BEN-05 Benefits Infotypes

Purpose

This job aid details the infotype screens utilized by the Benefits module in the Integrated HR/Payroll System. The infotypes covered include:

Actions (IT0000)

Image

Change Actions (0000)

Menu | Execute info group | Change info group

Pers.No. 80001035

Name Marvin Tillman

EEGroup A SPA Employees PersA 4601 Natural and Cultural Resources

EESubgroup A1 FT N-FLSAOT Perm

Start 06/01/2018 to 12/31/9999 Chng 06/27/2019 00380197

Personnel action

Action Type: ZA Reallocation (NC)

Reason for Action: 07 Class/Pay Plan Change

Status

Customer-specific:

Employment: 3 Active

Special payment: 1 Standard wage type

Organizational assignment

Position: 60083605 Museum Curator

Personnel area: 4601 Natural and Cultural Resources

Employee group: A SPA Employees

Employee subgroup: A1 FT N-FLSAOT Perm

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action

The Integrated HR/Payroll System simplifies the processing of complex personnel procedures, such as hiring a new employee, by using what are known as personnel actions. You can use personnel actions to:

- Hire an employee
- Change the organizational assignment of an employee
- Change the employee’s pay
- Set an employee’s status to early retiree or pensioner
- Document when an employee leaves or re-enters the enterprise

With the Actions infotype (0000), you can display an overview of all the important changes related to an employee, and you can then display the documentation of the most important stages that an employee passes through in your agency or division.

Field Definitions

Field Name	Description
Pers. No	The Orbit system-generated unique identifier for the employee
Name	The employee’s name

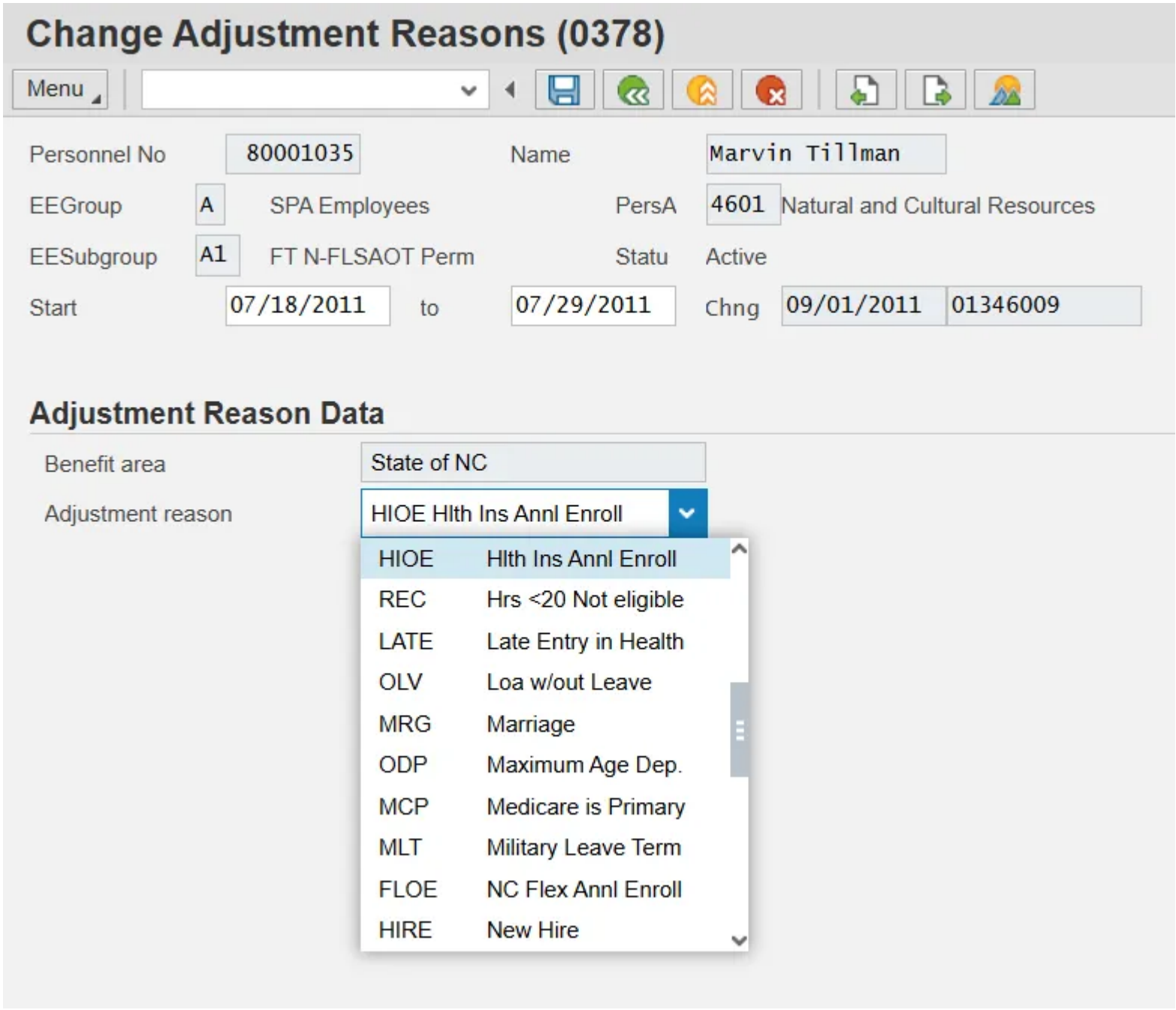
Field Name	Description
EE group	Employee group identifies an employee’s employment status and expresses the relationship between the employee and the State of North Carolina. This field is used by the system to establish rules for calculating leave. Examples: • A Permanent (Regular) • B Probationary • C Trainee • L Retired
Personnel area	Defined by company code NC01 or NC02, represents the agency or department for whom the EE works. The field code is a four-digit alphanumeric character where the first two digits are the NCAS (North Carolina Accounting System) entity number and the last two digits, if applicable, represent second level entities often referred to a division, otherwise it will be ’00’. For example: • 1400 Office of State Controller • 2200 DHHS – Division of Child Development

Field Name	Description
EE subgroup	Further defines an employee's relationship to the State of North Carolina and used to define Fair Labor Standards Act (FLSA) exempt and non-exempt status, and their full-time or part-time status. This field, in conjunction with the EE group, establishes the type of payroll calculations. Examples: • A0 Exempt, Full-Time • A1 Exempt, Part-Time • A5 Pick-up Firefighters • A8 Beneficiaries, Applicants, etc. • B1 Short-Term Disability
Start (date)	Beginning date of the information being viewed.
To (date)	Ending date of the data being viewed; if the information is current, the "end of time" (12/31/9999) will be displayed.
Action Type	Life cycle of an employee, hire, status change, leave, termination, etc. In the Integrated HR/Payroll System, actions sequence the presentation of infotypes to facilitate entry of data.
Reason for Action	The reason for the action.
Employment (status)	There are three employment statuses: • Active (also includes LOAs) • Inactive (Suspension, Separation Pay Continuation) • Withdrawn (Separated)

Field Name	Description
Position	Position number associated to the employee’s position. A position is described by a job and inherits planned compensation, EEO, AAP and other attributes from a job. A person holds a position.

