Chapter 7 Benefits

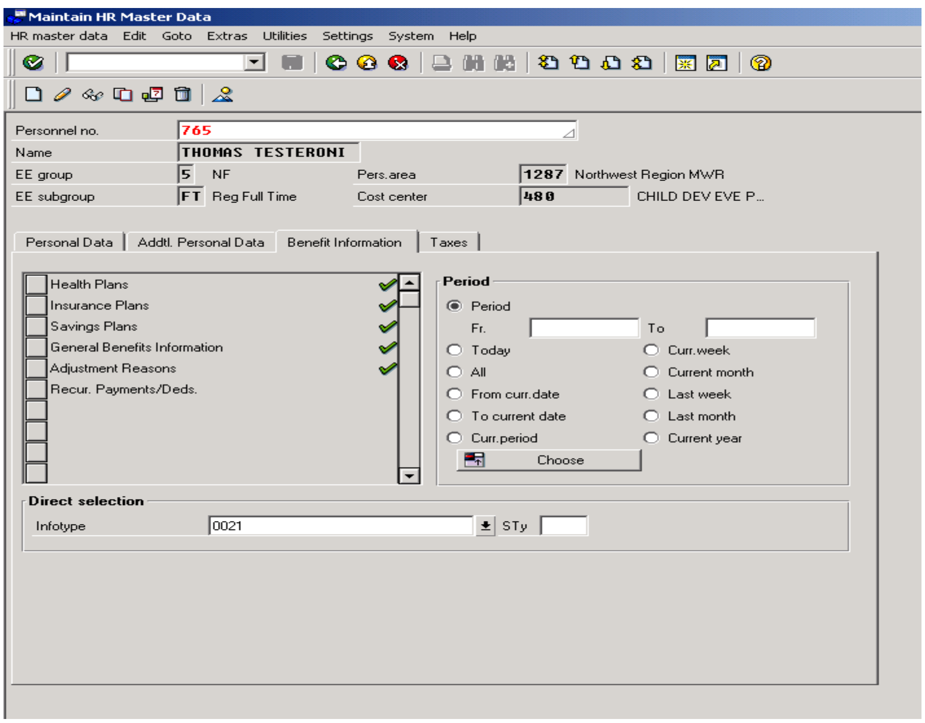
Benefit Enrollment Process

Prior to benefit, enrollment dependents and beneficiaries must be added to the employee. Complete the following steps for this process.

To Add a Dependent or Beneficiary:

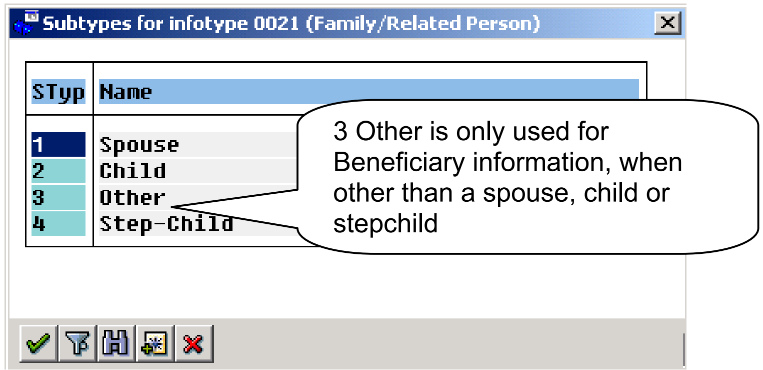
Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > MAINTAIN**

Transaction Code: **PA30**



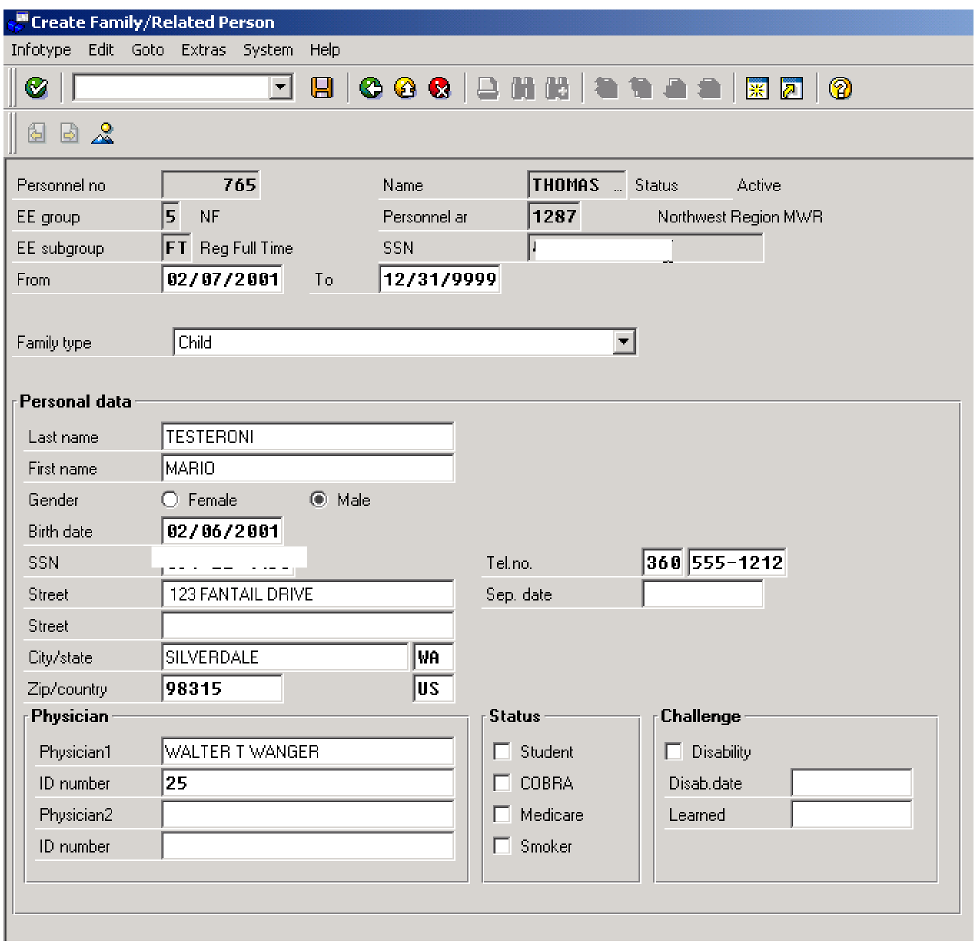
Field Name	Description	R/O/C	User Action/Values
Personnel Number	Personnel number of the employee	R	Enter the personnel number of the employee, if known. Use the dropdown arrow to select in not known.
Infotype	The number of the infotype to be created	R	Enter the Infotype number 0021 into the Direct Selection field or click on Family Related Person.

Click on the Create icon , you will be shown a pop-up window offering choices as to the type of dependent that you wish to add.



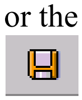
You double click on the selection or choose the subtype (i.e., spouse, child, other, etc.) and click the green check mark. For our example, we are choosing the subtype: Child.

