

ellucian[®]

Banner
Employee Self-Service
Release Guide

Release 8.12.1
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Introduction

The Banner® Employee Self-Service 8.12.1 release guide provides an overview of the enhancements available in Employee Self-Service 8.12.1. This release guide also lists system requirements and supporting resources that you might need while using the Employee Self-Service application.

Enhancements

The 8.12.1 release contains enhancements to the Employee Self-Service application to support the employer-provided health insurance offer and coverage reporting. This release helps institutions meet reporting requirements for the Affordable Care Act (ACA).

The enhancements are as follows:

- Support to provide consent for receiving the 1095-C forms in electronic format.
- Support to print electronic 1095-C forms including the Covered Individuals information.
- Support to enter the 1094-C Receipt IDs (received from IRS) and track the 1094-C submission status.
- A new Banner Web Tailor role, Tax Administrator, which is responsible for entering the 1094-C Receipt IDs and tracking the submission status.

For more information about ACA reporting processes (1095-C and 1094-C), see *Banner Human Resources Year-End Regulatory Handbook for U.S. and Puerto Rico*.

For more information about ACA, 1095-C, and 1094-C forms, see <https://www.irs.gov/aca>.

System requirements

To use Employee Self-Service 8.12.1, you also need other Banner® applications installed and updated to certain minimum versions.

ESS 8.12 clients

For clients running Employee Self-Service 8.12, the following table lists the minimum system requirements.

Banner applications	Versions
Banner Human Resources	8.12 + 8.12.2
Banner Position Control	8.12 + pcr-000133394_pos8120101
Banner Employee Self-Service	8.12
Banner General	8.6 + 8.7.1

Banner applications	Versions
Banner Web General	8.4+ 8.7.1
Banner Web Tailor	8.4

ESS 8.11 clients who have installed the Veterans Survey modifications

If you have already installed the Veterans Survey modifications, the following table lists the minimum system requirements.

Banner applications	Versions
Banner Human Resources	see System requirements for 8.11.x Human Resources clients on page 13 for the minimum requirements needed for the specific version of 8.11.x you are running.
Banner Position Control	see System requirements for 8.11.x Position Control clients on page 18 for the minimum requirements needed for the specific version of 8.11.x you are running.
Banner Employee Self-Service	8.11 + 8.11.1 + 8.11.2 + pcr-000128164_bwp8110201+pcr-000130600_bwp8110202
Banner General	8.6
Banner Web General	8.4 + 8.7.1
Banner Web Tailor	8.2

ESS 8.11 clients who have not installed the Veterans Survey modifications

If you have not installed the Veterans Survey, the following table lists the minimum requirements.

Banner applications	Versions
Banner Human Resources	see System requirements for 8.11.x Human Resources clients on page 13 for the minimum requirements needed for the specific version of 8.11.x you are running.
Banner Position Control	see System requirements for 8.11.x Position Control clients on page 18 for the minimum requirements needed for the specific version of 8.11.x you are running.
Banner Employee Self-Service	8.11 + 8.11.1 + 8.11.2 + pcr-000128164_bwp8110201+ pcr-000130600_bwp8110202
Banner General	8.6
Banner Web General	8.2
Banner Web Tailor	8.2

ESS 8.11 clients who upgrade to Employee Self-Service 8.12 after 8.12.1 is installed

If you want to install ESS 8.12 after you have installed this 8.12.1 release, you must apply easy patch pcr-000133976_bwp8120101 after upgrading to 8.12. This replaces various common objects that were previously delivered.

Information resources

In addition to the Employee Self-Service Guide, other documentation sources are also available for more information about the enhancements, changes, and defect corrections in the 8.12.1 release.

The following documentation sources are updated for this release:

- *Banner Employee Self-Service User Guide 8.12.1*
- *Banner Employee Self-Service Resolution Report 8.12.1*

Functional updates to Employee Self-Service

A summary of the enhanced functionality introduced with this release.

2015 U.S. W-2/W-2c Wage and Tax Statement changes

There were no functional changes for the W-2/W-2c Wage and Tax Statement.

Refer to the [Technical updates to Employee Self-Service](#) on page 9 for the technical changes that were implemented for W-2 and W-2c processing.