Adjustment Reasons (IT0378)

Image


Change Adjustment Reasons (0378)
Menu
Personnel No 80001035
Name Marvin Tillman
EEGroup A SPA Employees
PersA 4601 Natural and Cultural Resources
EESubgroup A1 FT N-FLSAOT Perm
Statu Active
Start 07/18/2011 to 07/29/2011
Chng 09/01/2011 01346009
Adjustment Reason Data
Benefit area State of NC
Adjustment reason HIOE Hlth Ins Annl Enroll
HIOE Hlth Ins Annl Enroll
REC Hrs <20 Not eligible
LATE Late Entry in Health
OLV Loa w/out Leave
MRG Marriage
ODP Maximum Age Dep.
MCP Medicare is Primary
MLT Military Leave Term
FLOE NC Flex Annl Enroll
HIRE New Hire

This infotype stores adjustment reasons that determine the changes employees can make to their benefits. The type of adjustment reason is the subtype of the record.

The validity of this record represents the period within which the employee can make changes to benefit elections. Thus, when an employee has one of these infotype records, the system produces a benefit offer in enrollment that is valid for the validity period of this record. The benefit offer allows a restricted set of changes to existing enrollments.

Note: The HR Master Data role will be able to create adjustment reasons for life-changing events.

Family Member/Dependents (IT0021)

Image

Display Family Member/Dependents (0021)

Menu

Personnel No	80001035	Name	Marvin Tillman		
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	05/01/2008	To	12/31/9999	Chng	06/19/2008 90000044

Member: 1 Spouse

Number:

Personal data

Last name	Tillman	Birth name	
First name	Cynthia	Initials	
Title		Nationality	
Gender	2 Female	Ref.Pers.No.	
Birth date	11/02/1966		
SSN	554-69-8751	Telephone number	0
BIN		Separation Date	
Street		Marital status	
Addr Line 2			
City/State			
Zip/country			

Challenge

- [ ] Disability

Status

- [ ] Student Indicator

A Family Member/Dependent record must exist before employees can include family and related persons as dependents in their benefit plans.

The From field for the begin date of the record must be a date later than the Organizational Assignment (IT0001) record begin date or date of birth of the individual, whichever is the later date.

The Status and Challenge indicators are relevant to COBRA administration. If the person whose details you store here ever becomes eligible for COBRA, this information will define the parameters for COBRA participation.

There are seven entries for the subtype for this infotype including spouse, child, legal dependent, stepchild, divorced spouse, foster child, and court-ordered dependent. These family members are available as dependents.

Field Definitions

Field Name	Description
Personal data fields	These fields contain the personal data of the family member or dependent. Please note the use of the following fields: *Reference Personnel Number for Family Member* - You can use this field to enter the testator's personnel number for pension payments to surviving dependents or the reference number of a family member to be used for storing additional data in the system.

Field Name	Description
	Disability Set this indicator if the family member is disabled. You can also indicate whether the person is partially or totally disabled by entering a percentage in the % field.
Challenge (indicator)	When you set this indicator and create a new record for infotype Fiscal Data B (0101), the corresponding field in IT0101 is updated accordingly. You can either confirm this value or change it. Note that only the value in IT0101 has an impact on the tax calculation. Example: The Nr. of disabled children field in IT0101 is automatically filled in with 1 if you have specified that your child is disabled.
Disability date	The date of determination of disability status.
Learned	The date the State of North Carolina learned of the disability status.
Status (Student indicator)	The Status and Challenge indicators are relevant to for dependent children over 19 years old who are full-time students or for dependent children over 19 years old or 26 years old who are medically disabled. When these indicators are checked, the system allows the dependent to continue to be eligible for health plans.

FSA Plans – Overview (IT0170)

Image

Display Flexible Spending Accounts (0170)

Menu

Personnel No	80001035	Name	Marvin Tillman		
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	01/01/2023	to	12/31/9999	Chng	01/05/2023 ZWFINOMPA191

Plan DCSA NC Flex Dependent Care FSA

Plan data | Administration | Employee contribution

General plan data

Benefit area	NC	State of NC
Plan type	DCAR	Dependent Care
Benefit plan	DCSA	NC Flex Dependent Care FSA

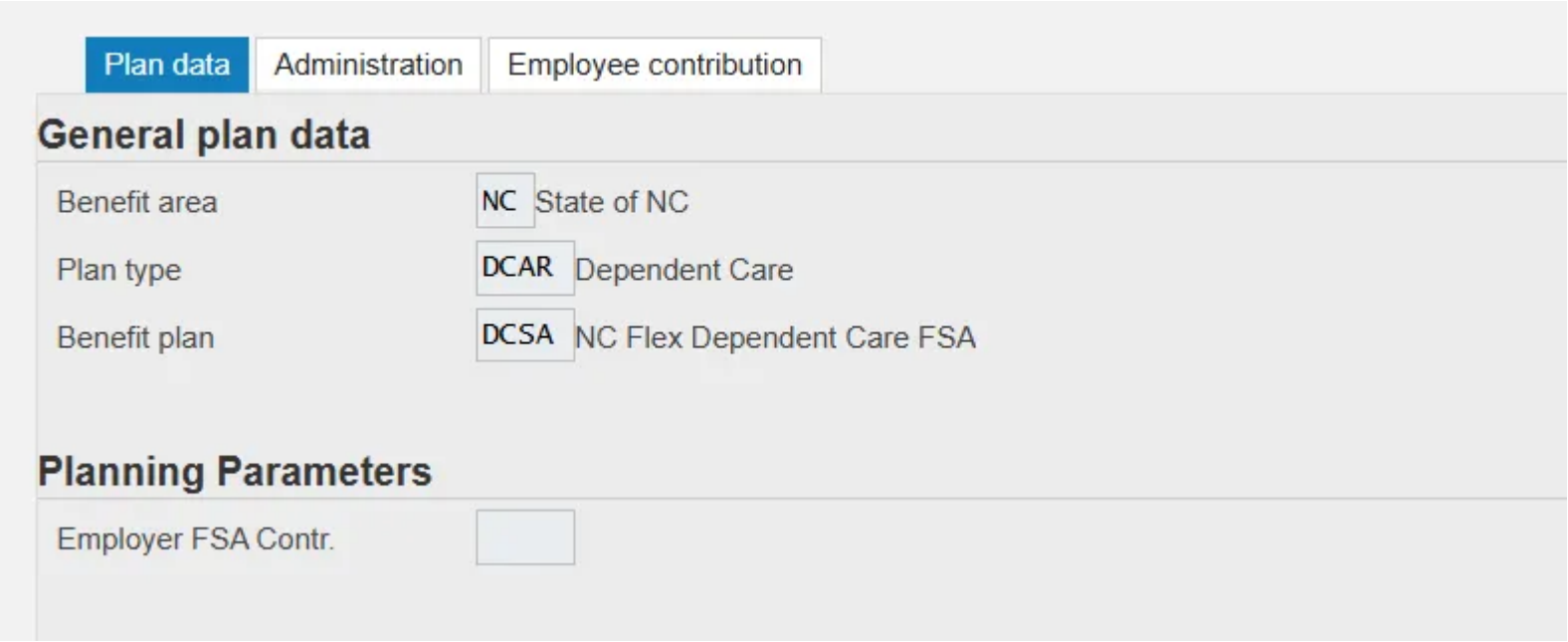
Planning Parameters

Employer FSA Contr.	

