



Last Update:

12/04/12 2:16 PM

Displaying HR Master Data for Benefits

PA20

Publisher Information

File Name

Document6

Link 1

Link 2

Link 3

Link 4

[PA_BN_PA20_Displaying_HR_Master_Data_for_Benefits.htm](#)

Job Role

Insert Job Role rows as necessary.

Transaction	User Data		Description
PA20	bpp		Displaying HR Master Data for Benefits
Client	Language	Doc Type	Job Role
		BPP	



Change History

Update the following table as necessary when this document is changed.

Date	Name	Change Description
Updated 3/26/08		

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 only view the Benefit Infotypes 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

IT0378: Adjustment Reasons

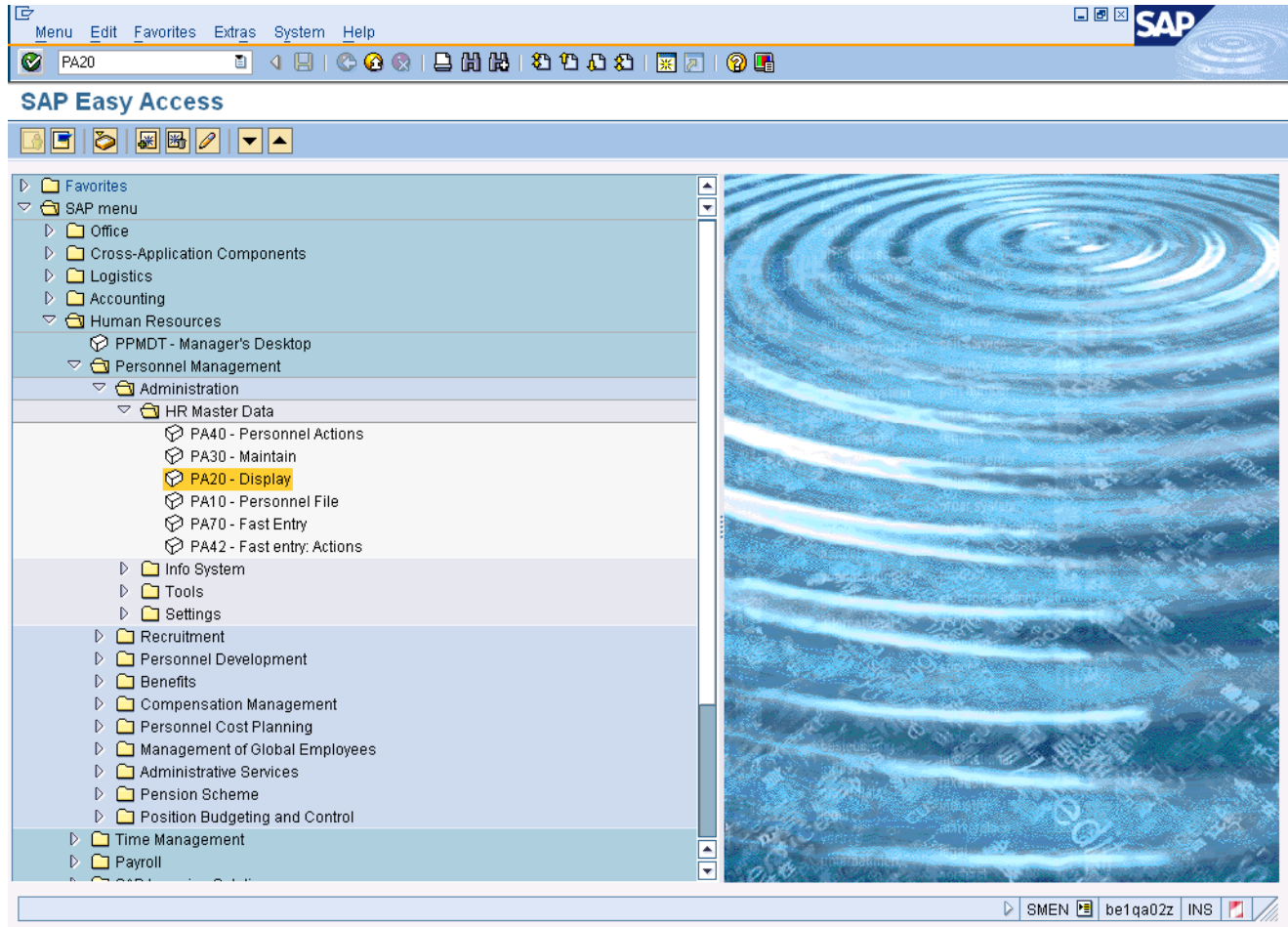
Access Transaction:

Via Menu Path	SAP menu >> Human Resources >> Personnel Management >> Administration >> HR Master Data >> PA20 - Display
Via Transaction Code	PA20



Procedure:

SAP Easy Access



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

2. Click **Enter**  button.



Title: *Displaying HR Master Data for Benefits*
Functional Area: *Human Resources*
Sub Area: *Benefits*



Display HR Master Data

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: 98221018

4. Click **Enter** button.



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



5. 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 of the data.



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



Information: Many infotypes related to Benefits information may 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.



Display HR Master Data

HR master data | Edit | Goto | Extras | Utilities(M) | Settings | System | Help

Display HR Master Data

Personnel no. 98221018
Name Perry C White
EEGroup K EPA Employees PersA 1401 State Controller
EESubgroup A1 FT N-FLSAOT Perm CostC 1400000000 OSC

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

Infotype text | E |
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

E1T (1) 801 | be1ta01z | OVR

- 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)

Infotype Edit Goto Extras System Help SAP

Display General Benefits Information (0171)

Personnel No: 98221018 Name: Perry C White

EEGroup: K EPA Employees PersA: 1401 State Controller

EESubgroup: A1 FT N-FLSAOT Perm Statu: Active

Start: 08/22/2007 to: 12/31/9999 Chng: 08/22/2007 SCRITTENDEN

General Benefits Information

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

E1T (1) 801 be1ta01z OVR

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



Information: Review the General Benefit infotype data as appropriate.



Display HR Master Data

HR master data Edit Goto Extras Utilities(M) Settings System Help

Display HR Master Data

Personnel no. 98221018
Name Perry C White
EEGroup K EPA Employees PersA 1401 State Controller
EESubgroup A1 FT N-FLSAOT Perm CostC 1400000000 OSC

Basic Personal Data Payroll Benefits Time Addtl. Personal Data

Infotype text E...
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
Choose

Direct selection
Infotype General Benefits Information STy

E1T (1) 801 be1ta01z OVR

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

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



Display Family Member/Dependents (0021)

The screenshot shows the SAP interface for displaying family member/dependents. The top bar includes the SAP logo and navigation icons. The main header reads "Display Family Member/Dependents (0021)". Below this, the personnel data for Perry C White is displayed, including Personnel No. 98221018, EE Group K (EPA Employees), PersA 1401 (State Controller), and EESubgroup A1 (FT N-FLSAOT Perm). The start date is 08/22/2007 and the end date is 12/31/9999. The member type is "Child".

Personal data

Last name	White	Birth name	
First name	Charles	Initials	
Title		Nationality	
Gender	<input type="radio"/> Female <input checked="" type="radio"/> Male	Ref.Pers.No.	
Birth date	05/12/1988	Telephone number	0
SSN		Separation Date	
Street		Marital status	
Addr Line 2			
City/State			
Zip/country			

Challenge

<input type="checkbox"/> Disability	
Disability Date	
Learned	

Status

<input checked="" type="checkbox"/> 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

HR master data Edit Goto Extras Utilities(M) Settings System Help

Display HR Master Data

Personnel no. 98221018
Name Perry C White
EEGroup K EPA Employees PersA 1401 State Controller
EESubgroup A1 FT N-FLSAOT Perm CostC 1400000000 OSC

Basic Personal Data Payroll Benefits Time Addtl. Personal Data

Infotype text E...
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
Choose

Direct selection
Infotype Family Member/Dependents STy

E1T (1) 801 be1ta01z OVR

13. Click **Adjustment Reasons**  button.

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



Display Adjustment Reasons (0378)

Infotype Edit Goto Extras System Help

Display Adjustment Reasons (0378)

Personnel No: 98221018 Name: Perry C White

EEGroup: K EPA Employees PersA: 1401 State Controller

EESubgroup: A1 FT N-FLSAOT Perm Statu: Active

Start: 10/16/2007 to: 11/15/2007 Chng: 08/22/2007 SCRITTENDEN

Adjustment Reason Data

Benefit area	State of NC
Adjustment reason	Change of Residence

E1T (1) 801 be1ta01z OVR

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



Information: Review the Adjustment Reasons infotype data as appropriate.



