BEN-12 Displaying HR Master Data for Benefits (PA20)

Purpose

The purpose of this Business Process Procedure is to explain how to display various Benefit infotypes on a personnel number in the Integrated HR-Payroll System.

Trigger

There is a need to display various Benefit infotype records on a personnel number, such as Insurance Plans or Savings Plans.

Business Process Procedure Overview

In some instances, you may need to view the Benefit Infotypes only using the display function (PA20). In display mode you are unable to process or update data. Common Infotypes you may want to view for Benefit Processing purposes include:

- IT0021: Family Member/Dependents
- IT0167: Health Plans
- IT0168: Insurance Plans
- IT0169: Savings Plans
- IT0170: Flexible Spending Accounts
- IT0171: General Benefits Information
- IT0219: External Organizations (used for designating an outside entity as a beneficiary for a Life Insurance Plan)

- IT0377: Miscellaneous Plans

Access Transaction

Via Menu Path

SAP menu >> Human Resources >> Personnel Management >> Administration >> HR Master Data >> PA20 – Display

Via Transaction Code

PA20

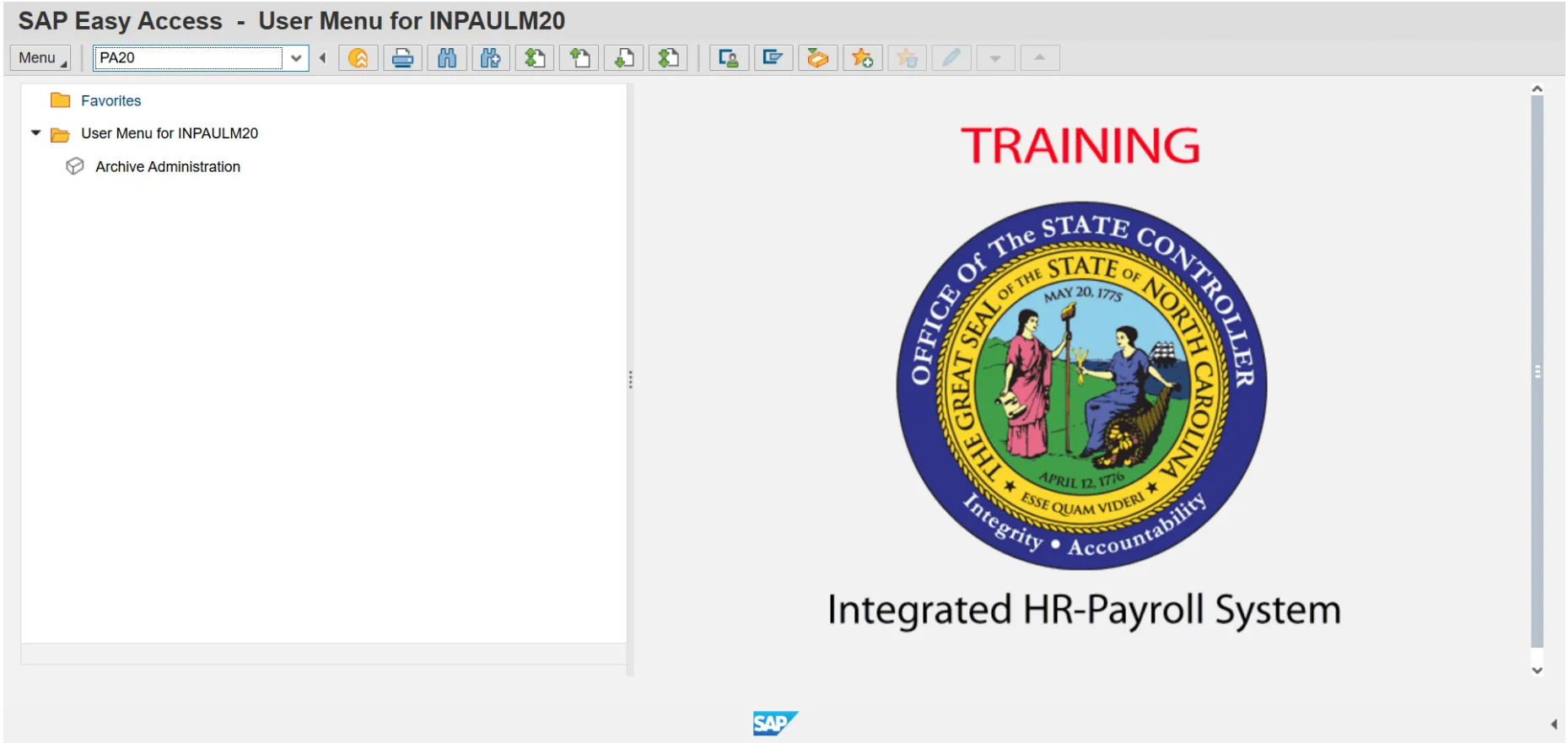
Procedure

There are 30 steps to complete this process.

