

SUNGARD HIGHER EDUCATION

BANNER HUMAN RESOURCES/BANNER POSITION CONTROL RELEASE NOTES

Release 8.4
November 2010

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Prepared by: SunGard Higher Education

4 Country View Road
Malvern, Pennsylvania 19355
United States of America

Customer Support Center Website

<http://connect.sungardhe.com>

Documentation Feedback

<http://education.sungardhe.com/survey/documentation.html>

Distribution Services E-mail Address

distserv@sungardhe.com

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8.4

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Introduction

This release notes discusses the functional and technical enhancements, resolutions and other enhancements in Banner ®Human Resource release 8.4.

This document also includes miscellaneous enhancements, RPEs, and problem resolutions for Banner ®Human Resource 8.4 release.

Enhancements for 8.4

The following enhancements are made for this release:

Benefits Administration

New Hire Benefits Enrollment

This enhancement provides institutions the ability to enroll a newly hired employee in benefits via Employee Self-Service. Institutions can do the following tasks:

- Define new hire enrollment rules to identify and allow new hires to enroll in their benefits they are eligible for.
- Define time period for the new hires to elect benefits and identify the date to use to begin the new benefits.

The enhancements allows the newly hired employees to select their benefits and enroll via Employee Self-Service for Health Insurance, Flexible spending benefits, Retirement benefits, Life Insurance, and Miscellaneous benefits. Newly hired employees are detected through a new facility that has been added to the Employee record and updated API. When a new Employee record is inserted, a new indicator is enabled that flags the individual as a new employee. This is recognized by Employee Self Service and enables the New Hire Enrollment link.

Life Event Change Benefits Enrollment

The institution defines rules for Life Event Change Benefits Enrollment and allow an employee experiencing a life event change to enroll or change benefits via Employee Self-Service. Institutions can do the following tasks:

- Set up benefit or deduction codes that are to be accessible by employees via Self-Service.
- Customize the display of information on the Web for each benefit or deduction and/or URLs that can be accessed via Self-Service

- Create benefit categories that an employee wishes to access via the Web and associate benefit or deduction codes with these benefit categories
- Define types of supporting documentation, which may include marriage certification statements, dependent certification statements, adoption papers, divorce decrees, death certificates

This new enhancement for Life Event Change allows an employee to select eligible benefits offered by the institution via Employee Self-Service when significant life event changes happen.

Beneficiary and Dependent tracking

The current Banner HR system allows for creation of beneficiaries. This feature is enhanced to track beneficiaries and dependents of employees and allow the employee to enter beneficiaries and allocation of assets for such programs as life insurance, disability insurance, and retirement.

The employee can define which beneficiaries are associated with a particular benefit and create primary and contingent beneficiaries per benefit.

An employee can define coverage or allocations for each of the employee's benefits by percentage or dollar amount.

The coverage and allocation can be updated for one of the following changes:

- Existing employee can update coverage and allocations
- A new hire, enrolled for benefits, can update coverage and allocations
- For a life event change, an employee can update the coverage and allocation for the employee's beneficiaries and dependents

An employee can also record via ESS New Hire enrollment, additional coverage information and/or allocations on employee's dependents. The enhancement also allows an employee to terminate a deduction for beneficiary coverage.

Benefit Administrator view

The benefits administrator view provided for Banner HR and Employee Self Service helps an Administrator with the Benefit Administrator role to perform the following tasks:

- Set up benefit or deduction codes that are to be accessible by employees via Self-Service.
- Customize the display of information on the Web for each benefit or deduction and/or URLs that can be accessed via Self-Service.
- Create benefit categories and associate benefit or deductions codes with these benefit categories.

- Set up start and end dates for benefits and deductions in a benefit category.
- Set up Web rules for each benefit category to control data pertaining to New Hire and Life Event Change enrollment.
- Specify dates for which benefit statements are made available for benefits or deductions in Self-Service.
- Filter employees to review enrollment by organization, benefit category, or benefit codes.
- Apply the life event benefit/deduction change after reviewing the supporting documents.
- New E-mail functionality automatically retrieves the employee's e-mail address based upon institutional preference.
- Ability to review the employee's confirmed enrollment, coverage and allocation data.

Electronic W-4

Enhancements are made in Banner ®Human Resource to support the Banner® Employee Self-Service 8.4 release to process Electronic W-4 forms and taxes as per Internal Revenue Service regulations. Feature is provided for the electronic signature certification before submitting data by the employee. With the Print option for W-4, an Administrator can print a W-4 in the employee's history after 2009.

Salary Planner to Budget Development Interface

The Salary Planner to Budget Development Interface is a Community Source initiative with Texas Tech University that enhances the interfacing of position budget information between Salary Planner Employee Self-Service and Budget Development Finance Self-Service. The enhanced functionality provides budget development users the ability to review their departmental budget in its entirety, including salary amounts.

Employee Summary View

The Employee Summary View is a Community Source Initiative with the University of Illinois. This is a new enhancement to Banner ®Human Resource 8.4. to view all information related to an employee including jobs, faculty assignments, faculty rank and faculty leave information, plus position budgets all on a single form.

Electronic Personnel Action Form (EPAF)

The Electronic Personnel Action Form (EPAF) functionality in Banner ®Human Resource is modified for Banner ®Human Resource 8.4 release for the following functionality:

- A new visual indicator that identifies which fields are required for data entry by the Originator on the EPAF (both in Employee Self-Service and in Banner) based on the "Required" check box selection on the Electronic Approval Type Rules Form (NTRAPTY). This new feature satisfies RPE 1-5WNHIZ.
- On the Electronic Approval Category Rules Form (NTRACAT), the existing checkbox, "Defaults Overrideable," has been re-labeled to "Value Enterable" and will now represent if the field is data enterable on the EPAF in addition to the current default overrideable feature. This new feature also satisfies RPE 1-5WNHIZ.

System requirements

Install the following minimum releases to upgrade to *Position Control* Release 8.4.

- Minimum Banner General 8.3
- Minimum Banner Position Control 8.3

Install the following minimum releases to upgrade to *Human Resources* Release 8.4.

- Minimum Banner General 8.3
- Minimum Banner Position Control 8.4
- Minimum Banner ®Human Resource 8.3

Cumulative Documentation

This document provides detailed information about the Human Resources 8.4 release only. Human Resources 8.4 is a cumulative release that also includes enhancements, RPEs and problem resolutions delivered since the 8.3 release. For complete information, please refer to the Problem Resolution section of this guide.

1 Benefits Administration-Functional

The following sections discuss the functional changes to Benefits Administration for Banner ®Human Resource 8.4 release.

The following topics are discussed in this section:

- [“Overview” on page 15](#)
- [“New Forms” on page 20](#)
- [“Changed Forms” on page 26](#)
- [“Changed Processes and Reports” on page 34](#)

Overview

The Benefits Administration enhancements for Banner ®Human Resource includes features to support New Hire Enrollment, Life Event Change Benefits Enrollment, enhanced Beneficiary and Dependent data, Benefits Coverage, and Benefit Administration processing for Employee Self Service. Additionally, new data has been added to allow for the capture and maintenance of Beneficiary Allocation information, in support of insurance and retirement programs.

These features allow the benefits administrator to define rules, define time lines, process benefits, and manage the benefit information. An employee can enroll themselves and dependents for eligible benefits when the employee is newly hired or during a significant life event change. The employee can also change dependent or beneficiary information when required, or can terminate the benefit coverage.

Banner HR and Employee Self Service capabilities include:

Newly hired employees will be able to:

- Enroll in benefits as a new employee at the institution (based on institution settings)
- Add dependents and beneficiaries

- Enroll in Dependent coverage or Beneficiary allocations during new hire election period (based upon institution settings)
- Allocate Employee Insurance, Retirement programs, and other benefits to Beneficiaries
- View Life Insurance premium calculations during enrollment
- View Enrollment Confirmation Statement upon completion
- Access enrollment via a Luminis Channel

Employees with a qualifying Life Event will be able to:

- Enroll/change their benefits in support of a significant life event
- Add dependents and beneficiaries
- Enroll in dependent coverage or beneficiary allocations during life event period (based upon institution settings)
- Allocate employee insurance, retirement programs, and other benefits to beneficiaries
- View Life Insurance premium calculations during enrollment View supporting document requirements
- View Enrollment Confirmation Statement upon completion
- Access enrollment via a Luminis Channel

Benefits Administrators will be able to:

- Set rules for new hire and life events enrollment processing
- Review, track, and apply records in Employee Self-Service as needed
- Access views of Confirmed, In Process, and Applied enrollment records
- Send e-mails to employees
- Indicate supporting document requirements from the employees
- Attach documents for completion with the Banner Document Management Suite (BDMS)

This section discusses the following topics:

- [“Process Flow Overview for Benefits Enrollment” on page 17](#)
- [“Set-up and Configuration” on page 18](#)

Process Flow Overview for Benefits Enrollment

To support New Hire and Life Event Benefit Enrollment, a number of rule and validation forms (detailed below) were created or updated, to control processing available to employees in the Employee Self Service application. Generally, the processing flows are similar in the self service application to accomplish the enrollment task:

1. Employee selects a Benefit Enrollment link, New Hire or Life Event Change.
2. If a Life Event Change is being recorded, the employee must indicate a qualified event and event date.
3. The system will immediately display Dependents and Beneficiaries that have been previously recorded in Banner. The employee can update an existing record or add a new family member.
4. Once all Beneficiary and Dependent information has been established, the employee can begin to record their enrollment choices. A list of Benefit Groups (Health, Life, Retirement, etc.) will be displayed and the employee can begin selecting their choices.
5. As each Benefit is chosen and saved in the self service application, the system rules will determine whether coverage or allocation information can be recorded. If so, the employee can update this information as each benefit is updated.
6. Once the employee is satisfied that the enrollment, coverage, and allocation information is complete, the employee can review a summary, confirm their choices, and print their summary.
7. Control of the information is now transferred to the Benefits Administrator.

The Benefits Administrator will have a number of self service pages with which to monitor both the New Hire and Life Event enrollment information.

1. Benefit Administrators, who have been previously authorized on PTRUSER, will have access to the Benefits Administrator link in Employee Self Service.
2. A filter page is presented to allow administrators to assist in narrowing the data selection and allowing views by Organization, Employee List or individual Employee.
3. Page views will display Confirmed, In Process, and Applied lists of Employee data.
4. The administrator can select an individual employee to inspect the data that has been entered by the employee, including, benefits selected, effective dates, coverage, and allocation records.

5. Records that are in a Confirmed status can be applied by the administrator. This will create the benefit records along with coverage and allocation information.
6. An e-mail link next to an employee name will allow the administrator the ability to send an e-mail, which will launch from the web page. Institutions can provide their priority lists of searchable e-mail addresses.
7. Administrators can attach and view documents for those employees that are filing Life Event records.

Set-up and Configuration

This section will reference the required rule and validation forms necessary to configure the controls for processing New Hire and Life Event Benefit Enrollment.

New Hire Enrollment

- **Benefit Deduction Termination Reason Code Form (PTVDREA)** - This validation form will hold reasons for which Benefit/Deductions are being terminated. It supplies Termination Reasons for stopping coverage for family members.
- **Benefit or Deduction Grouping Rules Form (PTRBDPG)** - This rule form configures rules for establishing which Benefit Groups to present to a new employee, as well as whether coverage and allocation records can be maintained by the employee.
- **Benefits and Deductions Rules Form (PTRBDCA)** - New controls on this rule form will determine whether Dependent Coverage or Beneficiary Allocation records can be maintained for a particular benefit. These indicators are to be set on the main benefit page and for those benefits with Plan Codes, must be set at the Plan level.



Note

Regardless of whether the site is configuring rules for New Hire Enrollment, if your site is maintaining coverage records for employees on PDABCOV, these indicators must be closely reviewed and updated upon installation of Banner 8.4. If they are not enabled for appropriate benefit records, Coverage records on PDABCOV cannot be accessed. ■

- **Benefit Category Form (PTRBCAT)** - Two sets of controls are established here for New Hire Enrollment. First, establish the Employment Base Enrollment Date and Enrollment Days on the Web Rules tab of the form. This rule calculates the length of time in which the new employee can enroll in Benefits on the web. Next, for the Benefits in which a new employee may enroll, install the rules for which the benefit will calculate a benefit/deduction start date by entering the New Hire Begin Date Indicator, Cut-Off Day, Waiting Period, and Waiting Period Day or Month Indicator. These are located on the Valid Benefits tab.

- **Benefit or Deduction Grouping Rules Form (PTRBDPG)** - This rule form is shared with Open Enrollment and contains all of the controls for New Hire Enrollment. It will provide the Benefit Groups to be presented in their Priority order and the Benefit Codes that allow enrollment, and indicators to control whether employees can establish coverage or allocation records for their family members.
- **Employee Form (PEAEMPL)** - A new indicator has been added to the Employee record, Employee History record and API. This indicator is automatically set when a new record is first created. This indicator will enable the correct link in the Employee Self Service menu for Benefits Enrollment. If this indicator is not set, the system assumes that enrollment has been made and set the employee's link to Life Event Change.

Life Event Change

In addition to the above configuration for New Hire Enrollment, the following controls will support the Life Event Change processing in Employee Self Service.

- **Benefit Deduction Supporting Documents Validation Form (PTVBDOC)** - This validation table establishes proof documents that the employee must submit to the Benefits Administrator for a significant Life Event change. These document names will be displayed on self service pages for the employee during the enrollment process.
- **Benefit Deduction Change Reason Code Rule Form (PTRBREA)** - This rule form is invoked in the Life Event Change process. This control supplies the process with each valid, institutional life event code and stipulates the time period in which the employee must enroll in their benefit changes that are associated with the event.
- **Life Event Change Rules Form (PTRLFCH)** - This new rule form provides the majority of the processing rules for Life Event Change. Each of the valid Life Event Change codes, provided on PTRBREA, will be used to establish rule for which Benefit Groups to present, which Benefits are eligible for enrollment or changes, and whether the employee can maintain coverage and allocation information on the self service pages.

Establish Access for Benefit Administrator(s)

- **User Codes Rules (PTRUSER)** - Ensure that the Benefit Administrator has a valid User ID established and the Benefits Administrator check box is enabled. This will allow the administrator proper access to the Benefit Administration link in Employee Self Service. Normal levels of HR security can be used to filter appropriate records to the administrator.

Establish Access for Benefit Administrator(s)

- **E-mail Address Settings (GTVSDAX)** - Administrators are provided a method to contact employees who have confirmed or are In Process of enrolling in either new

hire or life event change enrollment. The administrative view pages will display an E-mail icon if the employee has a matching GTVSDAX E-mail Address Type Code that is active. GTVSDAX records have been delivered with this released that must be populated with the site's preferred set of E-mail addresses for communication with employees.

The GTVSDAX records hold an Internal Code of BENENROLL and must be updated for use. They have been delivered with an External Code of 'Update Me'. This must be updated with the site's preferred sequence of E-mail Address Types that are being maintained for each employee. One or more records can be used for this purpose and the administrator's web page with search through the priorities to locate a valid E-mail address to communicate with the employee.

New Forms

The following forms are added to Banner ®Human Resource for release 8.4:

- [“Benefit Deduction Change Reason Code Rule Form \(PTRBREA\)” on page 20](#)
- [“Benefit Deduction Termination Reason Code Form \(PTVDREA\)” on page 22](#)
- [“Benefit Deduction Supporting Documents Validation Form \(PTVBDOC\)” on page 23](#)
- [“Life Event Change Rules Form \(PTRLFCH\)” on page 24](#)

Benefit Deduction Change Reason Code Rule Form (PTRBREA)

The PTRBREA form is used to define reasons for employee benefit change and associate those reasons with a change type. These controls are primarily to supply the valid Life Event categories for which an employee may use throughout the benefit year. These codes will be accessed by the Life Event Change Rule Form (PTRLFCH) in order to supply the rules for processing the benefit enrollment in self service.

These codes can also be used for all other benefit/deduction codes controlled by PTRBDCA. This code has been added to the Employee Deduction/Benefit Form (PDAEDN), and can be used as a notation as to why the record was inserted or changed.

Deduction Change Reason Code	Description	Deduction Change Type	Life Event Enrollment Days	User ID	Activity Date
ADOPTION	Adoption	Life Event	999	CDWESTFA	26-SEP-2010
BIRTH	Birth of a Child	Life Event	30	SLEE	08-SEP-2010
DEATH	Death	Life Event		KIJOHNSO	18-APR-2010
DIVORCE	Divorce	Life Event		KIJOHNSO	18-APR-2010
DOMESTIC	Domestic Partnership	Life Event		KIJOHNSO	18-APR-2010
DOMSEP	Domestic Partner Separation	Life Event		KIJOHNSO	18-APR-2010
FOSTER	Foster Care	Life Event		KIJOHNSO	18-APR-2010
GUARDIAN	Guardianship	Life Event		KIJOHNSO	18-APR-2010
MARRIAGE	Marriage -Leona	Life Event		DRICHIE	23-SEP-2010
TEST	Test	Other		CDWESTFA	26-SEP-2010
TEST2	Amey Test	Life Event	999	AMEYG	21-SEP-2010
TEST3	Leona Test	Life Event	30	DRICHIE	23-SEP-2010

Field	Description
Deduction Change Reason Code	Deduction Change Reason Code.
Description	Description for the Deduction Change Reason Code.
Deduction Change Type	Deduction Change Type. Valid values are: (L)ife Event, (N)ew Hire, (O)pen Enrollment, (T) Other. Default value is T.
Life Event Enrollment Days	The number of days from the event date the employee has to enroll or change benefits. If the Deduction Change Type has been set to Life Event, the user must stipulate the length of the in which the employee may enroll in their benefit changes.
User ID	ID of the last user to update the record.
Activity Date	The last date the record was inserted or updated

Benefit Deduction Termination Reason Code Form (PTVDREA)

The PTVDREA form is a new validation form to collect the reasons for which a dependent is being terminated from deduction for coverage. These termination reasons can be maintained by the employee in self service pages when updating coverage information, or by the administrator on the Beneficiary Coverage Form, PDABCOV.

Deduction Termination Reason Code	Description	User ID	Activity Date
AGELIMIT	Dependent Age Limit	KIJOHNSO	25-MAY-2010
APPTCHG	Appointment Change	KIJOHNSO	25-MAY-2010
CNCLNPAY	Cancelled Nonpay	KIJOHNSO	25-MAY-2010
CNCLRQST	Cancelled Requested	KIJOHNSO	25-MAY-2010
CONTRACT	Contract Expired	KIJOHNSO	25-MAY-2010
COVERCHG	Coverage Change	KIJOHNSO	25-MAY-2010
DEATH	Death	KIJOHNSO	25-MAY-2010
DISMISS	Dismissal	KIJOHNSO	25-MAY-2010
DIVORCE	Divorce	KIJOHNSO	25-MAY-2010
MARRIED	Dependent Married	KIJOHNSO	25-MAY-2010
MEDICARE	Medicare Eligible	KIJOHNSO	25-MAY-2010
RESIGNED	Resigned	KIJOHNSO	25-MAY-2010
RETIRED	Retired	KIJOHNSO	25-MAY-2010

Field	Description
Deduction Termination Reason Code	Benefit Deduction Termination Reason Code.
Description	Description for the Benefit Deduction Termination Reason Code.
User ID	ID of the last user who inserted or updated the record.
Activity Date	The last date the record was inserted or updated.

Benefit Deduction Supporting Documents Validation Form (PTVBDOC)

A new validation form defines supporting document types to be enclosed for life event change. The documents may include marriage certification statements, dependent certification statements, adoption papers, divorce decrees, and death certificates. These document descriptions will be presented to the employee during the Life Event Change enrollment process, in self service, to notify them that they must be provided to the Benefits Administrator. The administrator will also see the list attached to the employee's summary page as verification.

The screenshot shows a window titled "Benefit Deduction Supporting Documents Validatio PTVBDOC 8.4 (s10b80)". The window contains a table with the following data:

Supporting Document Code	Description	User ID	Activity Date
ADOPTION	Adoption Papers	KIJOHNSO	25-MAY-2010
BIRTH	Birth Certificate	KIJOHNSO	25-MAY-2010
DEATH	Death Certificate	KIJOHNSO	25-MAY-2010
DIVORCE	Dissolution of Marriage	KIJOHNSO	25-MAY-2010
DOC1	Document Type1	PRASHANTM	21-APR-2010
DOC2	Document Type 2	PRASHANTM	21-APR-2010
DOC3	Document Type 3	PRASHANTM	26-APR-2010
DOC4	Testing	AMEYG	13-MAY-2010
DOMESTIC	Domestic Partner Affidavit	KIJOHNSO	25-MAY-2010
MARRIAGE	Marriage Certificate	KIJOHNSO	25-MAY-2010
ORDERS	Military Orders	KIJOHNSO	25-MAY-2010
RETIRE	Retirement	KIJOHNSO	25-MAY-2010
SEPERATE	Legal Seperation	KIJOHNSO	25-MAY-2010

Field	Description
Supporting Document Code	Code for the supporting document.
Description	Description for the Benefit Deduction Termination Reason Code.

Field	Description
User ID	ID of the last user who updated the record.
Activity Date	The last date the record was inserted or updated.

Life Event Change Rules Form (PTRLFCH)

The Life Event Change Rules Form (PTRLFCH) is used to define rules to control the self-service processing for a primary group, and each associated benefit or deduction in the primary group.

The screenshot shows the 'Life Event Change Rules' form for PTRLFCH. At the top, the 'Benefit Deduction Change Reason' is set to 'BIRTH' with a checkbox for 'Birth of a Child'. The 'Enrollment Days' is set to 30. Below this is a section for 'Supporting Document Code' with a list including 'BIRTH Birth Certificate' and 'DOC4 Testing'. The next section is for 'Primary Group' with 'FS Flex Spending Accounts' selected, 'Display Employer Amounts' checked, and 'Benefit Enrollment Priority' set to 0. To the right, 'Web Actions For: Beneficiary Coverage' are set to Display, Insert, and Update. The final section is 'Associated Benefits Deductions Setup', which includes two entries: one for 'F20 Artists/Athletes' and one for 'FSD Dependent Care Spending Accn'. Each entry has 'Display Employer Amounts' checked and 'Web Actions for: Beneficiary Coverage' and 'Beneficiary Allocations' set to Display, Insert, and Update.

Field	Description
Benefit Deduction Change Reason	Benefit Deduction Change Reason Code Rule Form (PTRBREA) codes that are life event reason types only.
Enrollment Days	Display only from Benefit Deduction Change Reason Code Rule Form (PTRBREA).
Supporting Documentation Code	Supporting Documentation Code. The valid list is provided by the Benefit Deduction Supporting Documents Validation Form (PTVBDOC).

Field	Description
Description	Description for the Supporting Document Code.
Primary Group	Primary Group Code.
Display Employer Amounts	Select Yes to display employer amounts in self service.
Benefit Enrollment Priority	Enter the benefit group priority number order for enrollment processing. The Priority number will be used to order the Benefit Groups to the employee in self service and should represent the most important group with the lowest number.
Display Beneficiary Coverage	Select Yes to display beneficiary coverage to allow for the group.
Insert Beneficiary Coverage	Select Yes to Insert Beneficiary Coverage to allow for the group.
Update Beneficiary Coverage	Select Yes to update Beneficiary Coverage to allow for the group.
User ID	The ID of the last user to update the record.
Activity Date	The last date the record was updated.
Benefit or Deduction Code	Code for the benefit or deduction.
Display Benefit or Deduction	Select to display benefit or deduction.
Benefits Begin Date	The date when benefit begins. Valid Values are: (D)System Date; (E)vent Date; (N) First of Next Month; (T) First of This Month. Default value is E.
Display Beneficiary Coverage	Select to display beneficiary coverage information.
Insert Beneficiary Coverage	Select to insert beneficiary coverage
Update Beneficiary Coverage	Select to update beneficiary coverage.
Display Beneficiary Allocations	Select to display beneficiary allocations information.
Insert Beneficiary Allocations	Select to insert beneficiary allocations.
Update Beneficiary Allocations	Select to update beneficiary allocations.

