



## Participation Overview

See **Change Record** at end of document for updates to this BPP.

### Trigger:

When 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.

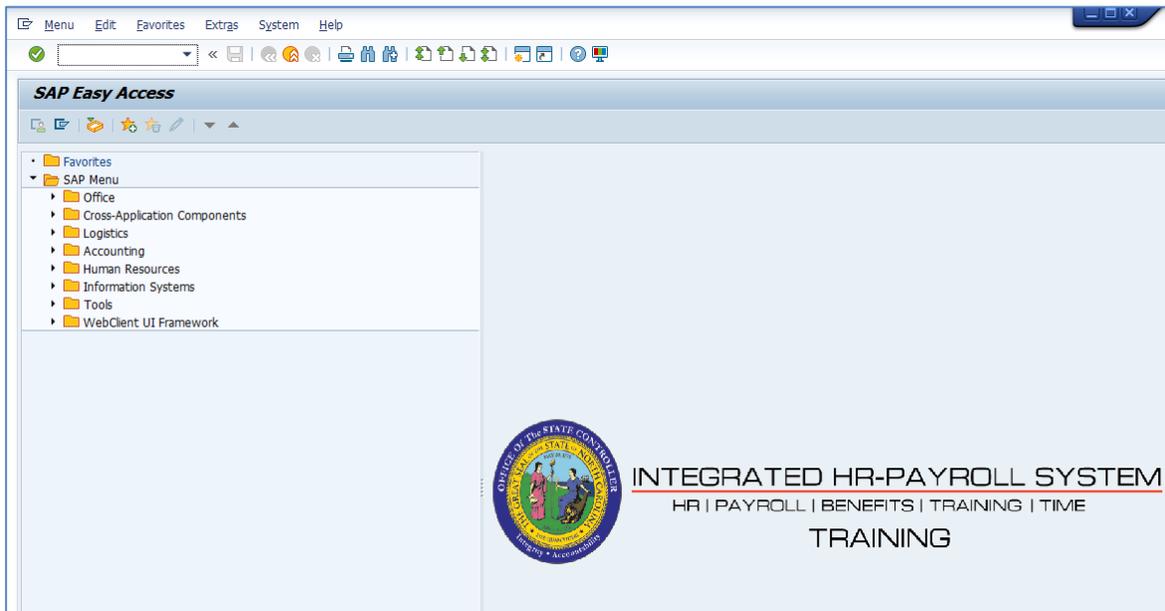
The overview of employee benefits shows the following information:

- 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:

<b>Via Menu Path:</b>	SAP menu >> Human Resources >> Personnel Management >> Benefits >> HRBEN0006 - Participation Overview  <i><b>NOTE:</b> Your menu path may contain this custom transaction code depending on your security roles.</i>
<b>Via Transaction Code:</b>	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. <b>Example:</b> HRBEN0006

