



Take Control of your Benefits Reporting

The KBX™ Benefits Toolkit is a robust, easy-to-use, and quickly implemented end-user reporting solution for Oracle® Benefits. Use KBX™ Benefits templates to run reports in minutes on enrollment counts, enrollment rates, life events, enrollment changes, and dependents and beneficiaries.

Additionally, if you are running Oracle® Payroll and Benefits, the KBX™ Benefits toolkit allows you to easily balance an employee's communicated deduction in Benefits and the actual payroll deduction from their checks. This reconciliation process enables you to quickly isolate deduction errors and ensure that both payroll and benefits are running correctly.



About KBACE

As a proven leader in Oracle® e-Business Suite consulting and operational insight, KBACE enables clients to gain the full perspective on their enterprises. For over seven years KBACE has set the standard for implementations, upgrades, education, and strategic services related to Oracle® Applications, representing some of Oracle®'s best ERP success stories.

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KBX™ Benefits Toolkit—Summary

The KBX™ Benefits Toolkit is a component of the KBX™ Data Management Suite. KBX™ utilizes Kubes of relational data to enable organizations in balancing, reconciling, and validating data quality with a methodology that provides insight into why information is the way that it is. Integrating Oracle® and Microsoft®, the KBX™ Data Management Suite encompasses plug-and-play Microsoft® Office Toolkits for the following Oracle® Application modules:

- Human Resources
- Payroll
- Benefits (Standard & Advanced)
- Time and Labor

The KBX™ Payroll Toolkit is a powerful, easy-to-use, and quick end-user solution to Oracle® Applications reporting. Key to the KBX™ Data Management Suite concept is the distribution of dozens of report templates with each Kube of data. These reporting templates are built by KBACE Technologies through extensive consulting field research and are installed as part of the core product. Immediately after installation, end users have the ability to run and modify detailed reports with no consulting engagement required.

1 Kube = Multiple Reports

The foundations for the ease-of-use are the simple graphical interface and the fact that all reports are designed for use with the Microsoft® Office Suite.

Delivered Kubes

The KBX™ Benefits Toolkit comes complete with 4 delivered Kubes that you can immediately begin using for your reporting needs:

- Benefit Statement
- Benefits Confirmation
- Dependents and Beneficiaries
- Elections Worksheet
- Enrollment Results
- Life Events
- Total Compensation

Template Summary

The templates delivered with the Benefits Toolkit are designed to make running reports out of Oracle as painless and efficient as possible. The templates are loaded through and can be customized within Microsoft® Excel, Word, and Access. A brief summary of each Kube and the templates associated with it is included here:

Benefit Statement

- Benefit Confirmation Statement

Form letter that provides a confirmation statement for each employee that lists out the plans and options they have selected, the total benefit amount, the period and annual contributions, as well as the employer's annual contribution. Can be merged to paper, fax and e-mail.

Benefits Confirmation

- Benefit Confirmation

The Benefits Confirmation documents are sent after employees have enrolled in plans and are used as a confirmation of their elections. It includes plans and rates as well as dependents and beneficiaries. It is an excellent communication tool for open enrollment.

Dependents and Beneficiaries

- Covered Dependents

This template breaks out the number of employees by option for each plan. This is useful in reconciling what is in Oracle® and what vendors have on file.

- Plan Beneficiaries

This template has a similar purpose as Covered Dependents except this one lists out plans with beneficiaries.

Elections Worksheet

- Elections Worksheets

The Elections Worksheet is used as an enrollment tool. The worksheet displays the employee current enrollment, if there is, and the plans that could be elected as a result of a life event.

Enrollment Results

- Enrollment Actions Items (OAB Only)

Enrollment Action Items are generated during the enrollment process (if they have been configured) and identify further actions that must be completed before enrollment is complete. This template breaks out actions based on their completion status and lists what plans and options have outstanding actions. An employee count and due date is provided for each entry. This template helps organizations ensure employees have finalized their enrollment by the necessary due dates.

- Enrollment Results - Counts

This template provides an employee count by plan and option for each plan type and program. This template is especially useful for plans that have no rates associated with them and also allows for usage analysis during Open Enrollment decision-making.

- Enrollment Results - Rates

This template allows for cost analysis of plans and options by program and activity type (i.e. Employee vs. Employer Payroll contribution). Tax type is also included to display when the various options are deducted. Communicated Amount refers to what the employee is being told they are paying by period. Defined Amount is how that rate is actually defined in the system. Annual Amount is Defined Amount annualized. This allows for comparison against actual element values.

- Excess Credits (OAB Only)

Excess Credits refer to “cafeteria-style” benefits and can be analyzed in this template (as long as a flex credit program has been configured). The template summarizes by plan, pool, and benefit, how much money has been provided to employees, how much has actually been used, how much has been cashed out, as well as any roll-ups and forfeitures. This is very useful in determining appropriate amounts for flex credit programs.

- Monthly Participant Premiums

This template tracks what employers are required to pay the vendor based upon employee enrollment. The template lists out the number of employees and the premium value for each plan. A higher-level view of the template displays totals by Payer, Supplier, and Type. If Regular Premiums, Stop Premiums, and ASO fees have been configured, those are also captured here. The template is very useful for making Open Enrollment decisions regarding plans and vendors.

Life Events

- Person Life Events

Life Events define events in a person's life that may result in changes to a person's available benefits (i.e. marriage). This template captures what life events have occurred, the date they occurred, and how many employees are associated with each event. This is useful in ensuring employees make necessary changes to their enrollments in the allotted amount of time as well as ensuring current configurations are adequately capturing all events.

The report is broken out by status to make analysis easier. Started indicates that the person has electable choices to make. Processed indicates that the event was processed and closed (usually indicates electable choices have been assigned). Voided indicates that the life event should not be processed and all prior electable choices should be restored. Backed Out indicates the life event can be re-processed if desired.

- Person Potential Life Events

This template is best run before Open Enrollment to see what Life Events need to be addressed before Open Enrollment. This is especially useful in determining if any Life Events are firing off erroneously. The template lists out the number of employees that have each potential life event by date. The report is summarized by status to allow for easier analysis. Detected indicates the change to the person was made in the HR Form. Changes made in the OAB Life Events form will have a status of unprocessed (sometimes these direct changes can cause issues because not all electable choices are viewable). Voided indicates that the life event was captured but backed out to prevent it from processing.

Total Compensation

- Total Compensation

This Kube retrieves all current benefits and salary data from the database and displays it in a Microsoft Access document, ready to distribute to your employees. The Total Compensation report uses graphics and annual totals of the company's contributions to the employee's compensation package.

The delivered template offering is really only the beginning. Many more templates can be created to satisfy individual business needs, as well as user preferences. By utilizing these delivered templates, a user can create a myriad of reports by simply manipulating what data is shown and how it is displayed. In addition, Kube Manager provides the ability to incorporate custom, user-defined Kubes limited only by the power of PL/SQL.