Changed Forms

The following forms have been changed for Banner @Human Resource release 8.4:

- [“Electronic Approval Category Rules Form \(NTRACAT\)” on page 26](#)
- [“Employee Benefit and Deduction Form \(PDAEDN\)” on page 26](#)
- [“Employee Deduction History Form \(PEIDHIS\)” on page 27](#)
- [“Employee History Form \(PEIEHIS\)” on page 27](#)
- [“Benefits and Deductions Rules Form \(PTRBDCA\)” on page 27](#)
- [“Employee Form \(PEAEMPL\)” on page 28](#)
- [“Beneficiary Form \(PDABENE\)” on page 29](#)
- [“Beneficiary Coverage Form \(PDABCOV\)” on page 30](#)
- [“New Hire Form \(PEAHIRE\)” on page 30](#)
- [“Benefit Category Form \(PTRBCAT\)” on page 31](#)
- [“Benefit or Deduction Grouping Rules Form \(PTRBDPG\)” on page 34](#)

Electronic Approval Category Rules Form (NTRACAT)

The Electronic Approval Category Rules Form (NTRACAT) has been modified to display the help text associated with the new Allow New Hire Enrollment indicator for usage in EPAFs.

Employee Benefit and Deduction Form (PDAEDN)

The following new fields have been added to the Employee Benefit and Deduction Form (PDAEDN):

Field	Description
Change Reason	Life event change reason. The Change Reason will hold data from the Life Event Benefit Enrollment self service process and is configured on the Benefit Deduction Change Reason Rule Form, PTRBREA. However, it can be utilized for any benefit or deduction being maintained on PDAEDN. Additional change reasons can be added to the rule form to track other event changes.
Event Date	Provide the date in which the change reason took place.

Employee Deduction History Form (PEIDHIS)

The following fields have been added to the Employee Deduction History Form (PEIDHIS).

Field	Description
Deduction Reason Change	Deduction Change Reason Code.
Event Date	Date of the event associated with the deduction change, if applicable.

Employee History Form (PEIEHIS)

A new indicator has been added to the Employee History Form (PEIEHIS) to allow new hire to enroll in benefits via Employee Self-Service.

Field	Description
Allow New Hire Benefits Enrollment	Indicator that determines if this employee is eligible to enroll in benefits via ESS New Hire Enrollment.

Benefits and Deductions Rules Form (PTRBDCA)

Note

With the installation of Banner 8.4, the Beneficiary and Coverage Indicators must be enabled in order to access employee Coverage records on PDABCOV. Indicators appear on both the main page and Plan page of the form. ■

The following new fields have been added to the Benefits and Deductions Rules Form (PTRBDCA) and Definition of Benefit and Deduction Plans window for Beneficiary and Coverage indicators:

Field	Description
Beneficiary	Select to allow beneficiary allocation.
Coverage	Select to allow Coverage tracking.
Effective Date	Defines the date to use to determine when the Provider details were entered/modified.
Provider ID	The SPRIDEN_ID of the Vendor/Provider whose information is stored in the block.
Name	SPRIDEN concatenated first, last or SPRIDEN NON_PERS_NAME. Display only.
Group ID	The Group Code identifier for the Vendor/Provider.

 **Note**

If the indicators are selected at both the plan, and benefit and deduction levels, plan always takes precedence. ■

Employee Form (PEAEMPL)

A new indicator has been added to the Employee Form (PEAEMPL) to allow new hire to enroll in benefits via Employee Self-Service. This indicator is automatically enabled (set to Yes) when an Employee record is newly inserted for an employee. This includes a new employee record resulting from the PEAEMPL or PEAHIRE forms. This indicator has also been provided for use on EPAF.

 **Note**

Review the institution's EPAF transactions that are in use to determine whether this indicator should be added to those transaction for new employee hire. ■

Field	Description
Allow New Hire Benefits Enrollment	Select to allow New Hires to enroll in benefits via Employee Self-Service.

Beneficiary Form (PDABENE)

The following new fields have been added to the Beneficiary Form (PDABENE):

Field	Description
Date Added	Select the date the dependent or beneficiary is associated with the employee information.
Spouse Employed	Check if spouse is employed by the institution.
Marital Status	Select marital status of dependent/beneficiary.
From	Date the employee/dependent starts attending college. The date can be added only if the Attending College indicator is selected.
To	Date the employee/dependent stops attending college.
Active	Select to indicate beneficiary/dependent is active and can be associated with coverage or allocation information. When this indicator is set to Inactive, the person cannot be associated with Benefit coverage or allocations.
Member Type	Select option to designate person as beneficiary, dependent, or both. If a person is designated as a beneficiary, only allocation information may be associated. If classified as a dependent, the person can only be associated with benefit coverage. The 'both' setting allows for association with coverage and allocations.
Disabled	Select to indicate person is disabled.
Age	Calculated from Birth Date to system date. Display only.

Note

The spouse employed indicator may only be updated if the relationship type associated with the relationship to employee is defined as spouse. The following fields may only be updated if the relationship type associated with the relationship to employee is defined as self: Attending College Indicator, From and To fields. ■

Beneficiary Coverage Form (PDABCOV)

A new block has been added to the Beneficiary Coverage Form (PDABCOV) to allow the administrator to enter the employee's beneficiaries and allocation of assets. The new block has the following fields:

Field	Description
Sequence Number	Sequence number.
Name	Beneficiary name. Display Only.
Relationship to Employee	Relationship of the beneficiary to employee.
Gender	Gender of the beneficiary. Display Only.
Primary	Indicator that determines if beneficiary is primary, unchecked for contingent. Valid values are Y or N.
Primary Percentage of Allocation	Provide the percentage allocated to the primary beneficiary.
Primary Amount of Allocation	Provide the amount allocated to the primary beneficiary.
Contingent Percent of Allocation	Provide the percentage allocated to the contingent beneficiary.
Contingent Amount of Allocation	Provide the amount allocated to the contingent beneficiary.

Note: When using percentages to express either Primary or Contingent Allocations, percentage values under each type must equal 100 for all beneficiaries to ensure full allocations. No validation occurs when amounts are used.

New Hire Form (PEAHIRE)

A new indicator has been added to the New Hire Form (PEAHIRE) to display the new hire enrollment indicator. This indicator is automatically enabled to support New Hire enrollment of Benefits in self service.

Field	Description
Allow New Hire Benefits Enrollment	Select to allow New Hires to enroll in benefits via Employee Self- Service

Benefit Category Form (PTRBCAT)

New rules have been established to control data during New Hire Benefit Enrollment in Employee Self Service. In addition, the institution defines which service date is used as the deduction begin date. In addition, a control has been added to limit the time period in which an employee can complete their benefit elections in self service.

The following new fields have been added to the Benefit Category form (PTRBCAT) to select or derive the begin date to be associated with this benefit or deduction:

Field	Description
Employment Base Enrollment Date	<p>Defines the date to use for deduction begin date when benefit/deduction is established via the ESS New Hire Enrollment.</p> <p>values are:</p> <ul style="list-style-type: none"> • System Date • Current Hire • Original Hire • Adjusted Service • Seniority • First Work Day • 1st of Next Month • 1st of this Month
Enrollment Days	Enter the number of days the new hire has to enroll in benefits.
New Hire Enrollment Begin Date	<p>Defines the date to use for deduction begin date when benefit/deduction is established via the ESS New Hire Enrollment.</p> <p>Valid values are: (C)urrent Hire; (O)riginal Hire; (A)djusted Hire; (S)eniority; (F)irst Work Day. Default value is C.</p>
Cut-Off Day	New Hire Enrollment Cut-Off Day, number between 0-31. Identifies the day of the month on or before which an employee must begin employment.

Field	Description
Waiting Period	Defines the waiting period for deduction begin date when benefit/deduction is established via the ESS New Hire Enrollment. This period of time works in conjunction with the Day or Month indicator, below.
Waiting Period Day or Month Indicator	Defines the waiting period type to use for deduction begin date when benefit or deduction is established via the New Hire Enrollment on the web.

New Hire Enrollment Benefit Begin Date Matrix

The following chart displays various combinations of data that provide examples of deriving the Benefit/Deduction Begin Date for new hires. There are several examples displayed where a waiting period may be imposed on a benefit when an employee is first enrolled.

This date computation matrix does not apply to Life Event Benefit enrollment. Refer to the Benefits Begin Date on the Life Event Change Rule form (PTRLFCH) for this information.

Rule	Employment Base Enrollment Date	New Hire Enrollment Begin Date method	Cut-Off Day	Waiting Period	Waiting Period Month or Day Indicator	Benefit Begin Date Result
If appointment date falls between 1st and the 15th of the calendar month, then that month is included in wait period. If employment commences between 16th and 30/31st of the month, that month is not included. Once wait period is satisfied, benefit may commence on the 1st day of the calendar month following the wait period.	Current Hire = May 3rd	1st of This Month	15	3	Months	August 1
	Current Hire = May 18th	1st of This Month	15	3	Months	September 1
Enrollment occurs 1st of the month following start date unless appointment commences on the 1st of that month, then starts right away.	Original Hire = May 1st	1st of This Month	1		None	May 1
	Original Hire = May 31st	1st of This Month	1		None	June 1

Rule	Employment Base Enrollment Date	New Hire Enrollment Begin Date method	Cut-Off Day	Waiting Period	Waiting Period Month or Day Indicator	Benefit Begin Date Result
The month following the 90th day of employment	Seniority = May 12th	1st of Next Month		90	Days	September 1
1st of the month following employment	Adjusted Service=May 1st	1st of Next Month				June 1
	Adjusted Service=May 31st	1st of Next Month				June 1
Current Hire Date	N/A	Current Hire	N/A	N/A	N/A	Current Hire Date
Original Hire Date	N/A	Original Hire	N/A	N/A	N/A	Original Hire Date
Adjusted Service Date	N/A	Adjusted Service	N/A	N/A	N/A	Adjusted Service Date
Seniority Date	N/A	Seniority	N/A	N/A	N/A	Seniority Date
First Day of Work	N/A	First Day of Work	N/A	N/A	N/A	First Day of Work
Current Hire Date	N/A	Current Hire		30	days	Current Hire Date + 30 days
Original Hire Date	N/A	Original Hire		2	months	Original Hire Date + 2 months
Adjusted Service Date	N/A	Adjusted Service		1	month	Adjusted Service Date + 1 month

Benefit or Deduction Grouping Rules Form (PTRBDPG)

The following new fields have been added to Benefit or Deduction Grouping Rules Form (PTRBDPG): This rule form controls data presented to the employee during the New Hire Enrollment process for self service.

Field	Description
Benefit Enrollment Priority	The benefit group priority number order for enrollment processing
Display Beneficiary Allocations	Display allowed for Beneficiary Allocations, Check for Yes.
Insert Beneficiary Allocations	Insert allowed for Beneficiary Allocations, Check for Yes.
Update Beneficiary Allocations	Update allowed for Beneficiary Allocations, Check for Yes.
Delete Beneficiary Allocations	Delete allowed for Beneficiary Allocations, Check for Yes.

Changed Processes and Reports

The following processes and reports have been modified for this enhancement:

- [“Audit Trail Report \(PORAUDT\)” on page 34](#)
- [“Pay Period Update Process \(phpupdt.pc\)” on page 35](#)
- [“Pay Period Update Process \(phpupdt.pc\)” on page 35](#)
- [“Pay Period Update Process \(phpupdt.pc\)” on page 35](#)
- [“Flex Benefit Update Process \(pdpflex.pc\)” on page 35](#)
- [“Life Insurance Calculation Process \(pdplife.pc\)” on page 36](#)

Audit Trail Report (PORAUDT)

The Audit Trail Report (PORAUDT) - Beneficiary Coverage History Fields has been modified to display additional attributes added to PDRBDCOV/PDRBCHS, PDRBBALC/PDRBCHS, and PDRBENE/PDRBEHS tables.

The Audit Trail Report (PORAUDT) prints information from the history tables. An audit trail entry is created each time one of the following types of employee records is changed on the Web or during regular Banner operations:

- Address/Telephone record
- Benefit/Deduction record
- Dependent/Beneficiary record
- Beneficiary Coverage record

A separate report is printed for each type of change. Using the report parameters, you can determine the types of reports to be printed, the period to be covered, and the employees whose data is to be included in the reports.

There are three types of audit trail entries. When a record is added to the database or a database record is changed, a copy of the new or changed record is written to the audit trail. When any record except an address/telephone record is deleted, a copy of the record is written to the history records with a note specifying that the record was deleted. The history is not updated when an address record is deleted.

The Dependent/Beneficiary record report will be modified to display the Beneficiary/Coverage indicator, Disable Dependent indicator, attend college from/to, acquire date, marital status, spouse indicator and an Active indicator.

The new Beneficiary Allocation record report will be modified to display the primary/contingent indicator, primary/contingent percentage, or primary/contingent amount.

Pay Period Update Process (phpupdt.pc)

This process is modified to support the new fields to capture the USER_ID and DATA_ORIGIN.

Flex Benefit Update Process (pdpflex.pc)

Ins_gtax_dedn and ins_new_dedn routines have been modified to insert default values for the new fields. Ins_dedn_his and ins_gtax_his routines have been modified to insert additional fields.

Life Insurance Calculation Process (pdplife.pc)

This process has been modified to utilize the newly created database package routine (pdklife.p_calc_amts) which handles calculation of coverage, premium, and salary amounts.

- Pdrdedn_user_id, pdrdedn_data_origin, pdrdedn_brea_code and pdrdedn_event_date columns have been added to the INSERT/UPDATE statements in the routines ins_new_dedn(), ins_gtax_dedn(), upd_dedn() and upd_gtax_dedn(). Only the user id and data origin columns are added in the update statements.
- Perdhis_data_origin, perdhis_brea_code and perdhis_event_date columns have been added to the INSERT statements in the routines ins_dedn_his() and ins_gtax_his().

Four new local variables have been created to fetch the pdrdedn_brea_code and pdrdedn_event_date fields in the sel_life_dedns() and sel_gtax_dedn() routines: rpt_brea_code, rpt_event_date, g_brea_code and g_event_date.

2 Benefits Administration - Technical

This section documents the database, API, and object changes made in Benefits Administration for Banner® Human Resource 8.4.

This section discusses the following topics:

- [“New Tables” on page 37](#)
- [“Changed Tables” on page 47](#)
- [“New Scripts” on page 53](#)
- [“Changed Scripts” on page 58](#)
- [“New APIs” on page 64](#)
- [“New BPIs” on page 69](#)
- [“Changed APIs” on page 70](#)
- [“New Packages” on page 70](#)
- [“Changed Packages” on page 71](#)
- [“New Database Objects” on page 72](#)
- [“New Seed Data” on page 73](#)

New Tables

Following are the new tables for Benefits Administration enhancement:

- [“Open Enrollment Employee Deduction Error Table \(PDRBERR\)” on page 38](#)
- [“Beneficiary Allocation Table \(PDRBALC\)” on page 39](#)
- [“Beneficiary Allocation History Table \(PDRBAHS\)” on page 39](#)
- [“Enrollment Employee Deduction Base Table \(PDRBDOE\)” on page 40](#)
- [“Enrollment Deduction Repeating Table \(PDRDTOE\)” on page 40](#)
- [“Beneficiary Allocation Temporary Table \(PDRTBAL\)” on page 42](#)
- [“Coverage Temporary Table \(PDRTCov\)” on page 42](#)

- [“Benefit Deduction Provider Information Repeating Table \(PTRBPRV\)” on page 43](#)
- [“Benefit Deduction Change Reason Rule Table \(PTRBREA\)” on page 44](#)
- [“Benefit Deduction Supporting Documents Validation Table \(PTVBDOC\)” on page 44](#)
- [“Life Event Change Benefit Deduction Group Rule Table \(PTRLFCH\)” on page 45](#)
- [“Life Event Change Supporting Document Rule Table \(PTRLFSD\)” on page 46](#)
- [“Life Event Change Benefit Deduction Rule Table \(PTRLFBD\)” on page 46](#)
- [“Benefit Deduction Termination Reason Validation Table \(PTVDREA\)” on page 47](#)

Open Enrollment Employee Deduction Error Table (PDRBERR)

Column	Format	Null/Not Null
PDRBERR_PIDM	NUMBER(8)	NOT NULL
PDRBERR_SEQ_NO	NUMBER(6)	NOT NULL
PDRBERR_EFFECTIVE_DATE	DATE	NOT NULL
PDRBERR_SEQ_NO	NUMBER(6)	NOT NULL
PDRBERR_MSG_TYPE	VARCHAR2(1)	NOT NULL
PDRBERR_ERROR_MSG	VARCHAR2(2000)	NOT NULL
PDRBERR_ACTIVITY_DATE	DATE	NOT NULL
PDRBERR_USER_ID	VARCHAR2(30)	NOT NULL
PDRBERR_DATA_ORIGIN	VARCHAR2(30)	

Primary Key: PDRBERR_PIDM, PDRBERR_BDCA_CODE, PDRBERR_EFFECTIVE_DATE, PDRBERR_SEQ_NO

Beneficiary Allocation Table (PDRBALC)

Column	Format	Null/Not Null
PDRBALC_PIDM	NUMBER(8)	NOT NULL
PDRBALC_BDCA_CODE	VARCHAR2(3)	NOT NULL
PDRBALC_BENE_SEQ_NO	NUMBER(2)	NOT NULL
PDRBALC_PRIMARY_IND	VARCHAR2(1)	NOT NULL
PDRBALC_ACTIVITY_DATE	DATE	NOT NULL
PDRBALC_USER_ID	VARCHAR2(30)	NOT NULL
PDRBALC_DATA_ORIGIN	VARCHAR2(30)	
PDRBALC_PRIMARY_ALLOC_PCT	NUMBER(5,2)	
PDRBALC_CONTINGENT_ALLOC_PCT	NUMBER(5,2)	
PDRBALC_PRIMARY_ALLOC_AMT	NUMBER(11,2)	
PDRBALC_CONTINGENT_ALLOC_AMT	NUMBER(11,2)	

Primary Key: PDRBALC_PIDM, PDRBALC_BDCA_CODE, PDRBALC_BENE_SEQ_NO

Foreign Key: FK1_PDRBALC_INV_PDRBDED_KEY

Beneficiary Allocation History Table (PDRBAHS)

Column	Format	Null/Not Null
PDRBAHS_PIDM	NUMBER(8)	NOT NULL
PDRBAHS_BDCA_CODE	VARCHAR2(3)	NOT NULL
PDRBAHS_BENE_SEQ_NO	NUMBER(2)	NOT NULL
PDRBAHS_PRIMARY_IND	VARCHAR2(1)	NOT NULL
PDRBAHS_ACTIVITY_DATE	DATE	NOT NULL
PDRBAHS_USER_ID	VARCHAR2(30)	NOT NULL
PDRBAHS_CAPTURE_DATE	DATE	NOT NULL
PDRBAHS_DELETED_IND	VARCHAR2(1)	NOT NULL

Column	Format	Null/Not Null
PDRBAHS_DATA_ORIGIN	VARCHAR2(30)	
PDRBAHS_PRIMARY_ALLOC_PCT	NUMBER(5,2)	
PDRBAHS_CONTINGENT_ALLOC_PCT	NUMBER(5,2)	
PDRBAHS_PRIMARY_ALLOC_AMT	NUMBER(11,2)	
PDRBAHS_CONTINGENT_ALLOC_AMT	NUMBER(11,2)	

Primary Key: PDRBAHS_PIDM, PDRBAHS_BDCA_CODE, PDRBAHS_BENE_SEQ_NO, PDRBAHS_CAPTURE_DATE

Enrollment Employee Deduction Base Table (PDRBDOE)

Column	Format	Null/Not Null
PDRBDOE_PIDM	NUMBER(8)	NOT NULL
PDRBDOE_BDCA_CODE	VARCHAR2(3)	NOT NULL
PDRBDOE_BEGIN_DATE	DATE	NOT NULL
PDRBDOE_ACTIVITY_DATE	DATE	NOT NULL
PDRBDOE_USER_ID	VARCHAR2(30)	NOT NULL
PDRBDOE_DATA_ORIGIN	VARCHAR2(30)	
PDRBDOE_END_DATE	DATE	

Primary Key: PDRBDOE_PIDM, PDRBDOE_BDCA_CODE

Foreign Key: FK1_PDRBDOE_INV_PTRBDCA_CODE

Enrollment Deduction Repeating Table (PDRDTOE)

Column	Format	Null/Not Null
PDRDTOE_PIDM	NUMBER(8)	NOT NULL
PDRDTOE_BDCA_CODE	VARCHAR2(3)	NOT NULL
PDRDTOE_EFFECTIVE_DATE	DATE	NOT NULL

Column	Format	Null/Not Null
PDRDTOE_STATUS	VARCHAR2(1)	NOT NULL
PDRDTOE_OPEN_ENROLLED_IND	VARCHAR2(1)	NOT NULL
PDRDTOE_ACTIVITY_DATE	DATE	NOT NULL
PDRDTOE_USER_ID	VARCHAR2(30)	NOT NULL
PDRDTOE_DATA_ORIGIN	VARCHAR2(30)	
PDRDTOE_AMOUNT1	NUMBER(11,2)	
PDRDTOE_AMOUNT2	NUMBER(11,2)	
PDRDTOE_AMOUNT3	NUMBER(11,2)	
PDRDTOE_AMOUNT4	NUMBER(11,2)	
PDRDTOE_OPT_CODE1	VARCHAR2(2)	
PDRDTOE_OPT_CODE2	VARCHAR2(2)	
PDRDTOE_OPT_CODE3	VARCHAR2(2)	
PDRDTOE_OPT_CODE4	VARCHAR2(2)	
PDRDTOE_OPT_CODE5	VARCHAR2(2)	
PDRDTOE_COVERAGE_DATE	DATE	
PDRDTOE_BDCL_CODE	VARCHAR2(8)	
PDRDTOE_BREA_CODE	VARCHAR2(8)	
PDRDTOE_EVENT_DATE	DATE	
PDRDTOE_CONFIRMED_DATE	DATE	
PDRDTOE_APPLIED_DATE	DATE	

Primary Key: PDRDTOE_PIDM, PDRDTOE_BDCA_CODE, PDRDTOE_EFFECTIVE_DATE

Foreign Key: FK1_PDRDTOE_INV_PTRBDCA_CODE,
FK1_PDRDTOE_INV_PTRBDCL_CODE, FK1_PDRDTOE_INV_PTRBREA_CODE,

Beneficiary Allocation Temporary Table (PDRTBAL)