2. Click the **Enter**  button.

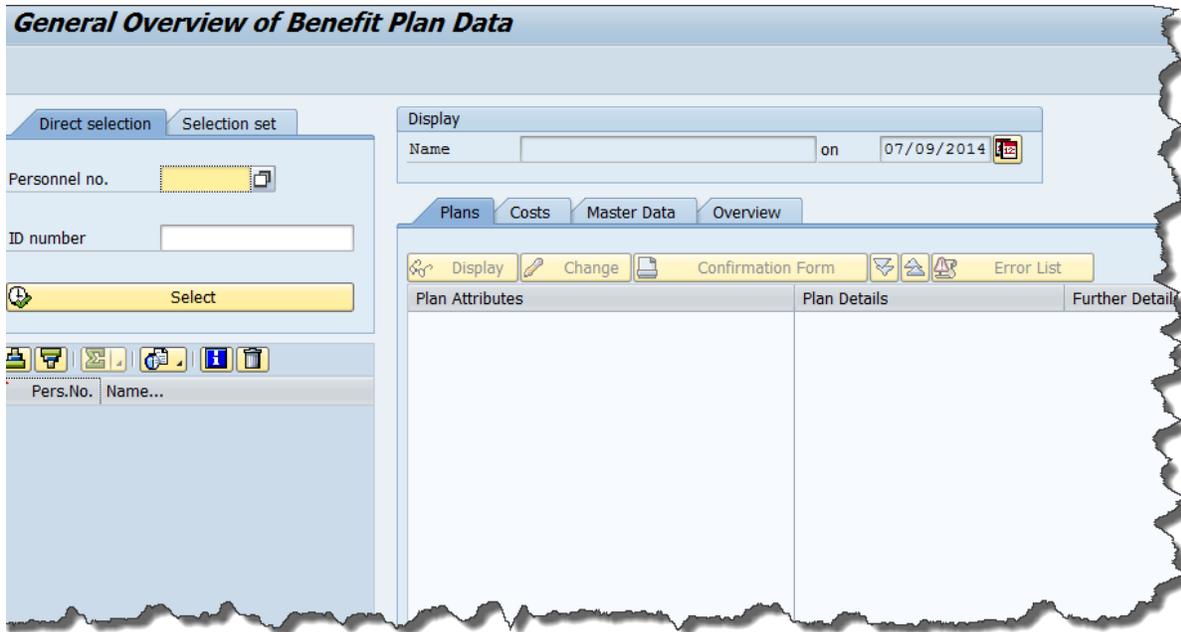
 **Information**

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.  <b>Example: 80001036</b>

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

Pers.No. Name...  
80001036 Jean Leach

Display  
Name: Jean Leach on 07/09/2014

Plans | **Costs** | Master Data | Overview

Display | Change | Confirmation Form | Error List

Plan Attributes	Plan Details	Further Details
▶ NC Flex Cancer Insurance	01/01/2013 - 12/31/9999	
▶ NC Flex Critical Illness Plan	01/01/2014 - 12/31/9999	
▶ NC Flex Dental Plan	06/01/2008 - 12/31/9999	
▶ Consumer-Directed 85/15 Plan	01/01/2014 - 12/31/9999	
▶ NC Flex Vision Plan	01/01/2014 - 12/31/9999	
▶ NC Flex Core AD&D Insurance	01/01/2014 - 12/31/9999	
▶ NC Flex AD&D Insurance	11/16/2012 - 12/31/9999	
▶ NC Flex Life Insurance	01/01/2014 - 12/31/9999	
▶ Child(ren) Life Insurance	01/01/2014 - 12/31/9999	
▶ TSERS - Retirement Plan	01/01/2008 - 12/31/9999	
▶ NC Flex Dependent Care FSA	01/01/2014 - 12/31/9999	
▶ NC Flex Health Care FSA	01/01/2014 - 12/31/9999	
▶ Health Assmnt Incentive 85/15	01/01/2014 - 12/31/9999	
▶ PCP Wellness Incentive 85/15	01/01/2014 - 12/31/9999	
▶ NonSmoker Incentive 85/15	01/01/2014 - 12/31/9999	

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. [ ]

ID number [ ]

Select

Pers.No. Name...  
80001036 Jean Leach

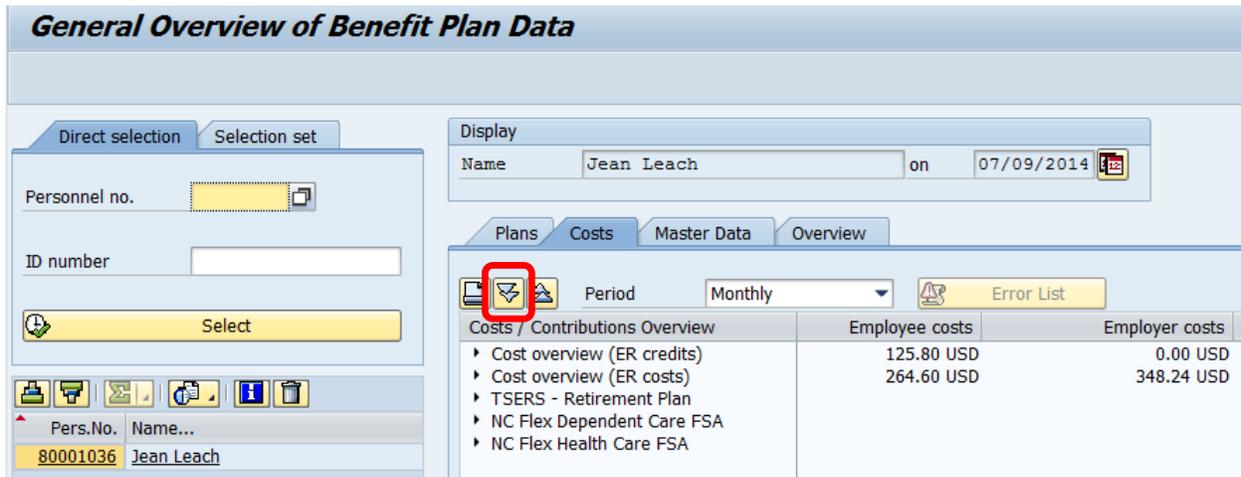
Display  
Name: Jean Leach on 07/09/2014