Update Online Help for W-2 forms

The Online Help topic for the W-2 form has been updated to include all required text for the "Notice to Employee." This text is usually printed on the employee copy of the forms.

New seed data

The following new scripts are delivered with this release.

Script	Reason
bwptwgrinfod_081201.sql	Deleted existing Online Help text for bwpktxs.P_ViewW2.
bwptwgrinfoi_081201.sql	Added a new version of the Online Help text for bwpktxs.P_ViewW2.

Electronic Regulatory Consent

The Electronic Regulatory Consent page has been enhanced so that employees can confirm or revoke their consent to receive the 1095-C tax statement in an electronic format.

Employees need to use this page only if your institution requires the employees to consent to receive their tax statements online.

For more information about providing consent for receiving tax forms in an electronic format, see the *Employee Self-Service User Guide*.

1095-C tax statement print support

Users can view and print the 1095-C tax statement by using the **1095-C Employer-Provided Health Insurance Offer and Coverage Statement** page. If electronic consent is required by your institution for receiving the tax statements in electronic format, you will be able to view and print the statements only after providing this consent.

If PIN entry control has been established prior to printing the tax statement, you will have to provide your Employee Self-Service PIN information to access the printable copy of your tax statement.

For more information about printing the 1095-C tax statement and PIN entry information, see the *Employee Self-Service User Guide*.

Covered Individuals Continuation page

If an institution is a self-insured institution and an employee has more than six dependents including the employee, the **Covered Individuals Continuation** page displays information about the rest of the dependents. This page addresses the Covered Individuals section of the 1095-C form.

This page can be accessed by using the **1095-C Employer-Provided Health Insurance Offer and Coverage Statement** page.

The **Covered Individuals Continuation** page also provides print support for the 1095-C tax statement.

For more information about the **Covered Individuals Continuation** page, see the *Employee Self-Service User Guide*.

1094-C Receipt ID

If the XML 1094-C form submission to the IRS is successful, the IRS returns a unique Receipt ID to the 1094-C form transmitter, which could be the institution or a third-party service. The **1094 Receipt ID Entry** page in the Self-Service application provides support to enter the Receipt ID and update the status of each submission.

The 1094-C form transmitter could be the institution or a third-party service.

To access this page, the user must be assigned the role of Tax Administrator in the Banner Web Tailor application.

For more information about entering the 1094-C Receipt ID in Employee Self-Service application, see the *Employee Self-Service User Guide*.

For more information about assigning the role of a Tax Administrator to a user by using Banner Web Tailor application, see *Banner Web Tailor User Guide*.

Technical updates to Employee Self-Service

A summary of the technical changes made for this release.

New package

A new package, BWPK15TS (bwpk15ts.sql/bwpk15t1.sql), is available with the Employee Self-Service 8.12.1 release. Use this package to generate 2015 tax documents for W-2, W-2C, and 1095-C.

Changed packages

Some of the existing packages are modified to include new routines, pages, procedures, and updated routines.

BWPKXTXS (bwpkxtxs.sql/bwpkxtx1.sql)

This package is modified with the following changes:

- The new routine, `f_get_employee_status`, and the updated **Electronic Regulatory Consent** page, prevent employees from updating the electronic consent when the employee is in the `Terminated` status and an appropriate message is displayed on the page.
- The following new pages are added to support the 1095-C and 1094-C tax statements for the reporting year, 2015.
 - `bwpkxtxs.P_Displ1094ReceiptIDs`
 - `bwpkxtxs.P_Choose1095cKey`
 - `bwpkxtxs.P_View1095c`
 - `bwpkxtxs.P_View1095cContinuation`
 - `bwpkxtxs.P_Print_1095c_Preview`
- A new procedure, `P_1095C_Certification`, has been added for PIN validation
- The routine, `P_W2ConsentDriver`, is updated to add a new parameter for the electronic consent of the 1095-C form.
- A new message is displayed when an employee tries to access the 1095-C form, but has not provided electronic consent for the form.
- The **Year** and **Employer Selection** logic for the W-2 and the 1095-C pages is consolidated by calling a new routine, `bwpkxw2s.p_choose_tax_year_body`.

