Eligible Employees Participation Report (HRBEN0071)

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

Trigger:

A report is needed to display benefit eligibility participation for one or more employees.

Business Process Procedure Overview:

The relationships infotype (1001) provides the method to attach the position to other objects within the system. The following relationships are currently in use in BEACON:

Tips and Tricks:

This report shows the employees who are eligible for specified benefit plans on a given date.

The report is run for a key date (today's date or another date).

The search can be narrowed using the following parameters:

- Personnel number
- Benefit area
- 1st Program grouping
- 2nd Program grouping
- Benefit plan

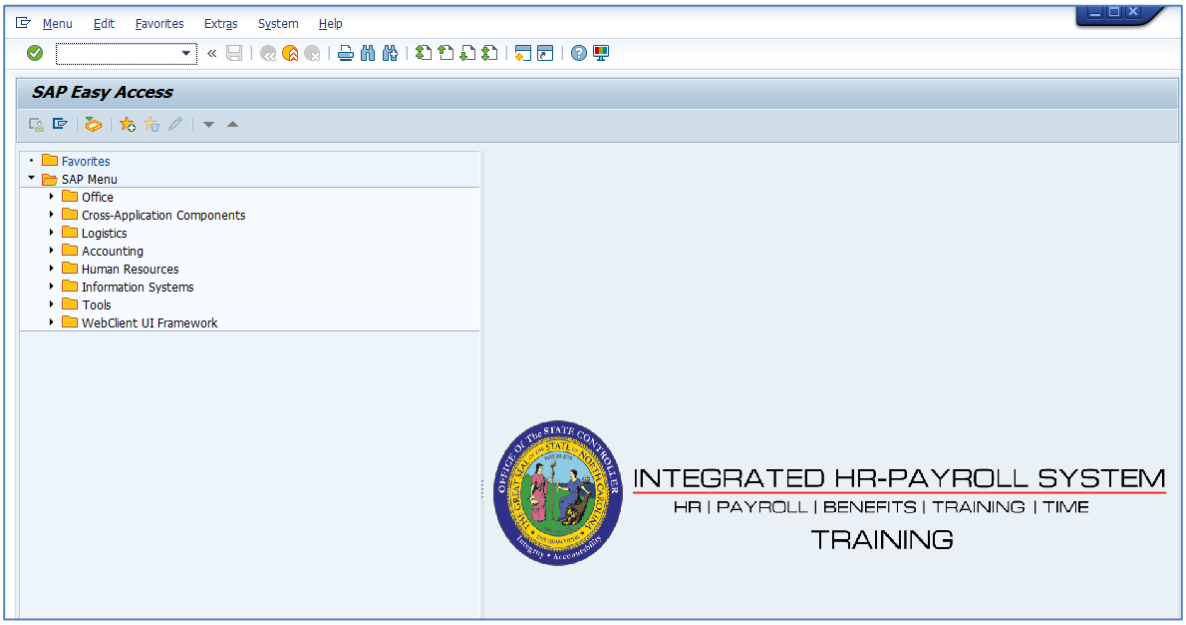
The report lists eligible employees per plan along with the following information:

- The employee's date of entry
- The calculated eligibility date

Access Transaction:

Via Menu Path:	SAP menu >> Human Resources >> Personnel Management >> Benefits >> Info System >> Reports >> Participation >> HRBEN0071 - Eligible Employees 🗁 **NOTE**: *Your menu path may contain this custom transaction code depending on your security roles.*
Via Transaction Code:	HRBEN0071

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**: HRBEN0071

2. Click the **Enter** button.

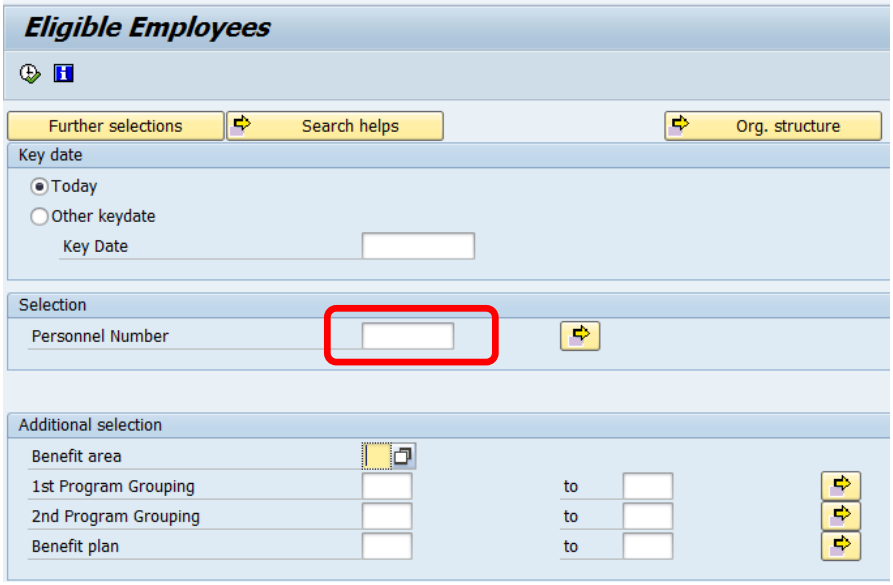
Information

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 **HRBEN0071**.
- 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:

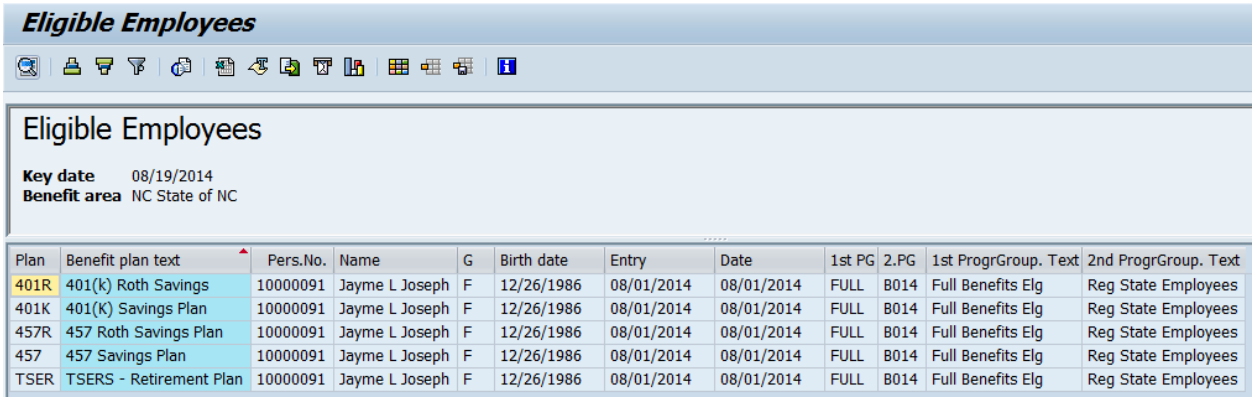
- Choose **Extras > Settings**.
- Place a check next to **Display Technical Names**.
- Click **Enter**.



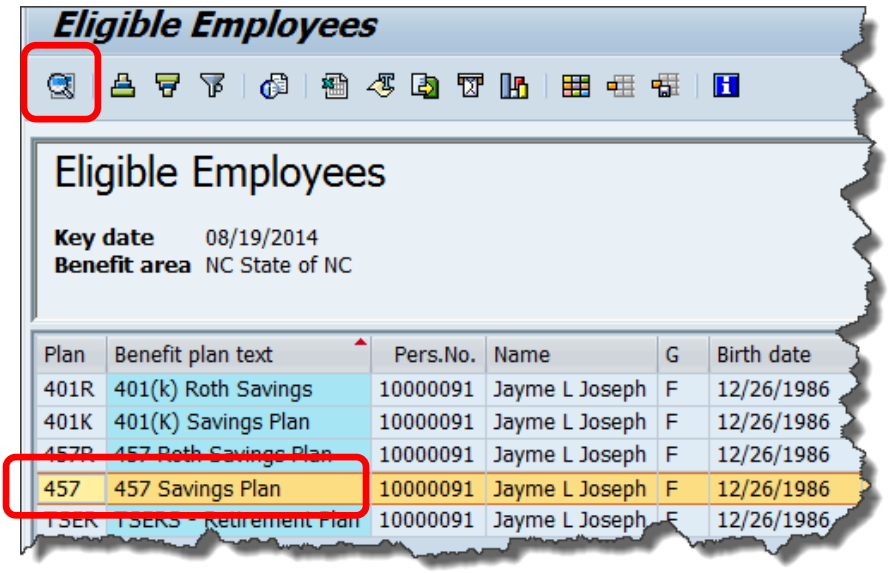
3. Update the following field:

Field Name	Description	Values
Personnel no.	Unique number identifying an individual's master record data in the system	Enter value in Personnel no. **Example:** 10000091

