



DISPLAYING HR MASTER DATA FOR BENEFITS

BEN-12 | TRANSACTION PA20

BN

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:

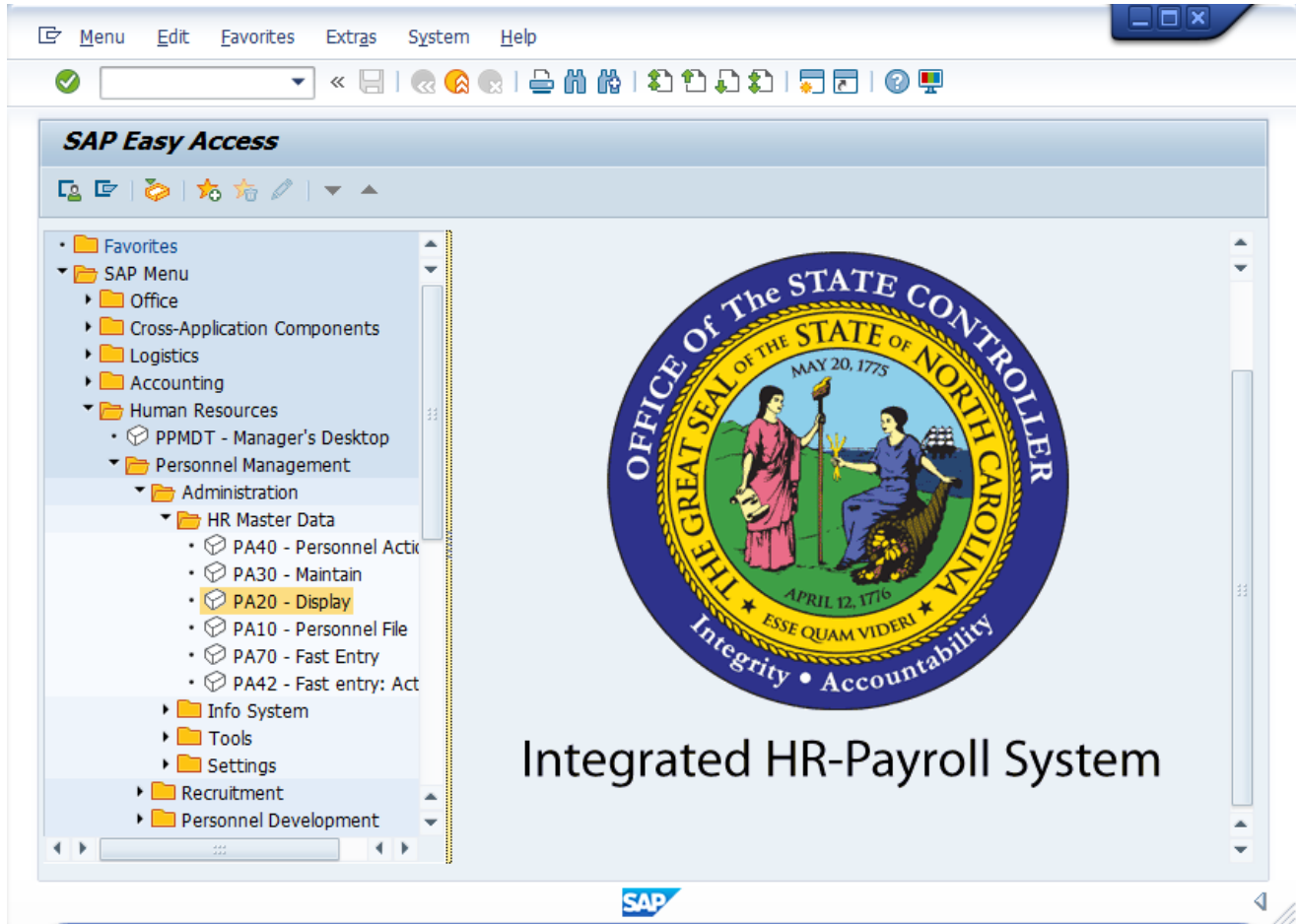
- IT0021: Family Member/Dependents
- IT0167: Health Plans
- IT0168: Insurance Plans
- IT0169: Savings Plans
- IT0170: Flexible Spending Accounts
- IT0171: General Benefits Information
- IT0219: External Organizations (used for designating an outside entity as a beneficiary for a Life Insurance Plan)
- IT0377: Miscellaneous Plans