Screen: Infotype 0021 -Create Family/Related Person



The table below will describe the information that we have used to fill out the infotype correctly. In our example, we added a child as a dependent.

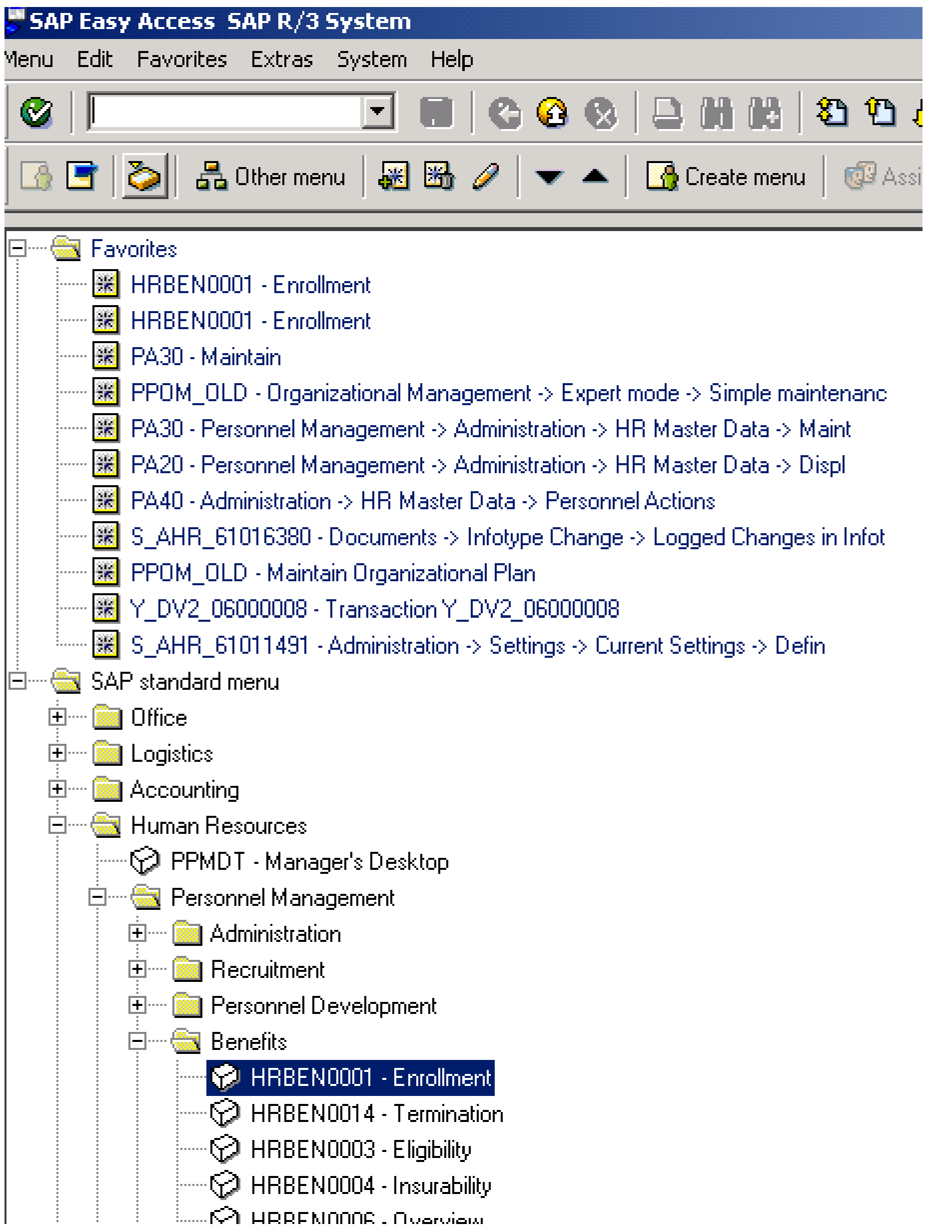
Field Name	Description	R/O/C	User Action/Values
From date	Effective date of the benefit	R	Enter the effective date. Leave the "To Date" as the default 12/31/9999
Family type	Relationship	R	This will default based on the subtype chosen on the pop-up window.
Last Name	Last name of the dependent or beneficiary	R	Enter the last name of the dependent.
First Name	First name of the dependent or beneficiary	R	Enter the first name of the dependent.
Gender	Male or Female	R	Check the radio button next to the correct choice.
Birth date	Birth date of the dependent	R	Enter the birth date of the dependent. A beneficiary birth date is NOT required.
SSN	Social Security Number	R	Enter the Social Security Number of the dependent or beneficiary.
Street/City/State/ Zip/Country	Permanent Address	R	Enter the address of the dependent or beneficiary.
Physician	The dependent's physician	R	Enter the Primary Care physician of the dependent
ID Number	Physician ID Number	R	Enter the ID number of the physician.
Status	Student	C	Required if dependent is 19 years of age or older and a college student.
Challenge	Whether the dependent is disabled/ handicapped.	C	Check if the dependent is disabled/ handicapped and enter the date of disability.

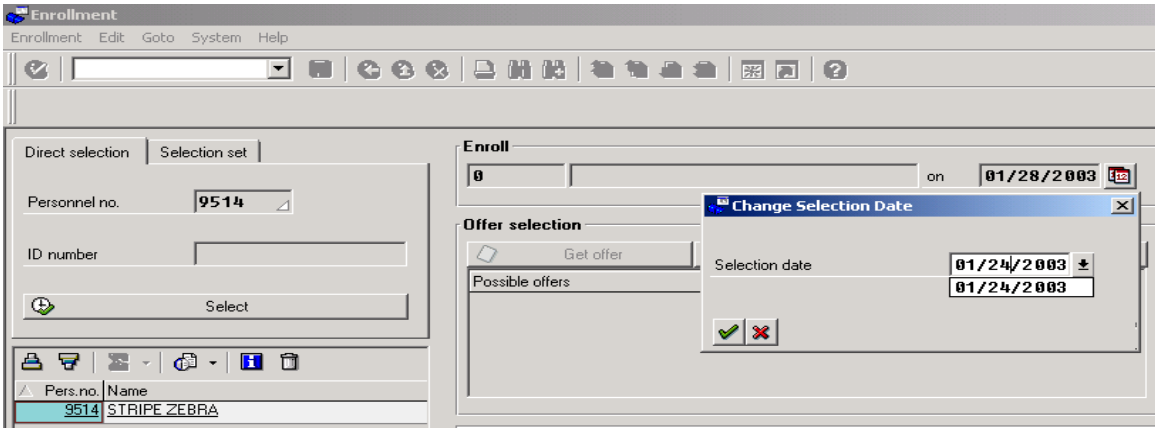
Press the enter key or the green check mark  to verify the accuracy of the entries and click the Save icon  to save the record. Continue adding all family related persons in the same manner or you may use the green arrow  to return to the SAP Easy Access Menu.

