



PARTICIPATION OVERVIEW

BEN-13 | TRANSACTION HRBEN0006

BN

The purpose of this Business Process Procedure is to explain how to display benefits enrollment information for employees in the Integrated HR-Payroll System.

Trigger: Benefit information for an individual is required.

Business Process Procedure Overview:

This function allows you to display information about the benefit enrollments for individual employees. It can be used to provide a general overview when a Benefit Administrator receives inquiries from employees regarding their current enrollment information.

This function can be accessed separately via HRBEN0006 or through other HR processing functions (enrollment, termination, participation, and insurability) by selecting the Overview tab.

The overview of employee benefits shows the following information:

- Plan data - The selected options, dependents/beneficiaries, costs, employee, and employer contributions costs.
- Cost data - The costs for the employer (if applicable) and employee are shown.
- Employee master data - A summary of relevant employee data is shown from the infotypes Personal Data (0002), General Benefits Information (0171), Organizational Assignment (0001), Family/Related Person (0021).
- Participation overview - A diagram shows participation in plans over a specific block of time.

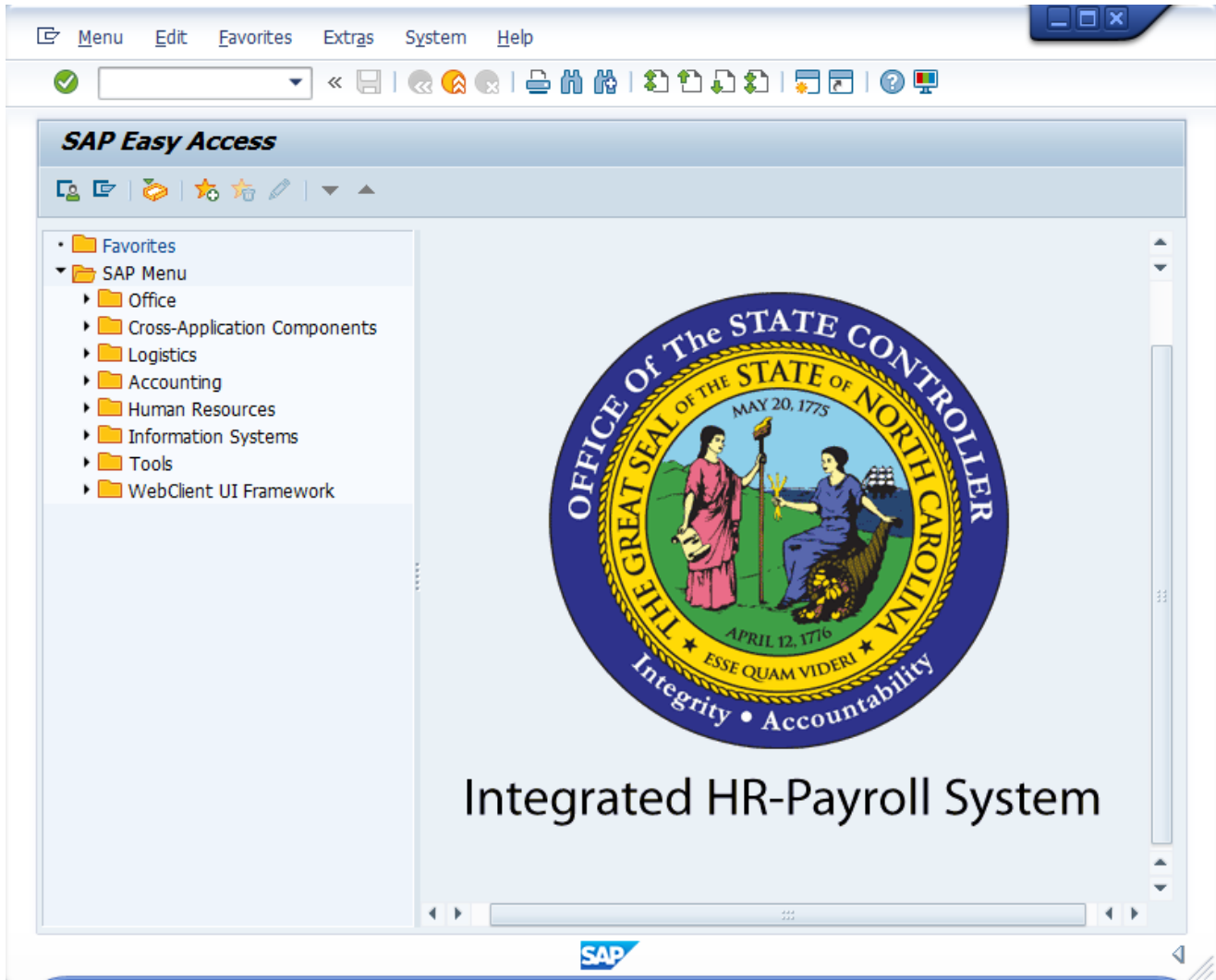
Access Transaction:

Via Menu Path: SAP menu >> Human Resources >> Personnel Management >> Benefits >> HRBEN0006 - Participation Overview

NOTE: Your menu path may contain this custom transaction code depending on your security roles.