Column	Format	Null/Not Null
PDRTBAL_PIDM	NUMBER(8)	NOT NULL
PDRTBAL_BDCA_CODE	VARCHAR2(3)	NOT NULL
PDRTBAL_BENE_SEQ_NO	NUMBER(2)	NOT NULL
PDRTBAL_PRIMARY_IND	VARCHAR2(1)	NOT NULL
PDRTBAL_OPEN_ENROLL_IND	VARCHAR2(1)	NOT NULL
PDRTBAL_ACTIVITY_DATE	DATE	NOT NULL
PDRTBAL_USER_ID	VARCHAR2(30)	NOT NULL
PDRTBAL_DATA_ORIGIN	VARCHAR2(30)	
PDRTBAL_PRIMARY_ALLOC_PCT	NUMBER(5,2)	
PDRTBAL_CONTINGENT_ALLOC_PCT	NUMBER(5,2)	
PDRTBAL_PRIMARY_ALLOC_AMT	NUMBER(11,2)	
PDRTBAL_CONTINGENT_ALLOC_AMT	NUMBER(11,2)	

Primary Key: PDRTBAL_PIDM, PDRTBAL_BDCA_CODE, PDRTBAL_BENE_SEQ_NO

Foreign Key: FK1_PDRTBAL_INV_PDRBDOE_KEY

Coverage Temporary Table (PDRTC OV)

Column	Format	Null/Not Null
PDRTC OV_PIDM	NUMBER(8)	NOT NULL
PDRTC OV_BDCA_CODE	VARCHAR2(3)	NOT NULL
PDRTC OV_BENE_SEQ_NO	NUMBER(2)	NOT NULL
PDRTC OV_BEGIN_DATE	DATE	NOT NULL
PDRTC OV_OTHER_COV_IND	VARCHAR2(1)	NOT NULL
PDRTC OV_PRE_EXISTING_IND	VARCHAR2(1)	NOT NULL
PDRTBAL_OPEN_ENROLL_IND	VARCHAR2(1)	NOT NULL

Column	Format	Null/Not Null
PDRTCOV_ACTIVITY_DATE	DATE	NOT NULL
PDRTCOV_USER_ID	VARCHAR2(30)	NOT NULL
PDRTCOV_DATA_ORIGIN	VARCHAR2(30)	
PDRTCOV_END_DATE	DATE	
PDRTCOV_DREA_CODE	VARCHAR2(8)	
PDRTCOV_REQUESTED_DATE	DATE	

Primary Key: PDRTCOV_PIDM, PDRTCOV_BDCA_CODE, PDRTCOV_BENE_SEQ_NO

Foreign Key: FK1_PDRTCOV_INV_PDRBDOE_KEY,
FK1_PDRTCOV_INV_PTVDREA_CODE

Benefit Deduction Provider Information Repeating Table (PTRBPRV)

Column	Format	Null/Not Null
PTRBPRV_BDCA_CODE	VARCHAR2(3)	NOT NULL
PTRBPRV_EFFECTIVE_DATE	DATE	NOT NULL
PTRBPRV_PROVIDER_PIDM	NUMBER(8)	NOT NULL
PTRBPRV_ACTIVITY_DATE	DATE	NOT NULL
PTRBPRV_USER_ID	VARCHAR2(30)	NOT NULL
PTRBPRV_DATA_ORIGIN	VARCHAR2(30)	
PTRBPRV_GROUP_ID	VARCHAR2(20)	

Primary Key: PTRBPRV_BDCA_CODE, PTRBPRV_EFFECTIVE_DATE,
PTRBPRV_PROVIDER_PIDM

Foreign Key: FK1_PTRBPRV_INV_PTRBDCA_CODE

Benefit Deduction Change Reason Rule Table (PTRBREA)

Column	Format	Null/Not Null
PTRBREA_CODE	VARCHAR2(8)	NOT NULL
PTRBREA_DESC	VARCHAR2(30)	NOT NULL
PTRBREA_DEDUCTION_CHG_TYPE	VARCHAR2(1)	NOT NULL
PTRBREA_ACTIVITY_DATE	DATE	NOT NULL
PTRBREA_USER_ID	VARCHAR2(30)	NOT NULL
PTRBREA_DATA_ORIGIN	VARCHAR2(30)	NOT NULL
PTRBREA_LIFECHG_ENROLL_DAYS	NUMBER(3)	

Primary Key: PTRBREA_CODE

Benefit Deduction Supporting Documents Validation Table (PTVBDOC)

Column	Format	Null/Not Null
PTVBOC_CODE	VARCHAR2(8)	NOT NULL
PTVBDOC_DESC	VARCHAR2(30)	NOT NULL
PTVBDOC_ACTIVITY_DATE	DATE	NOT NULL
PTVBDOC_USER_ID	VARCHAR2(30)	NOT NULL
PTVBDOC_DATA_ORIGIN	VARCHAR2(30)	

Primary Key: PTVBDOC_CODE

Life Event Change Benefit Deduction Group Rule Table (PTRLFCH)

Column	Format	Null/Not Null
PTRLFCH_BREA_CODE	VARCHAR2(8)	NOT NULL
PTRLFCH_BDPG_CODE	VARCHAR2(2)	NOT NULL
PTRLFCH_WEB_EMPR_IND	VARCHAR2(1)	NOT NULL
PTRLFCH_WEB_CVG_SEL_IND	VARCHAR2(1)	NOT NULL
PTRLFCH_WEB_CVG_INS_IND	VARCHAR2(1)	NOT NULL
PTRLFCH_WEB_CVG_UPD_IND	VARCHAR2(1)	NOT NULL
PTRLFCH_ACTIVITY_DATE	DATE	NOT NULL
PTRLFCH_USER_ID	VARCHAR2(30)	NOT NULL
PTRLFCH_DATA_ORIGIN	VARCHAR2(30)	
PTRLFCH_PRIORITY	NUMBER(3)	

Primary Key: PTRLFCH_BREA_CODE, PTRLFCH_BDPG_CODE

Foreign Key: FK1_PTRLFCH_INV_PTRBREA_CODE,
FK1_PTRLFCH_INV_PTVBDPG_CODE

Life Event Change Supporting Document Rule Table (PTRLFSD)

Column	Format	Null/Not Null
PTRLFSD_BREA_CODE	VARCHAR2(8)	NOT NULL
PTRLFSD_BDOC_CODE	VARCHAR2(8)	NOT NULL
PTRLFSD_ACTIVITY_DATE		NOT NULL
PTRLFSD_USER_ID	VARCHAR2(30)	NOT NULL
PTRLFSD_DATA_ORIGIN	VARCHAR2(30)	

Primary Key: PTRLFSD_BREA_CODE, PTRLFSD_BDOC_CODE

Foreign Key: FK1_PTRLFSD_INV_PTRBREA_CODE,
FK1_PTRLFSD_INV_PTVBDOC_CODE

Life Event Change Benefit Deduction Rule Table (PTRLFBD)

Column	Format	Null/Not Null
PTRLFSD_BREA_CODE	VARCHAR2(8)	NOT NULL
PTRLFBD_BDPG_CODE	VARCHAR2(2)	NOT NULL
PTRLFBD_BDCA_CODE	VARCHAR2(3)	NOT NULL
PTRLFBD_ENRL_BEGIN_DATE_METHOD	VARCHAR2(1)	NOT NULL
PTRLFBD_WEB_EMPR_IND	VARCHAR2(1)	NOT NULL
PTRLFBD_WEB_CVG_SEL_IND	VARCHAR2(1)	NOT NULL
PTRLFBD_WEB_CVG_INS_IND	VARCHAR2(1)	NOT NULL
PTRLFBD_WEB_CVG_UPD_IND	VARCHAR2(1)	NOT NULL
PTRLFBD_WEB_BALC_SEL_IND	VARCHAR2(1)	NOT NULL
PTRLFBD_WEB_BALC_INS_IND	VARCHAR2(1)	NOT NULL
PTRLFBD_WEB_BALC_UPD_IND	VARCHAR2(1)	NOT NULL
PTRLFBD_ACTIVITY_DATE	DATE	NOT NULL
PTRLFBD_USER_ID	VARCHAR2(30)	NOT NULL

Column	Format	Null/Not Null
PTRLFBD_DATA_ORIGIN	VARCHAR2(30)	

Primary Key: PTRLFBD_BREA_CODE, PTRLFBD_BDPG_CODE, PTRLFBD_BDCA_CODE

Foreign Key: FK1_PTRLFBD_INV_PTRBREA_CODE, FK1_PTRLFBD_INV_PTVBDPG_CODE, FK1_PTRLFBD_INV_PTVBDCA_CODE, FK1_PTRLFBD_INV_PTRLFCH_KEY

Unique Index: PTRLFBD_BREA_CODE, PTRLFBD_BDCA_CODE

Benefit Deduction Termination Reason Validation Table (PTVDREA)

Column	Format	Null/Not Null
PTVDREA_CODE	VARCHAR2(8)	NOT NULL
PTVDREA_DESC	VARCHAR2(30)	NOT NULL
PTVDREA_ACTIVITY_DATE	DATE	NOT NULL
PTVDREA_USER_ID	VARCHAR2(30)	NOT NULL
PTVDREA_DATA_ORIGIN	VARCHAR2(30)	

Primary Key: PTVDREA_CODE

Changed Tables

The following Banner ®Human Resource tables are modified for Benefits Administration Enhancement:

- [“Beneficiary Coverage History Table \(PDRBCHS\)” on page 48](#)
- [“Beneficiaries/Dependents History Table \(PDRBEHS\)” on page 48](#)
- [“Employee Deduction Repeating Table \(PDRDEDN\)” on page 49](#)
- [“Employee Base Table \(PEBEMPL\)” on page 49](#)
- [“Employee History Repeating Table \(PEREHIS\)” on page 49](#)
- [“Employee Deduction History Table \(PERDHIS\)” on page 49](#)
- [“Benefit Category Table \(PTRBCAT\)” on page 50](#)

- [“Dependent and Beneficiary Repeating Table \(PDRBENE\)” on page 50](#)
- [“Beneficiary Coverage Repeating Table \(PDRBCOV\)” on page 50](#)
- [“Benefit/Deduction Primary Group Rule Table \(PTRBDPG\)” on page 51](#)
- [“Benefit/Deduction group member rule table \(PTRBDGM\)” on page 51](#)
- [“Employee Deduction Repeating Base Table \(PDRBDED\)” on page 51](#)
- [“Benefit Category Set-up Rule Table \(PTRBCDN\)” on page 52](#)
- [“Benefit/Deduction Calculation Rule Table \(PTRBDCA\)” on page 52](#)
- [“Benefit/Deduction Valid Plan Rule Table \(PTRBDPL\)” on page 52](#)

Beneficiary Coverage History Table (PDRBCHS)

The following new columns are added to the Beneficiary Coverage History Table (PDRBCHS):

Column	Format	Null/Not Null
PDRBCHS_PRE_EXISTING_IND	VARCHAR2 (1)	NOT NULL
PDRBCHS_DREA_CODE	VARCHAR2 (8)	NOT NULL
PDRBCHS_REQUESTED_DATE	DATE	

Beneficiaries/Dependents History Table (PDRBEHS)

The following new columns are added to the Beneficiaries/Dependents Table (PDRBEHS):

Column	Format	Null/Not Null
PDRBEHS_MEMBER_TYPE	VARCHAR2(1)	
PDRBEHS_ACTIVE_IND	VARCHAR2(1)	
PDRBEHS_SPOUSE_EMPLOYED_IND	VARCHAR2(1)	
PDRBEHS_DISABILITY_IND	VARCHAR2(1)	
PDRBEHS_MRTL_CODE	VARCHAR2(1)	
PDRBEHS_ADDED_DATE	DATE	
PDRBEHS_COLLEGE_BEGIN_DATE	DATE	
PDRBEHS_COLLEGE_END_DATE	DATE	

Employee Deduction Repeating Table (PDRDEDN)

The following new columns are added to the Employee Deduction Repeating Table (PDRDEDN):

Column	Format	Null/Not Null
PDRDEDN_DATA_ORIGIN	VARCHAR2(30)	
PDRDEDN_BREA_CODE	VARCHAR2(8)	
PDRDEDN_EVENT_DATE	DATE	

Foreign Key: FK1_PDRDEDN_INV_PTRBREA_CODE

Employee Base Table (PEBEMPL)

The following new columns are added to the Employee Base Table (PEBEMPL):

Column	Format	Null/Not Null
PEBEMPL_NEW_HIRE_IND	VARCHAR2(1)	NOT NULL

Employee History Repeating Table (PEREHIS)

The following new columns are added to the PEREHIS table:

Column	Format	Null/Not Null
PEREHIS_NEW_HIRE_IND	VARCHAR2(1)	NOT NULL

Employee Deduction History Table (PERDHIS)

The following new columns are added to the Employee Deduction History Table (PERDHIS):

Column	Format	Null/Not Null
PERDHIS_DATA_ORIGIN	VARCHAR2(30)	
PERDHIS_BREA_CODE	VARCHAR2(8)	
PERDHIS_EVENT_DATE	DATE	

Benefit Category Table (PTRBCAT)

The following new columns are added to the Benefit Category Table (PTRBCAT):

Column	Format	Null/Not Null
PTRBCAT_ENRL_BASE_DATE_METHOD	VARCHAR2(1)	NOT NULL
PTRBCAT_NEWHIRE_ENROLL_DAYS	NUMBER (3)	

Dependent and Beneficiary Repeating Table (PDRBENE)

The following new columns are added to the Dependent and Beneficiary Repeating Table (PDRBENE):

Column	Format	Null/Not Null
PDRBENE_MEMBER_TYPE	VARCHAR2(1)	NOT NULL
PDRBENE_ACTIVE_IND	VARCHAR2(1)	NOT NULL
PDRBENE_SPOUSE_EMPLOYED_IND	VARCHAR2(1)	NOT NULL
PDRBENE_DISABILITY_IND	VARCHAR2(1)	NOT NULL
PDRBENE_MRTL_CODE	VARCHAR2(1)	
PDRBENE_ADDED_DATE	DATE	
PDRBENE_COLLEGE_BEGIN_DATE	DATE	
PDRBENE_COLLEGE_END_DATE	DATE	

Foreign Key: FK1_PDRBENE_INV_STVMRTL_CODE

Beneficiary Coverage Repeating Table (PDRBCOV)

The following new columns are added to the Beneficiary Coverage Repeating Table (PDRBCOV) to support the current release:

Column	Format	Null/Not Null
PDRBCOV_PRE_EXISTING_IND	VARCHAR2(1)	NOT NULL
PDRBCOV_DREA_CODE	VARCHAR2(8)	

Column	Format	Null/Not Null
PDRBCOV_REQUESTED_DATE	DATE	

Foreign Key #: FK1_PDRBCOV_INV_PTVDREA_CODE

Benefit/Deduction Primary Group Rule Table (PTRBDPG)

The following new column is added to the Benefit/Deduction primary group rule table (PTRBDPG):

Column	Format	Null/Not Null
PTRBDPG_PRIORITY	NUMBER(3)	

Benefit/Deduction group member rule table (PTRBDGM)

The following new columns are added to the Benefit/Deduction group member rule table (PTRBDGM):

Column	Format	Null/Not Null
PTRBDGM_WEB_BALC_SEL_IND	VARCHAR2(1)	NOT NULL
PTRBDGM_WEB_BALC_INS_IND	VARCHAR2(1)	NOT NULL
PTRBDGM_WEB_BALC_UPD_IND	VARCHAR2(1)	NOT NULL
PTRBDGM_WEB_BALC_DEL_IND	VARCHAR2(1)	NOT NULL

Employee Deduction Repeating Base Table (PDRBDED)

The following new columns are added to the Employee Deduction Repeating Base Table (PDRBDED):

Column	Format	Null/Not Null
PDRBDED_USER_ID	VARCHAR2(30)	
PDRBDED_DATA_ORIGIN	VARCHAR2(30)	

Benefit Category Set-up Rule Table (PTRBCDN)

The following new columns are added to the Benefit Category Set-up Rule Table (PTRBCDN):

Column	Format	Null/Not Null
PTRBCDN_ENRL_BEGIN_DATE_METHOD	VARCHAR2(1)	NOT NULL
PTRBDCN_WAIT_DAY_MONTH_IND	VARCHAR2(1)	NOT NULL
PTRBCDN_NEWHIRE_CUTOFF_DAY	NUMBER(2)	
PTRBCDN_NEWHIRE_WAITING_PERIOD	NUMBER(3)	

Benefit/Deduction Calculation Rule Table (PTRBDCA)

The following new columns are added to the Benefit/Deduction Calculation Rule Table (PTRBDCA) on the Benefits Deductions Rule window and Definition of Benefit and Deduction Plans window:

Column	Format	Null/Not Null
PTRBDCA_COVERAGE_IND	VARCHAR2(1)	NOT NULL
PTRBDCA_BENEFICIARY_IND	VARCHAR2(1)	NOT NULL

Benefit/Deduction Valid Plan Rule Table (PTRBDPL)

The following new columns are added to the Benefit/Deduction Valid Plan Rule Table (PTRBDPL):

Column	Format	Null/Not Null
PTRBDPL_COVERAGE_IND	VARCHAR2(1)	NOT NULL
PTRBDPL_BENEFICIARY_IND	VARCHAR2(1)	NOT NULL

New Scripts

The following scripts are associated with the new tables of the Benefits Administration enhancement.

pdrbajs_080400_01.sql

This script creates the Beneficiary Allocation History Table (PDRBAHS).

pdrbajs_080400_02.sql

This script creates the primary key for the PDRBAHS table.

pdrbajs_080400_03.sql

This script creates column comments for the PDRBAHS table.

pdrbalc_080400_01.sql

This script creates the Beneficiary Allocation Repeating Table (PDRBALC).

pdrbalc_080400_02.sql

This script creates the primary key for the PDRBALC table.

pdrbalc_080400_03.sql

This script creates a foreign key FK1_PDRBALC_INV_PDRBDED_KEY for the PDRBALC table.

pdrbalc_080400_04.sql

This script creates column comments for the PDRBALC table.

pdrbdoe_080400_01.sql

This script creates the Open Enrollment Employee Deduction Base Table (PDRBDOE).

pdrbdoe_080400_02.sql

This script creates the primary key for the PDRBDOE table.

pdrbdoe_080400_03.sql

This script creates a foreign key FK1_PDRBDOE_INV_PTRBDCA_CODE for the PDRBDOE table.

pdrbdoe_080400_04.sql

This script creates column comments for the PDRBDOE table.

pdrberr_080400_01.sql

This script creates the Open Enrollment Employee Deduction Error Table (PDRBERR).

pdrberr_080400_02.sql

This script creates the primary key for the PDRBERR table.

pdrberr_080400_03.sql

This script creates a foreign key FK1_PDRBERR_INV_PTRBDCA_CODE for the PDRBERR table.

pdrberr_080400_04.sql

This script creates column comments for the PDRBERR table.

pdrdtoe_080400_01.sql

This script creates the Open Enrollment Deduction Repeating Table (PDRDTOE).

pdrdtoe_080400_02.sql

This script creates the primary key for the PDRDTOE table.

pdrdtoe_080400_03.sql

This script creates a foreign key FK1_PDRDTOE_INV_PTRBDCA_CODE for the PDRDTOE table.

pdrdtoe_080400_04.sql

This script creates a foreign key FK1_PDRDTOE_INV_PTRBDCL_CODE for the PDRDTOE table.

pdrdtoe_080400_05.sql

This script creates a foreign key FK1_PDRDTOE_INV_PTRBREA_CODE for the PDRDTOE table.

pdrdtoe_080400_06.sql

This script creates column comments for the PDRDTOE table.

pdrtbal_080400_01.sql

This script creates the Beneficiary Allocation Temporary Table (PDRTBAL).

pdrtbal_080400_02.sql

This script creates the primary key for the PDRTBAL table.

pdrtbal_080400_03.sql

This script creates a foreign key FK1_PDRTBAL_INV_PDRBDOE_KEY for the PDRTBAL table.

pdrtbal_080400_04.sql

This script creates column comments for the PDRTBAL table.

pdrtcov_080400_01.sql

This script creates the Coverage Temporary Table (PDRTCov).

pdrtcov_080400_02.sql

This script creates the primary key for the PDRTCov table.

pdrtcov_080400_03.sql

This script creates a foreign key FK1_PDRTCov_INV_PDRBDOE_KEY for the PDRTCov table.

pdrtcov_080400_04.sql

This script creates a foreign key FK1_PDRTCov_INV_PTVDREA_CODE for the PDRTCov table.

pdrtcov_080400_05.sql

This script creates column comments for the PDRTCov table.

ptrbprv_080400_01.sql

This script creates the Benefit Deduction Provider Information Repeating Table (PTRBPRV).

ptrbprv_080400_02.sql

This script creates the primary key for the PTRBPRV table.

ptrbprv_080400_03.sql

This script creates a foreign key FK1_PTRBPRV_INV_PTRBDCA_CODE for the PTRBPRV table.

ptrbprv_080400_04.sql

This script creates column comments for the PTRBPRV table.

ptrbrea_080400_01.sql

This script creates the Benefit Deduction Change Reason Rule Table (PTRBREA).

ptrbrea_080400_02.sql

This script creates the primary key for the PTRBREA table.

ptrbrea_080400_03.sql

This script creates column comments for the PTRBREA table.

ptrlfbd_080400_01.sql

This script creates the Life Event Change Benefit Deduction Rule Table (PTRLFBD).

ptrlfbd_080400_02.sql

This script creates the primary key for the PTRLFBD table.

ptrlfbd_080400_03.sql

This script creates a unique key UK1_PTRLFBD for the PTRLFBD table.

ptrlfbd_080400_04.sql

This script creates a foreign key FK1_PTRLFBD_INV_PTRBREA_CODE for the PTRLFBD table.

ptrlfbd_080400_05.sql

This script creates a foreign key FK1_PTRLFBD_INV_PTVBDPG_CODE for the PTRLFBD table.

ptrlfbd_080400_06.sql

This script creates a foreign key FK1_PTRLFBD_INV_PTRBDCA_CODE for the PTRLFBD table.

ptrlfbd_080400_07.sql

This script creates a foreign key FK1_PTRLFBD_INV_PTRLFCH_KEY for the PTRLFBD table.

ptrlfbd_080400_08.sql

This script creates column comments for the PTRLFBD table.

ptrlfch_080400_01.sql

This script creates the Life Event Change Benefit Deduction Group Rule Table (PTRLFCH).

ptrlfch_080400_02.sql

This script creates the primary key for the PTRLFCH table.

ptrlfch_080400_03.sql

This script creates a foreign key FK1_PTRLFCH_INV_PTRBREA_CODE for the PTRLFCH table.

ptrlfch_080400_04.sql

This script creates a foreign key FK1_PTRLFCH_INV_PTVBDPG_CODE for the PTRLFCH table.

ptrlfch_080400_05.sql

This script creates column comments for the PTRLFCH table.

ptrlfsd_080400_01.sql

This script creates the Life Event Change Supporting Document Rule Table (PTRLFSD).

ptrlfsd_080400_02.sql

This script creates the primary key for the PTRLFSD table.

ptrlfsd_080400_03.sql

This script creates a foreign key FK1_PTRLFSD_INV_PTRBREA_CODE for the PTRLFSD table.

ptrlfsd_080400_04.sql

This script creates a foreign key FK1_PTRLFSD_INV_PTVBDOC_CODE for the PTRLFSD table.

ptrlfsd_080400_05.sql

This script creates column comments for the PTRLFSD table.

ptvbdoc_080400_01.sql

This script creates the Benefit Deduction Supporting Documents Validation Table (PTVBDOC).

ptvbdoc_080400_02.sql

This script creates the primary key for the PTVBDOC table.

ptvbdoc_080400_03.sql

This script creates column comments for the PTVBDOC table.

ptvdrea_080400_01.sql

This script creates the Benefit Deduction Termination Reason Validation Table (PTVDREA).

ptvdrea_080400_02.sql

This script creates the primary key for the PTVDREA table.

ptvdrea_080400_03.sql

This script creates column comments for the PTVDREA table.