Benefit Enrollment

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > ENROLLMENT**

Transaction Code: **HRBEN0001**

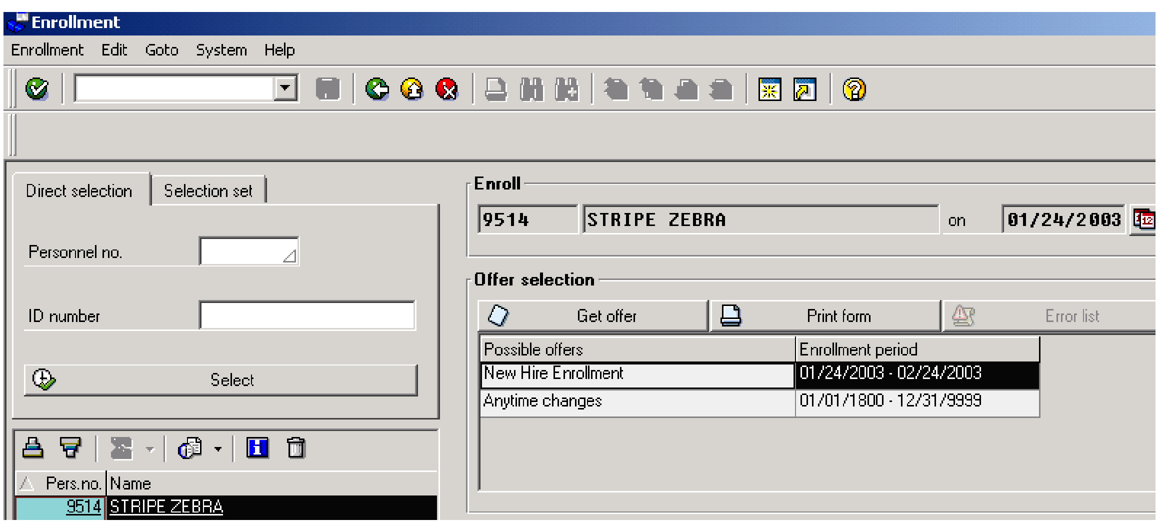




Enter the information for this screen based on the table below.

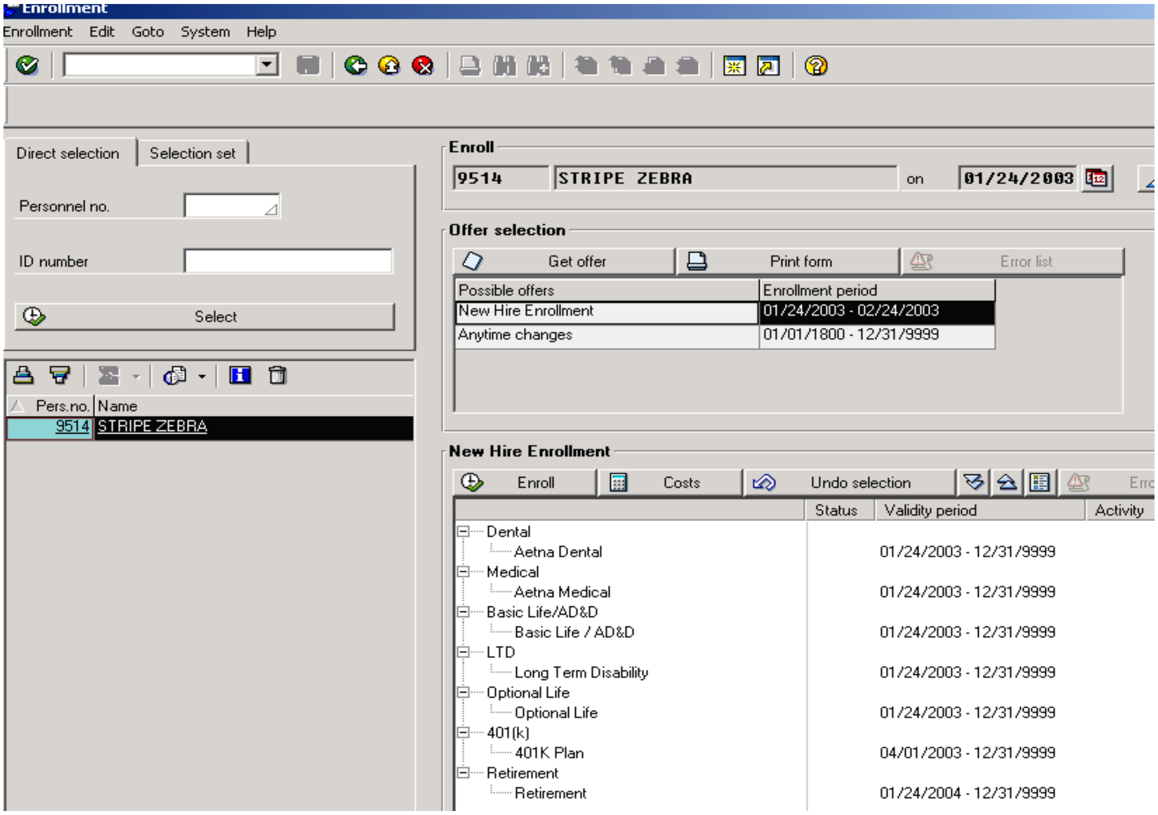
Field Name	Description	R/O/C	User Action/Values
Enroll date	Effective date of benefits	R	Click on the calendar icon and change the Selection Date and click on the green check mark. **This date must be the date the employee signed the forms. Enrollment must be within 31 days of hire date.**
Personnel Number	Employee's Personnel Number	R	Enter the employee's personnel number.

Click the Select icon .