Via Transaction Code: HRBEN0006


Procedure



1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. Example: HRBEN0006

2. Click the **Enter**  button.


Information

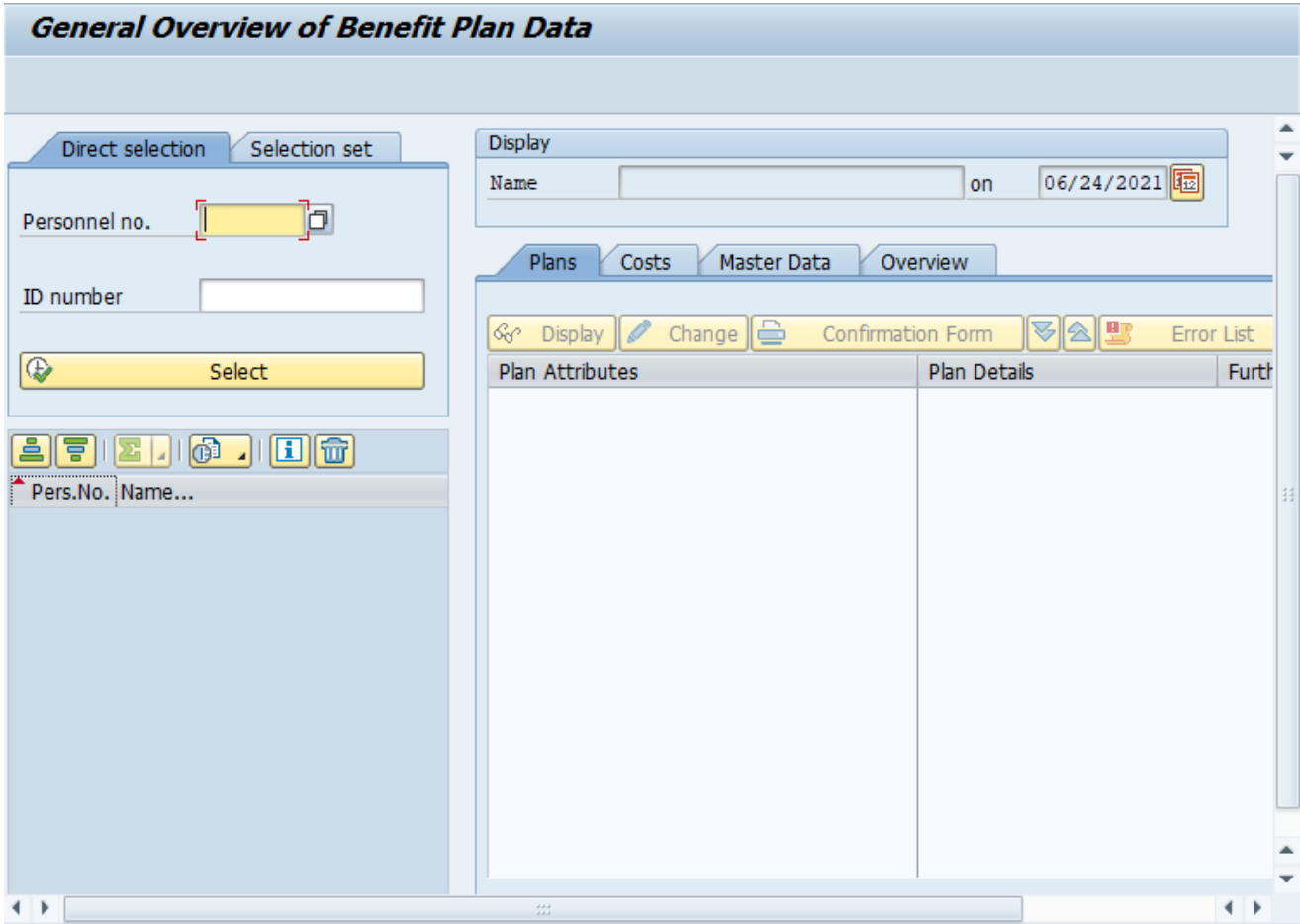
You may want to enter this transaction code in your Favorites Folder.

