



Oracle Fusion Cloud HCM: Configure Benefits

Student Guide
D108056GC10

Author

Joe Good

Technical Contributors and Reviewers

Adam Gates

Deborah Beodeker

Publisher

Veena Narasimhan

170830202424C

Copyright © 2024, Oracle and/or its affiliates.

Disclaimer

This document contains proprietary information and is protected by copyright and other intellectual property laws. The document may not be modified or altered in any way. Except where your use constitutes "fair use" under copyright law, you may not use, share, download, upload, copy, print, display, perform, reproduce, publish, license, post, transmit, or distribute this document in whole or in part without the express authorization of Oracle.

The information contained in this document is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Restricted Rights Notice

If this documentation is delivered to the United States Government or anyone using the documentation on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software" or "commercial computer software documentation" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

Trademark Notice

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

Third-Party Content, Products, and Services Disclaimer

This documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

1 Overview of Benefits Configuration

- Common Questions 1-2
- Oracle Human Capital Management 1-3
- Configuring and Administering Benefits Overview 1-4
- Benefits Hierarchy and Structure 1-5
- Component Creation Sequence 1-6
- Key Points 1-7
- Practices 1-8

2 Preliminary Configuration, Effective Dates, and Session Dates

- Common Questions 2-2
- Preliminary Setup 2-3
- How Are Benefits Associated With An Employee? 2-4
- When Do You Need To Take Action? 2-5
- Modify A Worker's Benefits Relationships 2-6
- Create Year Periods 2-7
- Effective Dates 2-8
- Session Dates 2-9
- Key Points 2-10
- Practices 2-11

3 Manage Benefit Plan Types

- Common Questions 3-2
- Plan Type 3-3
- Review: Benefits Hierarchy and Structure 3-4
- Configure a Plan Type: Set The Name And Codes 3-5
- Configure a Plan Type: Set the Option Type 3-6
- Configure a Plan Type: Configure Grouping, Enrollment, and Extracts 3-7
- Key Points 3-8
- Practices 3-9

4 Manage Benefit Options

- Common Questions 4-2
- Benefit Options 4-3
- Review: Benefits Hierarchy and Structure 4-4

Configure an Option: Set the Effective Start Date 4-5
Configure an Option: Set the Name and Codes 4-6
Configure an Option: If Needed, Create a Waive Option 4-7
Configure an Option: Configure the Period of Enrollment 4-8
Associate Plan Types with the Option 4-9
Specify Allowable Dependents or Beneficiaries 4-10
Key Points 4-11
Practices 4-12

5 Create Benefit Plans

Common Questions 5-2
Benefit Plans 5-3
Review: Benefits Hierarchy And Structure 5-4
The Plan Configuration Roadmap: Steps 1-4 5-5
The Plan Configuration Roadmap: Steps 5-8 5-6
Ways to Create a Plan 5-7
Method 1: Quick Create 5-8
What Can You Specify When You Quick Create a Plan? 5-9
Method 2: Quick Create From Program 5-10
What Can You Specify When You Quick Create a Plan from Within a Program? 5-11
Method 3: Plan Configuration Process 5-12
Method 4: Integrated Microsoft Excel Workbook 5-13
Step 1: Enter The Basic Details: Basic Settings 5-14
Step 1: Enter The Basic Details: Availability And Options 5-15
Step 2: Add Additional Configurations: Basic Settings 5-16
Step 2: Add Miscellaneous Information 5-17
Editing and Activating Plans 5-18
Viewing Plans and Associated Objects 5-19
Validating Plans 5-20
Key Points 5-21
Practices 5-22

6 Create Benefit Programs

Common Questions 6-2
Benefit Programs 6-3
Review: Benefits Hierarchy And Structure 6-4
The Program Configuration Roadmap: Steps 1-3 6-5
The Program Configuration Roadmap: Steps 4-6 6-6
Ways to Create a Program 6-7
Method 1: Quick Create Program 6-8