Access Transaction

Via Menu Path: SAP menu >> Human Resources >> Personnel Management >> Administration >> HR Master Data >> PA20 – Display

Via Transaction Code: PA20

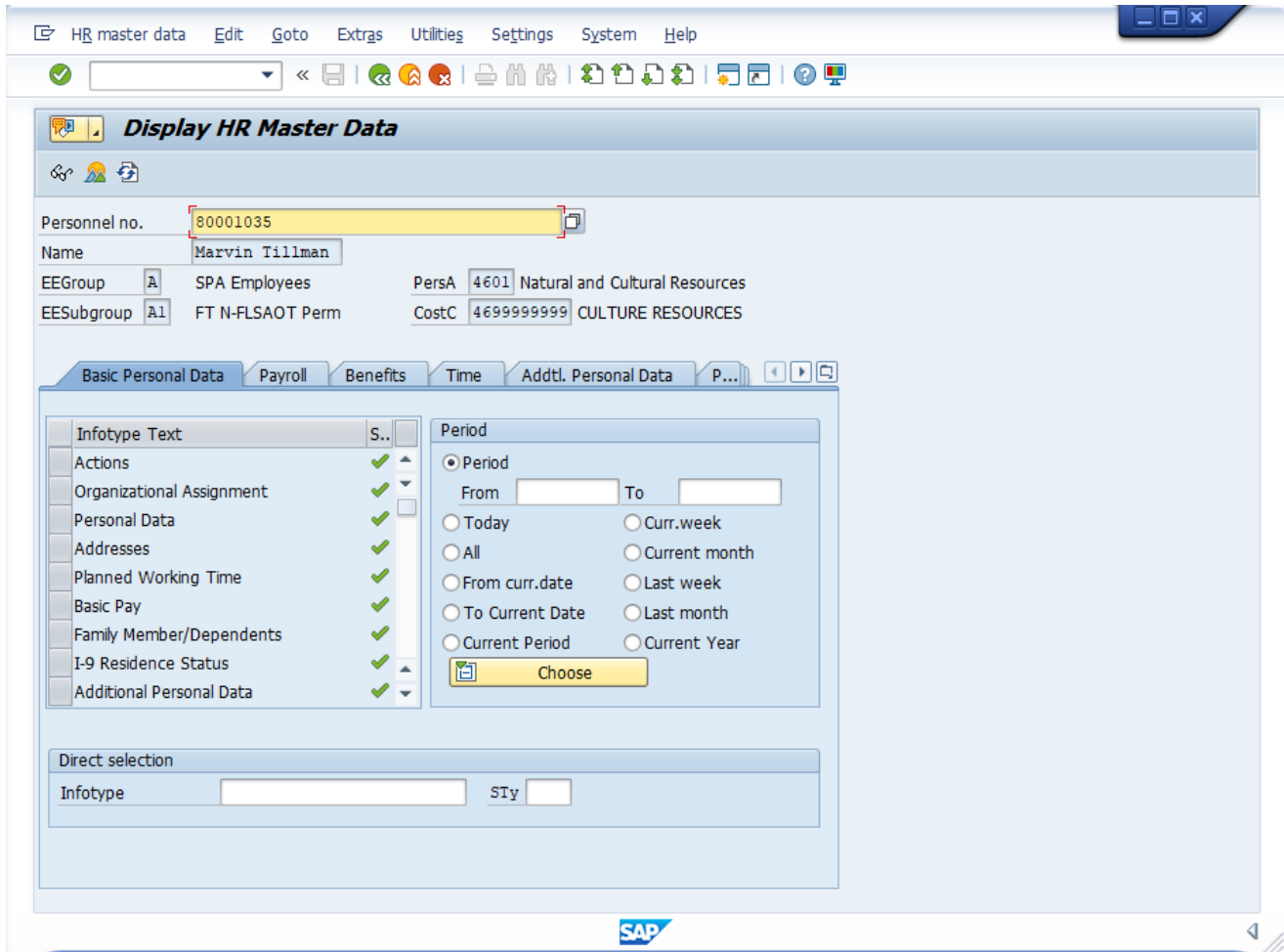
Procedure



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

- Click **Enter**  button.

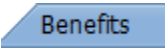


- Update the following **required** and **optional** fields:

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

- Click **Enter**  button.