Changed Scripts

The following scripts modify existing Banner ®Human Resource tables.

pdrbchs_080400_01.sql

This script adds columns PDRBCHS_PRE_EXISTING_IND, PDRBCHS_DREA_CODE and PDRBCHS_REQUESTED_DATE to the PDRBCHS table.

pdrbchs_080400_02.sql

This script sets the value of the new column, PDRBCHS_PRE_EXISTING_IND, to Y.

pdrbchs_080400_03.sql

This script sets the PDRBCHS_PRE_EXISTING_IND column as a NOT NULL column.

pdrbchs_080400_04.sql

This script adds column comments to the new columns of the PDRBCHS table.

pdrbcov_080400_01.sql

This script adds columns PDRBCOV_PRE_EXISTING_IND, PDRBCOV_DREA_CODE and PDRBCOV_REQUESTED_DATE to the PDRBCOV table.

pdrbcov_080400_02.sql

This script sets the value of the new column, PDRBCOV_PRE_EXISTING_IND, to Y.

pdrbcov_080400_03.sql

This script sets the PDRBCOV_PRE_EXISTING_IND column as a NOT NULL column.

pdrbcov_080400_04.sql

This script creates a foreign key FK1_PDRBCOV_INV_PTVDREA_CODE for the PDRBCOV table.

pdrbcov_080400_05.sql

This script adds column comments to the new columns of the PDRBCOV table.

pdrbded_080400_01.sql

This script adds columns PDRBDED_USER_ID and PDRBDED_DATA_ORIGIN to the PDRBDED table.

pdrbded_080400_02.sql

This script adds column comments to the new columns of the PDRBDED table.

pdrbehs_080400_01.sql

This script adds new columns to the PDRBEHS table. For a detailed listing, refer to the [“Changed Tables” on page 47](#).

pdrbehs_080400_02.sql

This script sets the value of the new columns:

PDRBEHS_MEMBER_TYPE to C

PDRBEHS_ACTIVE_IND to Y

PDRBEHS_SPOUSE_EMPLOYED_IND to N

PDRBEHS_DISABILITY_IND to N

pdrbehs_080400_03.sql

This script sets the PDRBEHS_MEMBER_TYPE, PDRBEHS_ACTIVE_IND, PDRBEHS_SPOUSE_EMPLOYED_IND and PDRBEHS_DISABILITY_IND columns as NOT NULL columns.

pdrbehs_080400_04.sql

This script adds column comments to the new columns of the PDRBEHS table.

pdrbene_080400_01.sql

This script adds new columns to the PDRBENE table. For a detailed listing, refer to the [“Dependent and Beneficiary Repeating Table \(PDRBENE\)” on page 50](#).

pdrbene_080400_02.sql

This script sets the value of the new columns:

PDRBENE_MEMBER_TYPE to C

PDRBENE_ACTIVE_IND to Y

PDRBENE_SPOUSE_EMPLOYED_IND to N

PDRBENE_DISABILITY_IND to N

pdrbene_080400_03.sql

This script sets the PDRBENE_MEMBER_TYPE, PDRBENE_ACTIVE_IND, PDRBENE_SPOUSE_EMPLOYED_IND and PDRBENE_DISABILITY_IND columns as NOT NULL columns.

pdrbene_080400_04.sql

This script creates a foreign key FK1_PDRBENE_INV_STVMRTL_CODE for the PDRBENE table.

pdrbene_080400_05.sql

This script adds column comments to the new columns of the PDRBENE table.

pdrdedn_080400_01.sql

This script adds new columns to the PDRDEDN table. For a detailed listing, refer to the [“Employee Deduction Repeating Base Table \(PDRBDED\)” on page 51](#).

pdrdedn_080400_04.sql

This script creates a foreign key FK1_PDRDEDN_INV_PTRBREA_CODE for the PDRDEDN table.

pdrdedn_080400_05.sql

This script adds column comments to the new columns of the PDRDEDN table.

pebempl_080400_01.sql

This script adds a new column, PEBEMPL_NEW_HIRE_IND, to the PEBEMPL table.

pebempl_080400_02.sql

This script sets the value of the new column, PEBEMPL_NEW_HIRE_IND, to N.

pebempl_080400_03.sql

This script sets the PEBEMPL_NEW_HIRE_IND column as a NOT NULL column.

pebempl_080400_04.sql

This script adds column comments to the new column of the PEBEMPL table.

perehis_080400_01.sql

This script adds a new column, PEREHIS_NEW_HIRE_IND, to the PEREHIS table.

perehis_080400_02.sql

This script sets the value of the new column, PEREHIS_NEW_HIRE_IND, to N.

perehis_080400_03.sql

This script sets the PEREHIS_NEW_HIRE_IND column as a NOT NULL column.

perehis_080400_04.sql

This script adds column comments to the new column of the PEREHIS table.

ptrbcat_080400_01.sql

This script adds columns PTRBCAT_ENRL_BASE_DATE_METHOD and PTRBCAT_NEWHIRE_ENROLL_DAYS to the PTRBCAT table.

ptrbcat_080400_02.sql

This script sets the value of the new column, PTRBCAT_ENRL_BASE_DATE_METHOD, to C.

ptrbcat_080400_03.sql

This script sets the PTRBCAT_ENRL_BASE_DATE_METHOD column as a NOT NULL column.

ptrbcat_080400_04.sql

This script adds column comments to the new columns of the PTRBCAT table.

ptrbcdn_080400_01.sql

This script adds new columns to the PTRBCDN table. For a detailed listing, refer to the [“Changed Tables” on page 47](#).

ptrbcdn_080400_02.sql

This script sets the value of the new columns, PTRBCDN_ENRL_BEGIN_DATE_METHOD to C, and PTRBCDN_WAIT_DAY_MONTH_IND to N.

ptrbcdn_080400_03.sql

This script sets the PTRBCDN_ENRL_BEGIN_DATE_METHOD and PTRBCDN_WAIT_DAY_MONTH_IND columns as NOT NULL columns.

ptrbcdn_080400_04.sql

This script adds column comments to the new columns of the PTRBCDN table.

ptrbdca_080400_01.sql

This script adds columns PTRBDCA_COVERAGE_IND and PTRBDCA_BENEFICIARY_IND to the PTRBDCA table.

ptrbdca_080400_02.sql

This script sets the value of the new columns, PTRBDCA_COVERAGE_IND and PTRBDCA_BENEFICIARY_IND, to N.

ptrbdca_080400_03.sql

This script sets the PTRBDCA_COVERAGE_IND and PTRBDCA_BENEFICIARY_IND columns as NOT NULL columns.

ptrbdca_080400_04.sql

This script adds column comments to the new columns of the PTRBDCA table.

ptrbdgm_080400_01.sql

This script adds new columns to the PTRBDGM table. For a detailed listing, refer to the [“Changed Tables” on page 47](#).

ptrbdgm_080400_02.sql

This script sets the value of the new columns, PTRBDGM_WEB_BALC_SEL_IND, PTRBDGM_WEB_BALC_INS_IND, PTRBDGM_WEB_BALC_UPD_IND and PTRBDGM_WEB_BALC_DEL_IND, to N.

ptrbdgm_080400_03.sql

This script sets the PTRBDGM_WEB_BALC_SEL_IND, PTRBDGM_WEB_BALC_INS_IND, PTRBDGM_WEB_BALC_UPD_IND and PTRBDGM_WEB_BALC_DEL_IND columns as NOT NULL columns.

ptrbdgm_080400_04.sql

This script adds column comments to the new columns of the PTRBDGM table.

ptrbdpg_080400_01.sql

This script adds a PTRBDPG_PRIORITY column into PTRBDPG table.

ptrbdpg_080400_02.sql

This script adds column comments to the new column of the PTRBDPG table.

ptrbdpl_080400_01.sql

This script adds columns PTRBDPL_COVERAGE_IND and PTRBDPL_BENEFICIARY_IND to the PTRBDPL table.

ptrbdpl_080400_02.sql

This script sets the value of the new columns, PTRBDPL_COVERAGE_IND and PTRBDPL_BENEFICIARY_IND, to N.

ptrbdpl_080400_03.sql

This script sets the PTRBDPL_COVERAGE_IND and PTRBDPL_BENEFICIARY_IND columns as NOT NULL columns.

ptrbdpl_080400_04.sql

This script adds column comments to the new columns of the PTRBDPL table.

New APIs

The following APIs have been added for HR 8.4 release:

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
	Beneficiary Allocation History		pdkd_pdrbabs0.sql pdkd_pdrbabs1.sql	PDRBAHS	
	Benefit Deduction Termination Reason	DLM_PTVDREA	pvkb_ptvdrea0.sql pvkb_ptvdrea1.sql	PTVDREA	PTVDREA
PB_BENEFICIARY_ALLOC	BENEFICIARY_ALLOC	PB_BENEFICIARY_ALLOC	pdkb_bene_alloc0.sql pdkb_bene_alloc1.sql	PDRBALC	PDABCOV
		PB_BENEFICIARY_ALLOC_RULES	pdkb_bene_alloc_r0.sql pdkb_bene_alloc_r1.sql		
		PB_BENEFICIARY_ALLOC_STRINGS	pdkb_bene_alloc_s0.sql pdkb_bene_alloc_s1.sql		
		DML_PDRBALC	pdkd_pdrbalc0.sql pdkd_pdrbalc1.sql		

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_DEDUCTION_BASE	DEDUCTION_BASE	PB_DEDUCTION_BASE	pdkb_dedn_base0.sql pdkb_dedn_base1.sql	PDRBDED	Employee Self-Service Benefits Administration
		PB_DEDUCTION_BASE_RULES	pdkb_dedn_base_r0.sql pdkb_dedn_base_r1.sql		
		PB_DEDUCTION_BASE_STRINGS	pdkb_dedn_base_s0.sql pdkb_dedn_base_s1.sql		
		DML_PDRBDED	pdkb_pdrbded0.sql pdkb_pdrbded0.sql		
PB_DEDUCTION_DETAIL	DEDUCTION_DETAIL	PB_DEDUCTION_DETAIL	pdkb_dedn_detail0.sql pdkb_dedn_detail1.sql	PDRDEDN	Employee Self-Service Benefits Administration
		PB_DEDUCTION_DETAIL_RULES	pdkb_dedn_detail_r0.sql pdkb_dedn_detail_r1.sql		
		PB_DEDUCTION_DETAIL_STRINGS	pdkb_dedn_detail_s0.sql pdkb_dedn_detail_s1.sql		
		DML_PDRDEDN	pdkd_pdrbded0.sql pdkd_pdrbded1.sql		
PB_OE_BENE_ALLOC	OE_BENE_ALLOC	PB_OE_BENE_ALLOC	pdkb_oe_bene_alloc0.sql pdkb_oe_bene_alloc1.sql	PDRTBAL	Employee Self-Service Benefits Administration
		PB_OE_BENE_ALLOC_RULES	pdkb_oe_bene_alloc_r0.sql pdkb_oe_bene_alloc_r1.sql		
		PB_OE_BENE_ALLOC_STRINGS	pdkb_oe_bene_alloc_s0.sql pdkb_oe_bene_alloc_s1.sql		
		DML_PDRTBAL	pdkd_pdrtbal0.sql pdkd_pdrtbal1.sql		

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_OE_COVERAGE	OE_COVERAGE	PB_OE_COVERAGE	pdkb_oe_coverage0.sql pdkb_oe_coverage1.sql	PDRTCov	Employee Self-Service Benefits Administration
		PB_OE_COVERAGE_RULES	pdkb_oe_coverage_r0.sql pdkb_oe_coverage_r1.sql		
		PB_OE_COVERAGE_STRINGS	pdkb_oe_coverage_s0.sql pdkb_oe_coverage_s1.sql		
		DML_PDRTCov	pdkd_pdrtcov0.sql pdkd_pdrtcov1.sql		
PB_PTVBDOC	PTVBDOC	PB_PTVBDOC	pvkb_ptvbdoc0.sql pvkb_ptvbdoc1.sql	PTVBDOC	PTVBDOC
		PB_PTVBDOC_RULES	pvkb_ptvbdoc_r0.sql pvkb_ptvbdoc_r1.sql		
		PB_PTVBDOC_STRINGS	pvkb_ptvbdoc_s0.sql pvkb_ptvbdoc_s1.sql		
PB_BENE_PROVIDER_INFO	BENE_PROVIDER_INFO	PB_BENE_PROVIDER_INFO	ptkb_provider_info0.sql ptkb_provider_info1.sql	PTRBPRV	PTRBDCA
		PB_BENE_PROVIDER_INFO_RULES	ptkb_provider_info_r0.sql ptkb_provider_info_r1.sql		
		PB_BENE_PROVIDER_INFO_STRINGS	ptkb_provider_info_s0.sql ptkb_provider_info_s1.sql		
		DML_PTRBPRV	ptkd_ptrbprv0.sql ptkd_ptrbprv1.sql		

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_BENEFIT_LIFECHG	BENEFIT_LIFECHG	PB_BENEFIT_LIFECHG	ptkb_lifechg_dedn0.sql ptkb_lifechg_dedn1.sql	PTRLFBD	PTRLFCH
		PB_BENEFIT_LIFECHG_RULES	ptkb_lifechg_dedn_r0.sql ptkb_lifechg_dedn_r1.sql		
		PB_BENEFIT_LIFECHG_STRINGS	ptkb_lifechg_dedn_s0.sql ptkb_lifechg_dedn_s1.sql		
		DML	ptkd_ptrlfbd0.sql ptkd_ptrlfbd1.sql		
PB_BENEFIT_DOC_LIFECHG	BENEFIT_DOC_LIFECHG	PB_BENEFIT_DOC_LIFECHG	ptkb_lifechg_doc0.sql ptkb_lifechg_doc1.sql	PTRLFSD	PTRLFCH
		PB_BENEFIT_DOC_LIFECHG_RULES	ptkb_lifechg_doc_r0.sql ptkb_lifechg_doc_r1.sql		
		PB_BENEFIT_DOC_LIFECHG_STRINGS	ptkb_lifechg_doc_s0.sql ptkb_lifechg_doc_s1.sql		
		DML	ptkd_ptrlfsd0.sql ptkd_ptrlfsd1.sql		
PB_BENEFIT_GRP_LIFECHG	BENEFIT_GRP_LIFECHG	PB_BENEFIT_GRP_LIFECHG	ptkb_lifechg_group0.sql ptkb_lifechg_group1.sql	PTRLFCH	PTRLFCH
		PB_BENEFIT_GRP_LIFECHG_RULES	ptkb_lifechg_group_r0.sql ptkb_lifechg_group_r1.sql		
		PB_BENEFIT_GRP_LIFECHG_STRINGS	ptkb_lifechg_group_s0.sql ptkb_lifechg_group_s1.sql		
		DML_PTRLFCH	ptkd_ptrlfch0.sql ptkd_ptrlfch1.sql		

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_DEDN_CHANGE_REASON	DEDN_CHANGE_REASON	PB_DEDN_CHANGE_REASON	ptkb_dednchgreason0.sql ptkb_dednchgreason1.sql	PTRBREA	PTRBREA
		PB_DEDN_CHANGE_REASON_RULES	ptkb_dednchgreason_r0.sql ptkb_dednchgreason_r1.sql		
		PB_DEDN_CHANGE_REASON_STRINGS	ptkb_dednchgreason_s0.sql ptkb_dednchgreason_s1.sql		
		DML_PTRBREA	ptkd_ptrbrea0.sql ptkd_ptrbrea1.sql		
PB_OE_ERRORS	OE_ERRORS	PB_OE_ERRORS	pdkb_oe_errors0.sql pdkb_oe_errors1.sql	PDRBERR	Employee Self-Service Benefits Administration
		PB_OE_ERRORS_RULES	pdkb_oe_errors_r0.sql pdkb_oe_errors_r1.sql		
		PB_OE_ERRORS_STRINGS	pdkb_oe_errors_s0.sql pdkb_oe_errors_s1.sql		
		DML_PDRBERR	pdkd_pdrberr0.sql pdkd_pdrberr1.sql		
PB_OE_BASE_DEDUCTION	OE_BASE_DEDUCTION	PB_OE_BASE_DEDUCTION	pdkb_oe_basededn0.sql pdkb_oe_basededn1.sql	PDRBDOE	Employee Self-Service Benefits Administration
		PB_OE_BASE_DEDUCTION_RULES	ppdkb_oe_basededn_r0.sql pdkb_oe_basededn_r1.sql		
		PB_OE_BASE_DEDUCTION_STRINGS	pdkb_oe_basededn_s0.sql pdkb_oe_basededn_s1.sql		
		DML_PDRBDOE	pdkd_pdrbdoe0.sql pdkd_pdrbdoe1.sql		

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_OE_DETAIL_DEDUCTION	OE_DETAIL_DEDUCTION	PB_OE_DETAIL_DEDUCTION	pdkb_oe_detl1dedn0.sql pdkb_oe_detl1dedn1.sql	PDRDTOE	Employee Self-Service Benefits Administration
		PB_OE_DETAIL_DEDUCTION_RULES	pdkb_oe_detl1dedn_r0.sql pdkb_oe_detl1dedn_r1.sql		
		PB_OE_DETAIL_DEDUCTION_STRINGS	pdkb_oe_detl1dedn_s0.sql pdkb_oe_detl1dedn_s1.sql		
		DML_PDRDTOE	pdkd_pdrdtoe0.sql pdkd_pdrdtoe1.sql		

New BPIs

Table .1 Benefits Deduction BPI

BPI Object Name	BPI Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PP_DEDUCTION		PP_DEDUCTION	pdkp_deduction0.sql	PDRDEDN	Employee Self-Service Benefits Administration
			pdkp_deduction1.sql	PDRBDED	

Changed APIs

The following APIs have been modified for this enhancement.

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_EMPLOYEE	EMPLOYEE	PB_EMPLOYEE	pokb_employee0.sql pokb_employee1.sql	PEBEMPL	PEAEMPL
		PB_EMPLOYEE_RULES	pokb_employee_r0.sql pokb_employee_r1.sql		PEAESCH
		PB_EMPLOYEE_STRINGS	pokb_employee_s0.sql pokb_employee_s1.sql		PEAHIRE
					PEA1PAY
					PHPUPDT
		DML_PEBEMPL	pokd_pebempl0.sql pokd_pebempl1.sql		NOKPLIB

New Packages

The following packages have been introduced to support this release:

- [“Open Enrollment package \(pdkenr1.sql / pdkenr11.sql\)” on page 70](#)
- [“Life Deduction Coverage and Premium calculation package \(pdklife.sql / pdklif1.sql\)” on page 70](#)

Open Enrollment package (pdkenr1.sql / pdkenr11.sql)

New package for New Hire Enrollment and Life Event Change processing.

Life Deduction Coverage and Premium calculation package (pdklife.sql / pdklif1.sql)

New package for calculating life deduction coverage and premium amounts.

Beneficiary Allocations DML Package (pdkd_pdrbahso.sql / pdkd_pdrbahs1.sql)

New DML package to insert Beneficiary Allocation History records to PDRBAHS table.

Base Deduction API Helper Package (pdkbded.sql / pdkbded1.sql)

New package for common functions and procedures associated with Deduction Base data.

Employee Filter Package (pokfltr.sql / pokflt1.sql)

New package to filter data on the web for Benefits Administration Enhancement.

Changed Packages

The following packages have been changed for the Benefits Administration Enhancement.

- [“Pdkdedn.sql / pdkded1.sql” on page 71](#)
- [“Pdklib1.sql” on page 71](#)
- [“Nokmup1.sql” on page 72](#)
- [“Nokedit1.sql” on page 72](#)

Pdkdedn.sql / pdkded1.sql

This package has been modified to include the below new fields:

Procedure `p_save_deduction` is modified to insert or update the new fields `pdrbded_user_id`, `pdrbded_data_origin`, `pdrdedn_user_id`, `pdrdedn_data_origin`, `pdrdedn_brea_code`, `pdrdedn_event_date`, `perdhis_data_origin`, `perdhis_brea_code`, `perdhis_event_date` while inserting or updating records in PDRBDED, PDRDEDN and PPERDHIS tables respectively.

The procedure `p_cross_field_edits` is modified to add validation on `pdrdedn_brea_code` and `pdrdedn_event_date` fields.

Pdklib1.sql

The existing copy forward functionality of the deduction record (PDRDEDN) in this package has been modified to include the new fields added to PDRDEDN and PERDHIS tables: Benefit Reason Code, (BREA_CODE), Life Event Change Date (EVENT_DATE).

This package is also modified to capture the User ID and Data Source (PDRDEDN_USER_ID and PDRDEDN_DATA_ORIGIN) when inserting or updating Deduction Detail record (PDRDEDN).

Nokmup1.sql

This package has been modified to include the new field, New Hire Indicator (PEBEMPL_NEW_HIRE_IND), through EPAF processing.

Nokedit1.sql

This package has been modified to include the new field, New Hire Indicator (PEBEMPL_NEW_HIRE_IND), through EPAF processing.

New Database Objects

The following scripts are added for the Human Resources 8.4 release:

- [“pdtbalc0.sql” on page 72](#)
- [“pdtbalc1.sql” on page 72](#)
- [“pdtbalc2.sql” on page 72](#)

pdtbalc0.sql

New database trigger to insert Beneficiary Allocations History record (PDRBAHS) when a new allocation (PDRBALC) is created.

pdtbalc1.sql

New database trigger to insert Beneficiary Allocations History record (PDRBAHS) when a change is made to an existing allocation (PDRBALC).

pdtbalc2.sql

New database trigger to insert Beneficiary Allocations History record (PDRBAHS) when an existing allocation (PDRBALC) is deleted.

New Seed Data

The following seed data has been added for the 8.4 release:

The following scripts insert a new e-mail code entry to GTVSDAX table for the Benefits Administration enhancement.

- pdrgtvsdaxi_080400.sql
- pgtvsdax_080400.sql
- pgtvsdaxi_080400.sql

The following scripts insert new and updated API messages to GURMESG table.

- pdrgurmesgi_080400.sql
- pgurmesg_080400.sql
- pgurmesgi_080400.sql

Pgtvsdaxi_080400.sql

This script adds seed data to the following columns of the GTVSDAX table:

Column	Value
GTVSDAX_EXTERNAL_CODE	UPDATE ME
GTVSDAX_INTERNAL_CODE	BENENROLL
GTVSDAX_REPORTING_DATE	NULL
GTVSDAX_TRANSLATION_CODE	NULL
GTVSDAX_INTERNAL_CODE_SEQNO	1
GTVSDAX_INTERNAL_CODE_GROUP	EMAIL
GTVSDAX_DESC	Bene Enrollment Contact Email
GTVSDAX_SYSREQ_IND	NULL
GTVSDAX_ACTIVITY_DATE	SYSDATE

Note

Note: The UPDATE ME value must be updated to the appropriate E-mail Address Type Code, GTVEMAL_CODE, as part of the set up for the Benefits Administration Enhancement. ■

Ntraufdi80400.sql

This script adds seed data to the following columns of the NTRAUFD table:

Column	Value
NTRAUFD_AUFM_CODE	PEAEMPL
NTRAUFD_AUBK_CODE	PEBEMPL
NTRAUFD_CODE	PEBEMPL_NEW_HIRE_IND
NTRAUFD_DESC	New Hire Indicator
NTRAUFD_FORMAT_IND	C
NTRAUFD_ENTERABLE_IND	Y
NTRAUFD_ACTIVITY_DATE	sysdate

3 Employee Summary-Functional

This section documents the functional changes made in Employee Summary View enhancement for Banner ®Human Resource 8.4.

