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		

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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.

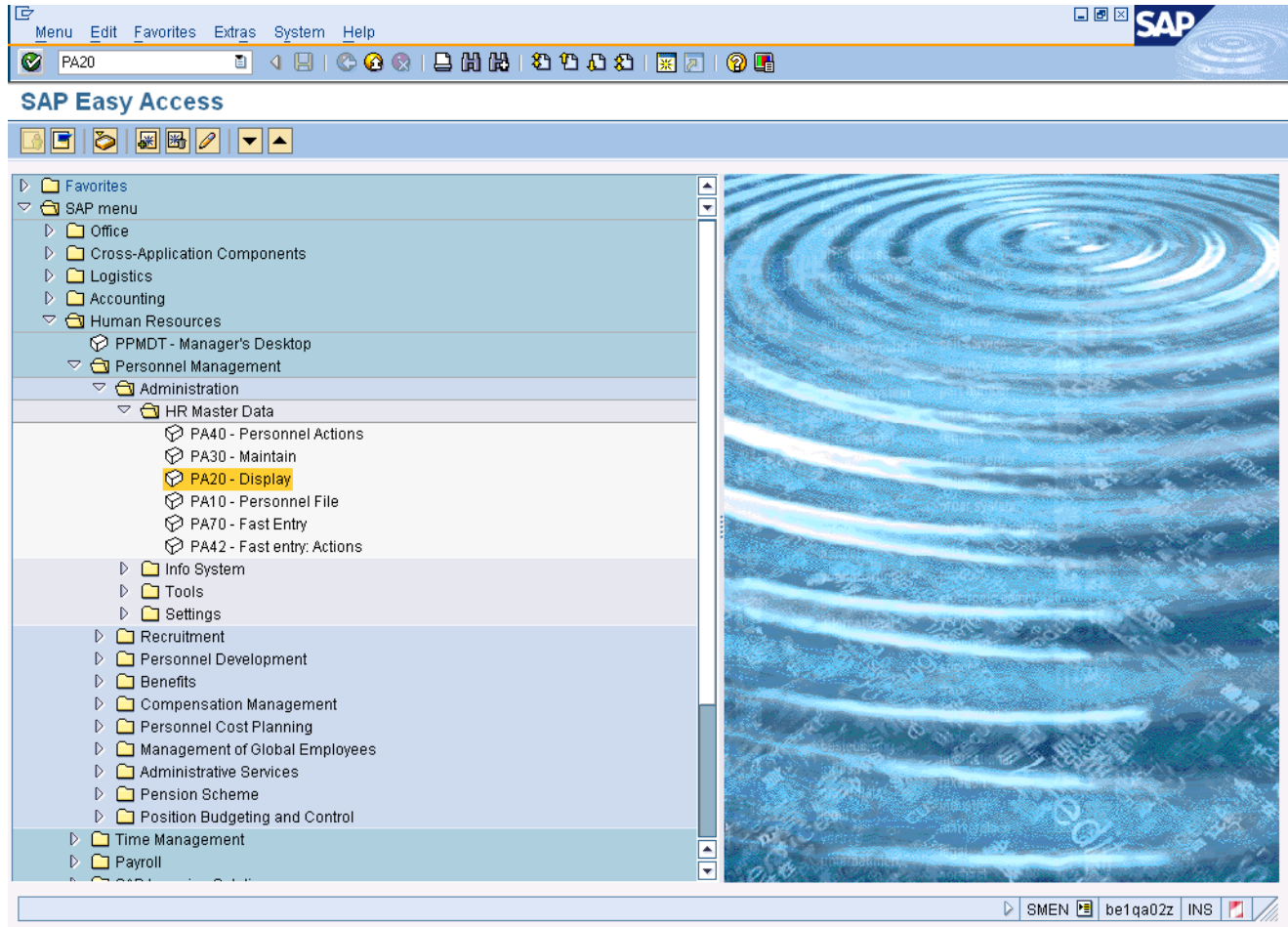| Business Process Procedure Overview |
| --- |
| In some instances, you may need to only view the Benefit Infotypes using the display function (PA20). In display mode you are unable to process or update data.
Common Infotypes you may want to view for Benefit Processing purposes include:
IT0021: Family 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

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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.

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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.

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

    (i)   **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.

    (i)   **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.

    (i)   **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.

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6.   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.

7.   Click **Display (F7)** 🔍 button.

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Display General Benefits Information (0171)

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

ℹ️   **Information:** Review the General Benefit infotype data as appropriate.

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

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

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Display Family Member/Dependents (0021)

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.

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13. Click **Adjustment Reasons** ☐ button.

14. Click **Display (F7)** ⬘ button.

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Display Adjustment Reasons (0378)

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

 Information: Review the Adjustment Reasons infotype data as appropriate.

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16.   Click **Health Plans** ⬜ button.

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

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Display Health Plans (0167)

Infotype Edit Goto Extras System Help   SAP
⊘   ◁ 🖫   ⊗ ⊙ ⊗   🗈 🛗 🗽   🗘 🗘 🗘 🗘   🗱 🗷   ⊘ 🗖

Display Health Plans (0167)

🗇 🗅 👤

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

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

         ▷ | E1T (1) 801 🖻 | be1ta01z | OVR |

18.   Click **Next record (Shift+F7)** 🗈 button.

     (i)   **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.

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20. Click **Insurance Plans** [ ] button.

21. Click **Display (F7)** [icon] button.

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Display Insurance Plans (0168)

Infotype   Edit   Goto   Extras   System   Help

Display Insurance Plans (0168)

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

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 |

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.

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

25. Click **Display (F7)** 🔍 button.

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Display Flexible Spending Accounts (0170)

```
Infotype  Edit  Goto  Extras  System  Help                                    SAP

Display Flexible Spending Accounts (0170)

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 ABLOM

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.

                                                         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.

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Display Flexible Spending Accounts (0170)

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

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28. Click **Savings Plans** [ ] button.

29. Click **Display (F7)** [icon] button.

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Display Savings Plans (0169)

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.

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31. Click **Back (F3)** ⬅ button.

> ℹ **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

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