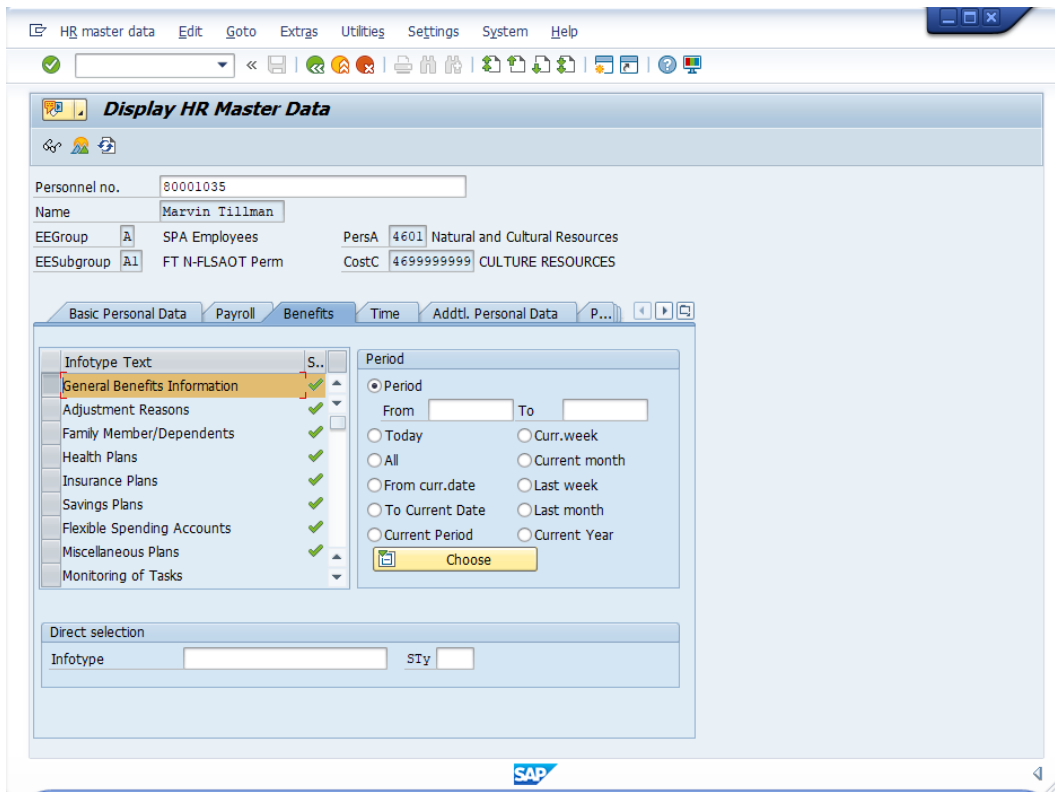
Information: Click Enter and ensure the correct personnel number was entered.

- Click the **Benefits**  tab button.

Information: 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.

Information: 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.

Information: 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.



- Click **General Benefits Information**  button.

Information: 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.

- Click **Display (F7)**  button.

Display General Benefits Information (0171)