This section discusses the following topics:

- [“Overview” on page 75](#)
- [“New Form” on page 75](#)
- [“Changed Forms” on page 98](#)
- [“Changed Tables” on page 99](#)
- [“Changed Scripts” on page 99](#)

Overview

The Employee Summary View is a new enhancement to Banner ®Human Resource 8.4. to view all information related to an employee including jobs, faculty assignments, faculty rank and faculty leave information, plus position budgets all on a single form. This satisfies CMS-RPE34300.

New Form

The following form is added to the Banner® Human Resource for Employee Summary View.

The Employee Summary View Form (PEIESUM)

The Employee Summary View Form (PEIESUM) allows a user to view all information related to an employee including jobs, faculty assignments, faculty rank and faculty leave information, plus position budgets all on a single form.

Following are the blocks and tabs on the Employee Summary View Form (PEIESUM).

Data of any fields in this form can be partially or completely obscured using the techniques of masking, hiding and concealing fields. For more information, refer to the *Banner General Data Security Handbook*.

The screenshot shows a web-based form titled "Employee Summary View Form PEIESUM 8.4 (s10b80)". At the top, there are several input fields: "ID:" (with a small square icon), "Employee Class:", "Home Department COA:", "Organization:", "Query Date:" (set to 16-NOV-2010), and a "Show Future Jobs" checkbox. Below these fields are five tabs: "Jobs", "Job and Labor Distribution", "Employee History", "Faculty Information", and "Position Budget". The "Jobs" tab is active, displaying a table with the following columns: Position, Suffix, COA, Organization, Title, Job Status, Personnel Date, Change Reason, Effective Date, and Next Effective Date. The table contains several rows of empty input fields for data entry.

The Key block

The key block includes a user enterable 'Query Date' and a 'Show Future Jobs' check box.

Field	Description
ID	Employee ID.
Query Date	The date for which the employee summary is viewed.
Employee Class	Code of the employee class associated with the employee from PEAEMPL. This is a display only field.
Home Department COA	Chart of Accounts. This is a display only field.
Organization	Organization code associated with the position. This is a display only field.
Show Future Jobs	Check to show jobs that begin after Query Date.

The Jobs tab

The Jobs tab shows all of an employee's active jobs as of the Query Date. If the 'Show Future Jobs' check box is checked, Jobs that will be active in the future will also display.

The data displayed on subsequent tabs is dependent on which job was highlighted on the first tab when the user navigated away. All fields are display only.

Position	Suffix	COA	Organization	Title	Job Status	Personnel Date	Change Reason	Effective Date	Next Effective Date
APIA31	00	B	11001	Adjunct Faculty	Active	01-JUL-2009		01-JUL-2009	
UI1900	00	B	11001	Senior Administrators	Leave with Pay,	01-JUL-2010		01-JUL-2010	01-JUL-2011
UI1900	02	B	11001	Presidential Search Commi	Leave with Pay,	01-JUL-2010		01-JUL-2010	01-JUL-2011
UI1900	03	B	11001	Stipend Position	Leave with Pay,	01-JUL-2010		01-JUL-2010	01-JUL-2011

Field	Description
Position	Code identifying the position associated with the job.
Suffix	Position suffix.
COA	Chart of Accounts
Organization	Organization code associated with the position.
Title	Title of the job.
Job Status	Status of the job.
Personnel Date	Date that the job creation or modification was initially to take place for the job being described.
Change Reason	Job change reason.
Effective Date	Date the job creation or modification went into effect for payroll activities associated with the job.
Next Effective Date	Effective Date of next job record.

Field	Description
Job Type	Indicates the Job Type: Primary, Secondary, or Overload.
Job FTE	Full-time equivalent assigned to the job.
Appointment Percent	Percentage of pay that is accountable with the job. The appointment percent cannot exceed 100 percent.
Employee FTE	Employee's full time equivalency.
Annual Salary	Employee's annual salary.
Assign Salary	Amount paid for the job each pay period.
Rate	Regular rate for employee's job.
Tenure Code	Code that describes the tenure status.
Tenure FTE	Full-Time Equivalence (FTE) factor associated within the department.
Sabbatical Indicator	This field identifies if the leave of absence is a sabbatical.

The Job and Labor Distribution tab

The Job and Labor Distribution displays both Job Detail and Labor Distribution data for the current record and all future effective records using a scrolling canvas. All fields are display only.

The screenshot shows the 'Employee Summary View Form' with the 'Job and Labor Distribution' tab selected. The form contains several input fields and a table. The top section includes fields for ID, Employee Class, Home Department COA, Organization, and Query Date. Below this are tabs for Jobs, Job and Labor Distribution, Employee History, Faculty Information, and Position Budget. The main section contains fields for Position, Suffix, Begin Date, End Date, Job Type, Effective Date, Personnel Date, Group, Grade, Status, Next Change Date, Table, Step, Title, Employee Class, Rate, Assign Salary, Job Location, Job FTE, Leave Category, Factor/Pays, Appointment Percent, Annual Salary, Timesheet Organization, Pay ID, Position Class, Change Reason, and National Occupation Code. At the bottom, there is a table with columns for Effective Date, COA, Index, Fund, Orgn, Acct, Prog, Actv, Locn, Salary, and Percent.

Effective Date	COA	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Salary	Percent
01-JUL-2009	B	BBATES	1110	11006	6121	40			3,333.00	33.33
01-JUL-2009	B		1110L4	11006	6121	40			6,667.00	66.67

Field	Description
Position	Code identifying the position associated with the job.
Suffix	Position suffix.
Begin Date	Job begin date.
End Date	Job end date if terminated.
Job Type	Indicates the Job Type: Primary, Secondary, or Overload.
Effective Date	Effective date of job record.
Personnel Date	Date that the job creation or modification was initially to take place for the job being described.
Group	Position Group.
Grade	Salary Grade code associated with the job.
Status	Employee's status with respect to the job assignment
Next Change Date	Effective Date of next job record.
Table	Salary table associated with the job assignment.
Step	Salary step associated within the salary grade.
Title	Job title.
Employee Class	Code of the employee class.
Job Location	The geographical location of the job assignment.
Appointment Percent	Percentage of pay that is accountable with the job.
Timesheet COA	Chart of Accounts where the time sheet is to be sent for the job assignment
Timesheet Organization	Organization where the time sheet is to be sent for the job assignment.
Change Reason	Job change reason.
Job FTE	Full-time equivalent assigned to the job.
Leave Category	Leave category code that is to be associated with the employee's Position and Suffix.

Field	Description
Pay ID	Payroll Identifier.
Rate	Regular rate for employee's job.
Assign Salary	Amount paid for the job each pay period.
Factor/Pays	Factor is the number of pays per calendar year. Pays are used for deferred pay calculations.
Annual Salary	Annual salary an employee will be paid for the job.
Position Class	Position Class code and description to which the employee belongs.
National Occupation Code	NOC code that classifies occupations according to skill type and skill level.
Effective Date	Effective date of labor distribution record.
COA	Chart of Accounts
Fund	Fund code
Orgn	Organization code
Acct	Account code
Prog	Program code
Actv	Activity code
Locn	Location code
External Account Code	Free form account code to allow update of an accounting system other than Banner Finance.
Salary	Portion of salary assigned to labor distribution.
Percent	Percentage of salary assigned to labor distribution.

Field	Description
Adjusted Service	Employee's first date of service at your enterprise, that is, the employee's hire date adjusted for leave of absence or times that the individual was not employed at the enterprise. This date was originally entered on the Employee Form (PEAEMPL).
Termination Reason	Reason for termination. The default value for this field is the current termination reason (if any) on the associated Employee Form (PEAEMPL)
Employee Data As of	Date the employee summary data is viewed, system date.
Check Distribution	The organization code used for check distribution from PEAEMPL.
Original Hire	Date the employee was originally hired.
First Work Date	Date the employee started work.
Last Day Worked	Last day that the employee worked.

The Faculty Information tab

The Faculty Information tab shows Faculty Appointment/Tenure Information, Rank, and Leave information as of the Query Date, plus any future effective records. Note: this tab will only display data if the "This Institution Will Track Faculty Actions By:" field on the Installation Rule form (PTRINST) is set to Position and Suffix. All fields are display only.

The screenshot shows the 'Faculty Information' tab in the 'Employee Summary View Form'. The form is for employee 'Tom Jefferson' (ID: UI0190003) in the 'Admin' class, with a query date of 16-NOV-2010. The 'Faculty Information' tab is active, showing the following data:

- Position:** UI1900, **Suffix:** 00, **Title:** Adjunct Faculty, **Status:** Leave with Pay, with Benefits
- Appointment:**
 - Appointment Effective Date: 01-DEC-2010
 - Appointment Begin Date: 01-JAN-2001
 - Appointment End Date: [Empty]
 - Review Type: [Empty]
 - Next Review Date: [Empty]
 - Terminal Appointment:
- Faculty Leave:**
 - Leave Begin Date: [Empty]
 - Leave End Date: [Empty]
 - Leave Type: [Empty]
 - Sabbatical:
 - Sabbatical Type: [Empty]
 - Next Eligibility Type: [Empty]
 - Next Eligibility Date: [Empty]
- Tenure:**
 - Tenure Effective Date: 01-DEC-2010
 - Tenure Code: Tenured
 - Tenure Status: Tenured
 - Tenure Review Type: Annual Review
 - Tenure Review Date: [Empty]
 - Tenure FTE: 0.5000
- Rank:**
 - Rank Effective Date: 01-OCT-2010
 - Rank: Associate Professor
 - Emeritus:
 - Next Review Date: [Empty]

Field	Description
Position	Code identifying the position associated with the job.
Suffix	Position suffix.
Title	Job title.
Status	Job status.
Appointment Effective Date	Effective date of employee's faculty appointment.
Appointment Begin Date	Begin date of employee's faculty appointment.
Appointment End Date	End date of employee's faculty appointment.
Review Type	Type of review that has taken place for the appointment.
Next Review Date	Next review date for appointment or reappointment.
Tenure Effective Date	Date the tenure becomes effective for the faculty member (employee).
Tenure Code	Type of tenure code as defined on PEAFACT.
Tenure Status	Tenure Status varies based on the tenure code displayed.
Tenure Review Type	Type of tenure review as defined on PEAFACT.
Tenure Review Date	Date the faculty member is up for review for a tenure decision.
Tenure FTE	Full-time equivalency salary.
Leave Begin Date	Leave Effective Begin Date that was entered on PEAFMLA.
Leave End Date	Leave Effective End Date that was entered on PEAFMLA.
Leave Type	Type of Leave of Absence taken by the faculty member.
Sabbatical Type	This field identifies if the leave of absence is a sabbatical. Determine whether a leave is considered a sabbatical or not on PTRLREA.

Field	Description
Next Eligibility Type	Type of leave the faculty member is eligible to take. Values for this field come from the Leave Reason Rule Form (PTRLREA).
Next Eligibility Date	Next date this faculty member is eligible to take a leave.
Rank Effective Date	Date when proposed rank takes effect.
Next Review Date	Date specifying when the employee will be next eligible for a rank review.

The Position Budget tab

The Position Budget tab displays the current Fiscal Year's Position Budget and the most current Job Labor Distribution. Note navigation to this tab is only available when the user is viewing the current job labor distribution record. All fields are display only.

Employee Summary View Form: PEIESUM 8.4 (s:10b90)

ID: UI0190003 Tom Jefferson Query Date: 16-NOV-2010
Employee Class: 01 Admin Home Department COA: B Organization: 11001 Show Future Jobs

Jobs Job and Labor Distribution Employee History Faculty Information **Position Budget**

Position: APIAJ1 Suffix: 00 Current Position Budget: 100,000.00 FTE: 6.000
Current Job Annual Salary: 10,000.00 FTE: 1.000

Current Position Budget Distribution
Fiscal Year: 2010

COA	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Position Budget	Percent
B	BBATES	1110	11006	6121	40			33,330.00	33.33
B		1110L4	11006	6121	40			66,670.00	66.67

Current Job Labor Distribution

Effective Date	COA	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Salary	Percent
01-JUL-2009	B	BBATES	1110	11006	6121	40			3,333.00	33.33
01-JUL-2009	B		1110L4	11006	6121	40			6,667.00	66.67

Field	Description
Position	Code identifying the position associated with the job.
Suffix	Position suffix.
Current Position Budget	Position budget for currently active fiscal year.
FTE	Full-time equivalency salary.
Current Job Annual Salary	Annual salary for current job.

Field	Description
FTE	Full-time equivalency salary.
Current Position Budget Distribution	
Fiscal Year	Fiscal year to which the budget is attached.
COA	Chart of Accounts
Index	Account index code
Fund	Fund code
Orgn	Organization code
Acct	Account code
Prog	Program code
Actv	Activity code
Locn	Location code
External Account Code	A NON-BANNER FINANCE System Account Distribution Code to which this position should be charged.
Position Budget	Portion of position budget assigned to labor distribution.
Percent	Percentage of position budget assigned to labor distribution.
Current Job Labor Distribution	
Effective Date	Date that the labor distribution record becomes effective.
COA	Chart of Accounts
Index	Account index code
Fund	Fund code
Orgn	Organization code
Acct	Account code
Prog	Program code

Field	Description
Actv	Activity code
Locn	Location code
Salary	Portion of salary assigned to labor distribution.
Percent	Percentage of salary assigned to labor distribution.
External Account Code	Free form account code to allow update of an accounting system other than Banner Finance.

Security Models

There are two different security models that can be used on this form.

- **Banner HR security:** is used when the 'Display Whole Employee Summary' check box on the Position Control Installation Rules (NTRINST) is set to No (unchecked). When a user has security set-up that matches with the Employee (PEAEMPL) record, thus Employee Class and Organization, the user will be able to access all of the employee's records on PEIESUM; that is, all jobs and position budgets regardless of any other Employee Class or Organization.
- **Security specific to PEIESUM form:** is used when the 'Display Whole Employee Summary' check box on the Position Control Installation Rules (NTRINST) is set to Yes (checked). In this mode if a user has security access to any of the Employee Class/Organization combinations used on either the current Employee record (PEAEMPL), or any of the Employee's Jobs records (NBAJOBS) they will be able to access all of the employee's information on PEIESUM (i.e. all jobs and position budgets).

Note

In the case of access provided by a job, the user's access will be granted retroactively to the start of the Fiscal Year in which the Job was active but terminate when the job terminates. ■

Security Examples

Scenario 1

- The user has security access to ECLS 11 and Organization B-11001
- The Query Date in the key block is 01-JUL-2010
- The 'Show Future Jobs' check box in the key block is set to No (unchecked).
- The 'Display Whole Employee Summary' check box on (NTRINST) is set to No (unchecked).

Employee 1

	Effective Date	Status	ECLS	COA-ORGN	Result on PEIESUM
Employee record	NA	Active	11	B-11001	Record is viewable
Job 1 A10001-00	01-JUL-2010	Active	01	B-14601	Record is viewable
Job 2 A10002-00	01-JUL-2010	Active	02	B-11407	Record is viewable
Job 3 A10003-00	01-JUL-2010	Active	03	B-31214	Record is viewable

Note

All records are viewable because the user has security access (via PSAORGN & PSAECLS) to the Employee Class and Organization associated with the Employee record. ■

Scenario 2 (Same as scenario 1 except NTRINST indicator is checked)

- The user has security access to ECLS 11 and Organization B-11001
- The Query Date in the key block is 01-JUL-2010
- The 'Show Future Jobs' check box in the key block is set to No (unchecked)
- The 'Display Whole Employee Summary' check box on (NTRINST) is set to Yes (checked).

Employee 1

	Effective Date	Status	ECLS	COA-ORGN	Result on PEIESUM
Employee record	NA	Active	11	B-11001	Record is viewable
Job 1 A10001-00	01-JUL-2010	Active	01	B-14601	Record is viewable
Job 2 A10002-00	01-JUL-2010	Active	02	B-11407	Record is viewable
Job 3 A10003-00	01-JUL-2010	Active	03	B-31214	Record is viewable

Note

All records are viewable because the user has security access (via PSAORGN & PSAECLS) to the Employee Class and Organization associated with the Employee record. ■

Scenario 3

- The user has security access to ECLS 01 and Organization B-14601
- The Query Date in the key block is 01-JUL-2010
- The 'Show Future Jobs' check box in the key block is set to No (unchecked).
- The 'Display Whole Employee Summary' check box on (NTRINST) is set to No (unchecked)

Employee 1

Effective Date	Status	ECLS	COA-ORGN	Result on PEIESUM	
Employee record	NA	Active	11	B-11001	Record is NOT viewable
Job 1 A10001-00	01-JUL-2010	Active	01	B-14601	Record is NOT viewable
Job 2 A10002-00	01-JUL-2010	Active	02	B-11407	Record is NOT viewable
Job 3 A10003-00	01-JUL-2010	Active	03	B-31214	Record is NOT viewable

Note

No records are viewable because the user does NOT have security access to the Employee Class and Organization associated with the Employee (PEAEMPL) record. ■

Scenario 4 (Same as scenario 3 except NTRINST indicator is checked)

- The user has security access to ECLS 01 and Organization B-14601
- The Query Date in the key block is 01-JUL-2010
- The 'Show Future Jobs' check box in the key block is set to No (unchecked)
- The 'Display Whole Employee Summary' check box on (NTRINST) is set to Yes (checked)

Employee 1

	Effective Date	Status	ECLS	COA-ORGN	Result on PEIESUM
Employee record	NA	Active	11	B-11001	Record is viewable
Job 1 A10001-00	01-JUL-2010	Active	01	B-14601	Record is viewable

		Effective Date	Status	ECLS	COA-ORGN	Result on PEIESUM
Job 2	A10002-00	01-JUL-2010	Active	02	B-11407	Record is viewable
Job 3	A10003-00	01-JUL-2010	Active	03	B-31214	Record is viewable

 **Note**

All records are viewable because the user has security access to one of the employee's jobs. ■

Scenario 5

- The user has security access to ECLS 01 and Organization B-14601
- The Query Date in the key block is 01-JUL-2010
- The 'Show Future Jobs' check box in the key block is set to No (unchecked)
- The 'Display Whole Employee Summary' check box on (NTRINST) is set to No (unchecked)

Employee 2

		Effective Date	Status	ECLS	COA-ORGN	Result on PEIESUM
Employee record		NA	Active	11	B-11001	Record is NOT viewable
Job 1	C10001-00	01-JUL-2010	Active	01	B-14601	Record is NOT viewable
		31-JUL-2010	Terminated	01	B-14601	Record is NOT viewable
Job 2	C10002-00	01-JUL-2010	Active	02	B-11407	Record is NOT viewable
		15-AUG-2010	Active	02	B-11407	Record is NOT viewable
Job 3	C10003-00	01-JUL-2010	Active	03	B-31214	Record is NOT viewable

 **Note**

No records are accessible because the user does NOT have security access (via PSAORGN & PSAECLS) to the Employee Class and Organization associated with the Employee record. ■

Scenario 6 (Same as scenario 1 except NTRINST indicator is checked)

- The user has security access to ECLS 01 and Organization B-14601
- The Query Date in the key block is 01-JUL-2010
- The 'Show Future Jobs' check box in the key block is set to No (unchecked)
- The 'Display Whole Employee Summary' check box on (NTRINST) is set to Yes (checked)

Employee 2

	Effective Date	Status	ECLS	COA-ORGN	Result on PEIESUM
Employee record	NA	Active	11	B-11001	Record is viewable
Job 1 C10001-00	01-JUL-2010	Active	01	B-14601	Record is viewable
	31-JUL-2010	Terminated	01	B-14601	Record is viewable
Job 2 C10002-00	01-JUL-2010	Active	02	B-11407	Record is viewable
	15-AUG-2010	Active	02	B-11407	Record is NOT viewable
Job 3 C10003-00	01-JUL-2010	Active	03	B-31214	Record is viewable

 **Note**

The user will be able to see all information through July 31, 2010 on PEIESUM because the user has security access to the Employee Class and Organization associated with Job 1. However, in this scenario the user will not see the 15-AUG-2010 record associated with Job 2 because the user's access terminated on July 31, 2010. ■

Scenario 7

- The user has security access to ECLS 11 and Organization B-11001
- The Query Date in the Key Block is 01-JUL-2010
- The `Show Future Jobs' check box in the key block is set to No (unchecked).
- The `Display Whole Employee Summary' check box on (NTRINST) is set to No (unchecked).

Employee 3

	Effective Date	Status	ECLS	COA-ORGN	Result on PEIESUM
Employee record	NA	Active	11	B-11001	Record is viewable
Job 1 U19010-00	01-DEC-2009	Active	F1	B-11106	Record is viewable
	28-FEB-2010	Terminated	F1	B-11106	Record is viewable
Job 2 F10033-00	01-MAY-2009	Active	F2	B-11330	Record is viewable
	01-JUN-2009	Active	F2	B-11330	Record is viewable
	15-AUG-2009	Active	F2	B-11330	Record is viewable
Job 3 A00102-00	01-JUL-2001	Active	02	B-11330	Record is viewable
	30-JUN-2009	Terminated	02	B-11330	Record is viewable

Note

The user will be able to see all information on PEIESUM because the user has security access to the Employee Class and Organization associated with the Employee record. ■

Scenario 8 (Same as scenario 7 except the NTRINST indicator is checked)

- The user has security access to ECLS 11 and Organization B-11001
- The Query Date in the Key Block is 01-JUL-2010
- The 'Show Future Jobs' check box in the key block is set to No (unchecked).
- The 'Display Whole Employee Summary' check box on (NTRINST) is set to Yes (checked).