This infotype stores details of the Flexible spending accounts (FSAs) in which the employee is enrolled. For each FSA in which the employee participates, a separate record exists.

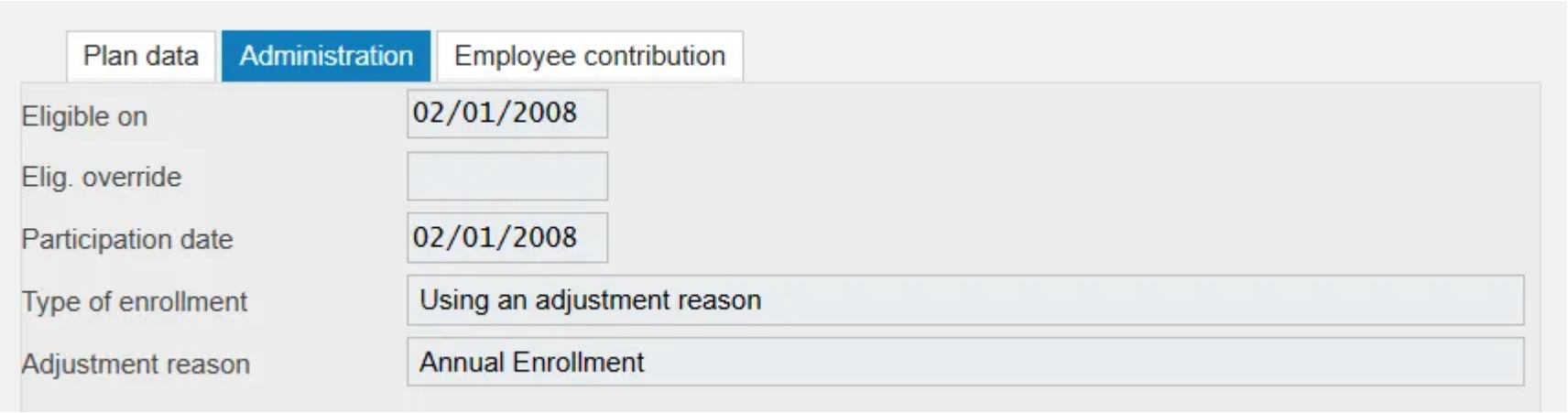
Note: Usually, changes will not be made to this infotype. It is created automatically and updated by enrollment procedures.

Image



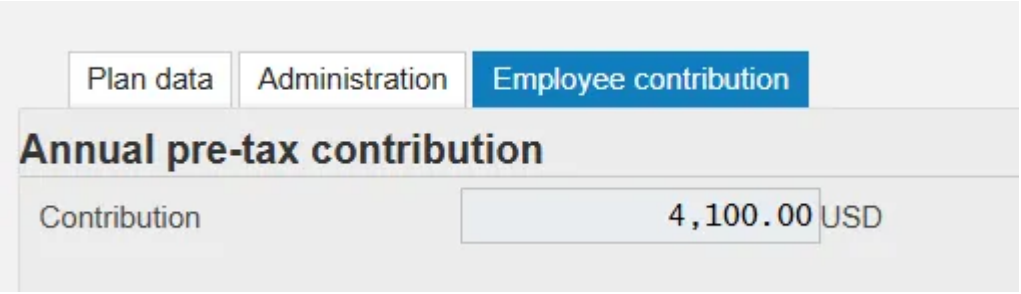
The Plan data tab shows how the plan fits into your benefit structure. It stores the employer contribution rule variant for the plan.

Image



The Administration data tab is created by the system at enrollment. It shows the eligibility status for the plan.

Image



The Employee contribution tab shows the annual pre-tax contribution made on regular payroll runs.

General Benefits Data (IT0171)

Image



This record is essential for benefits processing. An employee must have a General Benefits Information record before enrolling in a benefits plan.

Field Definitions

Field Name	Description
Benefits area	This field specifies the highest-level subdivision of benefits data which is State of North Carolina. Always select NC for State of North Carolina.

Field Name	Description
1st Programming Grouping	A first program grouping is a means of identifying a group of employees with common characteristics in order to determine on a high level the benefit program available for that group (macro-eligibility). The system sorts employees into first program groupings during processing, according to the corresponding feature. These three groups have been defined: • FULL – Full Benefits Eligible • BNR – Benefits no retirement • NOB – No benefits
2nd Programming Grouping	A second program grouping is a means of identifying a group of employees with common characteristics in order to determine on a high level the program of benefit plans available for that group (macro-eligibility). The system sorts employees into second program groupings during processing, according to the corresponding feature. Fourteen agency/department groups have been identified.

Health Plans – Overview (IT0167)

Image

Personnel No	80001035	Name	Marvin Tillman		
EEGroup	A SPA Employees	PersA	4601 Natural and Cultural Resources		
EESubgroup	A1 FT N-FLSAOT Perm	Statu	Active		
Start	01/01/2023	to	12/31/9999	Chng	01/05/2023 ZWFINOMPA191

Plan CANC NC Flex Cancer Insurance

Plan data | Administration | Costs | Dependents | Additional data

General plan data

Benefit area	NC State of NC
Plan type	CANC Cancer Plan
Benefit plan	CANC NC Flex Cancer Insurance
Health Plan Option	CHIG Cancer High Option
Dependent Coverage	EE Employee Only

Planning Parameters

Cost Rule Variant	CHEE Cancer High Opt EE Only Cost

This infotype stores details of the health plans in which the employee is enrolled. For each health plan in which the employee participants, a separate record exits. The following four subtypes have been defined:

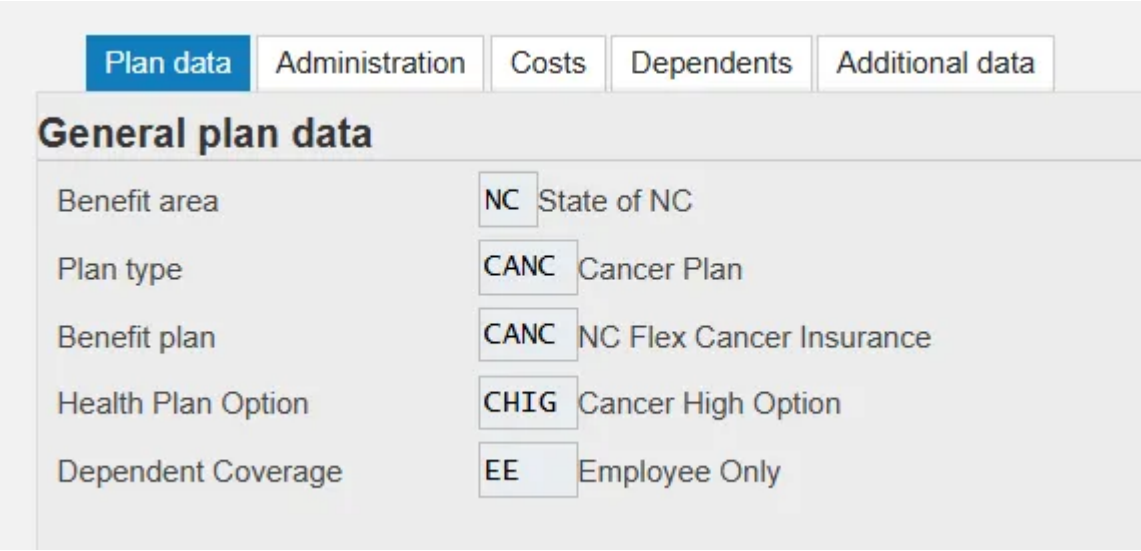
- CANC – Cancer
- DENT – Dental
- MEDI – Medical
- VIS – Vision

The tabs being used by the Integrated HR/Payroll System are:

- Plan data
- Administration
- Costs
- Dependents
- The Additional data tab is not being used by the Integrated HR/Payroll System

Note: Usually, changes will not be made to this infotype. It is created automatically and updated by enrollment procedures.