From the menu at the top of the screen:

- Choose **Favorites > Insert Transaction**
- Type in **HRBEN0006**
- Click **Enter**

To see the transaction code displayed in front of the link in your favorites from the menu at the top of the screen:

- Choose **Extras > Settings**
- Place a check next to **Display Technical Names**
- Click **Enter**



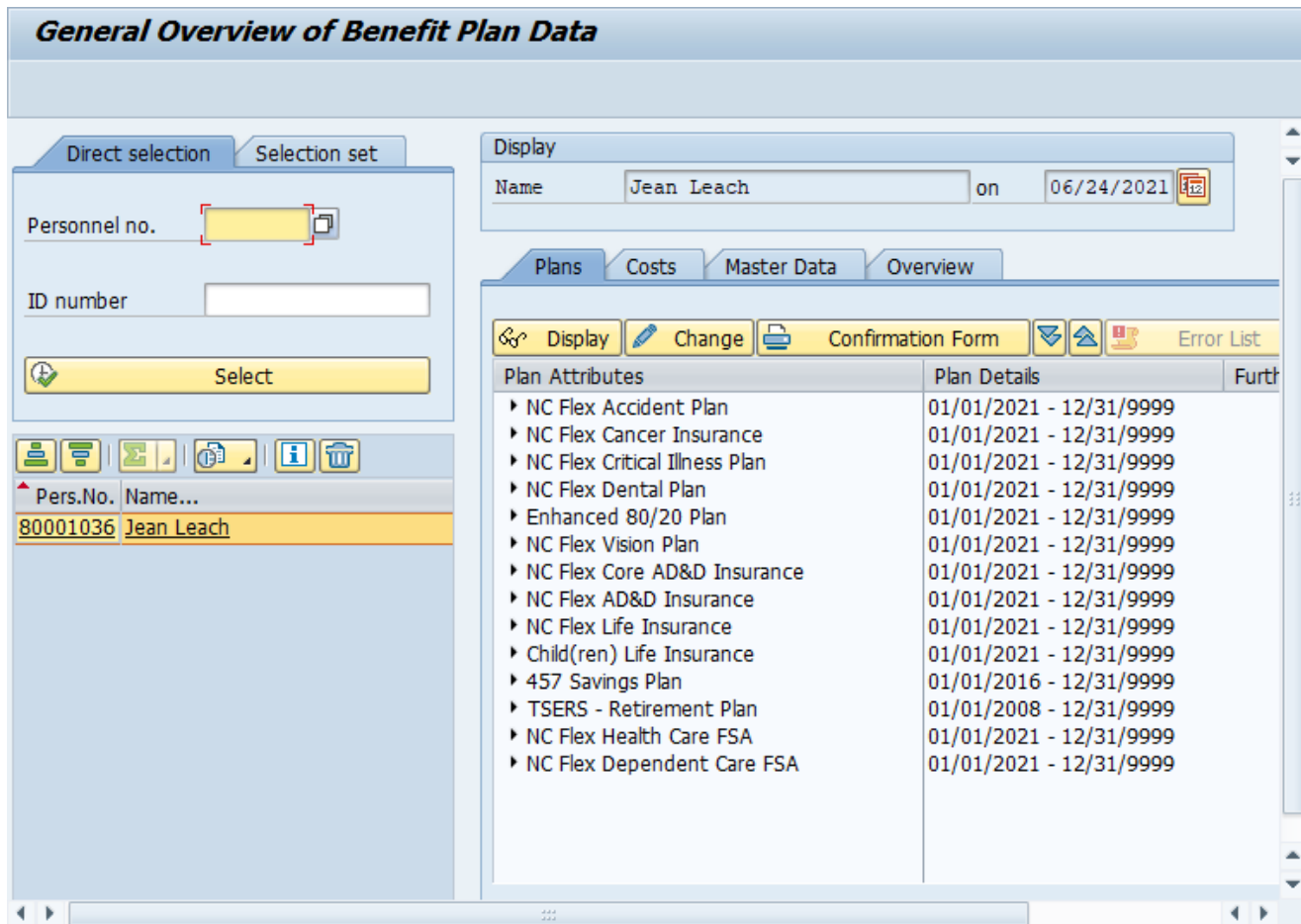
3. Update the following fields:

Field Name	Description	Values
Personnel no.	Unique employee identifier	Enter value in Personnel no. Example: 80001036

Ensure the correct personnel number was entered after clicking **Enter**.


NOTE: To generate an overview for a different date, click on the Change date button (to the right of the screen) or the calendar next to the date field and change the system date.

4. Click the **Select**  **Select** button.




General Overview of Benefit Plan Data


Direct selection Selection set

Personnel no. 