Employee 3

	Effective Date	Status	ECLS	COA-ORGN	Result on PEIESUM
Employee record	NA	Active	11	B-11001	Record is viewable
Job 1 U19010-00	01-DEC-2009	Active	F1	B-11106	Record is viewable
	28-FEB-2010	Terminated	F1	B-11106	Record is viewable
Job 2 F10033-00	01-MAY-2009	Active	F2	B-11330	Record is viewable
	01-JUN-2009	Active	F2	B-11330	Record is viewable
	15-AUG-2009	Active	F2	B-11330	Record is viewable
Job 3 A00102-00	01-JUL-2001	Active	02	B-11330	Record is viewable
	30-JUN-2009	Terminated	02	B-11330	Record is viewable

Note

The user will be able to see all information on PEIESUM because the user has security access to the Employee Class and Organization associated with the Employee record. ■

Scenario 9

- The user has security access to ECLS F1 and Organization B-11106
- The Query Date in the Key Block is 15-MAY-2009
- The 'Show Future Jobs' check box in the key block is set to Yes (checked)
- The 'Display Whole Employee Summary' check box on (NTRINST) is set to Yes (checked).
- Fiscal Year is July 1 - June 30

Employee 3

	Effective Date	Status	ECLS	COA-ORGN	Result on PEIESUM
Employee record	NA	Active	11	B-11001	Record is viewable
Job 1 U19010-00	01-DEC-2009	Active	F1	B-11106	Record is viewable
	28-FEB-2010	Terminated	F1	B-11106	Record is viewable
Job 2 F10033-00	01-MAY-2009	Active	F2	B-11330	Record is NOT viewable
	01-JUN-2009	Active	F2	B-11330	Record is viewable
	15-AUG-2009	Active	F2	B-11330	Record is viewable
Job 3 A00102-00	01-JUL-2001	Active	02	B-11330	Record is NOT viewable
	30-JUN-2009	Terminated	02	B-11330	Record is NOT viewable

 **Note**

Job 1 - The Effective Date 01-DEC-2009 record will display on the 1st tab because the Future Jobs check box is checked; and the user will be able to see the 28-FEB-2010 record on the 2nd tab. ■

 **Note**

Job 2 - Effective Date 01-MAY-2009 record will not display because the user's access does not begin until 01-JUL-2009, the start of the Fiscal Year that includes Job 1 which began on 01-DEC-2009. However, the 01-JUN-2009 record associated with Job 2 will display on the first tab since that was the record in effect at the start of the fiscal year to which the user has access. In addition, the user will be able to see the 15-AUG-2009 record on the 2nd tab. ■

 **Note**

Job 3 - The user will not see this job at all because the job terminates prior to the Fiscal Year when the user has access ■

Scenario 10 (Same as scenario 9 except the NTRINST indicator is unchecked)

- The user has security access to ECLS F1 and Organization B-11106
- The Query Date in the Key Block is 15-MAY-2009
- The 'Show Future Jobs' check box in the key block is set to Yes (checked).
- The 'Display Whole Employee Summary' check box on (NTRINST) is set to No (unchecked).
- Fiscal Year is July 1 - June 30

Employee 3

	Effective Date	Status	ECLS	COA- ORGN	Result on PEIESUM
Employee record	NA	Active	11	B-11001	Record is NOT viewable
Job 1 U19010-00	01-DEC-2009	Active	F1	B-11106	Record is NOT viewable
	28-FEB-2010	Terminated	F1	B-11106	Record is NOT viewable
Job 2 F10033-00	01-MAY-2009	Active	F2	B-11330	Record is NOT viewable
	01-JUN-2009	Active	F2	B-11330	Record is NOT viewable

	Effective Date	Status	ECLS	COA-ORGN	Result on PEIESUM
Job 3 A00102-00	15-AUG-2009	Active	F2	B-11330	Record is NOT viewable
	01-JUL-2001	Active	02	B-11330	Record is NOT viewable
	30-JUN-2009	Terminated	02	B-11330	Record is NOT viewable

 **Note**

No records are accessible because the user does NOT have security access (via PSAORGN & PSAECLS) to the Employee Class and Organization associated with the Employee record. ■

Scenario 11

- The user has security access to ECLS F1 and Organization B-11106
- The Query Date in the Key Block is 01-JUL-2009
- The 'Show Future Jobs' check box in the key block is set to No (unchecked).
- The 'Display Whole Employee Summary' check box on (NTRINST) is set to Yes (checked).
- Fiscal Year is July 1 - June 30

Employee 3

 **Note**

Job 1 - Neither the 01-DEC-2009 nor the 28-FEB-2009 records are

	Effective Date	Status	ECLS	COA-ORGN	Result on PEIESUM
Employee record	NA	Active	11	B-11001	Record is viewable
Job 1 U19010-00	01-DEC-2009	Active	F1	B-11106	Record is NOT viewable
	28-FEB-2010	Terminated	F1	B-11106	Record is NOT viewable

	Effective Date	Status	ECLS	COA-ORGN	Result on PEIESUM
Job 2 F10033-00	01-MAY-2009	Active	F2	B-11330	Record is NOT viewable
	01-JUN-2009	Active	F2	B-11330	Record is viewable
	15-AUG-2009	Active	F2	B-11330	Record is viewable
Job 3 A00102-00	01-JUL-2001	Active	02	B-11330	Record is NOT viewable
	30-JUN-2009	Terminated	02	B-11330	Record is NOT viewable

viewable because the job is not active as of the query date even though this is the job that is providing access to the employee. ■

 **Note**

Job 2 - The 01-MAY-2009 record is not viewable because it's before the start of the Fiscal Year to which the user has access. However, the 01-JUN-2009 and 15-AUG-2009 records are viewable because they are in the accessible Fiscal Year ■

 **Note**

Job 3 - Neither of the records are viewable because they are prior to the Query Date and Terminated as of the Query Date. ■

Changed Forms

The following form has been modified for this enhancement.

Position Control Installation Rules (NTRINST)

The form is modified to include a new indicator, Display Whole Employee Summary, on the Base Rule tab page.

Banner HR security: is used when the 'Display Whole Employee Summary' check box is set to No (unchecked). When a user has security set-up that matches with the Employee (PEAEMPL) record, thus Employee Class and Organization, the user will be able to access all of the employee's records on PEIESUM; that is, all jobs and position budgets regardless of any other Employee Class or Organization.

Security specific to PEIESUM form: is used when the 'Display Whole Employee Summary' check box is set to Yes (checked). In this mode if a user has security access to any of the Employee Class/Organization combinations used on either the current Employee record (PEAEMPL), or any of the Employee's Jobs records (NBAJOBS) they will be able to access all of the employee's information on PEIESUM (i.e. all jobs and position budgets).

Note

In the case of access provided by a job, the user's access will be granted retroactively to the start of the Fiscal Year in which the Job was active but terminate when the job terminates. ■

4 Employee Summary- Technical

This section documents the technical changes made in Employee Summary View enhancement for Banner® Human Resource 8.4.

Changed Tables

The following table is modified for this enhancement:

Position Control Installation Rule Table (NTRINST)

The following new columns are added to the Position Control Installation Rule Table (NTRINST):

Column	Format	Null/Not Null
NTRINST_ALLOW_ALL_EMP_SUM_IN D	VARCHAR2(1)	NOT NULL

Changed Scripts

The following scripts modify the database table:

ntrinst_080400_01.sql

The script adds column NTRINST_ALLOW_ALL_EMP_SUM_IND.

ntrinst_080400_02.sql

The script sets default value to N for column NTRINST_ALLOW_ALL_EMP_SUM_IND.

ntrinst_080400_03.sql

The script sets column constraint to not null for column
NTRINST_ALLOW_ALL_EMP_SUM_IND.

ntrinst_080400_04.sql

The script creates column comment for column NTRINST_ALLOW_ALL_EMP_SUM_IND.

5 Electronic Personnel Action Form-Functional



This section documents functional changes to the Electronic Personnel Action Form (EPAF) Banner ®Human Resource 8.4. This satisfies RPE 1-5WNHIZ and RPE 1-7Y45Z1.

RPE 1-5WNHIZ

The new features include the following:

- A new visual indicator that identifies which fields are required for data entry by the Originator on the EPAF (both in Employee Self-Service and in Banner) based on the "Required" checkbox selection on the Electronic Approval Type Rules Form (NTRAPTY). This new feature satisfies RPE 1-5WNHIZ.
- On the Electronic Approval Category Rules Form (NTRACAT), the existing checkbox, "Defaults Overrideable," has been re-labeled to "Value Enterable" and will now represent if the field is data enterable on the EPAF in addition to the current default overrideable feature. This new feature also satisfies RPE 1-5WNHIZ.

Required Indicator

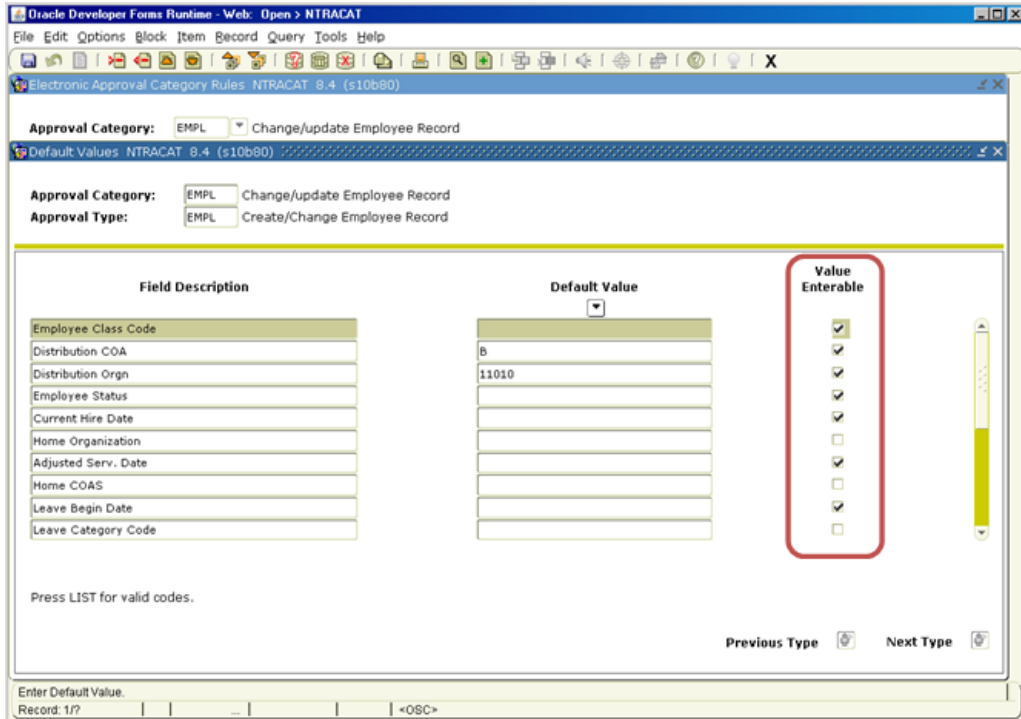
The Originator of an EPAF will now be alerted with a visual cue that a field is required for data entry. This Required Indicator (*) will be present both on the EPAF in Employee Self-Service and also on the Electronic Personnel Action Form (NOAEPAF) within Banner. To indicate which field on the EPAF requires data entry, update the existing "Required" checkbox on the Electronic Approval Type Rules Form (NTRAPTY) for the fields within the specific approval type.

When upgrading to 8.4, your current selections for the "Required" checkbox on NTRAPTY will be retained. If the institution needs to change any of these values, they would need to access NTRAPTY and update the approval types as needed.

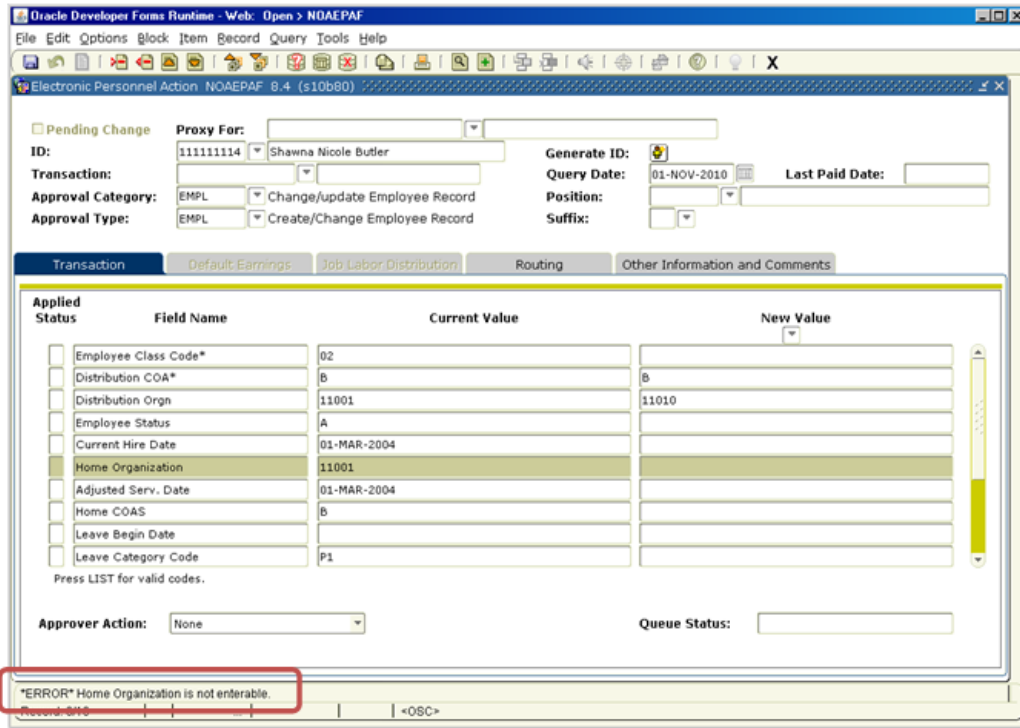
The following is an example of the NTRAPTY form and the **Required** check box field.

Field	Description	PAF Display Sequence Number	Required
PEBEMPL_ECLS_CODE	Employee Class Code	1.00	<input checked="" type="checkbox"/>
PEBEMPL_COAS_CODE_DIST	Distribution COA	2.00	<input checked="" type="checkbox"/>
PEBEMPL_ORGN_CODE_DIST	Distribution Orgn	2.50	<input type="checkbox"/>
PEBEMPL_EMPL_STATUS	Employee Status	3.00	<input type="checkbox"/>
PEBEMPL_CURRENT_HIRE_DATE	Current Hire Date	5.00	<input type="checkbox"/>
PEBEMPL_ORGN_CODE_HOME	Home Organization	6.00	<input type="checkbox"/>
PEBEMPL_ADJ_SERVICE_DATE	Adjusted Serv. Date	6.50	<input type="checkbox"/>
PEBEMPL_COAS_CODE_HOME	Home COAS	7.00	<input type="checkbox"/>
PEBEMPL_LOA_BEG_DATE	Leave Begin Date	8.00	<input type="checkbox"/>
PEBEMPL_LCAT_CODE	Leave Category Code	9.00	<input type="checkbox"/>
PEBEMPL_LOA_END_DATE	Leave End Date	10.00	<input type="checkbox"/>
PEBEMPL_LREA_CODE	Leave Reason Code	11.00	<input type="checkbox"/>
PEBEMPL_TREA_CODE	Term Reason Code	12.00	<input type="checkbox"/>
PEBEMPL_TERM_DATE	Termination Date	13.00	<input type="checkbox"/>
PEBEMPL_NEW_HIRE_IND	New Hire Indicator	14.00	<input type="checkbox"/>
PEBEMPL_IPEDS_SOFT_MONEY_IND	IPEDS Soft Money Ind	15.00	<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Here is what the Originator sees when entering an EPAF transaction on NOAEPAF. The required fields are designated by the asterisk.



Here is what the Originator sees when entering an EPAF transaction on NOAEPAF if he/she tries to enter a value in a field that has not been designated for entry.



Changed Forms

The following forms are modified for this release:

- [“Electronic Personnel Action Form \(NOAEPAF\)” on page 105](#)
- [“Electronic Approval Category Rules Form \(NTRACAT\)” on page 105](#)

Electronic Personnel Action Form (NOAEPAF)

This form is modified to note required fields with an asterisk (*) for ease of data entry.

Electronic Approval Category Rules Form (NTRACAT)

This form is modified to rephrase, 'Defaults Overrideable' indicator to 'Value Enterable' indicator so that this field can be utilized as default overrideable and data enterable features.

Changed Scripts

ntradfv_080400_01.sql

This resets column comment in database to reflect correct functionality of Default overrideable indicator column.

RPE 1-7Y45Z1

Currently, there are two sets of procedures for the application of EPAF transactions. Appliers can apply individual EPAF transactions from within Banner forms using the Electronic Personnel Action Form (NOAEPAF) or the Electronic Approval Summary Form (NOAAPSM), or in batch by running the Mass Apply Process (NOPEAMA) via Job Submission to apply multiple transactions at one time.

With 8.4, the code for the Apply functionality has now been consolidated into one function meaning that for both NOAEPAF and NOAAPSM, when applying a single transaction, they will call the same logic that NOPEAMA calls today. This code consolidation will ensure that there are no editing or processing differences in performing the EPAF apply function in multiple locations. In addition, now when using the Apply function from these forms, the visual calls (i.e. the screen painting) to forms like the Employee Jobs Form (NBAJOBS) will not occur. Once an EPAF transaction is applied

from NOAEPAF or NOAAPSM, the end user will see a message at the bottom of the form that the transaction has been applied and the status set to Completed.

Additionally with this change, users can now Apply transactions from NOAEPAF and NOAAPSM that involve Person Information (PPAIDEN) data.

Changed Forms

The following forms are modified for this enhancement:

Electronic Personnel Action Form (NOAEPAF)

This form is modified to call newly created apply routine which utilizes the same routine which is used in Mass apply process (nopeama.pc).

The below example is what the end user will see after applying an EPAF transaction on NOAEPAF.

The screenshot displays the 'Electronic Personnel Action Form (NOAEPAF)' interface. The form is titled 'Electronic Personnel Action NOAEPAF 8.4 (s10b80)'. It features several input fields and dropdown menus. The 'Transaction' field is set to '13663' and 'Completed', with 'Completed' highlighted in a red box. The 'Approval Category' is 'EMPL' and the 'Approval Type' is 'EMPL'. The 'Query Date' is '28-SEP-2010' and the 'Last Paid Date' is empty. The 'Proxy For' field is empty. The 'Generate ID' field has a dropdown arrow. The 'Position' and 'Suffix' fields are empty. Below the form fields, there are tabs for 'Transaction', 'Default Earnings', 'Job Labor Distribution', 'Routing', and 'Other Information and Comments'. The 'Transaction' tab is selected. Below the tabs, there is a table with the following columns: 'Applied Status', 'Field Name', 'Current Value', and 'New Value'. The table is empty. At the bottom of the form, there are 'Approver Action' and 'Queue Status' fields. A red box highlights the 'Transaction Applied.' message at the bottom left of the form. The status bar at the bottom shows 'Record: 1/1' and '<OSC>'.

Electronic Approval Summary Form (NOAAPSM)

This form is modified to call newly created apply routine which utilizes the same routine which is used in Mass apply process (nopeama.pc).

The screenshot displays the 'Electronic Approval Summary' window for NOAAPSM 8.4. The top section contains fields for 'User ID' (SLEE), 'Submitted From Date', 'Submitted To Date', 'Proxy For', 'Transaction Status' (Pending), and 'Queue Status' (Pending). Below these are two tabs: 'Transaction Information' and 'Other Information and Comments'. The main area features a table with the following columns: ID, Name, Approval Category, Description, Queue Status, Required Action Indicator, Approver Action, and Apply. The table is currently empty. At the bottom, a status bar indicates 'Transaction Applied.' and 'Record: 1/1'.

This example shows what the end user will see after applying an EPAF transaction on NOAAPSM.

Employee Form (PEAEMPL)

This form is modified to disable previous online apply logic.

Employee Job Form(NBAJOB)

This form is modified to disable previous online apply logic.

6 Electronic Personnel Action Form-Technical



This section documents the technical changes Electronic Personnel Action Form (EPAF) Banner® Human Resource 8.4.

New Packages

The following packages are new for this enhancement.

On-Line Apply package (nokepoa.sql/nokepo1.sql)

New package to process on-line apply call from Personnel Action Form(NOAEPAF) and Approval Summary Form(NOAAPSM).

Changed Packages

The following packages are modified to handle on-line apply call from Personnel Action Form(NOAEPAF) and Approval Summary Form(NOAAPSM).

- nokedit.sql/nokedit1.sql
- nokepa1.sql
- nokepc1.sql

Changed Processes and Reports

The following process is modified for this enhancement:

nopeama.pc

This process has been modified to accommodate on-line apply enhancement.

7 Electronic W-4 Form - Functional



This section documents the functional changes made for Form W-4 enhancement in Banner® Human Resource 8.4.

Overview

Enhancements are made in Banner Human Resource to support the Banner® Employee Self-Service 8.4 release to process Electronic W-4 forms and taxes as per Internal Revenue Service regulations. Feature is provided for the electronic signature certification before submitting data by the employee. With the Print option for W-4, an Administrator can print a W-4 in the employee's history after 2009.

This section discusses the following topics:

- [“Changed Forms” on page 110](#)
- [“Changed Tables” on page 112](#)
- [“Changed Scripts” on page 113](#)
- [“Changed APIs” on page 114](#)
- [“New Packages” on page 115](#)
- [“Changed Packages” on page 115](#)
- [“Changed Object:Access Views” on page 115](#)
- [“Changed Scripts” on page 116](#)

Changed Forms

The following forms are modified for this release:

- [“Employee Benefit and Deduction Form \(PDAEDN\)” on page 110](#)
- [“Employee Deduction History Form \(PEIDHIS\)” on page 111](#)

Employee Benefit and Deduction Form (PDAEDN)

The following new fields have been added to the Employee Benefit and Deduction Form (PDAEDN):

Field	Description
Comments Exist	Indicator to show if a comment record exists for this effective dated record.
IRS Lock-in Letter	Indicator to show if a Lock-in Letter is in effect.
Deduction Effective Date	Displays from PDRDEDN_EFFECTIVE_DATE; format DD-MON-YYYY.
Comment User ID	Displays the User ID that created, updated or deleted the record.
Comment Date	Displays the date the User performed the create, update or delete.
Comments	User may enter free-form text.
Deduction Effective Date (New Field)	Displays from PDRDEDN_EFFECTIVE_DATE on the Deduction tab.
W-4 last name differs from social security card	Check box for User entry and capture value from ESS W-4 entry
Letter Status	IRS Lock-In letter status.
Letter Date	Date of IRS Lock-In letter.
Filing Status	Lock-In Filing Status for federal tax withholding.
Allowances	Number of tax allowances from Lock-In letter.
Signed Date	Display the ESS W-4 capture date of electronic certification by employee.
Updated By	User ID from ESS W-4 electronic Certification that corresponds to Signed Date.

Employee Deduction History Form (PEIDHIS)

The following fields have been added to the Employee Deduction History Form (PEIDHIS).

Field	Description
Comments	User may enter free-form text.
Deduction Effective Date (New Field)	Displays from PDRDEDN_EFFECTIVE_DATE on the Deduction tab.
W-4 last name differs from social security card	Check box for User entry and capture value from ESS W-4 entry
Letter Status	IRS Lock-In letter status.
Letter Date	Date of IRS Lock-In letter.
Filing Status	Lock-In Filing Status for federal tax withholding.
Allowances	Number of tax allowances from Lock-In letter.
Signed Date	Display the ESS W-4 capture date of electronic certification by employee.
Updated By	User ID from ESS W-4 electronic Certification that corresponds to Signed Date.
IRS Lock-in Letter	Displays value from PDRDEDN record.

8 Electronic W-4 Form - Technical



This section documents the technical changes made in Electronic W-4 enhancement for Banner ®Human Resource 8.4.