Plans | **Costs** | Master Data | Overview

Display | Change | Confirmation Form | Error List

Plan Attributes	Plan Details	Further Details
▼ NC Flex Cancer Insurance	01/01/2013 - 12/31/9999	
• Option	Cancer High Option	
• Dependent coverage	Employee + Family	
• EE pre-tax	USD 26.06 Monthly	
▼ Dependents		
• Mary Leach	01/01/2013 - 12/31/9999	Legal Dependent
▼ NC Flex Critical Illness Plan	01/01/2014 - 12/31/9999	
• Option	Critical Illness \$15k Coverage	
• Dependent coverage	Employee Only	
• EE pre-tax	USD 13.00 Monthly	
▼ NC Flex Dental Plan	06/01/2008 - 12/31/9999	
• Option	Dental High Option	
• Dependent coverage	Employee + One Child	
• EE pre-tax	USD 71.96 Monthly	
▼ Dependents		
• Mary Leach	06/01/2008 - 12/31/9999	Legal Dependent
▼ Consumer-Directed 85/15 Plan	01/01/2014 - 12/31/9999	
• Option	Consumer-Directed 85/15 Plan	
• Dependent coverage	Employee+Child(ren)	
• EE pre-tax	USD 224.60 Monthly	
• ER costs	USD 348.24 Monthly	
▼ Dependents		
• Mary Leach	01/01/2014 - 12/31/9999	Legal Dependent
▼ NC Flex Vision Plan	01/01/2014 - 12/31/9999	
• Option	Core Vision	
• Dependent coverage	Employee Only	
▼ NC Flex Core AD&D Insurance	01/01/2014 - 12/31/9999	
• Option	\$10,000 EE Only	
• Coverage amount	USD 10,000.00	
▼ NC Flex AD&D Insurance	11/16/2012 - 12/31/9999	

6. Click the **Costs**  tab button.



**General Overview of Benefit Plan Data**

Direct selection Selection set

Personnel no.