Step 1. Update the following required and optional fields.

Field Name	Description	R/O/C	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	R	Enter value in Command Example: PA20

Image



Step 2. Click the **Enter** button.

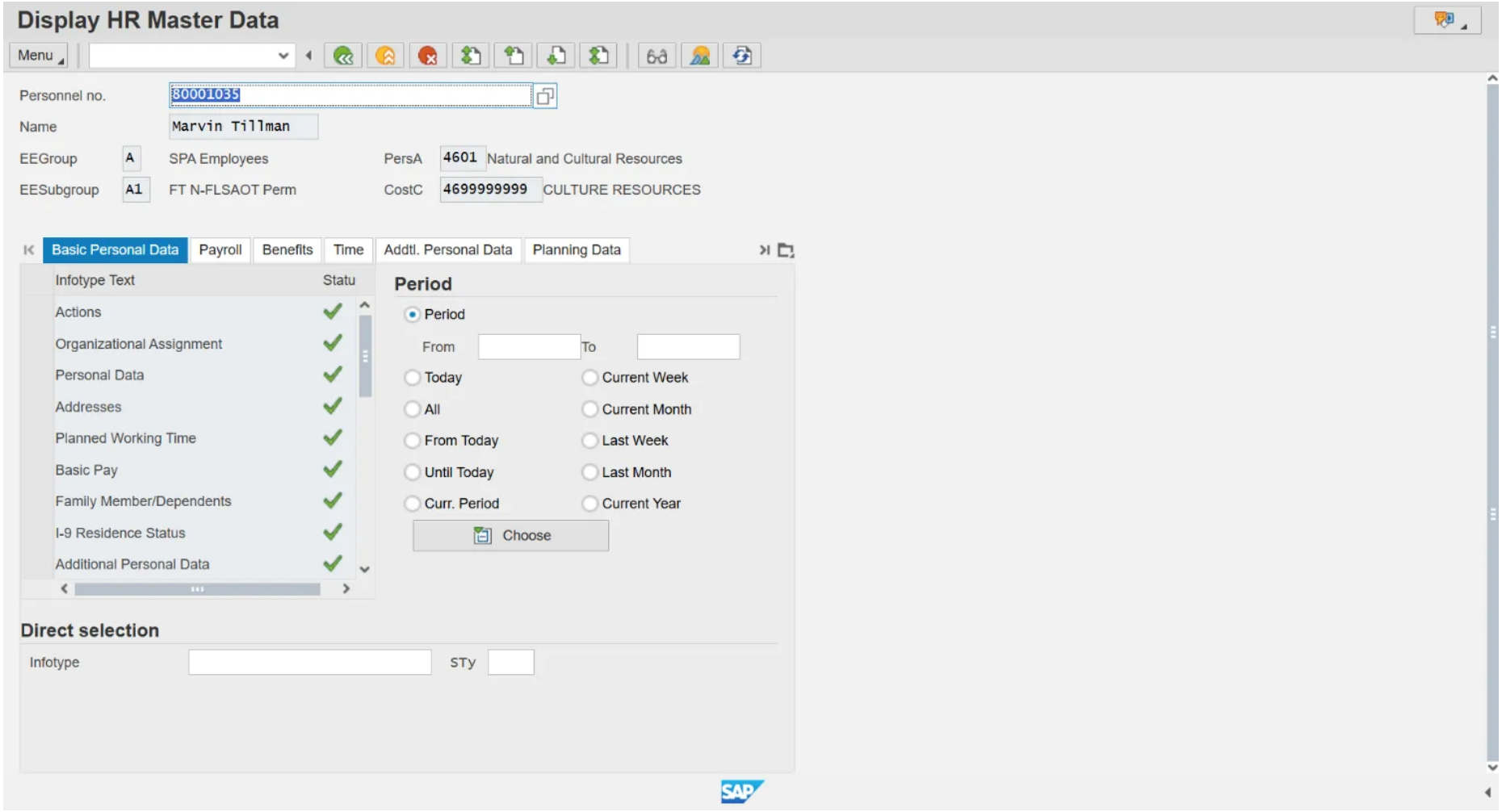
Step 3. Update the following **required** and **optional** fields.