Image

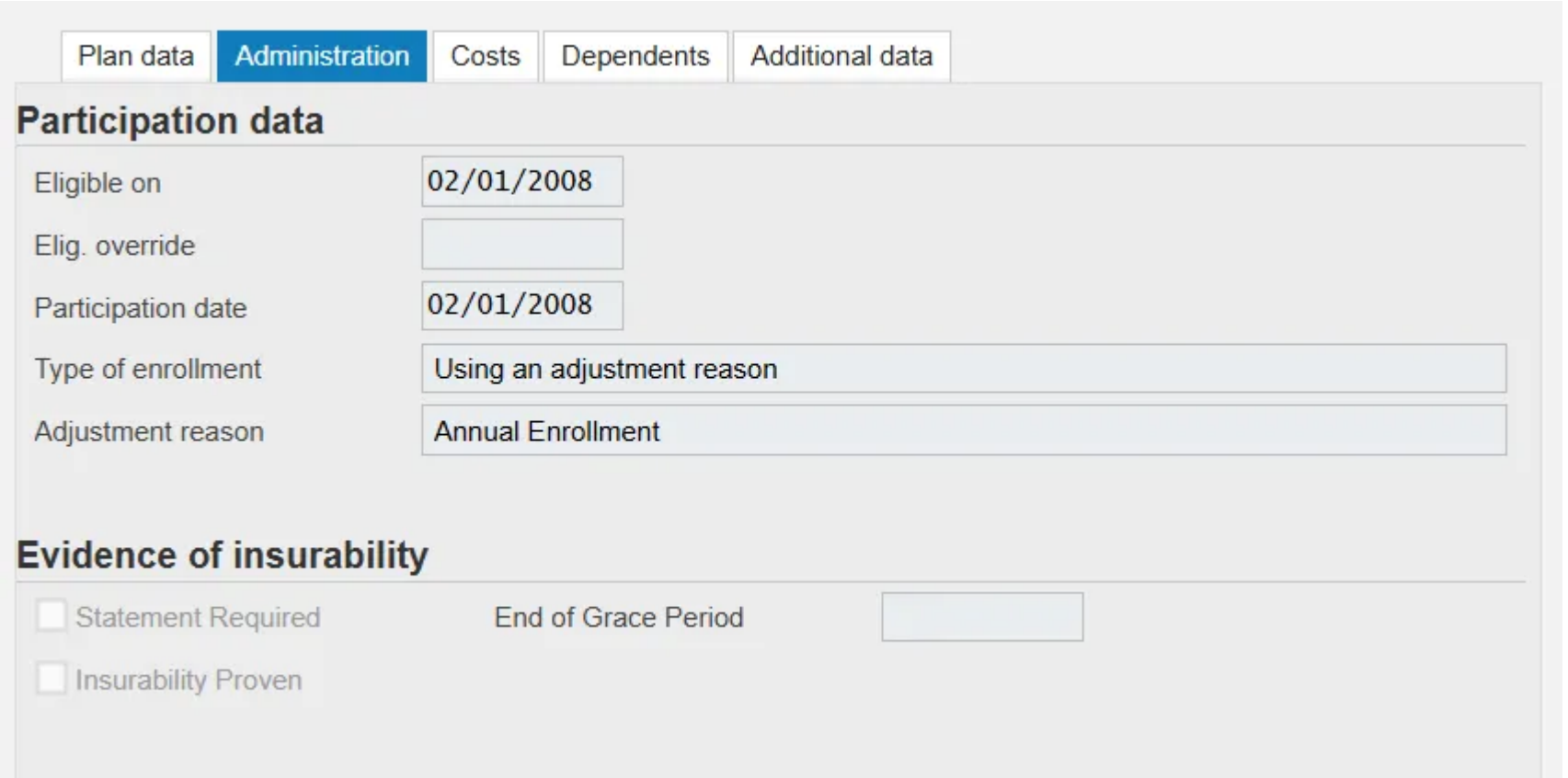


The Plan data tab shows how the plan fits into your benefit structure. It stores the cost rule variant for the plan.

Field Name	Description
Benefits area	Specifies the highest-level subdivision of benefits data, which is the State of North Carolina.
Plan type	Specifies a customer-defined subdivision of a plan category. The plan type determines the subtype of the infotype created for a plan. An employee can participate in only one plan of each plan type at any time. The categories are • Cancer care • Vision care • Dental care • Medical care
Benefit plan	A four-character identifier for the benefit plan.

Field Name	Description
Health Plan Option	The health plan options represent the choices an employee can make about different services within a health plan. Example: The following are medical health plan options: • SMCB – Smart Choice Basic 70/30 • SMCC – Smart Choice Standard 80/20 • SMCP – Smart Choice Plus 90/10
Dependent Coverage	This is the scope of dependent coverage. It shows which of the employee's dependents are covered under the health plan. For example, the dependent coverage options for the SMCB (Smart Choice Basic 70/30) medical plan are • EE = Employee • EE+C = Employee and Child or Children • EE+S = Employee + Spouse • EESF = Employee and family (Spouse required) NOTE: The dependent coverage options that are displayed will be specific to the selected health plan option.
Cost Rule Variant	A cost variant is a group of settings that determine which criteria influence the cost of a plan for an employee and how employees are grouped for the calculation of cost.