Personnel No Name

EEGroup SPA Employees PersA Natural and Cultural Resources

EESubgroup FT N-FLSAOT Perm Statu


Start to Chng

General Benefits Information

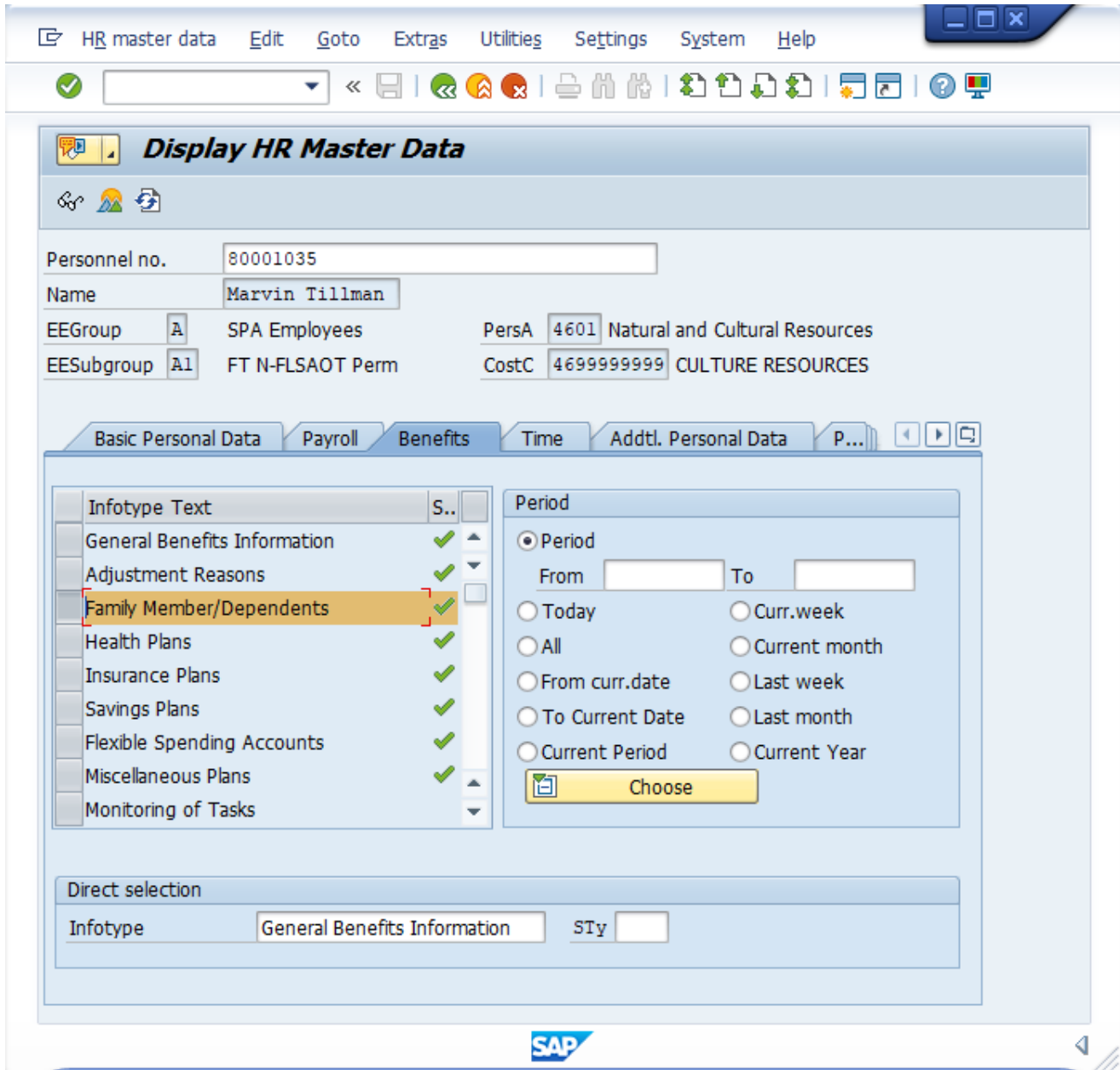
Benefit area State of NC

1st Program Grouping Full Benefits Elg


2nd Program Grouping Reg State Employees

8. Click **Back (F3)**  button.

Information: Review the General Benefit Infotype data as appropriate.



9. Click **Family Member/Dependents**  button.

10. Click **Display (F7)**  button.

Display Family Member/Dependents (0021)

Personnel No: 80001035 Name: Marvin Tillman

EGroup: A SPA Employees PersA: 4601 Natural and Cultural Resources

ESubgroup: A1 FT N-FLSAOT Perm Statu: Active

Start: 05/01/2008 To: 12/31/9999 Chng: 06/19/2008 90000044

Member: Spouse Number: _____

Personal data

Last name: Tillman Birth name: _____

First name: Cynthia Initials: _____

Title: _____ Nationality: _____

Gender: Female Male Undeclared

Birth date: 11/02/1966 Ref.Pers.No.: _____

SSN: 554-69-8751 Telephone number: 0 _____

BIN: _____ Separation Date: _____

Street: _____ Marital status: _____

Addr Line 2: _____

City/State: _____

Zip/country: _____


Challenge

Disability Disability Date: _____


Learned: _____

Status

Student Indicator

11. Click **Next record (Shift+F7)**  button.

Information: 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.

12. Click **Back (F3)**  button.

Display HR Master Data

Personnel no. 80001035
 Name Marvin Tillman
 EEGroup A SPA Employees PersA 4601 Natural and Cultural Resources
 EESubgroup A1 FT N-FLSAOT Perm CostC 4699999999 CULTURE RESOURCES

Basic Personal Data Payroll **Benefits** Time Addtl. Personal Data P...



