successfully finalized and changes are reflected in employees' benefit tables</p> <p>Status Date: displays date of processing status</p> <p>Process Indicator:</p> <p>Election Source: <i>None</i> (no elections entered), <i>Online</i> (elections entered via Election Entry) or <i>Web</i> (elections entered via Self-Service)</p> <p>Excess Credit: not used by UMS</p> <p>Option Notify: date enrollment was printed OR date employee accessed Self-Service</p> <p>Election Rcvd: date elections entered</p> <p>Confirm Notify: date confirmation statement was printed</p> <p>Finalize/Apply Defaults: checked if event was processed with defaults applied</p>



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Step	Action
11.	<p>The system will select the Address Eligibility Changed check box if there was a change, insertion, or deletion to address (State and Postal Code).</p> <p>The system will select the MultiJob Eligibility Changed check box if there was a change, insertion, or deletion to the multiple job indicators.</p> <p>The system will select the Job Eligibility Changed check box if there was a change, insertion, or deletion to the job information.</p> <p>If the event was processed out of sequence because a retroactively entered event preceded it, the system will select the Event Out of Sequence check box.</p> <p>If the event was disconnected because the event triggered one or more of the HR records used for eligibility were deleted, the system will select the Event Disconnected check box.</p> <p>If the Available through Self Service check box is selected, that means that the participant can enter their elections for the option processing results of this event through PeopleSoft eBenefits application.</p>
12.	<p>The Eligibility Source group box shows the source of eligibility data that was used when the event was last processed.</p> <p>The first line is always the effective date of the ADDRESSES table that contributed address data to the eligibility processing . The remaining rows show each job that may have contributed eligibility information and the Pri Job (primary job), Incl Elig (include for eligibility), Incl Ded (include for deductions) flags. These flags are used primarily in multiple job processing.</p>

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Participant Plan Type Option and Cost

Sched ID: ALL EmpID: 0099999 Ben Rcd#: 0 Event ID: 24

Plan Types First View: 1 First 4:20 of 20 Last

Plan Seq	Plan Type	01	Benefit Program
Plan Seq:	02	Plan Type:	60 Flex Spending Health - U.S.
Option Code:	10	Benefit Plan:	ADVHEA Coverage Code:
Curr Election:	Yes	<input type="checkbox"/> Elections Allowed	Coverage Begin: 10/01/2008
Enroll Action:	Enroll	<input type="checkbox"/> BAS Error	Deduction Begin: 10/01/2008
Ignore Plan:	No	<input type="checkbox"/> Proof Received	Coverage Elect: 10/10/2008
Coverage Elect:	Elect		Adtl Pay Eff: 10/01/2008

Flexible Spending Account

Employee Contribution:	Ann Excess Credits FSA:	Annual Pledge:
		2000.00

Billing


Billing Action:
N None

Plan Seq	Plan Type	03	Flex Spending Dependent Care
Option Code:	W	Benefit Plan:	Coverage Code:
Curr Election:	No	<input type="checkbox"/> Elections Allowed	Coverage Begin: 10/01/2008
Enroll Action:	Enroll	<input type="checkbox"/> BAS Error	Deduction Begin: 10/01/2008
Ignore Plan:	No	<input type="checkbox"/> Proof Received	Coverage Elect: 10/10/2008
Coverage Elect:	Waive		Adtl Pay Eff: 10/01/2008

Flexible Spending Account



Step	Action
13.	<p>The Plan Type page enables you to view employee benefit plan information.</p> <p>The Curr Election field is an indicator that explains why coverage might be terminated after event processing has occurred. The system displays one of the following options:</p> <p>Yes: The employee had coverage in this plan type as of the event date.</p> <p>No: The employee did not have coverage in this plan type as of the event date.</p> <p>Only: The employee had coverage in this plan type as of the event date, but is no longer eligible as a result of the event. Coverage is displayed here only because it will be terminated.</p> <p>Future: The employee has a future-dated election in this plan type that the system will terminate.</p> <p>When the Elections Allowed check box is selected, it means the employee can elect options in this plan type. If it is cleared, the employee cannot elect options in this plan type.</p> <p>Until the event is finalized, the Enroll Action field has default values of None and Elect. After finalization, Enroll Action can be either:</p> <p>None: No action occurred for this plan.</p> <p>Enroll: Coverage Elect is set to Waive or Elect.</p> <p>Terminate: Coverage Elect is set to Terminate.</p> <p>A participant receives an enroll action of None if the election for the given plan type matches the participant's current election. This way, if the participant stays in the same benefit plan for twenty years, there will be only one enrollment record rather than twenty. Participants also receive an enroll action of None if there is an error with the election, or no current election, when the participant is finalized.</p> <p>Plan Type</p>



Step	Action
14.	<p>Click the Option and Cost tab. The Option and Cost page enables you to view and track employee options and costs.</p> <p>If the Default Election check box is selected, it means that the option is a default option that can be assigned as a default to participants who fail to make their elections. It does not necessarily mean that this option was assigned to the participant as a default option.</p> <p>The Proof Required field is generally used for life and retirement plans. When Proof Required is selected, it means the participant must pass proof rules to legitimately enroll in the plan. These proof rules are stored in the event rules you have defined for your Benefits Administration system.</p> <p>The History Only check box identifies options which the employee is eligible for, but which the employee cannot choose. For example, when a participant undergoes a FSC (family status change) event such as a marriage, her eligibility for certain options will be unchanged, but the event rules associated with FSC events will only allow the participant to choose between the different options available to them as a direct result of the change in their coverage status. Later, when the participant enters Open Enrollment, she will have the ability to choose between the many different options for which she is eligible.</p> <p>Option and Cost</p>
15.	End of Procedure.