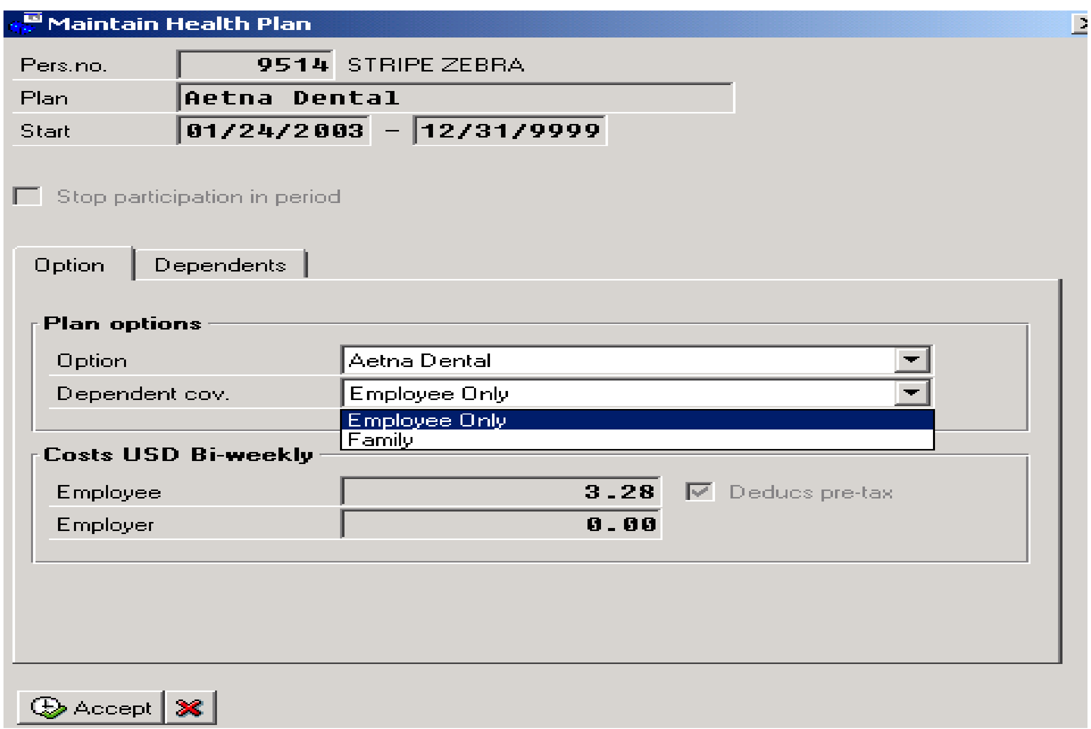
Double click on "New Hire Enrollment".

The following screen will come up.

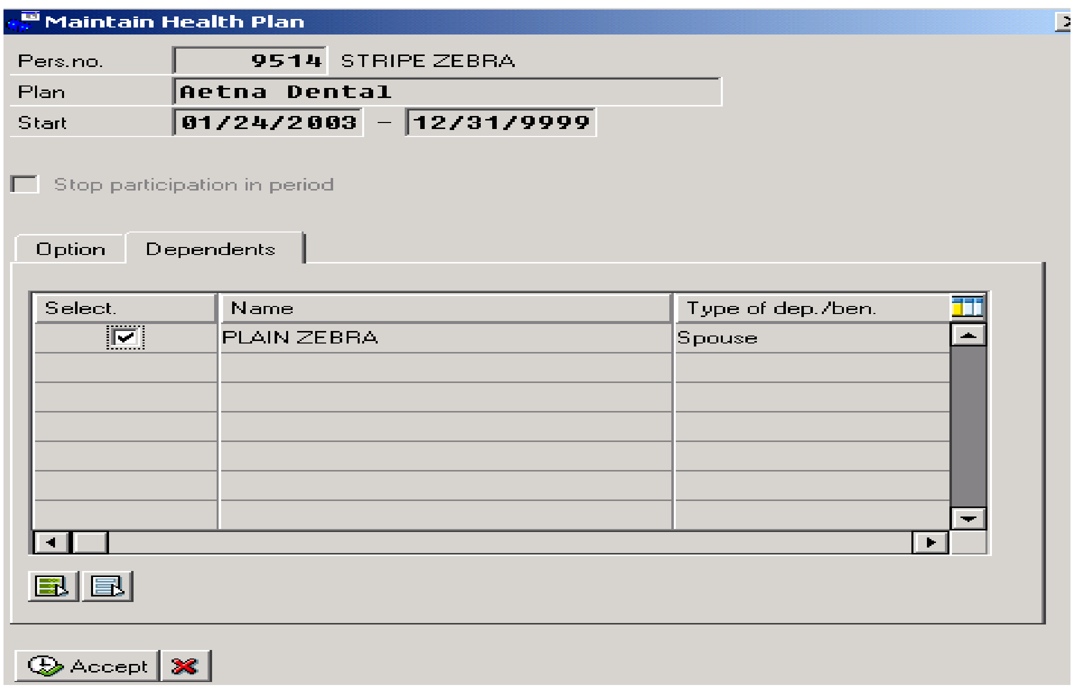


Double click on the benefit name.

The following screen will come up.



Field Name	Description	R/O/C	User Action/Values
Option tab	To select plan option and dependent coverage	R	Option field will default. Click on the dropdown arrow on the field labeled **Dependent cov.,** click on the coverage the employee has selected. The employee cost will automatically appear
Dependent folder tab	Dependents to be covered if applicable	R	Click on the Dependent folder tab to open. Click on the button to the left of each dependent's name. **If there are no dependents, this tab will not appear**. If no dependents are checked, they will not be enrolled through the interface.



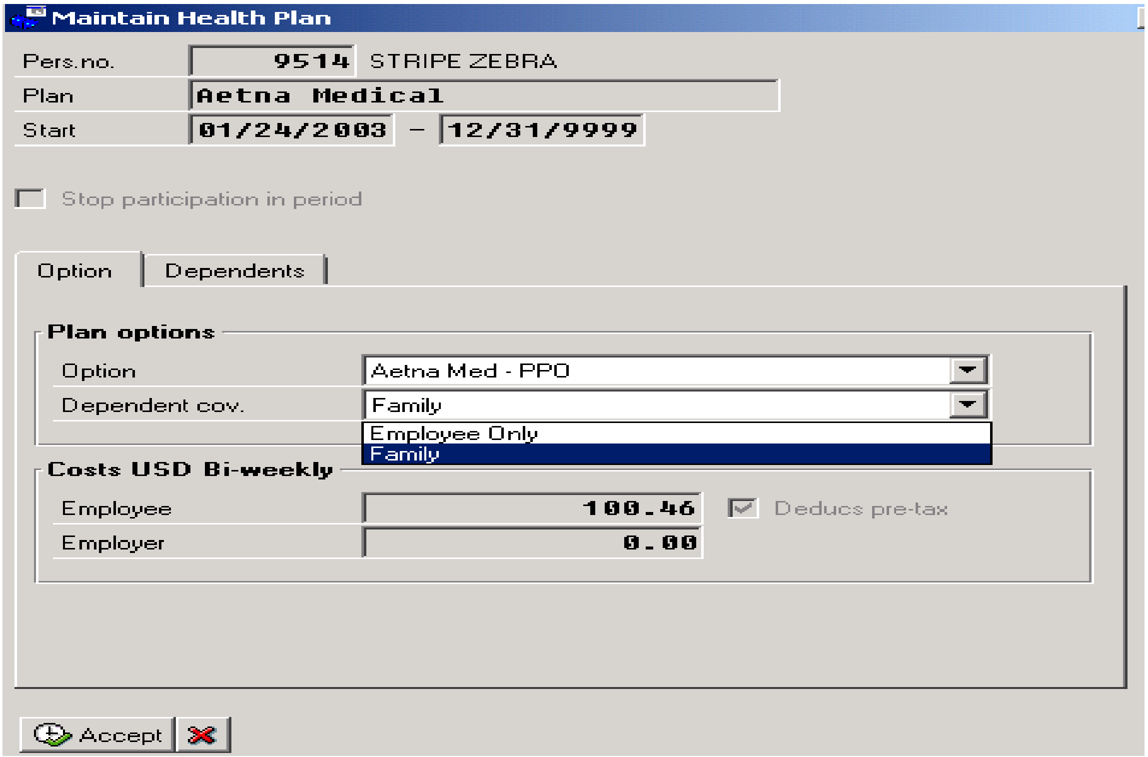
When finished click on the Accept  icon.