What Can You Specify When You Quick Create a Program? 6-9
Method 2: Program Configuration Process 6-10
Method 3: Integrated Microsoft Excel Workbook 6-11
Step 1: Enter The Basic Details: Basic Settings (Part 1 Of 2) 6-12
Step 1: Enter The Basic Details: Basic Settings (Part 2 Of 2) 6-13
Step 1: Enter The Basic Details: Availability, Plan Types, And Plans 6-14
Step 2: Add Additional Configurations: Reporting Groups, Organizations, Image,
And Documents 6-15
Editing and Activating Programs 6-16
Viewing Programs and Associated Objects 6-17
Validating Programs 6-18
Key Points 6-19
Practices 6-20

7 Configure Eligibility Criteria

Common Questions 7-2
What's It All About? 7-3
How Do You Configure an Eligibility Profile? 7-4
Eligibility Criteria 7-5
Personal Eligibility Criteria 7-6
Postal Code Ranges 7-7
Service Areas 7-8
Employment Eligibility Criteria 7-9
Derived Factors Eligibility Criteria 7-10
Other Eligibility Criteria 7-11
Benefit Groups 7-12
User-Defined Criteria 7-13
Related Coverage Eligibility Criteria 7-14
Labor Relations Eligibility Criteria 7-15
Key Points 7-16
Practice 7-17

8 Define Eligibility Profiles

Common Questions 8-2
Where And How Are Eligibility Profiles Used? 8-3
Review: How Do You Configure an Eligibility Profile? 8-4
Create the Eligibility Profile: Initial Settings 8-5
Create the Eligibility Profile: Additional Settings 8-6
Create the Eligibility Profile: Add Eligibility Criteria 8-7
Eligibility Criteria: Sequence and Exclude 8-8

How Do Eligibility Criteria Combine Within A Profile? 8-9
How Do Eligibility Profiles Combine Within A Plan Or Program? 8-10
How Do You Test An Eligibility Profile? 8-11
Key Points 8-12
Practice 8-13

9 Configure Eligibility

Common Questions 9-2
What's It All About? 9-3
The Eligibility Hierarchy 9-4
What Are the Components of Eligibility? 9-5
Configure Eligibility Step 1: Select the Benefits Object 9-6
Configure Eligibility Step 2: Specify the Participation and Waiting Period 9-7
Configure Eligibility Step 3: Add Eligibility Profiles 9-8
Configure Eligibility Step 4: Add Allowable Dependents or Beneficiaries to Plans
and/or Options 9-9
Key Points 9-10
Practice 9-11

10 Configure Life Events

Common Questions 10-2
What is a Life Event? 10-3
Life Event Life Cycle 10-4
What Do You Have To Do? 10-5
Types of Life Events 10-6
How Do You Create An Explicit Life Event? Step 1: Specify The Data Change That
Triggers The Event 10-7
How Do You Create An Explicit Life Event? Step 2: Create A New Life Event That
Uses The Data Change 10-8
How Do You Configure Other Life Events? 10-9
How Do You Configure Other Life Events? General Information 10-10
How Do You Configure Other Life Events? Additional Information 10-11
Common Configurations 10-12
Life Event Processing 10-13
Key Points 10-14
Practice 10-15

11 Collapse Life Events

Common Questions 11-2
Technical Challenge: Multiple Life Events In A Short Time 11-3

Why Isn't Override Good Enough? 11-4
How Do You Configure Collapsing Rules? 11-5
1-3. Configure The Collapsing Event Rule Header 11-6
How Does Sequence Number Work? 11-7
How Do You Set The Final Occurred On Date? 11-8
4-6. Add Selected Life Events, Specify A Resulting Event, And Select The Operator
And What To Do With Collapsed Events 11-9
How Do You Collapse Events? 11-10
Key Points 11-11

12 Configure Enrollments

Common Questions 12-2
How Does Enrollment Work? 12-3
Eligibility Life Events 12-4
Enrollment Life Events 12-5
The Enrollment Hierarchy 12-6
Configure Enrollment: Programs 12-7
Configure Enrollment: Plan Types Page 1 12-8
Configure Enrollment: Plan Types Page 2 12-9
Configure Enrollment: Plans 12-10
Configure Enrollment: Options 12-11
Configure Enrollment: Program Life Events 12-12
Configure Enrollment: Plan Type Life Events 12-13
Configure Enrollment: Plan Life Events 12-14
Configure Enrollment: Option Life Events 12-15
Key Points 12-16
Practices 12-17