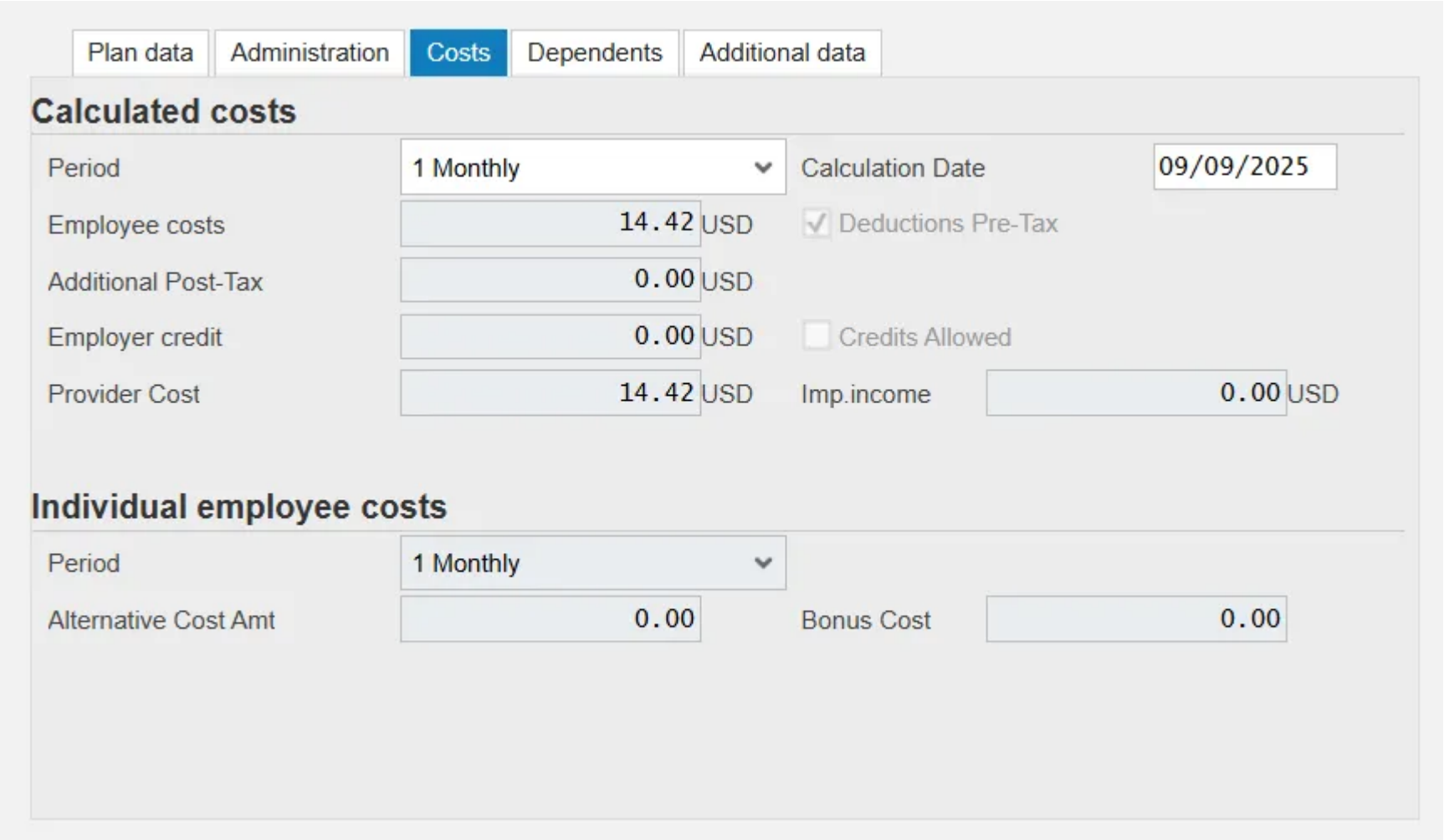
Image



The Administration tab is created by the Integrated HR/Payroll System at enrollment. It shows the status of evidence of insurability requirements for a health plan. Only Cancer and Life Insurance requires evidence of insurability.

NOTE: If an employee wants to add Cancer, change from the low Cancer option to the high Cancer option, or add Life Insurance over $100K, during an open enrollment period not associated with his or her new hire action, an adjustment reason is needed.

Image



The Costs tab shows the automatically generated employer and employee plan costs. The Integrated HR/Payroll System controls the cost information.

Important note: For employees assigned to the biweekly pay period, as denoted in the Payroll Status field, the cost displayed by the system in this tab is calculated for 26 bi-weekly pay periods per year. The State's actual calculation of cost is based on a 24 bi-weekly pay periods per year. In other words, this tab does not display the

actual costs.

Image



The Dependent tab lists the possible dependents for the plan. The dependents chosen by the employee are marked here in the Select indicator.

Insurance Plans – Overview (IT0168)

Image

Display Insurance Plans (0168)

Menu

Personnel No	80001035	Name	Marvin Tillman		
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	01/01/2023	to	12/31/9999	Chng	01/05/2023 ZWFINOMPA191

Plan ADDC NC Flex Core AD&D Insurance

Plan data | Administration | Insurance cov. | Costs | Beneficiaries

General plan data

Benefit area	NC	State of NC
Plan type	AADD	Core AD&D
Benefit plan	ADDC	NC Flex Core AD&D Insurance
Insurance Option	I010	$10,000 EE Only

Planning Parameters

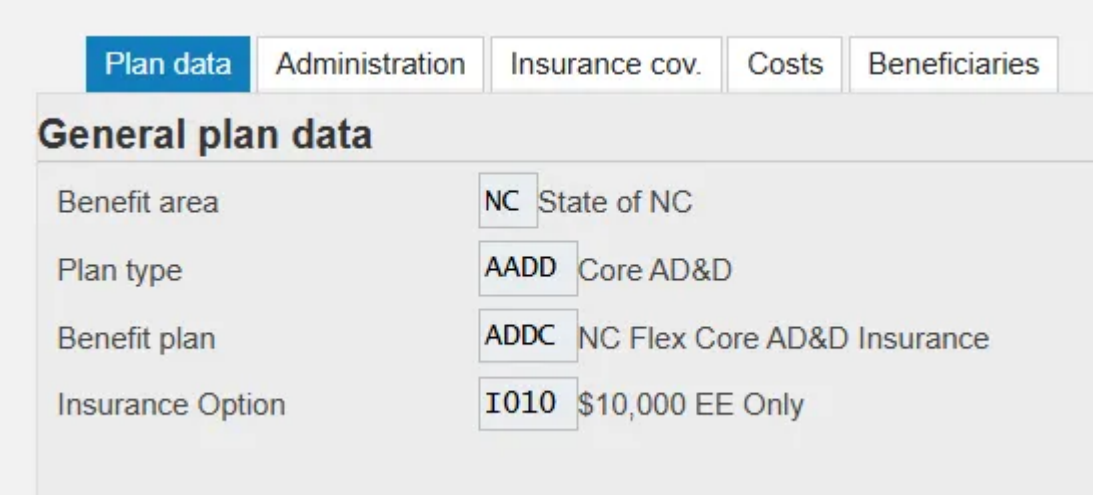
Coverage Variant	I010	$10,000 EE Only
Cost Rule Variant	I010	$10,000 EE Only

This infotype stores details of the insurance plans in which the employee is enrolled. The two subtypes are Life insurance and AD&D.

For each insurance plan in which the employee participates, a separate record exists. The infotype is used for payroll and for evaluations of employee benefits data.

Note: Usually, changes will not be made to this infotype. It is automatically created and updated by enrollment procedures.

