

Benefits Enrollment Conversion Using Employee Self Service

By Marta DiDomenico

Editor's Note: *Does the thought of a Benefit Enrollment conversion in JD Edwards® EnterpriseOne® turn your stomach into knots? Fear not, says Marta DiDomenico. By using parts of the Employee Self Service functionality (you don't even need the full ESS setup), you have a much easier—and more accurate—option for converting employees from one benefit package to another. Whether you're on Xe or Versions 8.10 and higher, Marta's got your setup covered in this article.*

One painful part of converting data to the JD Edwards Benefits package is Benefits Enrollment conversion. Fortunately, JD Edwards provides a relatively simple method to convert benefit enrollments. I call the method "Easy Benefit Enrollment using ESS", and it consists of converting employee benefits using pieces of JD Edwards Employee Self Service (ESS); the full setup of ESS is not required. The key here is that everything that is needed to use this method is contained within the software, but many clients aren't aware that ESS can be used to easily convert benefits enrollment. This article explores the steps and setup needed to perform benefits enrollment conversions using Employee Self Service.

This method can be used for initial benefit conversions as well as for implementing new companies/business units, as would be the case with a company merger or acquisition.

This method can also be used when a company implements a completely new benefit plan or changes benefit providers. In this situation, you can enroll all employees in the new plan using this easy method; just don't forget to un-enroll them from the old plan(s)!

In EnterpriseOne, Self Service functionality was not fully developed until version 8.10, but this method can be used for Xe just as easily. In fact, because Self Service was not fully developed for Xe, the setup is less complex than for subsequent versions (hence fewer bugs).

We'll start with the setup for Xe and then discuss the setup for versions 8.10 and higher.

Setup for EnterpriseOne Xe

There is very little setup involved in the Benefits Enrollment Conversion using Employee Self Service, other than Benefits Administration setup.

Fortunately, JD Edwards provides a relatively simple method to convert benefit enrollments.

Before you begin, you'll want to verify that your Benefit Groups, Categories, Plans, and Options have already been set up and that your Plans are tied to Categories and that Categories are tied to Benefit Groups. Without this setup, this method will not work properly.

The first step in converting Benefits Enrollment is to extract enrollment data from your current system (we'll call it the "legacy" system) and put that data into a .csv file, or an Excel spreadsheet.

We'll use a .csv file for a couple of reasons:

- A .csv file is easy to manipulate and can be easily imported into the appropriate EnterpriseOne forms.
- When importing a .csv file into any form in EnterpriseOne, the system edits the data contained in the .csv file against EnterpriseOne tables. If we were to use SQL, no edits would be performed, and that presents risks that we don't need!

The required fields for the Excel spreadsheet are:

- **Address Number (AN8)** – This is the Employee Address Book number
- **Plan ID (PLAN)** – The JDE® Plan name in which the employee will be enrolled
- **Plan Additional Option (AOPT)** – If you are using Plan Options in your benefits setup, this field should be populated with the appropriate option

- **Benefit Group Category (SBGR)** – The JDE category into which the employee will be enrolled

- **Effective Date (EFT)**
– The effective date for enrollment

- **Category Type (CATY)**
– This field should be zero. Make sure that zero is a valid value in UDC 08/CT

- **Selection 1 (SL01)**
– Populate this field with 1

- **Enrollment Event Type (EVET)** – Populate this field with 1

Additionally, if the plans that are being converted have amounts at the employee level, for example, 401(K) deductions, you will need to populate the following amount fields:

Amt Rte (EAOR) – Populate this field with a Y, when there is an amount at the employee level.

Amount or Rate (DTRM)
– Populate this field with the employee level amount.

Figure 1 illustrates a sample of an Excel spreadsheet with values to be converted.

Once all of the values are in the spreadsheet, you'll import it into JDE.

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	A	B	C	D	E	F	G	H	I	J
1	Address Number	Plan ID	Add Opt	Group Category	Effective Date	Category Type	Slc 01	Ev Ty	Amt Rte	Amount or Rate
2	124	DENFPMC		DENTAL	4/13/2008				1 N	
3	124	MED1FPM		HEALTH	4/13/2008				1 N	
4	126	DENFPMF		DENTAL	3/23/2008				1 N	
5	126	VISION L		VISION	3/23/2008				1 N	
6	126	MED1FPM		HEALTH	3/23/2008				1 N	
7	127	DENFPMF		DENTAL	3/23/2008				1 N	
8	127	FSA MED		FLEX-MEC	3/23/2008				1 Y	
9	127	MED1FPM		HEALTH	3/23/2008				1 N	
10	127	LIFE SP		LIFE	3/23/2008				1 Y	
11	128	DENFPMF		DENTAL	3/23/2008				1 N	
12	128	FSA MED		FLEX-MEC	3/23/2008				1 Y	
13	128	MED1SPN		HEALTH	3/23/2008				1 N	
14	128	401(K)		401(K)	3/23/2008				1 Y	10
15	130	DENFPMF		DENTAL	3/23/2008				1 N	
16										

Figure 1: Conversion Excel Spreadsheet

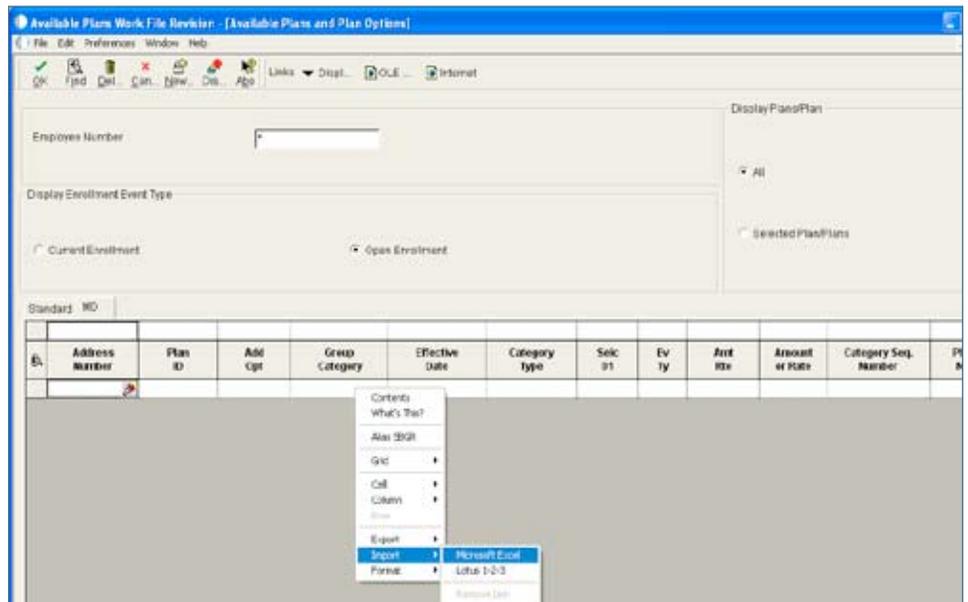


Figure 2: Available Plans and Plan Options; Importing Excel Spreadsheet

From the standard JDE menus, under Benefits Administration → Employee Self Service → Adv & Tech Operations → Available Plans Work File Mgmt:

1. Open the application Available Plans Workfile Revisions
2. Right click on any cell in the grid
3. Click on Import, then Microsoft Excel, as shown in Figure 2

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