Changed Tables

The following tables are modified for this enhancement:

- [“Employee Deduction Repeating Table \(PDRDEDN\)” on page 112](#)
- [“Employee Deduction History Table \(PERDHIS\)” on page 113](#)

Employee Deduction Repeating Table (PDRDEDN)

The following new columns are added to the Employee Deduction Repeating Table (PDRDEDN):

Column	Format	Null/Not Null
PDRDEDN_W4_NAME_CHANGE_IND	VARCHAR2(1)	NOT NULL
PDRDEDN_W4_SIGNED_PIDM	NUMBER(8)	
PDRDEDN_W4_SIGNED_DATE	DATE	
PDRDEDN_LOCKIN_LETTER_STATUS	VARCHAR2(1)	NOT NULL
PDRDEDN_LOCKIN_LETTER_DATE	DATE	
PDRDEDN_LOCKIN_FSTA_FIL_ST	VARCHAR2(2)	
PDRDEDN_LOCKIN_WITHHOLD_ALLOW	NUMBER(2)	NOT NULL
PDRDEDN_COMMENT	VARCHAR2(4000)	NOT NULL
PDRDEDN_COMMENT_DATE	DATE	
PDRDEDN_COMMENT_USER_ID	VARCHAR2(30)	

Column	Format	Null/Not Null
PDRDEDN_USER_ID	VARCHAR2(30)	
PDRDEDN_DATA_ORIGIN	VARCHAR2(30)	

Employee Deduction History Table (PERDHIS)

The following new columns are added to the Employee Deduction History Table (PERDHIS) table:

Column	Format	Null/Not Null
PERDHIS_W4_NAME_CHANGE_IND	VARCHAR2(1)	
PERDHIS_LOCKIN_LETTER_STATUS	VARCHAR2(1)	
PERDHIS_LOCKIN_LETTER_DATE	DATE	
PERDHIS _LOCKIN_FSTA_FIL_STAT	VARCHAR2(2)	
PERDHIS _LOCKIN_WITHHOLD_ALLOW	NUMBER(2)	
PERDHIS _W4_SIGNED_PIDM	NUMBER	
PERDHIS _W4_SIGNED_DATE	DATE	

Changed Scripts

The following scripts modify existing Banner ®Human Resource tables.

pdrdedn_080400_01.sql

This script adds new columns to the PDRDEDN table. For a detailed listing, refer to [“Employee Deduction Repeating Table \(PDRDEDN\)” on page 112](#).

pdrdedn_080400_02.sql

This script sets the value of the new columns, PDRDEDN_LOCKIN_LETTER_STATUS and PDRDEDN_W4_NAME_CHANGE_IND, to N.

pdrdedn_080400_03.sql

This script sets the PDRDEDN_W4_NAME_CHANGE_IND and PDRDEDN_LOCKIN_LETTER_STATUS columns as NOT NULL columns.

pdrdedn_080400_05.sql

This script adds column comments to the new columns of the PDRDEDN table.

perdhis_080400_01.sql

This script adds new columns to the PERDHIS table. For a detailed listing, refer to [“Employee Deduction History Table \(PERDHIS\)” on page 113](#).

perdhis_080400_02.sql

This script sets the value of the new columns, PERDHIS_LOCKIN_LETTER_STATUS and PERDHIS_W4_NAME_CHANGE_IND, to N.

perdhis_080400_03.sql

This script sets the PERDHIS_W4_NAME_CHANGE_IND and PERDHIS_LOCKIN_LETTER_STATUS columns as NOT NULL columns.

perdhis_080400_04.sql

This script adds column comments to the new columns of the PERDHIS table.

Changed APIs

The following API has been modified for this enhancement:

API Object Name	API Entity Name	Associated Packages	Associated Scripts	Associated Table	Affected Forms and Processes
PB_EXPERIENCE	EXPERIENCE	pb_experience	ppkb_experience0.sql ppkb_experience1.sql	PPREXPE	PPAEXPR
		pb_experience_rules	ppkb_experience0.sql ppkb_experience1.sql		
		pb_experience_strings	ppkb_experience_s0.sql ppkb_experience_s1.sql		
		DML_PPREXPE	ppkd_pprexpe0.sql ppkd_pprexpe1.sql		

New Packages

The following data objects are new for this enhancement:

pxktaxs.sql and pxktax1.sql

These new packages contain common routines related to printing tax documents.

Changed Packages

pdkded1.sql, pdklib1.sql, and pdklibs.sql

These objects have been modified to include the new fields, pdrdedn_w4_name_change_ind, pdrdedn_w4_signed_pidm, pdrdedn_w4_signed_date, pdrdedn_lockin_letter_status, pdrdedn_lockin_letter_date, pdrdedn_lockin_fsta_fil_st and pdrdedn_lockin_withhold_allow while inserting or updating records in PDRDEDN table and while inserting into PERDHIS table.

pxklib1.sql

This package is modified to include two new routines, P_send_request_W4 and P_show_request_W4, to support W4 form printing.

pdvded0.sql and pdvded1.sql

These packages are modified to include the new W-4 PDRDEDN columns.

Changed Object:Access Views

The following Object:Access View has been modified for the Electronic W-4 Enhancement. Refer to the Banner ®Human Resource 8.4 Object:Access Reporting Guide for details.

- Deduction Benefits (AP_DEDUCTIONS_BENEFITS)

Changed Scripts

The following scripts modify the database table.

pdrdedn_080400_01.sql

This scripts add the following new columns to PDRDEDN table:

- PDRDEDN_W4_NAME_CHANGE_IND
- PDRDEDN_W4_SIGNED_PIDM
- PDRDEDN_W4_SIGNED_DATE
- PDRDEDN_LOCKIN_LETTER_STATUS
- PDRDEDN_LOCKIN_LETTER_DATE
- PDRDEDN_LOCKIN_FSTA_FIL_ST
- PDRDEDN_LOCKIN_WITHHOLD_ALLOW
- PDRDEDN_COMMENT
- PDRDEDN_COMMENT_DATE
- PDRDEDN_COMMENT_USER_ID
- PDRDEDN_USER_ID
- PDRDEDN_DATA_ORIGIN

pdrdedn_080400_02.sql

This script updates existing records in PDRDEDN table with 'N' for PDRDEDN_LOCKIN_LETTER_STATUS and PDRDEDN_W4_NAME_CHANGE_IND.

pdrdedn_080400_03.sql

This script modifies PDRDEDN table to add NOT NULL constraint to PDRDEDN_W4_NAME_CHANGE_IND and PDRDEDN_LOCKIN_LETTER_STATUS columns.

pdrdedn_080400_04.sql

This script adds column comments to the new columns.

perdhis_080400_01.sql

This scripts add the following new columns to PDRDEDN table:

- PERDHIS_W4_NAME_CHANGE_IND
- PERDHIS_W4_SIGNED_PIDM
- PERDHIS_W4_SIGNED_DATE
- PERDHIS_LOCKIN_LETTER_STATUS
- PERDHIS_LOCKIN_LETTER_DATE

- PERDHIS_LOCKIN_FSTA_FIL_ST
- PERDHIS_LOCKIN_WITHHOLD_ALLOW
- PERDHIS_DATA_ORIGIN

perdhis _080400_02.sql

This script updates existing records in PERDHIS table with 'N' for PERDHIS_LOCKIN_LETTER_STATUS and PERDHIS_W4_NAME_CHANGE_IND.

perdhis _080400_03.sql

This script modifies PERDHIS table to add NOT NULL constraint to PERDHIS_W4_NAME_CHANGE_IND and PERDHIS_LOCKIN_LETTER_STATUS columns.

perdhis _080400_04.sql

This script adds column comments to the new columns.



9 Salary Planner/Budget Development Interface - Functional



This section documents the functional changes made for the Salary Planner to Budget Development Interface enhancement in Banner ®Human Resource 8.4.

Overview

New enhancements have been made to the Finance Self Service Budget Development and Human Resources Salary Planner modules to interface position budget information. Because of these enhancements, a new parameter has been added to the Salary Planner Upload Process (NBPSPUP) to allow the deletion of Salary Planner related entries in the Budget Development table (FBBBLIN). This satisfies RPE 1-8VC6YF.

Note

The Salary Planner enhancement originated with the Community Source initiative and was contributed and co-developed by Texas Tech University.

See *Employee Self Service* and *Finance Self Service 8.4 Release Guides* for more information on this enhancement.

This section discusses the following topics:

- [“Changed Processes and Reports” on page 120](#)
- [“New Packages” on page 122](#)
- [“Changed Database Objects” on page 123](#)
- [“New Database Objects” on page 123](#)
- [“Changed Scripts” on page 124](#)

Changed Processes and Reports

The following process has been modified for this enhancement.

Salary Planner Upload Process (NBPSPUP)

The process is modified to include new parameter 10 - Delete Budget Development entries. Salary Planner amounts may be zeroed out in Budget Development when running the Salary Planner Upload Process (NBPSPUP) if the position budget amounts will be fed to Budget Development through GURFEED from Position Control for example. This allows the institution the flexibility to decide whether it's appropriate to keep Salary Planner labor budgets (SALP origin) in Finance Budget Development for future viewing.

When Salary Planner changes are uploaded to Position Budgets in Banner ®Human Resource, and the Delete parameter is set to Yes, FBBBLIN records with a 'SALP' origin will be set to zero.

See the *Banner ®Human Resource 8.4 User Guide* for more information on the process.



10 Salary Planner/Budget Development Interface - Technical



This section documents the technical changes made in Salary Planner/Budget Development Interface enhancement for Banner ®Human Resource 8.4.

New Packages

The following packages are new for Position Control 8.4 release:

- [“nbksppn0.sql” on page 122](#)
- [“nbksppn1.sql” on page 122](#)

nbksppn0.sql

The package contains common functions and procedures to support Salary Planner/Budget Development interface.

nbksppn1.sql

The package contains common functions and procedures to support Salary Planner/Budget Development interface.

Changed Database Objects

The following packages are changed for Position Control 8.4 release.

nbkbudg.sql / nbkbud1.sq

The package is modified to include new Salary Planner Extract Header columns, NBREHDR_AUTO_UPD_POSN_IND, NBREHDR_AUTO_UPD_BUD_DEV_IND and NBREHDR_POST_TO_BUD_POOL_IND.

New Database Objects

The following objects are new for Position Control 8.4 release:

- [“nbtejob0.sql” on page 123](#)
- [“nbtepld0.sql” on page 123](#)
- [“nbtsalc0.sql” on page 123](#)

nbtejob0.sql

New trigger, NT_NBREJOB_UPDATE_NBREPSA, has been added to update Salary Planner position Proposed FTE whenever Salary Planner employee Proposed FTE is updated.

nbtepld0.sql

New trigger, NT_NBREPLD_UPDATE_FBBBLIN, has been added for the Salary Planner/Budget Development interface.

nbtsalc0.sql

New trigger, NT_NBRALC_UPDATE_NBREPSA, has been added to update Salary Planner position data whenever Salary Planner employee data is updated.

Changed Scripts

The following scripts modify the database table:

nbrehdr_080400_01.sql

The script adds columns NBREHDR_AUTO_UPD_POSN_IND, NBREHDR_AUTO_UPD_BUD_DEV_IND and NBREHDR_POST_TO_BUD_POOL_IND.

nbrehdr_080400_02.sql

The script sets default value to N for columns NBREHDR_AUTO_UPD_POSN_IND, NBREHDR_AUTO_UPD_BUD_DEV_IND and NBREHDR_POST_TO_BUD_POOL_IND.

nbrehdr_080400_03.sql

The script sets column constraint to not null for columns NBREHDR_AUTO_UPD_POSN_IND, NBREHDR_AUTO_UPD_BUD_DEV_IND and NBREHDR_POST_TO_BUD_POOL_IND.

nbrehdr_080400_04.sql

The script creates column comments for columns NBREHDR_AUTO_UPD_POSN_IND, NBREHDR_AUTO_UPD_BUD_DEV_IND and NBREHDR_POST_TO_BUD_POOL_IND.

11 Miscellaneous Enhancements



This section discusses the miscellaneous enhancements for the 8.4 release.

FOAPAL Validation Report (NBRFOAP)

FOAPAL elements must be valid as of the date they are entered; however, no backwards validation occurs if an element is terminated or inactivated. This can cause feeds from payroll to finance to error. The FOAPAL Validation Report (NBRFOAP) provides a report that identifies invalid FOAPAL strings prior to the feed to Finance, on an exception basis. This satisfies RPE 1-7Y3NJZ.

The FOAPAL Validation Report (NBRFOAP) verifies the FOAPAL, identifies any invalid strings, and provides an exception report of these problems. The user is responsible for monitoring this report, and correcting the data prior to the Finance feed. No automated correction are made. The Finance package `ffkfoap.p_validate_foapal` is used to validate FOAPAL components, including Index, if used. The process first looks for valid Index, if used. If the Index is invalid, an error is printed and the next record is validated. If an Index is not used, or the Index is valid, the process goes on to each FOAPAL component.

This new process looks at FOAPAL transactions in one of the following three ways

- By Position (evaluating the NBRPLBD table),
- By Job (evaluating the NBRJLBD table), or
- By pay history.

Note

FOAPAL Validation Report (NBRFOAP) will be delivered post 8.4 release. ■

RPEs

The following table outlines the RPEs that are addressed in the Banner ®Human Resource 8.4 release.

RPE#	Description
1-7Y3NJZ	<p>Request: Provide the ability to validate FOAPAL's prior to payroll processing to avoid errors in Finance post</p> <p>Resolution: A new reporting process has been created.</p> <p>Note: This RPE will be available post Human Resources 8.4 release.</p>
1-7Y45Z1	<p>Request: Technical improvement to EPAF apply processing</p> <p>Resolution: Modified NOAEPAF and NOAAPSM forms to internally call the APIs and apply the transaction. Calls to forms like NBAJOBS and PEAEMPL is removed. There were two sets of procedures for the application of EPAF transactions. There is one that is available online for NOAEPAF and NOAAPSM and one processed via Job Submission. This enhancement consolidated the code in one location, by calling the same routine used in batch apply process (NOPEAMA) from the on-line forms. This ensures that there are no editing or processing differences in performing the EPAF apply.</p>
1-8IYXOL	<p>Request: Electronic W-4</p> <p>Resolution: Enhancements have been made to the Employee Self Service W-4 Form to provide electronic certification and printing by the employee. In addition, changes have been made to the Employee Benefit or Deduction Form (PTRDEDN) to capture the electronic certification as well as IRS Lock-In Letter information.</p>
1-8VC6YF	<p>Request: Salary Planner/Budget Development Interface</p> <p>Resolution: Enhancements were made to Banner HR Salary Planner and Finance Self Service Budget Development modules to interface position budget information. A Master Salary Planner User may select options when creating a Scenario to update position information from job changes, post to Budget Development, and post to pooled accounts. A new page has been created in Self Service Budget Development to allow quick access to a user's budget worksheets, maintaining pre-selected defaults.</p>

1-8VCCJG

Request: Currently when you look at the routing queue for a labor redistribution approval, if one of the levels is a Group, the description below the person's name is 'Group' which is not very helpful if there are multiple Group approval levels. Other levels which are based on individuals display a description of the grant, fund, etc.

 **Note**

There were two sets of procedures for the application of EPAF transactions. There is one available online for NOAEPAF and NOAAPSM and one processed via Job Submission. This enhancement consolidated the code in one location, by calling the same routine used in batch apply process (NOPEAMA) from the on-line forms. This ensures that there are no editing or processing differences in performing the EPAF apply. ■

Resolution: When the user views the Routing Queue, any members in the routing queue that have been added as part of the Group will now display the name of the group, along with the Group label. For example the Routing queue member display might contain the following information:

Sally Smith,

Group, Sponsored Research

Sequence 1.0, Approve

1-CBU37N

Request: ERLR - Need capability to select specific position and suffix OR earn code for multi pay period update

Resolution: The modification allows the user to select position and suffix, and earning codes to be processed selectively for labor redistribution.

1-CD00R9

Request: Java Path Changes - Support for General RPE 1-BGKXTQ

Resolution: Created a new script that enables the setting of Java environment variables for use for batch processes. This script enables clients to define their specific environment in one script that will then be called by multiple batch processing scripts eliminating the need to update every Java based script after updates

CMS-RPE34300

Request: Employee Summary - It would be great if there was a screen/form in banner that display a simple employee profile - basic information such as name, address, status, etc... and on this screen it would be great if banner could display an annual salary that represented all jobs that the employee was is. It would also be tremendous valuable if the employee profile object access view also displayed an annual salary that represents the total of all the jobs the employee is current in.

Resolution: Added a new field in the object access view for the employee profile that adds the salaries of all jobs that the employee is currently in. Created a new form in Banner that displayed basic information for the employee, such as name, addresses, status, etc., that also has displays the salaries of all jobs that the employee is currently in added together.

- 1-5WNHIZ **Request:** EPAF - Required fields should be marked with a * and utilize Display only functionality
- Resolution:** Required fields are marked with a * in both INB and ESS EPAF processing. Also Default Overridable feature in Approval Category form (NTRACAT) is relabeled as 'Value Enterable' so that the field usages can be conveyed more accurately as default overrideable feature as well as display only indicator.
- 1-58VL2L **Request:** Dependents with an end date should not be shown on the Beneficiaries and Dependents page.
- Resolution:** An end relationship date is added to PDRBENE. Those records do not have PDRBCOV records or they are not displayed on the Employee Self-Service Beneficiaries and Dependents page.
- 1-7F5QJC **Request:** We are planning on using SSB Open Enrollment this year. We want to make the process as easy as possible for users who have different levels of computer skills. The database procedure "bwpkdcnm.P_OpenEnrollmentUpdate" requires that the Deduction Amount and Plan Year Annual Limit fields contain a comma if the amount exceeds 999.99. The SSB page displays the error message "Plan Year Annual Limit is invalid - Format is 999,999.99" if a comma is not entered when the amount exceeds 999.99.
- Resolution:** The web page is modified to be more flexible in the way an amount can be entered and it accepts amounts that both use and do not use a comma.
- 1-CXJ921 **Request:** Control the Open Enrollment link within ESS to display only when the open enrollment period within PTRBCAT is actually open.
- Resolution:** Removed the web tailor menu rows, TWGRMENU, for the Open Enrollment link from the below pages and place the Open Enrollment link directly on the page via a new routine, bwpkduti.P_ShowOE_link, so the link can be disabled when the open enrollment period is closed.
- 1-GXZQ1 **Request:** For purposes of tracking life insurance beneficiaries, relationship codes of "Primary Beneficiary" and "Secondary Beneficiary" can be defined along with "Husband", "Wife", "Child", etc. A person's husband can then be set up with two different relationship codes on PDABENE (i.e. "Husband" and "Primary Beneficiary"). Then the "Husband" code can be linked to Medical Insurance on PDABCOV to indicate that this person is covered under the employee's insurance plan. When viewing this on Self-Service Banner, it is not appropriate to see the "Primary Beneficiary" listings show as "NOT COVERED" in the "Benefit Coverage" section of the Beneficiaries and Dependents page.
- Resolution:** Only dependents in the "Benefit Coverage" section of the Beneficiaries and Dependents web page are listed if they are indeed covered under a benefit plan.
- 1-TLS5D **Request:** We are just beginning a Banner 7.3 HR implementation. We would like new employees to have the equivalent functionality via self-service of Open Enrollment, but perhaps just a two-week window and just for that employee.
- Resolution:** Allows the new employee to enter in much of the benefits selection rather than back-office HR staff via INB.

CMS-RPE11351 **Request:** Provide the ability to define the text based on where the user has come from.

Resolution: Another procedure has been added to prompt the user to identify what they want to do next; continue, complete, save for another session, etc. From there, the user would be taken to the appropriate continuation screen.

CMS-RPE24879 **Request:** Have Banner Web for Employees Open Enrollment be smart enough to know when an employee needs beneficiaries for a benefit (based on opt codes). For example, a person can sign up for Employee plus Family for a Health code but not have any beneficiaries listed for the health code. It is a minor problem when HRSC does data entry but will be a major problem if employees sign up for benefits via Web open enrollment.

Resolution: There will be two new indicators on the Benefits and Deduction Rules Form (PTRBDCA) form for Beneficiary Allocations and Coverage.

If the allocations indicator is checked for the deduction or plan, the user can enter beneficiary allocation information in PDABCOV beneficiary block or in Employee Self-Service Benefit Coverage page during benefits enrollment processing including open, new hire, life event change, or update enrollment.

If the coverage indicator is checked for the deduction or plan, the user can enter coverage information in PDABCOV in the coverage block or in Employee Self-Service Beneficiary Allocations page during benefits enrollment processing including open, new hire, life event change, or update enrollment.

Both of these indicators are always enabled and can be checked or unchecked.

During New Hire or Life Event enrollment if the benefit allows for either covered dependents or beneficiary allocations when the user returns to the group page after choices have been added, they will see links as well as a new button to allow the employee to Update Beneficiaries or Dependents. The employee can continue enrollment in this benefits group or access the link to add coverage or beneficiaries or continue to the next benefit group.

CMS-RPE25394 **Request:** Clients would like to be able to view Life Insurance over Employee self-service for new hire or life event benefit enrollment. This will allow the LF group from PTVBDPG and PTRBDPG to be used within new hire or life event benefits enrollment only. This solution will automatically calculate the premium amounts and coverage amount, or use the entered override amount. This will also allow the usage of calculation rules 50, 51, 52 and 53. This will not affect Open Enrollment or direct enrollment to allow for setting up of Life Insurance (RPE 1-EH3DOF).

Resolution: The enhanced functionality provides clients the ability to allow enrollment of life insurance and display the potential calculated premium, coverage, and taxable premium amounts for new hire and life event enrollment.

CMS-RPE32276 **Request:** We want one process for all benefit changes whether it is open enrollment, new hire or qualifying event.

Resolution: A Web process has been created where qualifying events can be defined and when the user selects one of the events it prompts them to change affected benefits. Institution could set up events and which benefits are associated with each event.

CMS-RPE33834 **Request:** It should have '\$' dollar sign and also right-justified when the field entries are related to money.

Resolution: \$ sign has been added to employee self-services



12 Miscellaneous Enhancements - Technical



The following section documents the technical changes for Miscellaneous Enhancements for Human Resources 8.4 release.

The following topics are discussed:

- [“Changed Tables” on page 132](#)
- [“Changed Scripts” on page 136](#)
- [“New Seed Data” on page 139](#)

Changed Tables

The following tables have been modified for this release:

Fringe Actual Budget Temporary Table (NBFTTOT)

This table was modified for the Session ID field Expansion (Defect #1-8JYBRM).

Column	Format
NBFTTOT_SESSION_ID	NUMBER

Salary Planner Upload Jobs Error Temporary Table (NBTJERR)

This table was modified for the Session ID field Expansion (Defect #1-8JYBRM).

Column	Format
NBTJERR_SESSION_ID	VARCHAR2(38)

Salary Planner Upload Position Error Temporary Table (NBTPERR)

This table was modified for the Session ID field Expansion (Defect #1-8JYBRM).

Column	Format
NBTPERR_SESSION_ID	VARCHAR2(38)

Position Labor Distribution Account Temporary Table (NBTPLBD)

This table was modified for the Session ID field Expansion (Defect #1-8JYBRM).

Column	Format
NBTPLBD_SESSION_ID	NUMBER

Salary Budget Temporary Table (NBTPTOT)

This table was modified for the Session ID field Expansion (Defect #1-8JYBRM).

Column	Format
NBTPTOT_SESSION_ID	NUMBER

Premium Earnings Budget Totals Temporary Table (NBTRTOT)

This table was modified for the Session ID field Expansion (Defect #1-8JYBRM).

Column	Format
NBTRTOT_SESSION_ID	NUMBER

Temporary Table for the nhrecrt - Effort Certification Report (NHRECRT)

This table was modified for the Session ID field Expansion (Defect #1-8JYBRM).

Column	Format
NHRECRT_SESSIONID	NUMBER

Collector Table for the nhrsdst report (NHRSDST)

This table was modified for the Session ID field Expansion (Defect #1-8JYBRM).

Column	Format
NHRSDST_SESSIONID	NUMBER

Parameter Collector Repeating Table (NPRCOLR)

This table was modified for the Session ID field Expansion (Defect #1-8JYBRM).