ID number

Select

Pers.No. Name...  
80001036 Jean Leach

Display  
Name Jean Leach on 07/09/2014

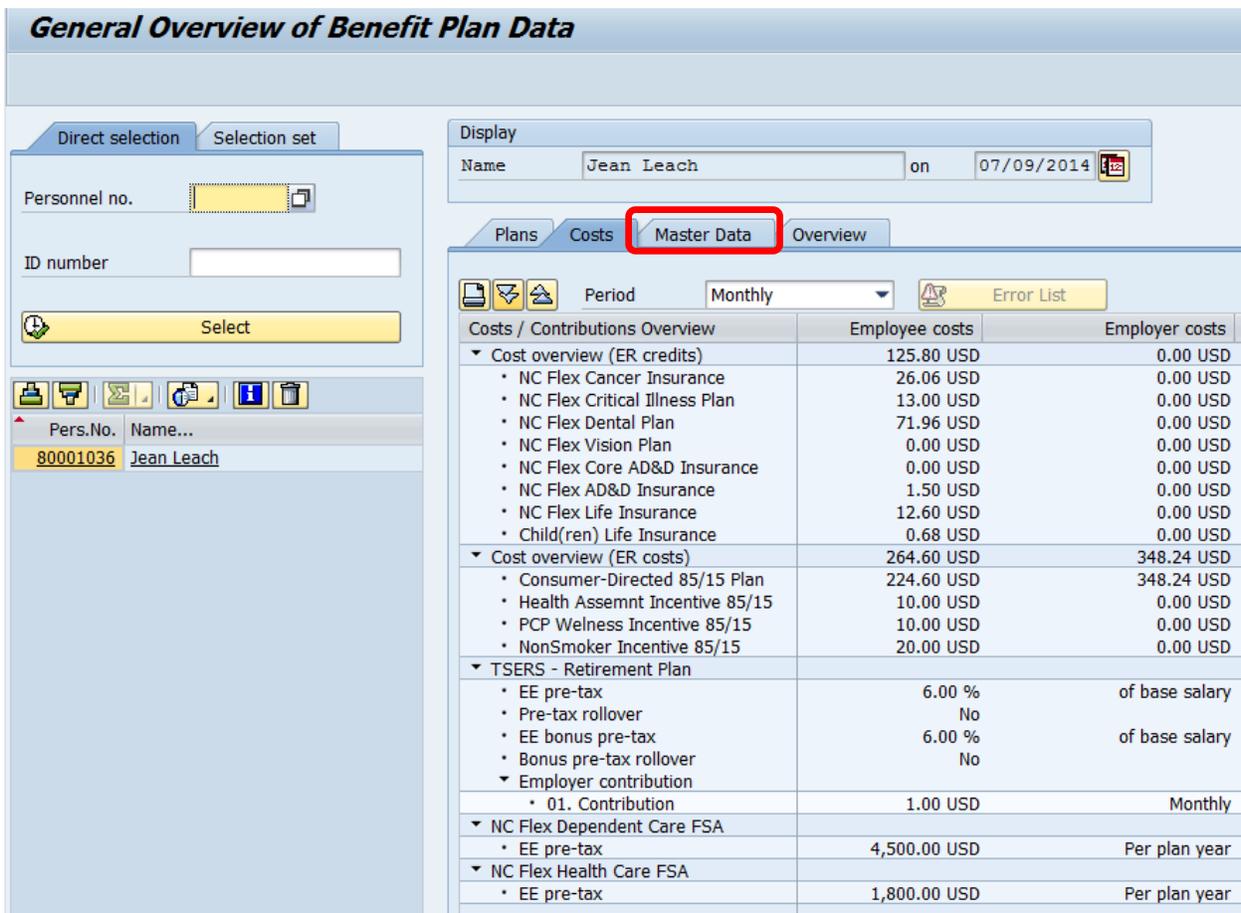
Plans **Costs** Master Data Overview

Period Monthly Error List

Costs / Contributions Overview	Employee costs	Employer costs
Cost overview (ER credits)	125.80 USD	0.00 USD
Cost overview (ER costs)	264.60 USD	348.24 USD
TSERS - Retirement Plan		
NC Flex Dependent Care FSA		
NC Flex Health Care FSA		

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.



**General Overview of Benefit Plan Data**

Direct selection Selection set

Personnel no.

ID number

Select

Pers.No. Name...  
80001036 Jean Leach

Display  
Name Jean Leach on 07/09/2014

Plans Costs **Master Data** Overview

Period Monthly Error List

Costs / Contributions Overview	Employee costs	Employer costs
Cost overview (ER credits)	125.80 USD	0.00 USD
NC Flex Cancer Insurance	26.06 USD	0.00 USD
NC Flex Critical Illness Plan	13.00 USD	0.00 USD
NC Flex Dental Plan	71.96 USD	0.00 USD
NC Flex Vision Plan	0.00 USD	0.00 USD
NC Flex Core AD&D Insurance	0.00 USD	0.00 USD
NC Flex AD&D Insurance	1.50 USD	0.00 USD
NC Flex Life Insurance	12.60 USD	0.00 USD
Child(ren) Life Insurance	0.68 USD	0.00 USD
Cost overview (ER costs)	264.60 USD	348.24 USD
Consumer-Directed 85/15 Plan	224.60 USD	348.24 USD
Health Assemnt Incentive 85/15	10.00 USD	0.00 USD
PCP Wellness Incentive 85/15	10.00 USD	0.00 USD
NonSmoker Incentive 85/15	20.00 USD	0.00 USD
TSERS - Retirement Plan		
EE pre-tax	6.00 %	of base salary
Pre-tax rollover	No	
EE bonus pre-tax	6.00 %	of base salary
Bonus pre-tax rollover	No	
Employer contribution		
01. Contribution	1.00 USD	Monthly
NC Flex Dependent Care FSA		
EE pre-tax	4,500.00 USD	Per plan year
NC Flex Health Care FSA		
EE pre-tax	1,800.00 USD	Per plan year

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

**General Overview of Benefit Plan Data**

Direct selection Selection set

Personnel no.