BWPKXW2S (bwpkxw2s.sql/bwpkxw21.sql)

This package has been modified with the following changes:

- The new routine, `f_get_employee_status`, and the updated **Electronic Regulatory Consent** page, prevent employees from updating the electronic consent when the employee is in the `Terminated` status and an appropriate message is displayed on the page.
- The following routines have new logic that are required to process the electronic consent for 1095-C:
 - `p_update_eStatements_consent`
 - `f_get_employee_1095c_consent`
 - `f_1095c_restriction`

Technical updates to Web Tailor

Banner Web Tailor application has been updated to support the changes in Employee Self-Service 8.12.1.

The following Web Tailor tables are updated:

- TWGBWMNU
- TWGRINFO
- TWGRMENU
- TWGRWMRL
- TWTVROLE

The following Web Tailor data scripts are delivered with this release:

- bwptwgbwmnui_081201.sql
- bwptwgbwmnuu_081201.sql
- bwptwgrinfod_081201.sql
- bwptwgrinfoi_081201.sql
- bwptwgrmenuud_081201.sql
- bwptwgrmenui_081201.sql
- bwptwgrmenuu_081201.sql
- bwptwgrwmrli_081201.sql
- bwptwtvrolei_081201.sql

Resolution Report

There are no defects associated with the Employee Self-Service 8.12.1 release.

System requirements for 8.11.x clients

This section provides you with the minimum requirements you will need if you are on an 8.11 version of Banner Human Resources or Position Control and have installed one or more subsequent 8.11.x releases.

Answer the questions in the column headings to determine the minimum releases you will need for each application.

System requirements for 8.11.x Human Resources clients

Refer to this section if you are running a version of HR 8.11 and have not yet upgraded to version 8.12.

Human Resources minimum releases needed

Is the 2014 Veterans Release installed?	Is the Canadian ROE release (HR 8.11.1) installed?	Is Employee Profile (HR 8.11.3) installed?	Is Position Description (HR 8.11.5) installed?	Minimum Position Control release required	Additional Human Resources patches required	Additional Human Resources patches required
Y	Y	Y	Y	See <i>System requirements for 8.11.x Position Control clients</i> section	8.11 + 8.11.1 + 8.11.2 + 8.11.3 + 8.11.4 + 8.11.5	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302 pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501
Y	Y	Y	N	See <i>System requirements for 8.11.x Position Control clients</i> section	8.11 + 8.11.1 + 8.11.2 + 8.11.3 + 8.11.4	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302 pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501

Is the 2014 Veterans Release installed?	Is the Canadian ROE release (HR 8.11.1) installed?	Is Employee Profile (HR 8.11.3) installed?	Is Position Description (HR 8.11.5) installed?	Minimum Position Control release required	Additional Human Resources patches required	Additional Human Resources patches required
Y	Y	N	N	See <i>System requirements for 8.11.x Position Control clients</i> section	8.11 + 8.11.1 + 8.11.2 + 8.11.4	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302 pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501
Y	N	N	N	See <i>System requirements for 8.11.x Position Control clients</i> section	8.11 + 8.11.2 + 8.11.4	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302 pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501
Y	N	N	Y	See <i>System requirements for 8.11.x Position Control clients</i> section	8.11 + 8.11.2 + 8.11.4 + 8.11.5	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302 pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501
Y	N	Y	Y	See <i>System requirements for 8.11.x Position Control clients</i> section	8.11 + 8.11.2 + 8.11.3 + 8.11.4 + 8.11.5	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302 pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501
Y	N	Y	N	See <i>System requirements for 8.11.x Position Control clients</i> section	8.11 + 8.11.2 + 8.11.3 + 8.11.4	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302

Is the 2014 Veterans Release installed?	Is the Canadian ROE release (HR 8.11.1) installed?	Is Employee Profile (HR 8.11.3) installed?	Is Position Description (HR 8.11.5) installed?	Minimum Position Control release required	Additional Human Resources patches required	Additional Human Resources patches required
				<i>Control clients</i> section		pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501
Y	Y	N	Y	See System requirements for 8.11.x Position Control clients section	8.11 + 8.11.1 + 8.11.2 + 8.11.4 + 8.11.5	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302 pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501
N	N	N	N	See System requirements for 8.11.x Position Control clients section	8.11 + 8.11.2 + 8.11.4	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302 pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501
N	N	N	Y	See System requirements for 8.11.x Position Control clients section	8.11 + 8.11.2 + 8.11.4 + 8.11.5	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302 pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501
N	N	Y	Y	See System requirements for 8.11.x Position Control clients section	8.11 + 8.11.2 + 8.11.3+ 8.11.4 + 8.11.5	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302 pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501