ID number

 **Select**

Display

Name on 

Plans Costs Master Data Overview

 **Display**  **Change**  **Confirmation Form**  **Error List**

Plan Attributes	Plan Details	Furt
▶ NC Flex Accident Plan	01/01/2021 - 12/31/9999	
▶ NC Flex Cancer Insurance	01/01/2021 - 12/31/9999	
▶ NC Flex Critical Illness Plan	01/01/2021 - 12/31/9999	
▶ NC Flex Dental Plan	01/01/2021 - 12/31/9999	
▶ Enhanced 80/20 Plan	01/01/2021 - 12/31/9999	
▶ NC Flex Vision Plan	01/01/2021 - 12/31/9999	
▶ NC Flex Core AD&D Insurance	01/01/2021 - 12/31/9999	
▶ NC Flex AD&D Insurance	01/01/2021 - 12/31/9999	
▶ NC Flex Life Insurance	01/01/2021 - 12/31/9999	
▶ Child(ren) Life Insurance	01/01/2021 - 12/31/9999	
▶ 457 Savings Plan	01/01/2016 - 12/31/9999	
▶ TSERS - Retirement Plan	01/01/2008 - 12/31/9999	
▶ NC Flex Health Care FSA	01/01/2021 - 12/31/9999	
▶ NC Flex Dependent Care FSA	01/01/2021 - 12/31/9999	

Pers.No. Name...

80001036	Jean Leach
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5. Click the **Expand All**  button.

The gray triangles may be used to expand or collapse an individual folder or all folders at once.