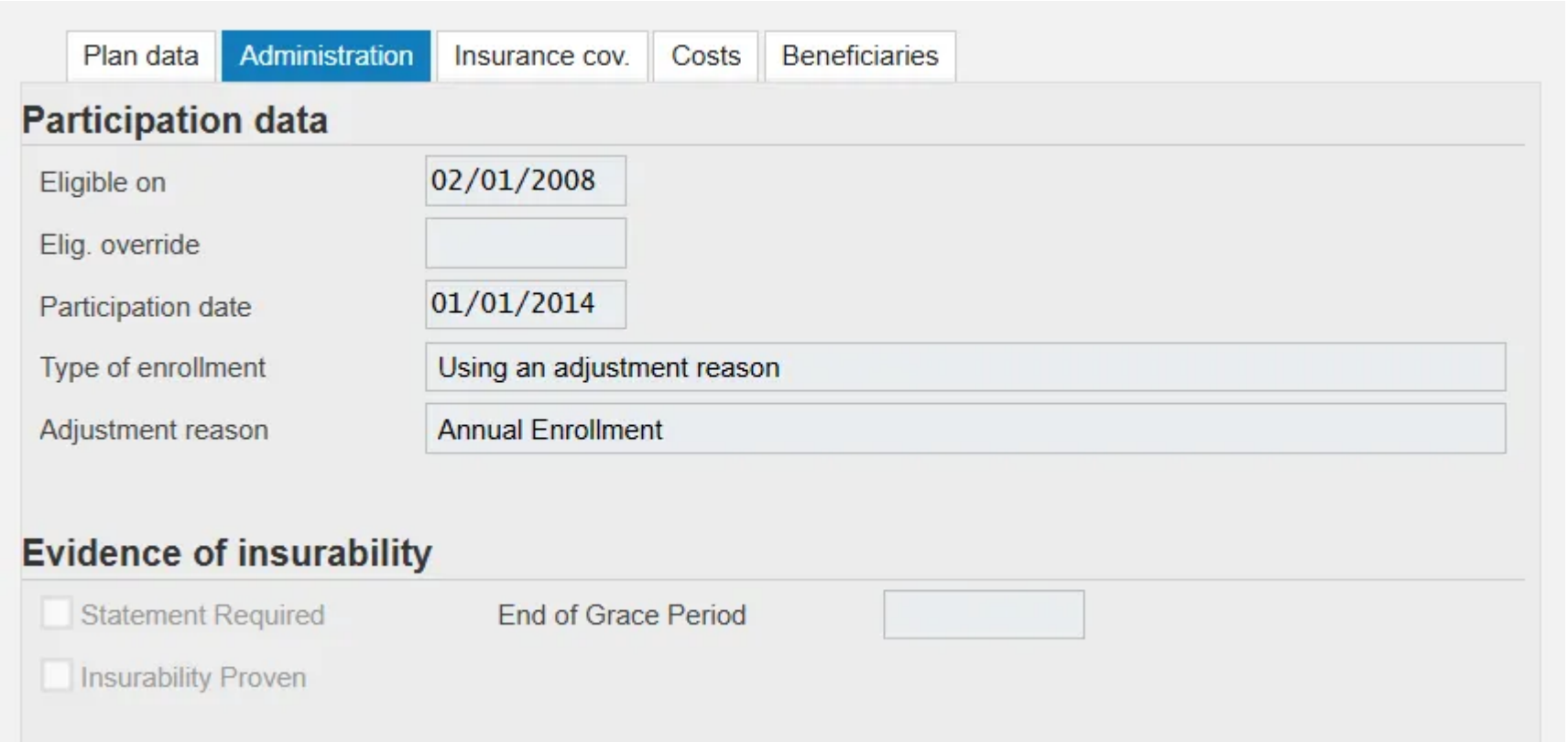
Image



The Plan data tab shows how the plan fits into your benefit structure. It stores the cost and coverage rule variants for the plan.

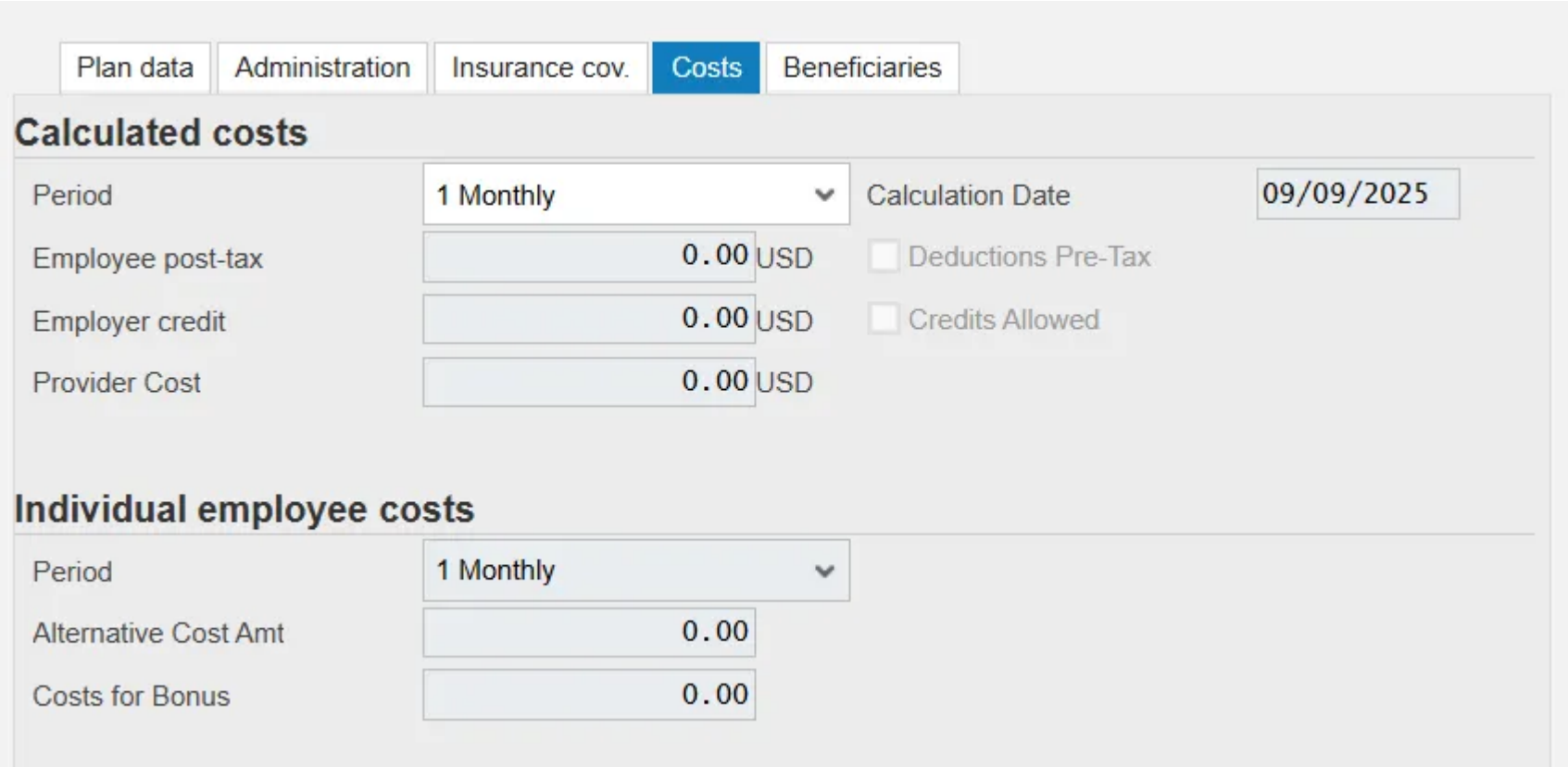
Field Name	Description
Benefits area	Specifies the highest-level subdivision of benefits data, which is the State of North Carolina.