Is the 2014 Veterans Release installed?	Is the Canadian ROE release (HR 8.11.1) installed?	Is Employee Profile (HR 8.11.3) installed?	Is Position Description (HR 8.11.5) installed?	Minimum Position Control release required	Additional Human Resources patches required	Additional Human Resources patches required
N	Y	Y	Y	See System requirements for 8.11.x Position Control clients section	8.11 + 8.11.1 + 8.11.2 + 8.11.3 + 8.11.4 + 8.11.5	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302 pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501
N	Y	Y	N	See System requirements for 8.11.x Position Control clients section	8.11 + 8.11.1 + 8.11.2 + 8.11.3 + 8.11.4	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302 pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501
N	N	Y	N	See System requirements for 8.11.x Position Control clients section	8.11 + 8.11.2 + 8.11.3 + 8.11.4	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302 pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501
N	Y	N	Y	See System requirements for 8.11.x Position Control clients section	8.11 + 8.11.1 + 8.11.2 + 8.11.4 + 8.11.5	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302 pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501
N	Y	N	N	See System requirements for 8.11.x Position Control clients section	8.11 + 8.11.1 + 8.11.2 + 8.11.4	pcr-000123172_pay8110202 pcr-000123573_pay8110204 pcr-000123625_pay8110302

Is the 2014 Veterans Release installed?	Is the Canadian ROE release (HR 8.11.1) installed?	Is Employee Profile (HR 8.11.3) installed?	Is Position Description (HR 8.11.5) installed?	Minimum Position Control release required	Additional Human Resources patches required	Additional Human Resources patches required
				<i>Control clients</i> section		pcr-000126708_pay8110401 pcr-000128154_pay8110403 pcr-000128182_pay8110501

Human Resources 8.11 clients without the Employee Profile (HR 8.11.3) release

After you install HR 8.12.2/ESS 8.12.1, you must install the backward compatibility patch pcr-000133977_pay8120201 to reinstate the Installation Rule (PTRINST) form object without 8.11.3 modifications.

Upgrading Banner HR from 8.11 to 8.11.3 or 8.12 after this release

After you have installed HR 8.12.2/ESS 8.12.1, you must install the following easy patches:

- pcr-000133978_pay8120202
- pcr-000133976_bwp8120101

These patches replace various common HR and ESS objects that were previously delivered as HR 8.12.2/ESS 8.12.1.

System requirements for 8.11.x Position Control clients

Refer to this section if you are running a version of PC 8.11 and have not yet upgraded to version 8.12.

Position Control minimum releases needed

Is the 2014 Veterans Release installed?	Is Employee Profile (PC 8.11.1) installed?	Is Position Description (PC 8.11.2) installed?	Minimum Position Control release required	Minimum Banner General release required
Y	Y	Y	8.11 + 8.11.1 + 8.11.2 + pcr-000114611_pos8110001	8.6 + 8.7.1
Y	Y	N	8.11 + 8.11.1 + pcr-000114611_pos8110001	8.6 + 8.7.1
Y	N	N	8.11 + 8.11.1 + pcr-000114611_pos8110001	8.6 + 8.7.1
Y	N	Y	8.11 + 8.11.2 + pcr-000114611_pos8110001	8.6 + 8.7.1
N	N	N	8.11	8.6
N	N	Y	8.11 + 8.11.2	8.6
N	Y	Y	8.11 + 8.11.1 + 8.11.2	8.6
N	Y	N	8.11 + 8.11.1	8.6

Position Control year-end patch requirements

You must install an additional patch to receive required Position Control objects. Select the patch based on if you have installed the Banner General 8.7.1 release. The General 8.7.1 release contained the Veterans Survey modifications.

- If you have installed the Banner General Veterans Survey modifications, install patch pcr-000133394_pos8120101.

- If you have not installed the Banner General Veterans Survey modification install patch pcr-000133395_pos8120102.