You will now be taken back to the New Hire Enrollment screen and a green check shows next to the plan enrolled in.

The procedure for enrolling employees into any of the eligible plans is essentially the same. The first step is to highlight the plan and double click on the line. The next plan to enroll in is medical.

Double click on the medical plan.

The following screen will come up.

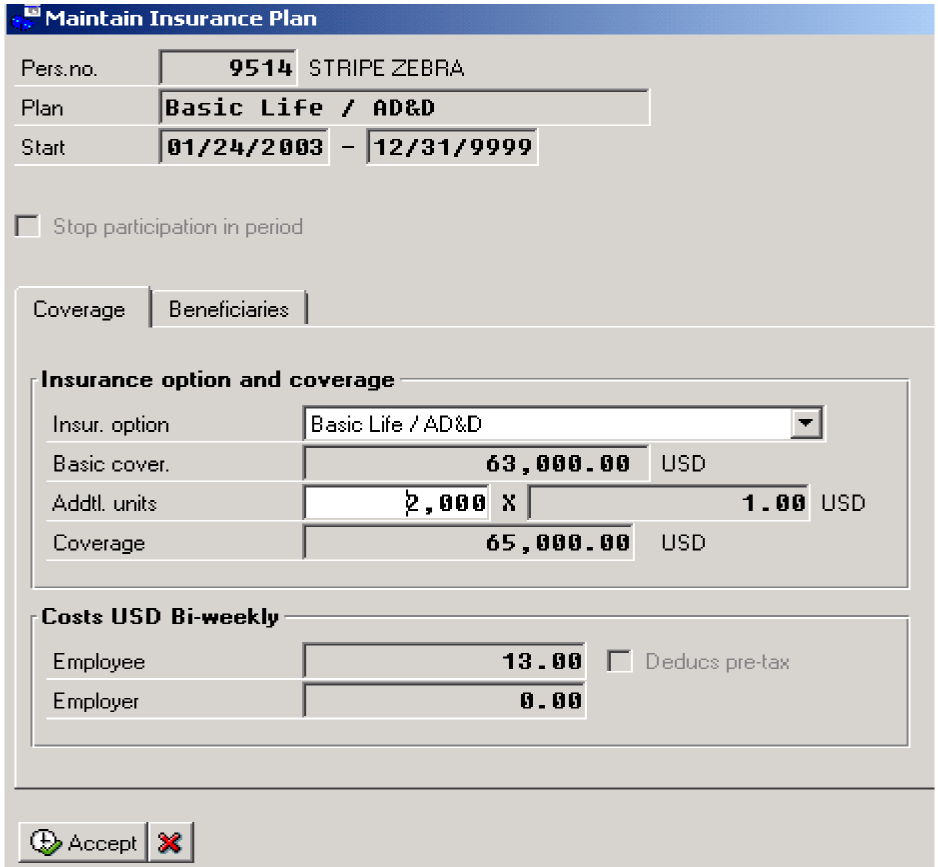


Field Name	Description	R/O/C	User Action/Values
Option tab	To select plan option and dependent coverage	R	Option field will default. Click on the dropdown arrow on the field labeled **Dependent cov.,** click on the coverage the employee has selected. The employee cost will automatically appear
Dependent folder tab	Dependents to be covered if applicable	R	Click on the Dependent folder tab to open. Click on the button to the left of each dependent's name. **If there are no dependents, this tab will not appear**. If no dependents are checked, they will not be enrolled through the interface.

Click the accept icon 

at the bottom of the pop-up enrollment window, the window closes and you will then return to the **New Hire Enrollment** screen.

Highlight and **double click** on the next indented plan in which you are enrolling the employee. We are showing the selection of Basic Life Insurance.



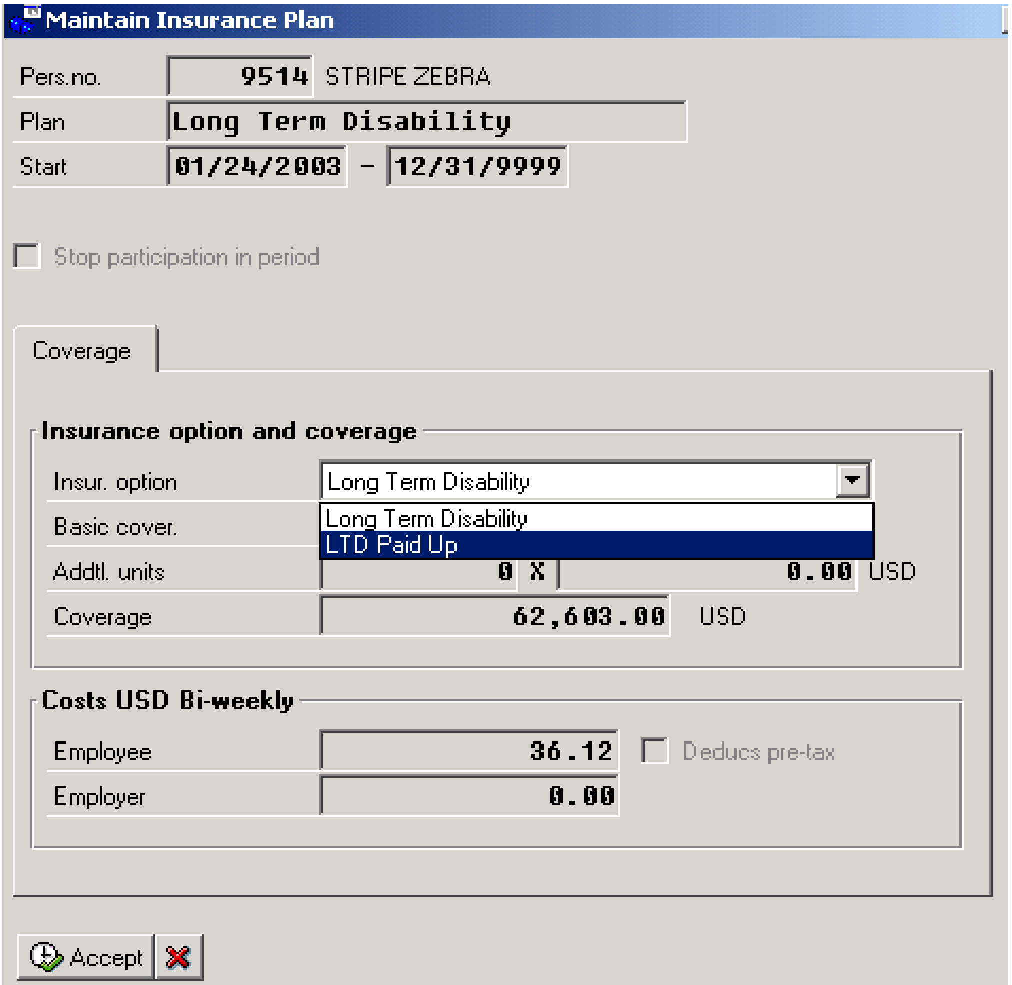
Enter and check the information as specified in the table below:

Field Name	Description	R/O/C	User Action/Values
Coverage tab	To select Basic Life/AD&D coverage	R	Insurance option defaults this plan. **Input 2000** into the "**Addtl units**" field. **This field is configured to accept nothing else**. You will note that the Employee cost will automatically appear.
Beneficiaries tab	Input field	R	Click on the "Beneficiary Folder" and enter the percentage % of the benefit to be assigned each dependent.