ID number

Select

Display

Name  on

Plans Costs **Master Data** Overview

Maintain HR Master Data Error List

**Personal Data**

Personnel Number  Entry Date

ID  Date of Birth

**General Benefits Information**

Benefit area  State of NC

1st Program Grouping  Full Benefits Elg

2nd Program Grouping  Reg State Employees

**Organizational Data**

Personnel area  Cultural Resources

Personnel subarea  7day Norm

Employee group  SPA Employees

Employee subgroup  FT N-FLSAOT Perm

Payroll area  NC Monthly

**Family/Related Persons**

Name	Dep./ben. type
Mary Leach	Legal Dependent

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.

9. Click the **Overview** Overview tab button.

Plan types	2013												2014												2015		
	Jul '13	Aug '13	Sep '13	Oct '13	Nov '13	Dec '13	Jan '14	Feb '14	Mar '14	Apr '14	May '14	Jun '14	Jul '14	Aug '14	Sep '14	Oct '14	Nov '14	Dec '14	Jan '15	Feb '15	Mar '15						
Cancer Plan																											
Critical Plan																											
Dental																											
Medical																											
Vision																											
Core AD&D																											
AD&D																											
Employee Life																											
Child Life Ins																											
Retirement Plan																											
Dependent Care																											
Health Care FSA																											
HlthAssmnt Cred																											
PCP Credit																											
NonSmoker Cred																											

The Overview tab provides the time-frame of enrollment for each benefit plan.

10. Click the **Plans**  tab button.

Display

Name: Jean Leach on 07/09/2014

Plans Costs Master Data Overview

Display Change Confirmation Form Error List

Plan Attributes	Plan Details	Further Details
▼ NC Flex Cancer Insurance	01/01/2013 - 12/31/9999	
• Option	Cancer High Option	
• Dependent coverage	Employee + Family	
• EE pre-tax	USD 26.06 Monthly	
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• Dependent coverage	Employee Only	
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▼ NC Flex Dental Plan	06/01/2008 - 12/31/9999	
• Option	Dental High Option	
• Dependent coverage	Employee + One Child	
• EE pre-tax	USD 71.96 Monthly	
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• Mary Leach	06/01/2008 - 12/31/9999	Legal Dependent
▼ Consumer-Directed 85/15 Plan	01/01/2014 - 12/31/9999	
• Option	Consumer-Directed 85/15 Plan	
• Dependent coverage	Employee+Child(ren)	
• EE pre-tax	USD 224.60 Monthly	
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▼ Dependents		
• Mary Leach	01/01/2014 - 12/31/9999	Legal Dependent
▼ NC Flex Vision Plan	01/01/2014 - 12/31/9999	
• Option	Core Vision	
• Dependent coverage	Employee Only	
▼ NC Flex Core AD&D Insurance	01/01/2014 - 12/31/9999	
• Option	\$10,000 EE Only	
• Coverage amount	USD 10,000.00	
▼ NC Flex AD&D Insurance	11/16/2012 - 12/31/9999	
• Option	\$10k Family	

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

### Display Health Plans (0167)





Personnel No	00001036	Name	Jean Leach
EEGroup	A SPA Employees	PersA	4601 Cultural Resources
EESubgroup	A1 FT N-FLSAOT Perm	Statu	Active
Start	01/01/2013 to 12/31/9999	Chng	11/16/2012 01346009
Plan	CANC NC Flex Cancer Insurance		

**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	EEFY Employee + Family

**Planning Parameters**

Cost Rule Variant	CHFM Cancer High Opt Family Cost
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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.

14. Click the **Back (F3)**  button.
15. Click the **Exit (F3)**  button.

The system task is complete.

### BPP Change Record

Change Date: 9/29/16	Changed by: L Brown
Changes:	<ul style="list-style-type: none"> <li>New BPP format</li> <li>Updated all screen captures due to SAP upgrade to SAPGUI 7.40</li> </ul>