13 Certifications

Common Questions 13-2
What's It All About? 13-3
Where Do You Manage Certifications? 13-4
Add a Certification Requirement 13-5
Add An Enrollment Certification 13-6
Life Event Enrollment Certifications 13-7
Where Do You Manage Restrictions? 13-8
Benefit Amount Restrictions 13-9
Plan or Option Sequence Restrictions 13-10
Key Points 13-11
Practice 13-12

14 Designations

Common Questions 14-2

Review: Specify Allowable Dependents or Beneficiaries for Options 14-3

Review: Specify Allowable Dependents or Beneficiaries for Plans or Options in Plan 14-4

How Do You Configure Designation? 14-5

For Programs, Specify The Dependent Designation Level 14-6

Configure Dependent Designations: Overview 14-7

Configure Dependent Designations: Add Action Items 14-8

Configure Dependent Designations: Add Certifications 14-9

Configure Dependent Designations: Life Event Settings 14-10

Configure Beneficiary Designations: Add Action Items 14-11

Configure Beneficiary Designations: Add Restrictions 14-12

Key Points 14-13

Practice 14-14

15 Export and Import Plan Configurations

Common Questions 15-2

What's It All About: Exports? 15-3

What Should You Do Before You Perform an Export? 15-4

Perform the Export 15-5

What Gets Exported? 15-6

How Do You Check Your Export? 15-7

What's It All About: Imports? 15-8

Prepare the Target Environment 15-9

Start the Import 15-10

Specify the Required Mappings 15-11

Possible Mappings 15-12

Validate the Results 15-13

Review the Results 15-14

Key Points 15-15

16 Fast Formulas for Benefits

Common Questions 16-2

What's It All About? 16-3

General Information About Formulas 16-4

How Are Formulas Created? 16-5

How Are Formulas Used? Examples 16-6

Formula Types 16-7

Who Can Modify Formulas? 16-8
How Do You Test a Formula? 16-9
Key Points 16-10

17 Benefit Rates and Elements

Common Questions 17-2
What's It All About? 17-3
Standard Rates 17-4
Variable Rate Profiles 17-5
Additional Information for Variable Rate Profiles 17-6
Variable Formulas 17-7
Add a Rate to a Plan or Option in Plan 17-8
1. Create Any Required Elements And Set Their Options 17-9
2. Set Element Eligibility 17-10
3. Create Variable Rate Profiles or Variable Formulas 17-11
4. Create a Standard Rate (Page 1 of 3) 17-12
4. Create a Standard Rate (Page 2 of 3) 17-13
4. Create a Standard Rate (Page 3 of 3) 17-14
What are Imputed Rates? 17-15
How Do You Implement Imputed Rates? 17-16
Key Points 17-17
Practices 17-18

18 Calculation Methods

Common Questions 18-2
What's It All About? 18-3
Calculation Methods 18-4
Calculation Methods: Flat Amount 18-5
Calculation Methods: Multiple Of 18-6
Additional Configurations 18-7
Processing Information 18-8
Extra Inputs 18-9
Partial Month Determination 18-10
How Are Rates Communicated? Communicated Rate Frequency 18-11
How Are Rates Communicated? Defined Rate Frequency 18-12
How Are Rates Communicated? Value Passed to Payroll 18-13
Key Points 18-14
Practice 18-15

19 Variable Rate Profiles

- Common Questions 19-2
- What's It All About? 19-3
- How Does It Work? 19-4
- What If You Have Multiple Eligibility Criteria? 19-5
- Creation Sequence 19-6
- Create a Variable Rate Profile: Header Information 19-7
- Create a Variable Rate: Calculation Method 19-8
- Create a Variable Rate: Rounding, Limits, and Ultimate Limits 19-9
- Add the Variable Rate to a Standard Rate 19-10
- Key Points 19-11
- Practices 19-12