Click the accept icon 

on the bottom of the pop-up window, the window will close and you will be returned to the "New Hire Enrollment" screen.
Continue to highlight and double click on each of the indented plans in which you are enrolling an employee and proceed with each benefit enrollment following the same procedures as described above.

For example, for **Long Term Disability Insurance**:

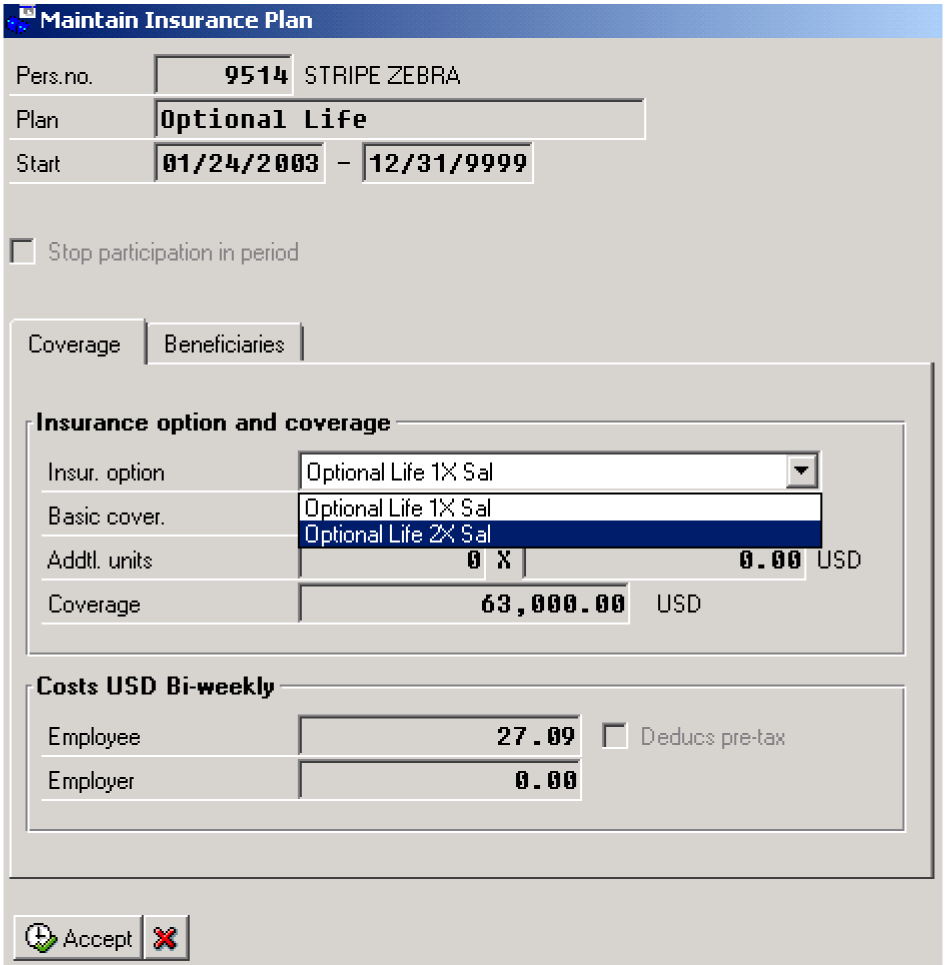


Click on the dropdown arrow on the **Insurance Option** line. Select either Long Term Disability or LTD Paid up.

Note: If choosing the Long-Term Disability option, the employee cost will appear. If choosing the Paid up option, the amount will be zero.

Click the accept icon Accept on the bottom of the pop-up window, the window will close and you will be returned to the "Enrollment Plan Selection" screen.

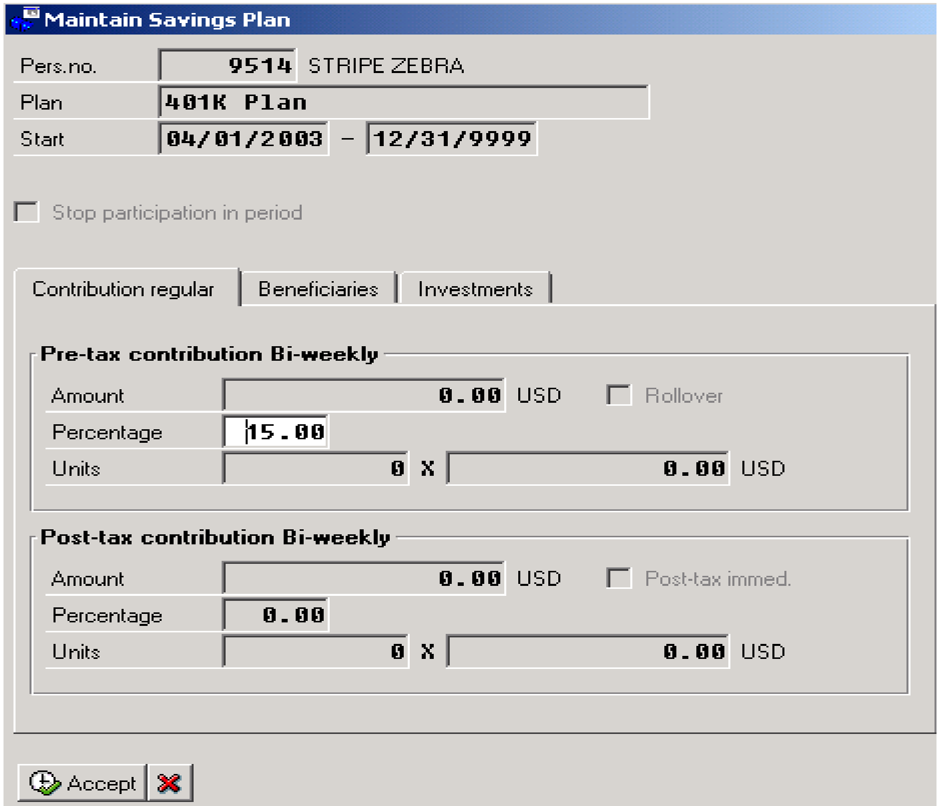
The next example of the procedures is illustrated using the **Optional Life** enrollment.