Display HR Master Data

The screenshot shows the SAP HR Master Data interface for Perry C White (Personnel no. 98221018). The 'Benefits' tab is active, and the 'Health Plans' infotype is selected. The 'Period' section is also visible, showing options for Today, All, From curr. date, Current Period, Curr. week, Current month, Last week, Last month, and Current Year. A 'Choose' button is present in the 'Period' section. The 'Direct selection' section shows 'Adjustment Reasons' selected.

16. Click **Health Plans**  button.

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



Display Health Plans (0167)

The screenshot shows the SAP 'Display Health Plans (0167)' infotype. The header includes the SAP logo and navigation icons. The main data area displays the following information:

Personnel No:	98221018	Name:	Perry C White			
EEGroup:	K EPA Employees	PersA:	1401 State Controller			
EESubgroup:	A1 FT N-FLSAOT Perm	Statu:	Active			
Start:	09/01/2007	to:	12/31/9999	Chng:	08/22/2007	SCRITTENDEN

Plan: DENT NC Flex Dental Plan

Navigation tabs: Plan data, Administration, Costs, Dependents, Additional data

General plan data

Benefit area:	NC State of NC
Plan type:	DENT Dental
Benefit plan:	DENT NC Flex Dental Plan
Health Plan Option:	DHIG Dental High Option
Dependent Coverage:	EESF EE+Fmly(Spouse Req)

Planning Parameters

Cost Rule Variant:	DN05 Dent Cost High Opt. FAMILY
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Footer: E1T (1) 801 | be1ta01z | OVR

18. 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.

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



Display HR Master Data

The screenshot shows the SAP HR Master Data interface for Perry C White (Personnel no. 98221018). The 'Benefits' tab is active, and 'Insurance Plans' is selected in the list. The 'Direct selection' area shows 'Health Plans' selected. The status bar at the bottom indicates 'E1T (1) 801', 'be1ta01z', and 'OVR'.

20. Click **Insurance Plans**  button.

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



Display Insurance Plans (0168)

The screenshot shows the SAP Display Insurance Plans (0168) interface. The top bar includes the SAP logo and navigation icons. The main content area displays the following data:

Personnel No:	98221018	Name:	Perry C White			
EEGroup:	K EPA Employees	PersA:	1401 State Controller			
EESubgroup:	A1 FT N-FLSAOT Perm	Statu:	Active			
Start:	09/01/2007	to:	12/31/9999	Chng:	08/22/2007	SCRITTENDEN

Plan: LIFE NC Flex Life Insurance

Navigation tabs: Plan data, Administration, Insurance cov., Costs, Beneficiaries

General plan data

Benefit area:	NC State of NC
Plan type:	LIFE Life Insurance
Benefit plan:	LIFE NC Flex Life Insurance
Insurance Option:	LIFE NC Flex Life Insurance

Planning Parameters

Coverage Variant:	LIFE NC Flex Life Ins
Cost Rule Variant:	LIFE NC Flex Life Cost

Bottom status bar: E1T (1) 801 | be1ta01z | OVR

22. 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.