General Overview of Benefit Plan Data

Direct selection Selection set

Personnel no. 80001036

ID number

Select

Display

Name Jean Leach on 06/24/2021

Plans Costs Master Data Overview

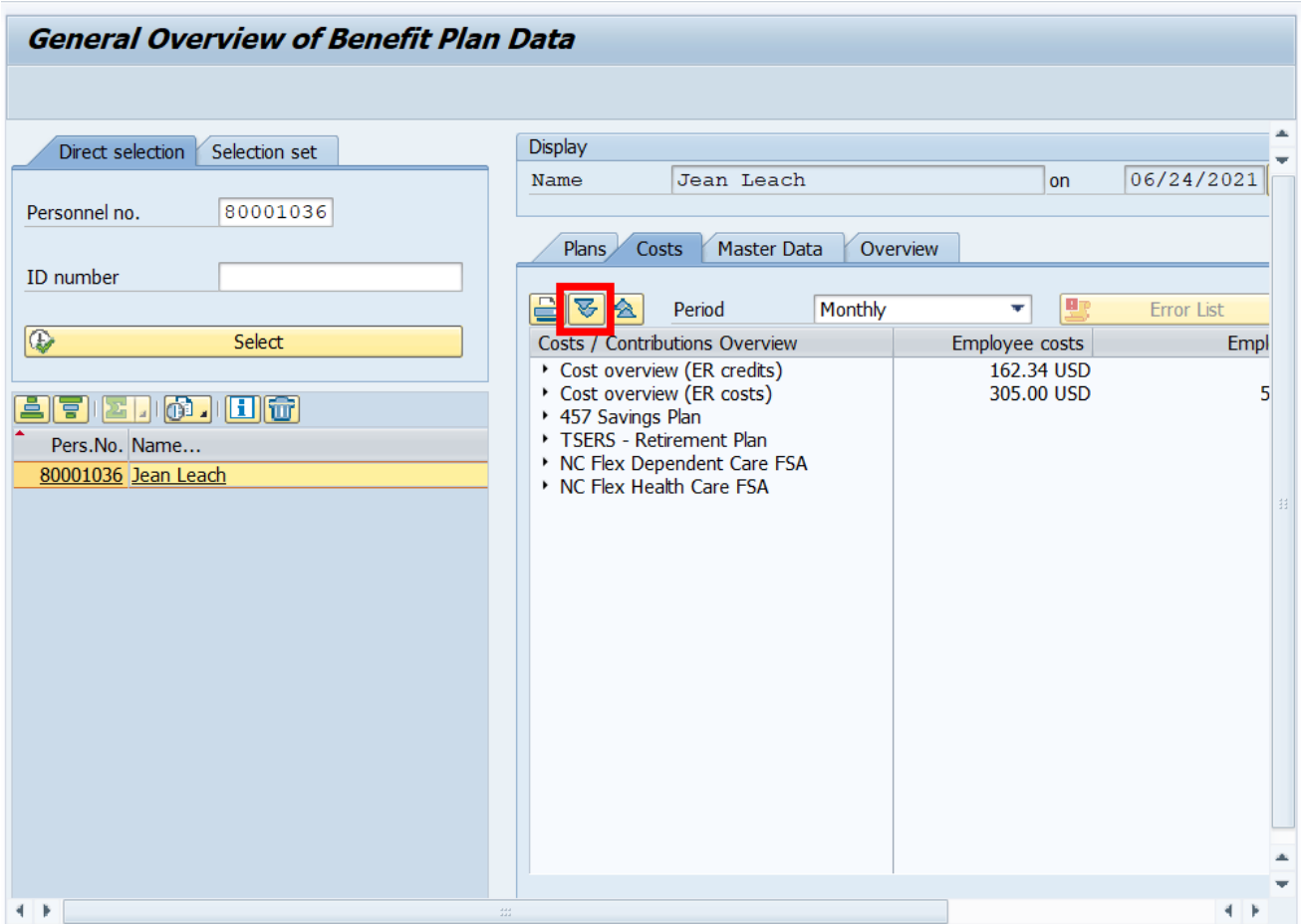
Display Change Confirmation Form

Plan Attributes	Plan Details
▼ NC Flex Accident Plan	01/01/2021 - 12/31/9999
• Option	NC Flex Accident Plan
• Dependent coverage	Employee Only
• EE pre-tax	USD 6.94 Monthly
▼ NC Flex Cancer Insurance	01/01/2021 - 12/31/9999
• Option	Cancer High Option
• Dependent coverage	Employee + Family
• EE pre-tax	USD 25.16 Monthly
▼ Dependents	
• Mary Leach	01/01/2016 - 12/31/9999
▼ NC Flex Critical Illness Plan	01/01/2021 - 12/31/9999
• Option	Critical Illness \$15k Coverage
• Dependent coverage	Employee Only
• EE pre-tax	USD 16.50 Monthly
▼ NC Flex Dental Plan	01/01/2021 - 12/31/9999
• Option	Dental High Option
• Dependent coverage	Employee+Child(ren)
• EE pre-tax	USD 96.36 Monthly
▼ Dependents	
• Mary Leach	01/01/2016 - 12/31/9999
▼ Enhanced 80/20 Plan	01/01/2021 - 12/31/9999
• Option	Enhanced 80/20 Non Smoker

6. Click the **Costs**  tab.

7. Click the **Expand All**  button.

The Costs tab will provide an overview of the costs and contributions an employee is making each payroll cycle to their benefit plans. It provides details for both the employee and the employer costs. The total expected contributions per plan year will be available if the employee is enrolled in either the Health or Dependent Day Care Flexible Spending Accounts.