Infotype Text	S..	Period
General Benefits Information	✓	<input checked="" type="radio"/> Period
Adjustment Reasons	✓	From <input type="text"/> To <input type="text"/>
Family Member/Dependents	✓	<input type="radio"/> Today <input type="radio"/> Curr.week
Health Plans	✓	<input type="radio"/> All <input type="radio"/> Current month
Insurance Plans	✓	<input type="radio"/> From curr.date <input type="radio"/> Last week
Savings Plans	✓	<input type="radio"/> To Current Date <input type="radio"/> Last month
Flexible Spending Accounts	✓	<input type="radio"/> Current Period <input type="radio"/> Current Year
Miscellaneous Plans	✓	<input type="button" value="Choose"/>
Monitoring of Tasks	✓	

Direct selection
 Infotype Family Member/Dependents STy

13. Click **Health Plans**  button.

14. Click **Display (F7)**  button.

Display Health Plans (0167)

Personnel No Name

EEGroup SPA Employees PersA Natural and Cultural Resources

EESubgroup FT N-FLSAOT Perm Statu Active

Start to Chng

Plan NC Flex Cancer Insurance

General plan data

Benefit area State of NC

Plan type Cancer Plan

Benefit plan NC Flex Cancer Insurance

Health Plan Option Cancer High Option


Dependent Coverage Employee Only