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



Display HR Master Data

The screenshot shows the SAP HR Master Data interface. The top menu bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities(M)', 'Settings', 'System', and 'Help'. The title bar reads 'Display HR Master Data'. Below the title bar, the personnel information is displayed: Personnel no. 98221018, Name Perry C White, EEGroup K EPA Employees, PersA 1401 State Controller, EESubgroup A1 FT N-FLSAOT Perm, CostC 1400000000 OSC. The 'Benefits' tab is active, showing a list of benefit categories with checkboxes. 'Flexible Spending Accounts' is selected. The 'Period' section on the right has radio buttons for 'Today', 'Curr.week', 'All', 'Current month', 'From curr.date', 'Last week', 'To Current Date', 'Last month', 'Current Period', and 'Current Year'. A 'Choose' button is visible. The 'Direct selection' section shows 'Insurance Plans' selected. The status bar at the bottom indicates 'E1T (1) 801', 'be1ta01z', and 'OVR'.

24. Click **Flexible Spending Accounts**  button.

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



Display Flexible Spending Accounts (0170)

The screenshot shows the SAP infotype 'Display Flexible Spending Accounts (0170)'. The interface includes a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar with various icons. The main data area contains the following fields:

Personnel No:	99999500	Name	Tina INT1-0701-NC01-A-A2-1			
EE group	A SPA Employees	Personnel ar	0701 State Treasurer			
EE subgroup	A2 FT N-FLSAOT Prob	Status	Active			
Start	02/01/2007	to	08/31/2007	Chng	05/10/2007	ABL0M

Plan: DCSA NC Flex Dependent Care FSA

Navigation tabs: 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.	<input type="checkbox"/>
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Bottom status bar: PA20 be1qa02z INS

26. 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)

Infotype Edit Goto Extras System Help SAP

Display Flexible Spending Accounts (0170)

Personnel No: 98221018 Name: Perry C White

EEGroup: K EPA Employees PersA: 1401 State Controller

EESubgroup: A1 FT N-FLSAOT Perm Statu: Active

Start: 09/01/2007 to: 12/31/9999 Chng: 08/22/2007 SCRITTENDEN

Plan: HCSA NC Flex Health Care FSA

Plan data Administration Employee contribution

General plan data

Benefit area	NC State of NC
Plan type	HCAR Health Care FSA
Benefit plan	HCSA NC Flex Health Care FSA

Planning Parameters

Employer FSA Contr.	<input type="checkbox"/>
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E1T (1) 801 be1ta01z OVR

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



Display HR Master Data

The screenshot shows the SAP HR Master Data interface for employee Perry C White (Personnel no. 98221018). The 'Benefits' tab is active, and the 'Savings Plans' infotype is selected. The 'Direct selection' section shows 'Flexible Spending Accounts' with a 'STy' field. The 'Period' section has radio buttons for 'Today', 'All', 'From curr.date', 'To Current Date', 'Current Period', 'Curr.week', 'Current month', 'Last week', and 'Current Year'. A 'Choose' button is visible below the period options.

28. Click **Savings Plans**  button.

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



Display Savings Plans (0169)

The screenshot shows the SAP 'Display Savings Plans (0169)' screen. At the top, there is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main content area displays the following data:

Personnel No:	98221018	Name:	Perry C White			
EEGroup:	K EPA Employees	PersA:	1401 State Controller			
EESubgroup:	A1 FT N-FLSAOT Perm	Statu:	Active			
Start:	08/22/2007	to:	12/31/9999	Chng:	08/22/2007	SCRITTENDEN

Plan: TSER TSERS - Retirement Plan

Navigation tabs: Plan data, Administration, Regular contrib., Bonus contribution, Benefic...

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:	

At the bottom right, there is a status bar showing 'E1T (1) 801', 'be1ta01z', 'OVR', and a red flag icon.

30. 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

The screenshot shows the SAP HR Master Data interface for employee Perry C White (Personnel no. P8221018). The 'Benefits' tab is active, displaying a list of infotypes with green checkmarks indicating data entry. The 'Savings Plans' infotype is highlighted. The 'Period' section shows options for 'Today', 'Curr.week', 'All', 'Current month', 'From curr.date', 'Last week', 'To Current Date', 'Last month', 'Current Period', and 'Current Year'. A 'Choose' button is visible. The status bar at the bottom indicates 'E1T (1) 801', 'be1ta01z', and 'OVR'.

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



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

32. The system task is complete.

Launch WEB HELP



Title: *Displaying HR Master Data for Benefits*
Functional Area: *Human Resources*
Sub Area: *Benefits*