20 Benefits Plan Coverage

- Common Questions 20-2
- What's It All About? 20-3
- How Do You Create A Coverage? 20-4
- Select The Plan, Option, And Calculation Method 20-5
- Calculation Methods: Flat Amount 20-6
- Calculation Methods: Flat Range 20-7
- Calculation Methods: Multiple of Compensation 20-8
- Calculation Methods: Additional Options 20-9
- Variable Coverage Profiles 20-10
- Configure a Variable Coverage Profile 20-11
- Annual Values And Ultimate Limits 20-12
- Add Variable Coverage Profiles to Coverages 20-13
- Limit Coverage for a Program 20-14
- Key Points 20-15
- Practices 20-16

21 Flex Credits

- Common Questions 21-2
- What's It All About? 21-3
- What Are Flex Credits? 21-4
- How Do Flex Credits Work? 21-5
- Configure Programs To Use Flex Credits 21-6
- Unrestricted Programs 21-7
- Implement A Flex Credit Plan 21-8
- 1: Create a Flex Credits Plan Type 21-9
- 2: Create A Flex Credit Shell Plan 21-10
- 3: Add Programs to the Plan 21-11

- 4: Specify The Rates 21-12
- 5: Add Credit Pools for Programs, Plans in Program, and/or Options in Plan 21-13
- Credits Provided 21-14
- Spending Options 21-15
- Excess Credits 21-16
- Configure Rollovers 21-17
- Rollover Example 21-18
- Key Points 21-19
- Practices 21-20

22 Configure Enrollment Display Options

- Common Questions 22-2
- What's It All About? 22-3
- Review: Display Options for Plan Types and Rates 22-4
- Configure Plan Type Grouping Display 22-5
- Configure Plan Type Grouping Display: Rate Column Display 22-6
- Configure Plan Type Grouping Display: Plan Dependency Rules 22-7
- Configure Plan Type Grouping Display: Mutually Exclusive Plans 22-8
- Create An Authorization 22-9
- Self-Service Configuration: Page 1 of 2 22-10
- Self-Service Configuration: Page 2 of 2 22-11
- Alerts 22-12
- Deep Links for Benefits 22-13
- Key Points 22-14
- Practices 22-15

23 Configure Plan Comparison

- Common Questions 23-2
- What's It All About? 23-3
- How Is It Built? 23-4
- Use The Plan Comparison Values Page To Create Your Values 23-5
- Create a Template Type Group and Template Types 23-6
- Create a Category Group and Categories 23-7
- Create an Option Group and Options 23-8
- Create a Feature Value Group and Feature Values 23-9
- Create a Plan Comparison Template: Basic Details 23-10
- Create a Plan Comparison Template: Highlights 23-11
- Create a Plan Comparison Template: Feature Groups and Features 23-12
- Create a Plan Comparison Template: Features 23-13
- Add Plans to Your Plan Comparison Template 23-14
- Configure Each Plan: Details, Costs, and Highlights 23-15

- Configure Each Plan: Feature Values 23-16
- Get the Template Id 23-17
- Add the Comparison to the UI 23-18
- Test the Results 23-19
- Key Points 23-20
- Practices 23-21

24 Vacation and Sick Time Sell Plans

- Common Questions 24-2
- What's It All About? 24-3
- How Do You Do It? 24-4
- Configure Absence Management 24-5
- Create a Vacation or Sick Time Sell Plan 24-6
- Create User Values 24-7
- Create the Standard Rate for Your Plan 24-8
- Create the Coverage for Your Plan 24-9
- Key Points 24-10

25 Lookups

- Common Questions 25-2
- What's It All About? 25-3
- Lookup Configuration Level 25-4
- Person Factors Lookups 25-5
- Process Name Lookups 25-6
- Regulations Lookups 25-7
- Health Care Services and Primary Care Physician 25-8
- Certification Lookups 25-9
- Key Points 25-10

26 Information Resources

- Information Resources 26-2
- Oracle Help Center 26-3
- My Oracle Support 26-4
- Oracle Cloud Customer Connect 26-5
- Oracle University 26-6
- Oracle Partner Community 26-7