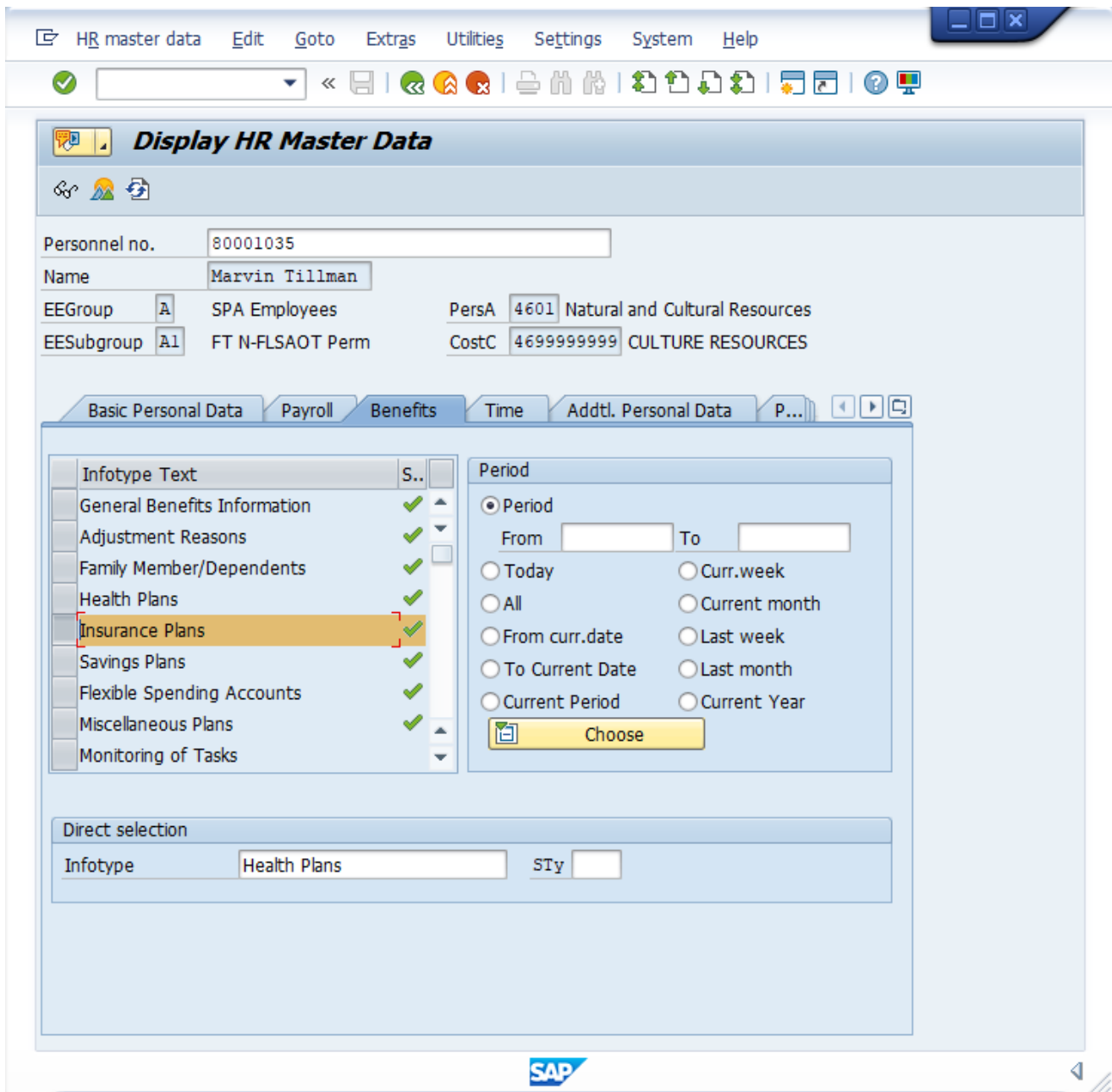
Planning Parameters

Cost Rule Variant Cancer High Opt EE Only Cost

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

Information: 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.

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



17. Click **Insurance Plans**  button.

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

The screenshot shows the SAP HR Master Data for Benefits interface. The title bar reads "Display Insurance Plans (0168)". The main data area contains the following information:


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	01/01/2021	to	12/31/9999
Chng	03/15/2021		01928036

Below this, the "Plan" is identified as "ADDC NC Flex Core AD&D Insurance".


Navigation tabs include "Plan data", "Administration", "Insurance cov.", "Costs", and "Beneficiaries". The "Plan data" tab is active, showing two sections:

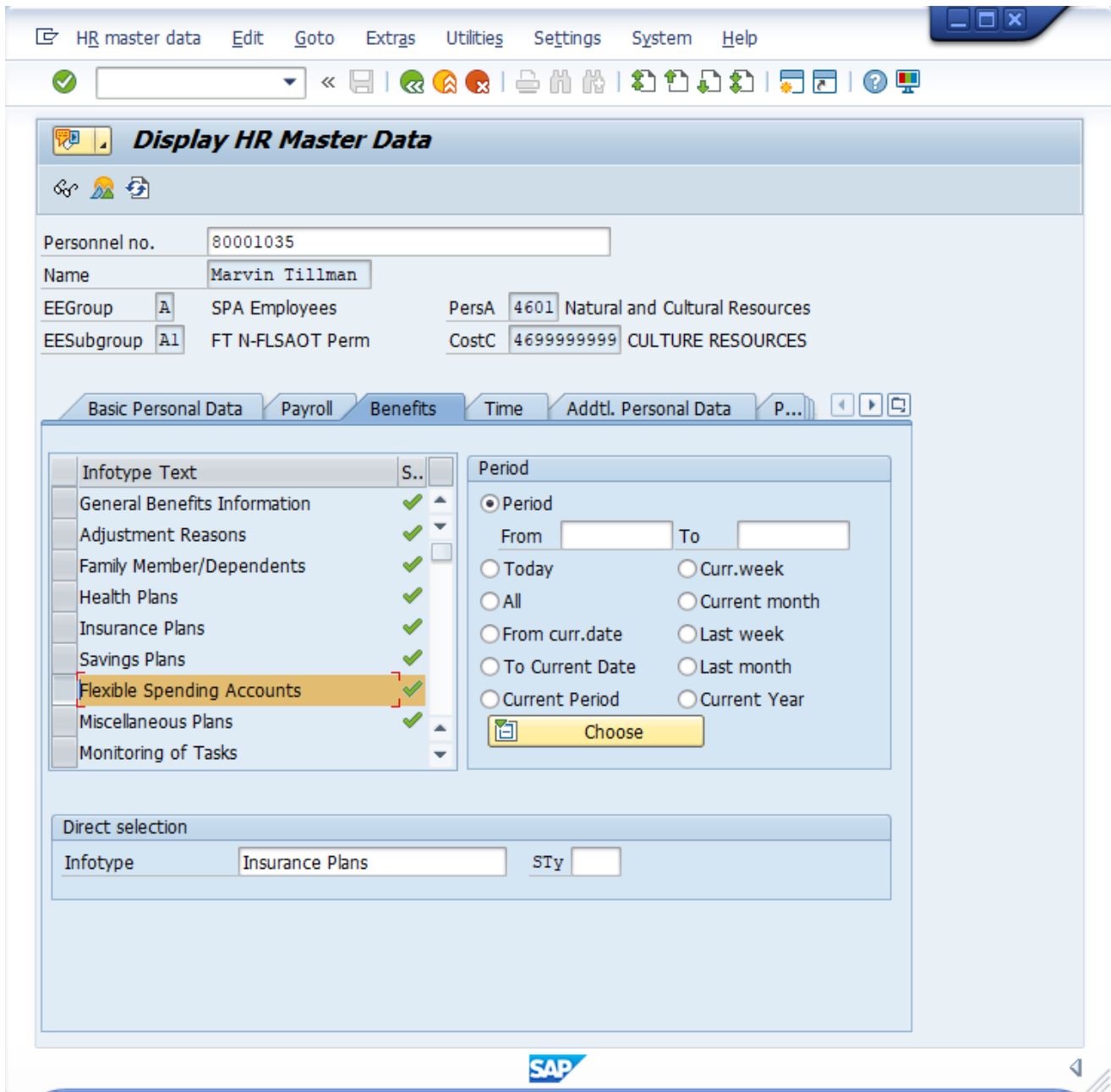
- General plan data:**
 - Benefit area: NC State of NC
 - Plan type: AADD Core AD&D
 - Benefit plan: ADDC NC Flex Core AD&D Insurance
 - Insurance Option: I010 \$10,000 EE Only
- Planning Parameters:**
 - Coverage Variant: I010 \$10,000 EE Only
 - Cost Rule Variant: I010 \$10,000 EE Only