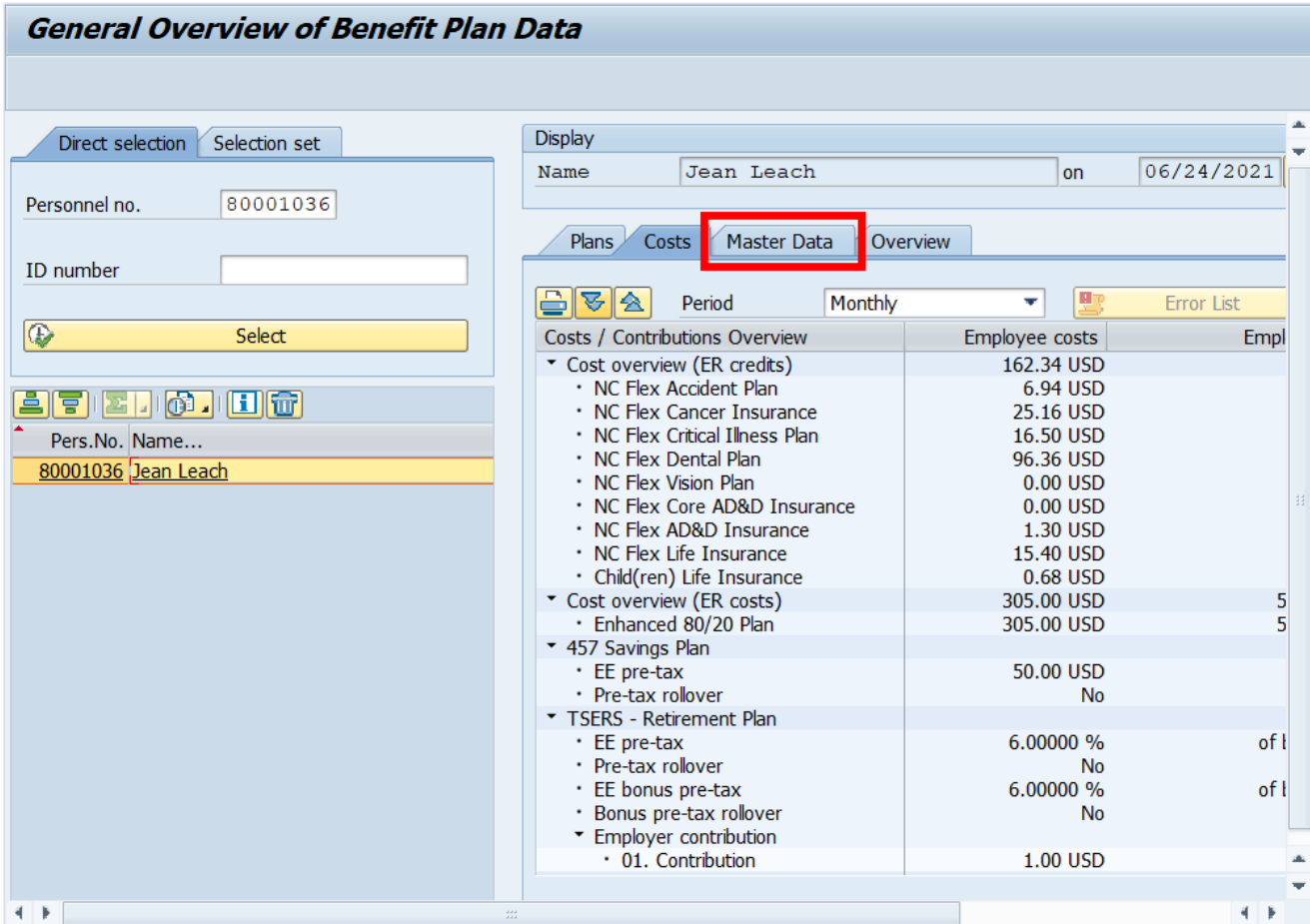


The screenshot displays the 'General Overview of Benefit Plan Data' window. On the left, there are input fields for 'Personnel no.' (80001036) and 'ID number', along with a 'Select' button. Below these are icons for print, save, refresh, and other functions. A table lists personnel with columns for 'Pers.No.' and 'Name...', showing '80001036 Jean Leach' selected. On the right, the 'Display' section shows 'Name: Jean Leach' and 'on: 06/24/2021'. The 'Costs' tab is active, showing a 'Period' of 'Monthly' and an 'Error List' button. A table titled 'Costs / Contributions Overview' is shown with columns for 'Employee costs' and 'Empl'. The table lists several benefit plans with their respective costs.

Costs / Contributions Overview	Employee costs	Empl
Cost overview (ER credits)	162.34 USD	
Cost overview (ER costs)	305.00 USD	5
457 Savings Plan		
TSERS - Retirement Plan		
NC Flex Dependent Care FSA		
NC Flex Health Care FSA		

8. Click the **Master Data**  tab.

The Master Data tab provides a general overview of the data contained on several infotypes, such as SSN, Benefit Groupings, Payroll Cycles or Dependents in one place for easy reference.