Select either Optional Life 1X Salary or Optional Life 2X Salary. Click on the "Beneficiary tab" and enter the % of the benefit to be assigned to each beneficiary. Click the Accept 

icon and you will be returned to the "New Hire Enrollment" screen.

The next example of the procedures is illustrated using the **401K Savings Plan** enrollment.

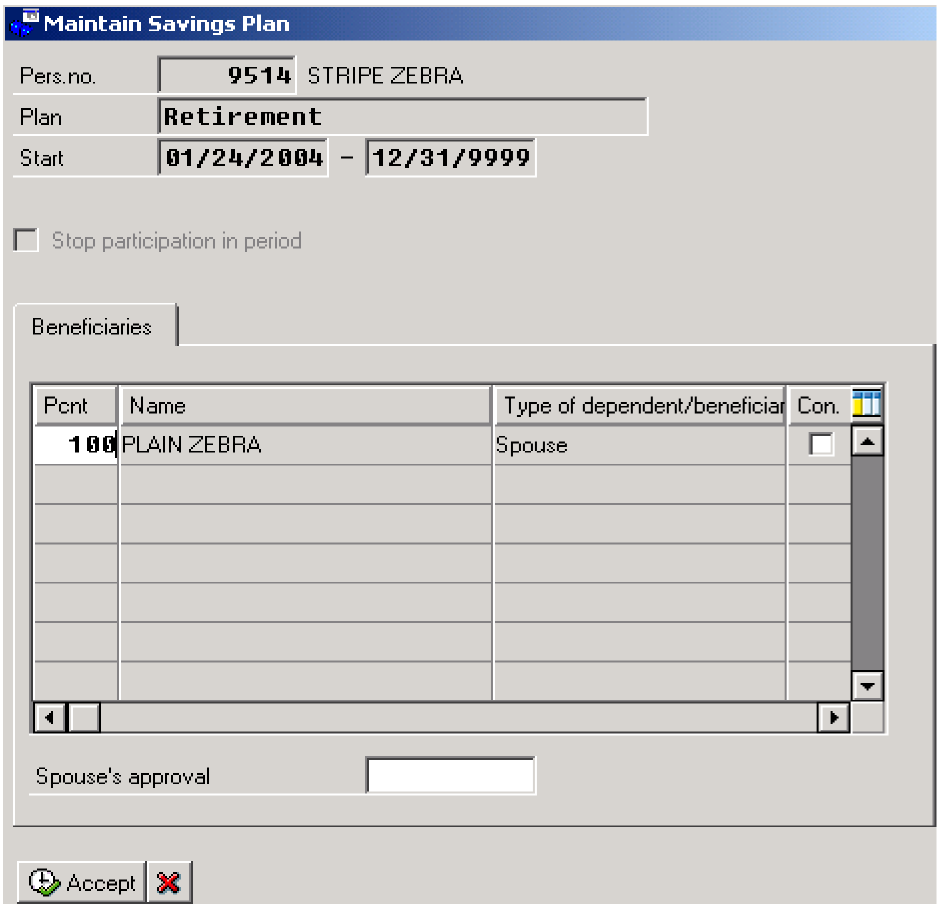


The input for this **Maintain Savings Plan** screen is explained in the table below.

Tab Names	Description	R/O/C	User Action/Values
Contributions Regular	Pre-tax, bi-weekly contribution	R	Percentage. Enter a percentage % amount.
Investments	Input field. **This must be selected for new enrollments only.** Changes will be handled directly by the vendor.	R	Click on the **Investments** tab. Enter the percentage of investments applicable to each plan. Percentages must total 100%
Beneficiaries	Input field. **This must be selected for new enrollments only.** Changes will be handled directly by the vendor.	R	Click on the **Beneficiaries** tab. Enter the % of the benefit to be distributed to each beneficiary. If the beneficiary is someone other than a spouse, the date the spouse signs the 401k consent must be entered in the Spousal Consent field.

Click the Accept icon  on the bottom of the pop-up window, the window will close, and you will be returned to the "New Hire Enrollment" screen.

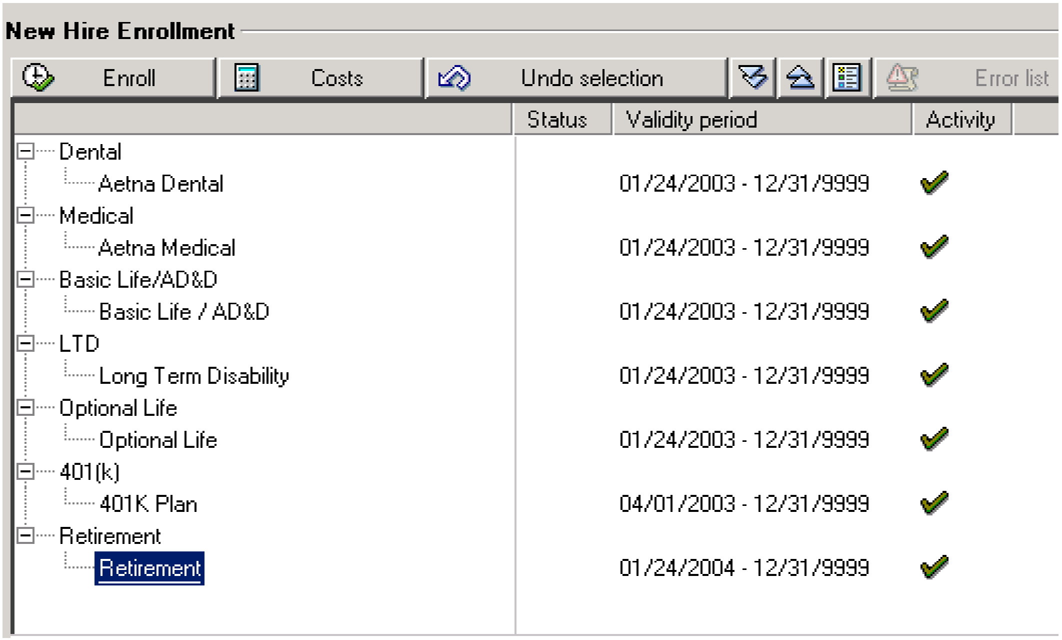
The next example shows the Retirement option.



If the employee is married and the beneficiary is someone other than spouse, you must have written spouse approval. Enter the date the form was signed in the "Spouse's approval" field.

Enter the percentage for each beneficiary, designate a contingent beneficiary by clicking the checkbox (if desired), then click the Accept  icon.