Column	Format
NPRCOLR_SESSIONID	VARCHAR2(38)

Time Entry Temporary Jobs Table (PETJOBS)

This table was modified for the Session ID field Expansion (Defect #1-8L9FUW).

Column	Format
PETJOBS_SESSION_ID	VARCHAR2(38)

Temporary Table To Implement Roster and Organizational Time Sheet Reports (PHRTERN)

This table was modified for the Session ID field Expansion (Defect #1-8L9FUW).

Column	Format
PHRTERN_SESSIONID	VARCHAR2(38)

Temporary Table To Implement Work Schedules (PHRTHRS)

This table was modified for the Session ID field Expansion (Defect #1-8L9FUW).

Column	Format
PHRTHRS_SESSIONID	VARCHAR2(38)

Temporary Retro Active Pay Period Table (PHTRPER)

This table was modified for the Session ID field Expansion (Defect #1-8L9FUW).

Column	Format
PHTRPER_SESSIONID	VARCHAR2(38)

Temporary Parameter Table for Views (POTPARM)

This table was modified for the Session ID field Expansion (Defect #1-8L9FUW).

Column	Format
POTPARM_SESSION_ID	VARCHAR2(38)

Parameter Collector Repeating Table (PPRCOLR)

This table was modified for the Session ID field Expansion (Defect #1-8L9FUW).

Column	Format
PPRCOLR_SESSIONID	VARCHAR2(38)

Temporary Table for Queries (PPRQRYT)

This table was modified for the Session ID field Expansion (Defect #1-8L9FUW).

Column	Format
PPRQRYT_SESSIONID	VARCHAR2(38)

Tax Reporting Rule Table (PXRREPT)

This table was modified for the Session ID field Expansion (Defect #1-8L9FUW).

Column	Format
PXRREPT_SESSION_ID	VARCHAR2(38)

Changed Scripts

The following scripts are run as a part of the upgrade process for the release.

petjobs_080400_01.sql

This script increases the field length of the PETJOBS_SESSION_ID field to VARCHAR2(38) in the PETJOBS table.

phrtern_080400_01.sql

This script increases the field length of the PHRTERN_SESSIONID field to VARCHAR2(38) in the PHRTERN table.

phrthrs_080400_01.sql

This script increases the field length of the PHRTHRS_SESSIONID field to VARCHAR2(38) in the PHRTHRS table.

phtrper_080400_01.sql

This script increases the field length of the PHTRPER_SESSIONID field to VARCHAR2(38) in the PHTRPER table.

potparm_080400_01.sql

This script increases the field length of the POTPARM_SESSION_ID field to VARCHAR2(38) in the POTPARM table.

pprcolr_080400_01.sql

This script increases the field length of the PPRCOLR_SESSIONID field to VARCHAR2(38) in the PPRCOLR table.

pprqryt_080400_01.sql

This script increases the field length of the PPRQRYT_SESSIONID field to VARCHAR2(38) in the PPRQRYT table.

pxrrept_080400_01.sql

This script increases the field length of the PXRREPT_SESSION_ID field to VARCHAR2(38) in the PXRREPT table.

pprexpe_080300_01.sql

This script adds columns PPREXPE_HIRE_ACT_START_DATE and PPREXPE_HIRE_ACT_VERIF_REC_IND to the PPREXPE table.

pprexpe_080300_02.sql

This script sets the value of the new column, PPREXPE_HIRE_ACT_VERIF_REC_IND, to N.

pprexpe_080300_03.sql

This script sets the PPREXPE_HIRE_ACT_VERIF_REC_IND column as a NOT NULL column.

pprexpe_080300_04.sql

This script adds column comments to the new columns of the PPREXPE table.

ptrinst_080300_01.sql

This script adds columns PTRINST_12HOUR_CLOCK_IND and PTRINST_WEB_JOBSALA_DISP_IND to the PTRINST table.

ptrinst_080300_02.sql

This script sets the value of the new columns, PTRINST_12HOUR_CLOCK_IND to Y and PTRINST_WEB_JOBSALA_DISP_IND to N.

ptrinst_080300_03.sql

This script sets the PTRINST_12HOUR_CLOCK_IND and PTRINST_WEB_JOBSALA_DISP_IND columns as a NOT NULL columns.

ptrinst_080300_04.sql

This script adds column comments to the new columns of the PTRINST table.

nbftot_080400_01.sql

This script increases the field length of the NBTFTOT_SESSION_ID field to VARCHAR2(38) in the NBTFTOT table.

nbtjerr_080400_01.sql

This script increases the field length of the NBTJERR_SESSION_ID field to VARCHAR2(38) in the NBTJERR table.

nbtperr_080400_01.sql

This script increases the field length of the NBTPERR_SESSION_ID field to VARCHAR2(38) in the NBTPERR table.

nbtplbd_080400_01.sql

This script increases the field length of the NBTPLBD_SESSION_ID field to VARCHAR2(38) in the NBTPLBD table.

nbtptot_080400_01.sql

This script increases the field length of the NBTPTOT_SESSION_ID field to VARCHAR2(38) in the NBTPTOT table.

nbtrtot_080400_01.sql

This script increases the field length of the NBTRTOT_SESSION_ID field to VARCHAR2(38) in the NBTRTOT table.

nhrecrt_080400_01.sql

This script increases the field length of the NHRECRT_SESSIONID field to VARCHAR2(38) in the NHRECRT table.

nhrsdst_080400_01.sql

This script increases the field length of the NHRSDST_SESSIONID field to VARCHAR2(38) in the NHRSDST table.

nprcolr_080400_01.sql

This script increases the field length of the NPRCOLR_SESSIONID field to VARCHAR2(38) in the NPRCOLR table.

ntradfv_080400_01.sql

This script modifies column comments for the NTRADFV_AUFD_DEFAULT and NTRADFV_DEFAULT_OVERRIDE_IND columns.

New Seed Data

The following seed data is new for this release:

pgurmesgi_080400.sql

This script inserts new and updated API messages to GURMESG table.



13 Problem Resolutions

At the time this guide was completed, the following problem resolutions were targeted for delivery with this release.

Note

For comprehensive and detailed problem, impact, and resolution information for all defects corrected in this release, refer to the supplemental problem resolutions file (`humres80400resolutions.txt`) delivered along with your release guide. The information in this text file is extracted directly from the Customer Support Center just prior to release of the product and may include additional defects that were resolved after this document was finalized. ■

Human Resources

This section lists the problem resolutions included for the HR 8.4 release.

Object	Number	Summary
documentation	1-8Y4EF0	Documented the procedures for adding, changing and terminating flexible benefits for the Employee Flexible Benefits (PDAFLEX) form.
multiple	1-8L9FUW	The Oracle SESSIONID was limited in Banner. This has been resolved with 8.4 to increase the length of the session id holding variable to 38 characters as defined by Oracle.
nhredst.pc	1-5ZUEXT	Procedure for printing employees was not called at all required places. Modified a procedure to display all employee data.
pdabene.fmb	1-4NQDIS	The form should allow the Attending College box to be updated on the employee record. Code is added to the trigger PDRBENE.POST-QUERY which will set the items' update property based on the condition.

Object	Number	Summary
pdadedn.fmb	1-C3UW7L	Created a field Delete flag in the Key-Block. This field is set to a value of Y after the deduction record is terminated and deleted. Once the value is set to Y the user gets an error message not to update the values for the deduction before the last paid date.
pdaflex.fmb	1-8Z9W8G	New procedure ENBLE_DSBLE_DEDUCT_BLK is created. This newly added procedure will make the deduction block items available for insert or update based on the approved indicator.
pdaflex.fmb	1-BAGPDB	Last Paid Date item is displayed on the key block and populated with database function, nokplib.f_get_last_paid_date.
pdpflex.pc	1-70G7ES	The PDPFLEX process has been changed to correctly evaluate the effective dated records and insert or update to the deduction if they already exist on PDADEDN. The combined limit code is not needed and can be passed as null.
pdpflex.pc	1-AYC7IM	chk_upd_ovg_udg routine is added to set base deduction end date with the previous date of the newly added counter overage or underage effective date. Also a deduction and deduction history records are added for the previous overage or underage deduction with the terminated status.
pdpflex.pc, pdaflex.fmb	1-BCZLWO	<p>pdpflex.pc: This process is restructured, modularized and removed redundancy to insert/update deductions and to end deductions based on pdaflex input data and existing deductions. Overage and underage logic is rewritten.</p> <p>pdaflex.fmb: p_chk_rec_change routine is added to do edits on deduction change status on each fields and called in pre-update trigger in pdrflex block.</p>

Object	Number	Summary
pdplife.pc	1-3HSSEW	Included a condition to check the PDRDEDN deduction status as Active, while selecting the employee life deductions in sel_life_dedns.
pealeav.fmb	1-AU53GM	Post-Change trigger in ID item of key block has been modified to use employee API validation routines which give consistent error messages on incomplete bio and address information like other Banner forms.
pekfasgl.sql	1-D3LU1Z	p_get_pay_dates routine is modified to reset start and end date properly.
pekflacl.sql	1-AXP1GH	Modify f_open_nist_levels_rc to select specific PTRNILV columns instead of doing a SELECT *, so it would match with the FETCH statement in bwpkfcm package. This is the cursor to select the faculty levels for the Non-Instructional assignments.
pepfcap.pc	1-90X1TL	When Banner Finance is not installed, routine get_orgn_desc will call nokcode.f_code_cv to get organization description.
perv100.jar,perv100.zip	1-AC2RLI	The reference to the Employee Skill Code A0 is removed from the program; the Vets-100A report will print the Job Categories completely.
pevempl.sql	1-7VN7EB	Now, the PEVEMPL view is displaying the data for the fields pevempl_vera_ind , pevempl_sdvet_ind, pevempl_armed_serv_med_vet_ind and pevempl_confid_ind.
phaadjt.fmb	1-AEMAFA	Erase_Check trigger is modified not to delete phrcmnt record if PHRHIST_ASSOC_SEQ_NO item is null.
phaadjt.fmb,ptrshft.fmb, ptrlgt.y.fmb,pcacpay.fmb	1-AAIKWB	The number 0.00 has been changed to 0 in the required triggers.
phahour.fmb	1-77FN5A	Modified code in the trigger POST-CHANGE for the item PHREARN_SHIFT by adding a condition for calling the trigger CHECK_DUPLICATE_EARN.

Object	Number	Summary
phatime.fmb,pekteex.sql ,pektee1.sql	1-BHBJ21	<ol style="list-style-type: none"> 1. phatime.fmb :- Modified PHVTIME.PRE-QUERY for considering last name properly. 2. pekteex.sql :- Modified p_mass_extract procedure, added one new parameter for last_name. 3. pektee1.sql :- Modified p_mass_extract procedure, added one new parameter for last_name. <p>After this change, procedure will consider last name also for time extraction along with the pidm.</p>
phcdedn.fmb	1-C3UW7H	Now the sequence 0 transaction, may not have deductions updated or deleted when at disposition 62.
phkfmla1.sql	1-B19U41	<p>On the Employee FMLA Information form (PEAFMLA) the Leave usage information would not import if the Payroll Interface Date was set to pay period end date on the PTRINST form. Additionally, when leave history did import on PEAFMLA it would insert the check date for the pay period end date column. This should always show the pay period end date.</p> <p>This has been corrected to import data based on the Leave Begin Date and Leave End Date (or fiscal year end date), regardless of the PTRINST Payroll Interface Date setting.</p>
phklrac1.sql	1-A8CJLO	The f_pending_lrrq_action_exists routine is modified not to check chart of account code.
phkreds1.sql	1-C0F2WF	When searching for distributions using only the Employee ID, the response time is exceptionally slow. With this modification, the full table scan has been eliminated, thus providing much improved performance for the user.

Object	Number	Summary
PHPCALC.pco	1-9Z8R84	Changed logic in PHPCALC to handle earn codes that are pensionable and have zero hours without aborting.
PHPCALC.pco	1-7KJF84	<p>Modified PHPCALC, PHPTAXS and PXPVRFY, moving initialization of the table TAX-CALCULATED-OCCURENCE fields from subroutine PHPTAXS to the calling programs PHPCALC and PXPVRFY. Adjust table size from 50 to 60.</p> <p>Within PHPCALC, added logic to populate the table with all deductions with a non-blank BDTY code for an employee so that they are available to PHPTAXS and PXACALC processing.</p>
phpchk1.pc,phpchek.pc	1-ADMXC8	Removed the host variable indicator Ind_01 in the right operand in the routine do_convert.
phpchk1.pc,phpchek.pc	1-B3BDML	<p>New parameter, Duplicate Document Prevention, has been added and utilized when this process checks duplicate documents. chk_high_docno and chk_dup_doc_no routines have been modified so that duplicate documents can be checked within the same document type.</p>
phpdird.pc	1-B3FWSN	<ul style="list-style-type: none"> • Added new variable total_sub_entry_cnt to accumulate sub_entry_cnt of all IAT/non-IAT batches • Modified ins_phrdird and upd_phrdird to use total_sub_entry_cnt, total_debit, entry_hash. • Moved phrdird insert/update logic from dird_foot to tape_foot.

Object	Number	Summary
phpdird.pc	1-BDZDQ3	<ol style="list-style-type: none"> 1. Added create_ctry_list, sel_ctry_list, sel_docm_list, and update_node, and modified sel_comp_header_payroll, sel_emp_no, tape_detail, and comp_detail to record the total direct deposit amount on only one direct deposit record when multiple GXRDIRD records exist with the same routing and account numbers. 2. Added gxrdird_exists and print_dd_changed_emp to print employee IDs, whose GXADIRD direct deposit Bank Routing or Account Number is changed, or Status is changed from Active to Prenote or Inactive, after phpdocm has been run and before the phpdird process, in the .log file. 3. Added print_job_parms to print job parameters in the .log file.
phpdird.pc	1-BKMU17	Entry class code and company description are defined as constants. sel_file_header will select the company descriptive date and effective_date.
phpdird.pc	1-E06K8S	<ul style="list-style-type: none"> • Modified ins_phrdird routine to use MOD function on hash total amount so that large amount with more than 10 digits can be updated with right precision. • Modified tape_foot to call sel_hash_no_trunc before insert/update phrdird record.
phpecex.com	1-CHSFIP	The classpath statement is broken down into several pieces to limit the line length less than 255. Also the script was not redirecting the output to the database and to the printer. This issue also fixed now.
phpprof.pc	1-A6DH6D	ins_phrrerl_failures_bdca has been modified to evaluate the compatible combined limit codes within the current pay period.

Object	Number	Summary
phpreto.pc	1-AUFAH4	sel_orgn_title routine is modified to utilize tmstreat instead catstr. Also the size of sqlstring8 variable gets enlarged from 350 to 500 and date format is used on the date variable.
phpshrs.pc	1-EBG2NF	check_sfbetrm routine is modified to add () to combine date check with term code. get_level routine is modified to add () to combine date check with term code.
phptime.pc	1-AV6AM9	jobs_body and holiday_hrs routines have been modified to set disposition to 15 when a warning on holiday hours exceeding reg hours gets generated.
PHRDERR 8.2	1-7X3VA8	Corrected the name to PHRDERR in the main function. The log file now reports the correct process name, PHRDERR.
phrlrar.pc	1-AJDC60	Sizes of variables (report_title and select_rc) are adjusted. filler variable is removed and variables are initialized with an empty string. table definitions, 17, 18, 20 and 21 are modified to accomodate negative hrs/unit.
phpecex.shl, phpecex.pl, phpecex.com, phpecex.jar, activemq-core-5_3_0.jar, xstream-1_2_1.jar, jms.jar, activemq-opt-5_3_0.jar, ger-j2ee-man-1_0.jar, commons-httpc-3_1.jar, commons-codec.jar, xpp3_min-1_1_4c.jar, usr_bwperlr_m_1.sql, ban_bwperlr_m_1.sql	1-C5J4L8	Implemented the JMS solution to submit the request to the ERLR application that is running on the application server. This executes the extract logic and submit the response back to the PHPECEX client via the messaging queue.
poviden.sql	1-C744HI	When the user logs into the ESS application to Certify My Effort, the retrieval of reports is taking an exceptionally long time. With this modification, the user will no longer experience extended response time retrieving effort reports. This patch depends on the patch p1-8dfgdv_bwp80300.

Object	Number	Summary
ppagenl.fmb	1-28GXIB	PPAGENL will now have the General Education tab renamed to Prior College and the functionality of that block will continue as is. The title of the SGBI field will be renamed Prior College. A new block for High Scholl information will be added. The users will now be able to enter high school attended, graduation date, transcript received date, Class Rank/Size, Percentile, GPA, and whether High School was a college prep school.
ppkd_pprexp0.sql,ppaexp r.fmb,pxrp941.pc, PHPTAXS.pco,see comments	1-BTYC23	Modified Banner 8.x for 2010 New Hire Act signed into law March 18, 2010. Provides for a 'tax holiday' from the employer's portion of FICA Old Age for qualified newly hired employees.
ptkb_effcert_ecls_r1.sql ptkb_effcert_pcls_r1.sql	1-CSN0NB	Database Stored Procedures - Object fails to compile after DB New has been applied to database. This has now been corrected.
ptrtrea.fmb	1-AVBSYD	When the user attempted to delete a reason code, the form was not checking to see if the code was already in use on PEAEMPL. In addition, the form was allowing duplicate reason codes to be stored. Checked to prevent deletion of termination reason codes used in employee records. Update of termination code not allowed. Checked to prevent duplicate termination code.
pxkp_w2_20091.sql	1-ATIP2E	Procedure p_compute_box_amounts is modified to skip negative amounts edit for box 14.
pxpmroe.pc,pxr1099.pc	1-AWXHJF	Removed the special character from audit trail lines.
pxrp941.pc	1-87OCAG	sel_pp_totals, month_body and pay_period_body are modified to add 1042-S subject income once to federal subject income.

Object	Number	Summary
<p>phpecex.shl, phpecex.pl, phpecex.com, phpecex.jar, activemq-core-5_3_0.jar, xstream-1_2_1.jar, jms.jar, activemq-opt-5_3_0.jar, ger-j2ee-man-1_0.jar, commons-httpc-3_1.jar, commons-codec.jar, xpp3_min-1_1_4c.jar, pviden.sql, phklabr.sql, phklabr1.sql, phkreds.sql, phkreds1.sql, usr_bwperl_r_m_1.sql, ban_bwperl_r_m_1.sql</p>	1-EHWIMZ	his defect is a place holder and contains a list of all defects and RPE's release as part of the Octobe 2010 HR 8.3.0.6 release.
<p>PHPTAXS.pco, phaadjt.fmb, phcdedn.fmb, pch1042identifirate.sql, pch1042identifygrad.sql, pch1042fixrate.sql, pch1042fixgrad.sql, pch1042identifyallow.sql</p>	1-A4OI2X	This defect correction includes a process, two forms and five scripts: PHPTAXS.pco, phaadjt.fmb, phcdedn.fmb, pch1042identifirate.sql, pch1042identifygrad.sql, pch1042fixrate.sql, pch1042fixgrad.sql, pch1042identifyallow.sql

Position Control

This section lists the problem resolutions included in Release 8.4. For details about a problem resolution, refer to the `posnct180400resolutions.txt` file that accompanies this release.

Object	Number	Summary
nbapbud.fmb,nbijlhs.fmb	1-AAIKV5	Form errors occur when 0.00 is not replaced by 0.The number 0.00 has been changed to 0 in the required triggers.
nbbud1.sql,nopiwks.sql	1-E2S9BR	Objects fails to compile after DB New has been applied to database: nbbud1.sql, nopiwks.sql This has been corrected.

Object	Number	Summary
nbkb_job_base_r1.sql	1-AVQO79	In the procedure p_validate added a call to p_check_failure to propagate the error back to the form.
nbkencm1.sql	1-AJU49D	Modified required procedure to replace SQLERRM / ORA-xxxx errors with user friendly messages.
nbkjenc1.sql	1-87KEOX	Days of the week were hardcoded in this object, making it out of compliance with international codings standards. The hardcoding has been removed, and this issue is now corrected.
nbkjenc1.sql	1-AF34BX	<p>The nbkjenc1.sql package that does encumbrance calculations does an unnecessary check for job labor records that causes the following error message to display: 'Job Labor records required for Activefiscal year'.</p> <p>This has been corrected so that new LD records will be inserted appropriately when needed.</p>
nbkjenc1.sql	1-DY7NNM	The Employee Jobs Form (NBAJOBS) would return the error "Edit_sal_enc_posn_budget, trigger raised unhandled exception, ORA – 01476 divisor is equal to zero" when one job existed in the current fiscal year and the job status was on leave. This has been corrected in the function f_active_days to return a 1 instead of zero.
nbkj1bd1.sql	1-CSQ480	Database Stored Procedure Objects failed to compile after new columns were applied to database. This has been corrected.
nbkp_job_labor1.sql	1-5Q7LE7	f_isequal_rec_for_backout routine is modified to check whether external account and percent get changed when encumbrance amount is available for the existing external accounts. Also finance installation is checked for this change is done for Non-Finance clients.

Object	Number	Summary
nbpspex.pc,nbkbudg.sql,nbkbud1.sql	1-BM95UE	<p>When the Salary Planner Extract (NBPSPEX) was run in Add/Delete mode with the Copy Position LD to Jobs set to Y, existing pooled position labor distribution records initially loaded disappeared. This only occurred when the NBPSPEX process was run to Copy Position LD to Jobs is set to Y.</p> <p>This has been corrected and existing records will not be affected.</p>
nhidist.fmb,nbipinc.fmb	1-8JYBRM	<p>NHIDIST and NBIPINC can fail when the Oracle Session ID sequence exceeds 8 digits. With the implementation of this solution, the forms will not longer fail if the Oracle Session ID is larger than 8 digits.</p>
nhrecrt.pc	CMS-DFCT82916	<p>NHRECRT is not producing a report, but rather aborting when the user attempts to execute the process using the "S"pecific option for the FOAPAL components.</p> <p>NHRECRT is not allowing the user the ability to process multiple Chart of Account codes in a single run. Both of these issues cause the user to have incorrect or incomplete data in the report.</p> <p>With this modification, the user will no longer see the process ending unexpectedly when processing using the "S"pecific parameter option for the FOAPAL components, and will also see the appropriate data when executing multiple Chart of Account codes.</p>
nokepal.sql	1-ED9SJ3	<p>Messages may not display correctly for International clients.</p> <p>With this modification, messages will display correctly for International clients.</p>

Object	Number	Summary
nokepc1.sql	1-8317VP	<p>Following changes are done as part of this defect fix.</p> <ol style="list-style-type: none">1. Changed the sorting order in f_open_ntrsgrp_rc function.2. Changed select value of ntrsgrp_desc column in the sgrp_code_rc cursor. This function is called from the bwpkdpt.p_pop_codedesc_list. Apart from this package, package bwpkepdt is also modified under defect number 1-8317VP as part of this defect.



The logo consists of a horizontal bar divided into two sections: a black section on the left and a blue section on the right. Below this bar is a decorative row of small, multi-colored rectangular blocks. The text "SUNGARD HIGHER EDUCATION" is centered horizontally across the bar, with "SUNGARD" in white on the black background and "HIGHER EDUCATION" in white on the blue background.

SUNGARD HIGHER EDUCATION

4 Country View Road
Malvern, Pennsylvania 19355
United States of America
www.sungardhe.com