General Overview of Benefit Plan Data

Direct selection Selection set

Personnel no. 80001036

ID number

Select

Display Name Jean Leach on 06/24/2021

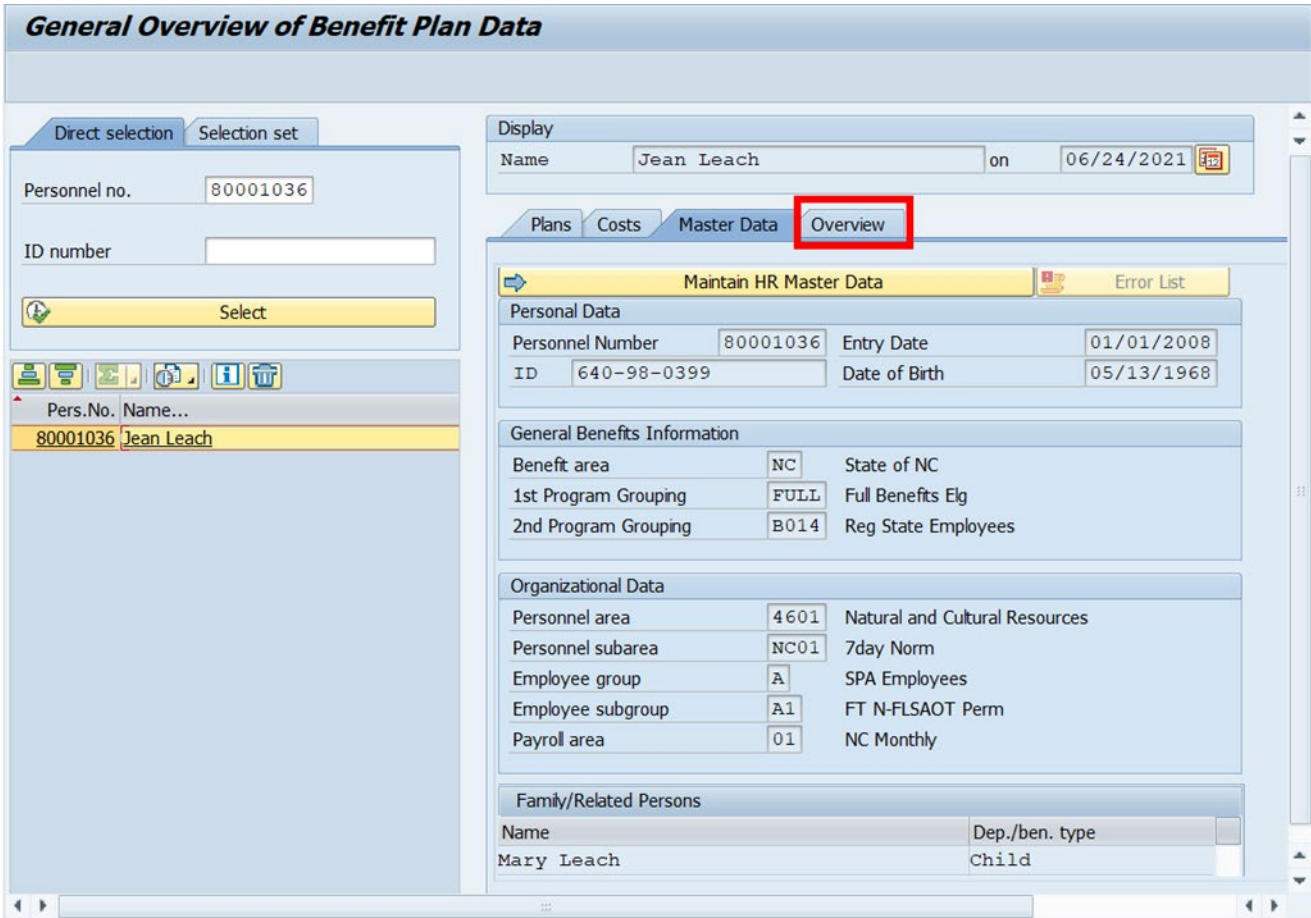
Plans Costs **Master Data** Overview

Period Monthly Error List

Costs / Contributions Overview	Employee costs	Empl
Cost overview (ER credits)	162.34 USD	
• NC Flex Accident Plan	6.94 USD	
• NC Flex Cancer Insurance	25.16 USD	
• NC Flex Critical Illness Plan	16.50 USD	
• NC Flex Dental Plan	96.36 USD	
• NC Flex Vision Plan	0.00 USD	
• NC Flex Core AD&D Insurance	0.00 USD	
• NC Flex AD&D Insurance	1.30 USD	
• NC Flex Life Insurance	15.40 USD	
• Child(ren) Life Insurance	0.68 USD	
Cost overview (ER costs)	305.00 USD	5
• Enhanced 80/20 Plan	305.00 USD	5
457 Savings Plan		
• EE pre-tax	50.00 USD	
• Pre-tax rollover	No	
TSERS - Retirement Plan		
• EE pre-tax	6.00000 %	of l
• Pre-tax rollover	No	
• EE bonus pre-tax	6.00000 %	of l
• Bonus pre-tax rollover	No	
Employer contribution		
• 01. Contribution	1.00 USD	

9. Click the **Overview**  tab.

The Overview tab provides the timeframe of enrollment for each benefit plan.



General Overview of Benefit Plan Data

Direct selection Selection set

Personnel no. 80001036

ID number

Select

Maintain HR Master Data Error List

Plans Costs Master Data **Overview**

Display Name Jean Leach on 06/24/2021

Personal Data

Personnel Number	80001036	Entry Date	01/01/2008
ID	640-98-0399	Date of Birth	05/13/1968

General Benefits Information

Benefit area	NC	State of NC
1st Program Grouping	FULL	Full Benefits Elg
2nd Program Grouping	B014	Reg State Employees

Organizational Data

Personnel area	4601	Natural and Cultural Resources
Personnel subarea	NC01	7day Norm
Employee group	A	SPA Employees
Employee subgroup	A1	FT N-FLSAOT Perm
Payroll area	01	NC Monthly