Field Name	Description
Plan type	Specifies a customer-defined subdivision of a plan category. The plan type determines the subtype of the infotype created for a plan. An employee can participate in only one plan of each plan type at any time. The categories are: • Life insurance • AD&D
Benefit Plan	A four-character identifier for the benefit plan
Insurance Option	This is the insurance plan option, within the insurance plan. Example: The AD&D has 24 options, which the employee selects the desired coverage from.
Coverage Variant	A coverage variant is a group of settings that determine which criteria influence plan coverage for an employee and how employees are grouped for the calculation of coverage amounts.
Cost Rule Variant	A cost variant is a group of settings that determine which criteria influence the cost of a plan for an employee and how employees are grouped for the calculation of cost.
Image	



The Administration tab is created by the system at enrollment. It shows the evidence of insurability requirements for the plan.

Image



The Costs tab shows the automatically generated employer and employee plan costs.

NOTE: When an EOI is pending, the additional coverage amount will display in the Alternative Coverage field.

The Dependents tab shows the possible beneficiaries for the plan and the payout percentage chosen by the employee.

Miscellaneous Plans (IT0377)

Image

Display Miscellaneous Plans (0377)

Menu

Personnel No	80001035	Name	Marvin Tillman		
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	12/21/2013	to	12/31/2013	Chng	02/17/2014 01346009

Plan BYP1 Enhanced 80/20 Refund Plan

Plan data | Administration | Costs/credits

General plan data

Benefit area	NC	State of NC
Plan type	BYPP	Buyup Pln PrePd
Benefit plan	BYP1	Enhanced 80/20 Refund Plan
Option miscel. plan	CS29	Buyup EE+Child PrePd

Planning Parameters

Cost Rule Variant	CS29	Buy- Up EE+Child

The Miscellaneous Plans infotype is created automatically when an employee enrolls in an SHP (State Health Plan) as the mechanism to collect the prepaid premium for the first enrollment month. For example, if an employee is hired 6/19/11 and has selected to start the SHP plan on 8/01/11, then the validity dates for this infotype will be 7/01/11 to 07/31/11 to collect the prepaid premium for the first month of enrollment in the plan. Subsequent premiums will occur automatically as a payroll deduction.

This infotype is created automatically through a nightly batch processing job based on that day’s enrollment.

Note: Usually, you should not need to make any changes to this infotype. It is automatically created and updated by enrollment procedures.

Savings Plans – Overview (IT0169)

Image

Personnel No	80001035	Name	Marvin Tillman		
EEGroup	A SPA Employees	PersA	4601 Natural and Cultural Resources		
EESubgroup	A1 FT N-FLSAOT Perm	Statu	Active		
Start	12/01/2015	to	12/31/9999	Chng	02/04/2016 01974238

Plan 401K 401(K) Savings Plan

Plan data | Administration | Regular contrib. | Bonus contribution | Beneficiaries | Investments

General plan data

Benefit area	NC State of NC
Plan type	401K 401(k) Savings
Benefit plan	401K 401(K) Savings Plan

Planning Parameters

EE Contr. Variant	401K 401K EE Contri
ER Contr. Variant	
Vesting rule	
Investment Group	

This infotype stores details of the savings plans in which the employee is enrolled. For each savings plan in which the employee participates, a separate record exists. The infotype is used for payroll and for evaluations of employee benefits data.

The State of North Carolina offers these voluntary saving plans: 401(k), 401(k) Roth, 403b for some agencies and 457.

The State of North Carolina offers these retirement plans:

- TSERS (Teachers’ and State Employee Retirement System
- LEORS (Law Enforcement Officer Retirement System)
- CJRS (Consolidated Judicial Retirement System)
- ORP (Optional Retirement Plan) only at NC School of Science and Math

Note: Usually, changes will not be made to this infotype. It is automatically created and updated by enrollment procedures.

Image



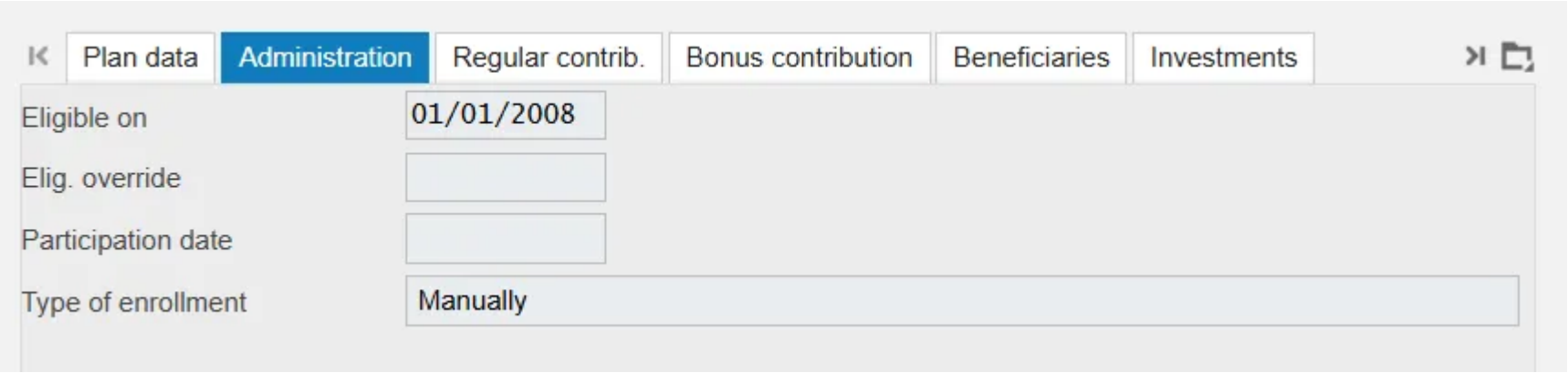
The Plan data tab shows how the plan fits into your benefit structure. It stores the contribution rule variants, vesting rules, and investment group for the plan.

Field Name	Description
Benefits area	Specifies the highest-level subdivision of benefits data, which is the State of North Carolina.

Field Name	Description
Plan type	Specifies a customer-defined subdivision of a plan category. The plan type determines the subtype of the infotype created for a plan. An employee can participate in only one plan of each plan type at any time. The categories are: • Life insurance • AD&D
Benefit Plan	A four-character identifier for the benefit plan.
EE Contribution Variant	An employee contribution variant is a group of settings that determine which criteria influence an employee's contribution to a plan and how employees are grouped for the calculation of contribution amounts.
ER Contribution Variant	An employer contribution variant is a group of settings that determine which criteria influence an employee's contribution to a plan and how employees are grouped for the calculation of contribution amounts.
Vesting rule	This is the name of the vesting rule. Under each vesting rule there are vested portions.
Investment group	The investment group represents several investments. You can then assign an investment group to a Savings plan, to provide the investment choices for employees.