Field Name	Description	R/O/C	Values
Personnel no.	Unique employee identifier	R	Enter value in Personnel no. Example: 80001035

Step 4. Click the **Enter** button.

Note: Click Enter and ensure the correct personnel number was entered.

Image



Step 5. Click the **Benefits** tab button.

Note: Review the infotype master data as appropriate. Depending on the type of infotype data, there may be additional screens to scroll through to locate all the data.

Note: To review history, you can select an overview of the Infotype and select multiple rows. When displayed you will be able to move from record to record with the Next button.

Note: Many infotypes related to Benefits information can be displayed via [PA20]. In this example Personal Data is displayed. To display master data contained within an infotype, highlight the line item for the infotype and click Display, or enter the infotype number in the Infotype field at the bottom of the screen and click Display.

Step 6. Click **General Benefits Information** button.

Note: The Benefits tab contains various infotypes typically used by the Benefits functionality, although users may need to view other data such as personal information or address information, located on other tabs.

Image

Display HR Master Data

Menu

EESubgroup A1 FT N-FLSAOT Perm CostC 4699999999 CULTURE RESOURCES

Basic Personal Data | Payroll | Benefits | Time | Addtl. Personal Data | Planning Data

Infotype Text	Statu
General Benefits Information	✓
Adjustment Reasons	✓
Family Member/Dependents	✓
Health Plans	✓
Insurance Plans	✓
Savings Plans	✓
Flexible Spending Accounts	✓
Miscellaneous Plans	✓
Monitoring of Tasks	

Period

- Period
  - From To
- Today
- All
- From Today
- Until Today
- Curr. Period
- Current Week
- Current Month
- Last Week
- Last Month
- Current Year

Choose

Direct selection

Infotype STy

Step 7. Click **Display (F7)** button.