Family/Related Persons

Name	Dep./ben. type
Mary Leach	Child

10. Click the **Plans** tab.

General Overview of Benefit Plan Data

Direct selection Selection set

Personnel no. 80001036

ID number

Select

Plan types

80001036 Jean Leach

Display


Name Jean Leach on 06/24/2021

Plans Costs Master Data Overview

Start date 06/24/2020 End date 06/24/2022

Plan types	2020	2021													
	Jul '20	Aug '20	Sep '20	Oct '20	Nov '20	Dec '20	Jan '21	Feb '21	Mar '21	Apr '21	May '21	Jun '21	Jul '21	Aug '21	Sep '21
Accident Plan															NC Flex
Cancer Plan															NC Flex C
Critical Plan															NC Flex Cr
Dental															NC Fle
Medical															Enhanc
Vision															NC Fle
Core AD&D															NC Flex Cor
AD&D															NC Flex A
Employee Life															NC Flex
Child Life Ins															Child(ren
457 Def Comp															457 Savings Plan
Retirement Plan															TSERS - Retirement Plan
Dependent Care															NC Flex Dep
Health Care FSA															NC Flex H

Plan types 07/14/2020

- 11. If the view is not expanded, click the **Expand All**  button.
- 12. Click **Option** under any plan. (For purposes of this exercise, select the Option under the NC Flex Cancer Insurance.)

General Overview of Benefit Plan Data

Direct selection Selection set

Personnel no. 80001036

ID number

Select

Pers.No. Name...

80001036	Jean Leach
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Display

Name Jean Leach on 06/24/2021


Plans Costs Master Data Overview

Display Change Confirmation Form Error List

Plan Attributes	Plan Details	Further
NC Flex Accident Plan	01/01/2021 - 12/31/9999	
Option	NC Flex Accident Plan	
Dependent coverage	Employee Only	
EE pre-tax	USD 6.94 Monthly	
NC Flex Cancer Insurance	01/01/2021 - 12/31/9999	
Option	Cancer High Option	
Dependent coverage	Employee + Family	
EE pre-tax	USD 25.16 Monthly	
Dependents		
Mary Leach	01/01/2016 - 12/31/9999	Child
NC Flex Critical Illness Plan	01/01/2021 - 12/31/9999	
Option	Critical Illness \$15k Coverage	
Dependent coverage	Employee Only	
EE pre-tax	USD 16.50 Monthly	
NC Flex Dental Plan	01/01/2021 - 12/31/9999	
Option	Dental High Option	
Dependent coverage	Employee+Child(ren)	
EE pre-tax	USD 96.36 Monthly	
Dependents		
Mary Leach	01/01/2016 - 12/31/9999	Child
Enhanced 80/20 Plan	01/01/2021 - 12/31/9999	
Option	Enhanced 80/20 Non Smoker	
Dependent coverage	Employee+Child(ren)	
EE pre-tax	USD 305.00 Monthly	
ER costs	USD 521.96 Monthly	

13. Click the **Display**  **Display** button.

Display Health Plans (0167)

Personnel No	<input type="text" value="80001036"/>	Name	<input type="text" value="Jean Leach"/>
EEGroup	<input type="text" value="A"/> SPA Employees	PersA	<input type="text" value="4601"/> Natural and Cultural Resources
EESubgroup	<input type="text" value="A1"/> FT N-FLSAOT Perm	Statu	<input type="text" value="Active"/>
Start	<input type="text" value="01/01/2021"/> to <input type="text" value="12/31/9999"/>	Chng	<input type="text" value="03/15/2021"/> <input type="text" value="01937282"/>
Plan	<input type="text" value="ACCT"/> NC Flex Accident Plan		

Plan data Administration Costs Dependents Additional data

General plan data


Benefit area	<input type="text" value="NC"/> State of NC
Plan type	<input type="text" value="ACCT"/> Accident Plan
Benefit plan	<input type="text" value="ACCT"/> NC Flex Accident Plan
Health Plan Option	<input type="text" value="ACCT"/> NC Flex Accident Plan
Dependent Coverage	<input type="text" value="EE"/> Employee Only


Planning Parameters

Cost Rule Variant	<input type="text" value="ACT1"/> ACCT Cost EE Only
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NOTE: To display additional details behind a line item, highlight the line and click Display.

IMPORTANT: Do not use the Change button to make any changes to an employee's benefits. This may cause inaccurate data to be passed to the benefit vendors. Change the record using the PA30 transaction.

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

13. Click the **Exit** (F3)  button.

The system task is complete.

Change Record

- 9/29/16 – New BPP format; updated all screen captures due to SAP upgrade to SAPGUI 7.40 – L. Brown
- 3/19/21 – Updated format, assigned reference number, and made accessible – C. Ennis
- 6/24/21- Updated images, numbered steps, and added alt text. - L. Lee