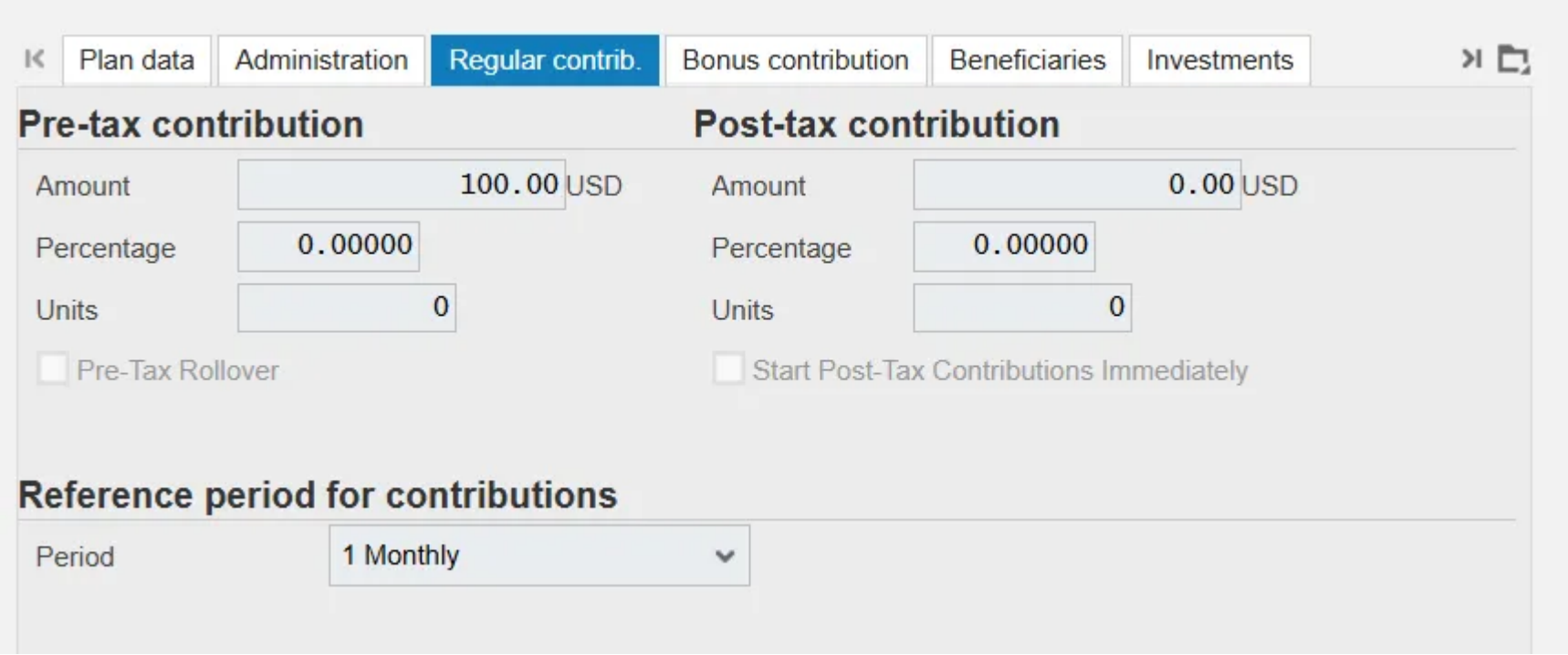
The Administrative data tab is created by the system at enrollment. It shows the eligibility status for the plan.

Image



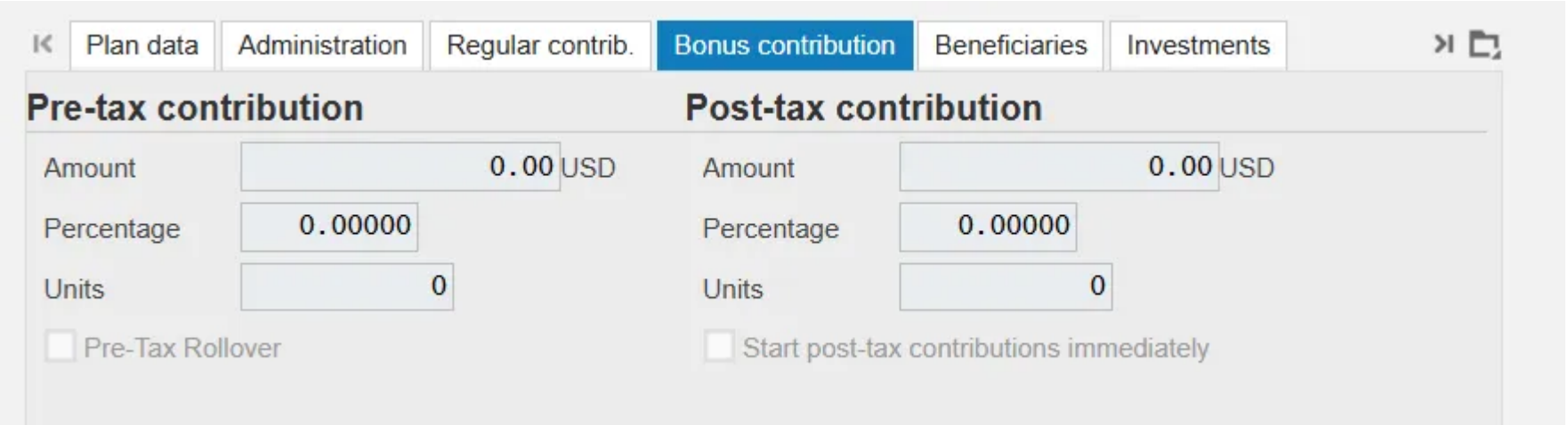
The Regular contribution tab shows the contribution made on regular payroll runs.

Image



The Bonus contribution tab shows the contribution made only on a bonus payroll run.

Image



The following tabs on the Savings Plans infotype are not being used by the Integrated HR/Payroll System:

- Beneficiaries tab
- Investments tab
- Additional data

Supplemental Benefits

Agency-specific benefits will be processed using one of these two payroll infotypes:

Recurring Payments/Deductions, IT0014 - You can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll accounting. Recurring Payments or deductions are wage elements that are not paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted with a defined periodicity.

Image

Display Recurring Payments/Deductions (0014)

Menu

Personnel No	80001035	Name	Marvin Tillman		
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	02/01/2018	to	12/31/9999	Chng	03/20/2018 00999802

Recurring Payments/Deductions

Wage Type	2450	Combined Campaign			
Amount	A	25.00	USD	Ind. Val.	
Number/unit		0.00			
Assignment Number					
Reason for Change					

Payment dates

Payment model					
1st payment period	00	or	1st payment date		
Interval in periods	00		Interval/Unit	0	

Additional Payments, IT0015 - You can store an amount and/or a value and a unit of measurement that should be paid or deducted in a certain period by Payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined period.

Image

Create Additional Payments (0015)

Menu

Personnel No	80001035		Name	Marvin Tillman	
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	

Additional Payments

Wage Type	*		
Amount		USD	Ind.val.
Number/unit			
Date of origin	05/31/2019		
Default Date			
Assignment Number			
Reason for Change			

Reference Period for Payment

Start Date	
End Date	

Note: For more information about maintaining these infotypes, please refer to the PY300 - Maintain Payroll course.

First Published

Sun, 05/22/2011

Last Updated

Mon, 10/06/2025

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