4. Click the **Execute (F8)** button.



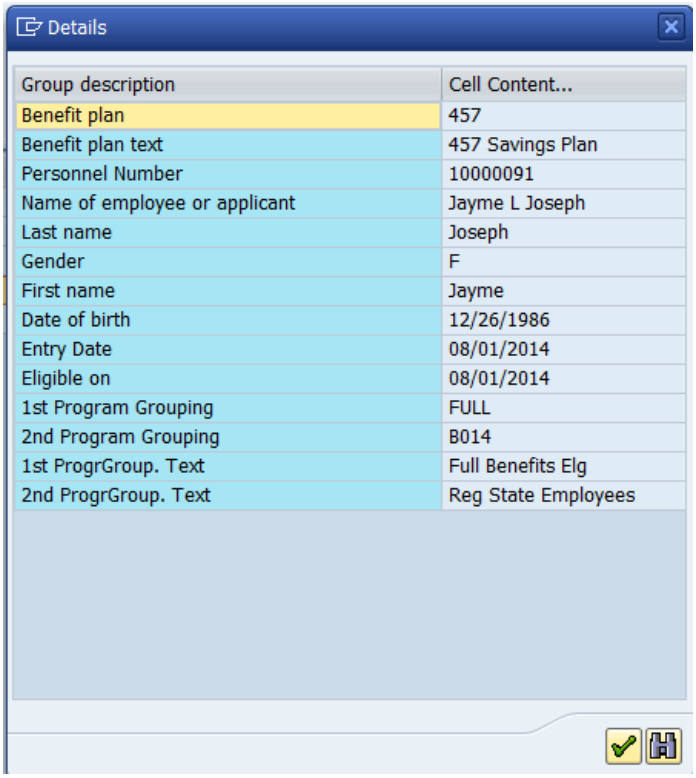
Plan	Benefit plan text	Pers.No.	Name	G	Birth date	Entry	Date	1st PG	2.PG	1st ProgrGroup. Text	2nd ProgrGroup. Text
401R	401(k) Roth Savings	10000091	Jayme L Joseph	F	12/26/1986	08/01/2014	08/01/2014	FULL	B014	Full Benefits Elg	Reg State Employees
401K	401(K) Savings Plan	10000091	Jayme L Joseph	F	12/26/1986	08/01/2014	08/01/2014	FULL	B014	Full Benefits Elg	Reg State Employees
457R	457 Roth Savings Plan	10000091	Jayme L Joseph	F	12/26/1986	08/01/2014	08/01/2014	FULL	B014	Full Benefits Elg	Reg State Employees
457	457 Savings Plan	10000091	Jayme L Joseph	F	12/26/1986	08/01/2014	08/01/2014	FULL	B014	Full Benefits Elg	Reg State Employees
TSER	TSERS - Retirement Plan	10000091	Jayme L Joseph	F	12/26/1986	08/01/2014	08/01/2014	FULL	B014	Full Benefits Elg	Reg State Employees



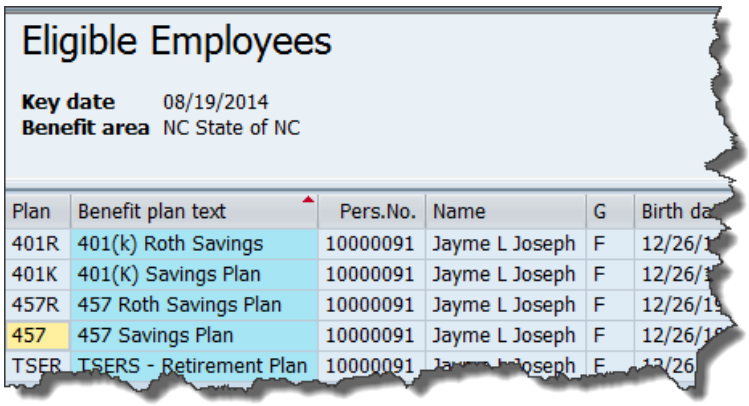
5. Click the 457 Savings Benefit plan text column.

6. Click the Details (Ctrl+Shift+F3) button.

   NOTE: You can choose any of the benefits plan types by highlighting the name to view the details of the plan.

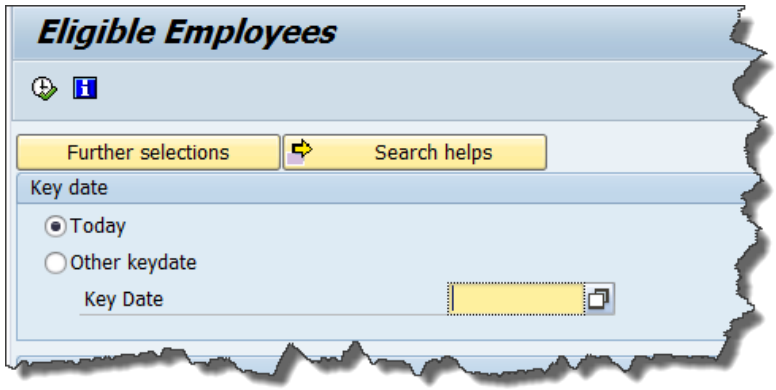


7. Review the data as needed and then close the window by clicking the **Close Window** button.



The typical navigation is available on this report, such as sorting within a column or adding additional columns to view.

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



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

The system task is complete.

Change Log

Change Date: 9/29/16	Changed by: L Brown
Changes:	• New BPP format • Updated all screen captures due to SAP upgrade to SAPGUI 7.40