Image

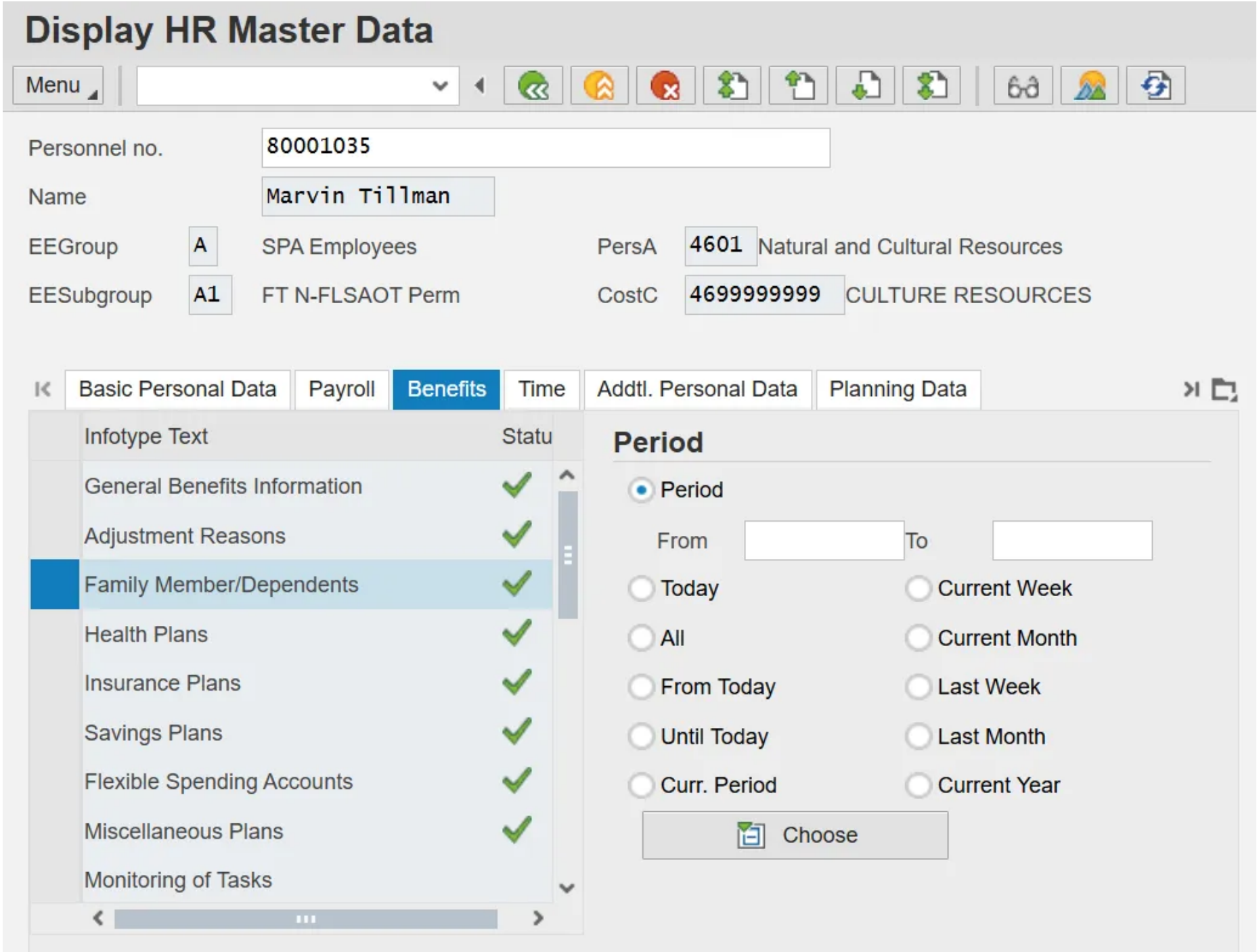


Step 8. Review the General Benefit Infotype data as appropriate.

Step 9. Click **Back (F3)** button.

Step 10. Click **Family Member/Dependents** button.

Image


Display HR Master Data
Menu
Personnel no. 80001035
Name Marvin Tillman
EEGroup A SPA Employees
EESubgroup A1 FT N-FLSAOT Perm
PersA 4601 Natural and Cultural Resources
CostC 4699999999 CULTURE RESOURCES
Basic Personal Data
Payroll
Benefits
Time
Addtl. Personal Data
Planning Data
Infotype Text
Statu
General Benefits Information
Adjustment Reasons
Family Member/Dependents
Health Plans
Insurance Plans
Savings Plans
Flexible Spending Accounts
Miscellaneous Plans
Monitoring of Tasks
Period
Period
From
To
Today
All
From Today
Until Today
Curr. Period
Current Week
Current Month
Last Week
Last Month
Current Year
Choose

Step 11. Click **Display (F7)** button.

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

Step 12. Click **Next record (Shift+F7)** button.

Review the Family Member/Dependents infotype data as appropriate. In some cases, there is more than one record. To view the next record, click the Next record button.

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	02/01/2008	To	12/31/9999	Chng	11/16/2012 01346009

Member: 2 Child

Child no: 01

Personal data

Last name	Tillman	Birth name	
First name	Marvin Jr	Initials	
Title		Nationality	
Gender	1 Male	Ref.Pers.No.	
Birth date	01/25/1986		
SSN	556-49-7785	Telephone number	0
BIN		Separation Date	
Street		Marital status	
Addr Line 2			
City/State			
Zip/country			

Challenge	Status

Step 13. Click **Back (F3)** button.

Step 14. Click **Health Plans** button.

Click **Display (F7)** button.

Image

Display Health Plans (0167)

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 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

Step 15. Click **Next record (Shift+F7)** button.

Review the Health Plans infotype data as appropriate. In some cases, there is more than one record. To view the next record, click the Next record button.

Step 16. Click **Back (F3)** button.

Step 17. Click **Insurance Plans** button.

Step 18. Click **Display (F7)** button.

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

Step 19. Click **Next record (Shift+F7)** button.

Review the Insurance Plans infotype data as appropriate. In some cases, there is more than one record. To view the next record, click the Next record button.

Step 20. Click **Back (F3)** button.

Step 21. Click Flexible Spending Accounts button.

Step 22. Click **Display (F7)** button.

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.	

Step 23. Click **Next record (Shift+F7)** button.

Review the Flexible Spending Accounts infotype data as appropriate. In some cases, there is more than one record. To view the next record, click the Next record button.

Step 24. Click **Back (F3)** button.

Step 25. Click **Savings Plans** button.

Step 26. Click **Display (F7)** button.

Review the Savings Plans infotype data as appropriate. There may be multiple records for infotype 0169 (savings plans) available by clicking on the next screen or previous screen buttons. If there are multiple tabs on the screen, additional data is available on other tabs.

Image

Display Savings Plans (0169)

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	12/01/2015	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		

Step 27. Click **Back (F3)** button.

Step 28. Click **Back (F3)** button.

Step 29. Review additional infotypes as appropriate. If there is a green check mark next to an infotype title, then master data has been entered for that infotype on this employee's record.

Step 30. The system task is complete.

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