The SAP logo is visible in the bottom right corner of the window.

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

Information: 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.

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



21. Click Flexible Spending Accounts  button.

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

Display Flexible Spending Accounts (0170)

Personnel No. Name

EEGroup SPA Employees PersA Natural and Cultural Resources

EESubgroup FT N-FLSAOT Perm Statu

Start to Chng

Plan NC Flex Dependent Care FSA

Plan data Administration Employee contribution

General plan data


Benefit area State of NC

Plan type Dependent Care

Benefit plan NC Flex Dependent Care FSA

Planning Parameters

Employer FSA Contr.

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

Information: 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.

Display Flexible Spending Accounts (0170)

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 01/01/2020 to 12/31/2020 Chng 03/15/2021 01928036

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.

SAP

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

 **Display HR Master Data**

Personnel no.

Name

EEGroup SPA Employees PersA Natural and Cultural Resources

EESubgroup FT N-FLSAOT Perm CostC CULTURE RESOURCES

Basic Personal Data
Payroll
Benefits
Time
Addtl. Personal Data
P...

Infotype Text	S..
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 Curr.week
 All Current month
 From curr.date Last week
 To Current Date Last month
 Current Period Current Year

Direct selection

Infotype STy

25. Click **Savings Plans**  button.

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

Display Savings Plans (0169)

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: 01/01/2008 to: 12/31/9999 Chng: 06/20/2008 90000044

Plan: TSER TSERS - Retirement Plan

Plan data Administration Regular contrib. Bonus contribution Benefi...

General plan data

Benefit area: NC State of NC

Plan type: RET Retirement Plan

Benefit plan: TSER TSERS - Retirement Plan


Planning Parameters

EE Contr. Variant: TSER TSERS EE Contributio

ER Contr. Variant: TSER TSERS ER Contributio

Vesting rule: []

Investment Group: []

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

Information: 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.

Display HR Master Data

Personnel no. 80001035
 Name Marvin Tillman
 EEGroup A SPA Employees PersA 4601 Natural and Cultural Resources
 EESubgroup A1 FT N-FLSAOT Perm CostC 4699999999 CULTURE RESOURCES

Basic Personal Data Payroll **Benefits** Time Addtl. Personal Data P...

Infotype Text S..

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 Curr.week
 All Current month
 From curr.date Last week
 To Current Date Last month
 Current Period Current Year

Direct selection

Infotype STy

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

Information: 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.

The system task is complete.

Change Record

- 3/15/21 – Updated format, assigned reference number, and made accessible – C. Ennis
- 6/23/21 – Updated images and added alt text. - L. Lee