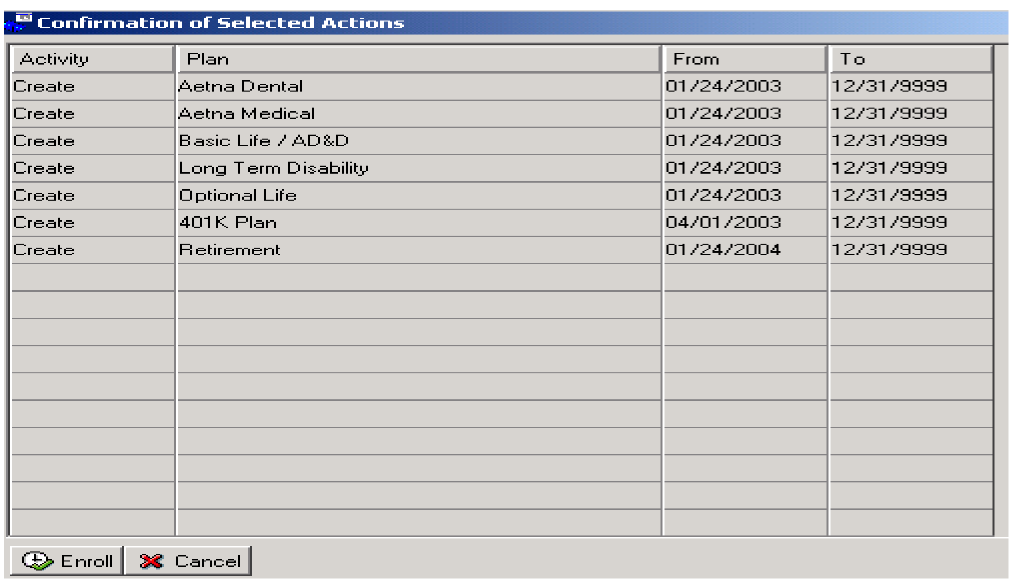
Notice that each time you finished a "**Benefit Enrollment**" and returned to the **"New Hire Enrollment"** screen, a green "check mark" appears to the right of each completed action.



When all the enrollment actions have been completed, click on the Enroll icon 

in the new hire enrollment section.

You will now see a pop-up screen labeled **Confirmation of Selected Actions**. This window will show you a list of all the enrolled benefits and their effective dates.


Confirmation of Selected Actions

Activity	Plan	From	To
Create	Aetna Dental	01/24/2003	12/31/9999
Create	Aetna Medical	01/24/2003	12/31/9999
Create	Basic Life / AD&D	01/24/2003	12/31/9999
Create	Long Term Disability	01/24/2003	12/31/9999
Create	Optional Life	01/24/2003	12/31/9999
Create	401K Plan	04/01/2003	12/31/9999
Create	Retirement	01/24/2004	12/31/9999

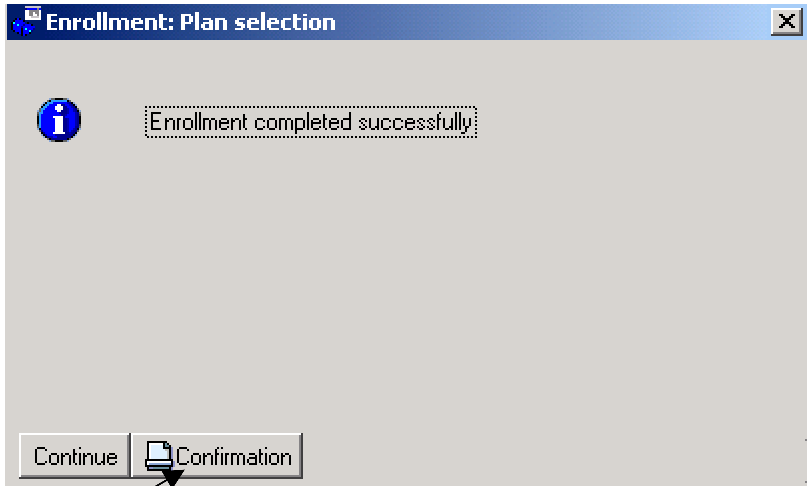
Enroll Cancel

If all the information is correct, click on the Enroll pushbutton 

on the bottom of the pop-up window. If not, click Cancel 

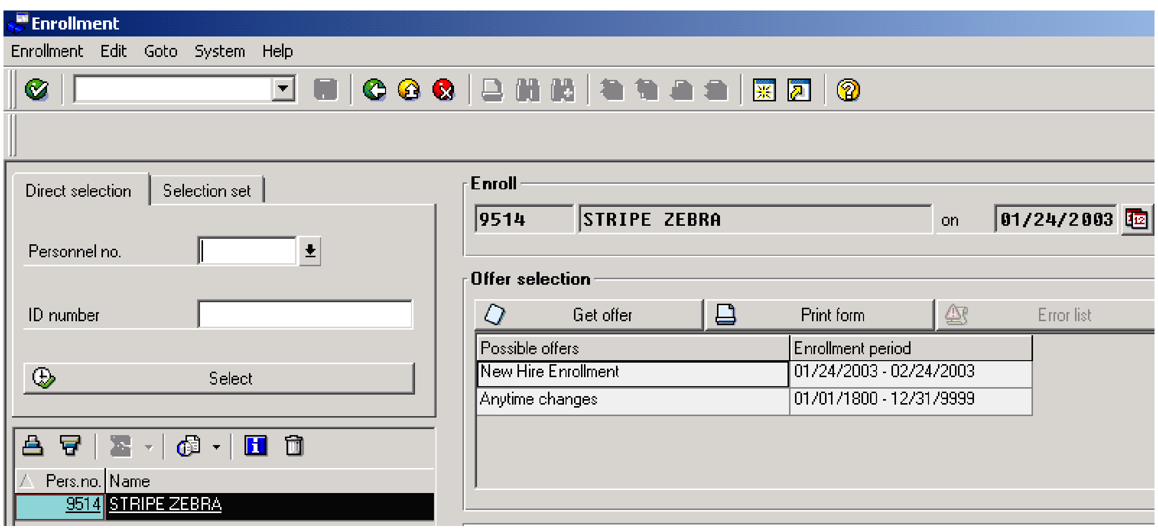
, correct the entry, and click Enroll again.

You will see another popup window verifying that the enrollment has been completed successfully.



At this point, if you are connected to a printer and the employee wants a printed confirmation of all the enrollments, click the Confirmation icon at the bottom of the window or if you are finished, click on the "Continue" button.

You are returned to the **Enrollment** screen



Select the  to return to the **SAP Easy Access Screen**.

Employee Changes to Benefit Coverage

When an employee has married, has a new child, divorces, or has a change of circumstances that necessitate a change in some or all of his/her benefit coverage, the following steps required to make the changes necessary to his/her benefits are:

- **Create the applicable Adjustment Reason.** This option will be used when an employee has a life-changing action of marriage, birth or adoption of a child, divorce or the death of a spouse or dependent. Making changes via the Master Data Menu. **Infotype 0378-Adjustment Reason** must be created using the reason **"family status change".**

- **Create Family Related Persons, if necessary.** If the change involves adding new dependents, add them through **infotype 0021 Family/Related person**. If a dependent is no longer eligible, enter an End Date to their record.

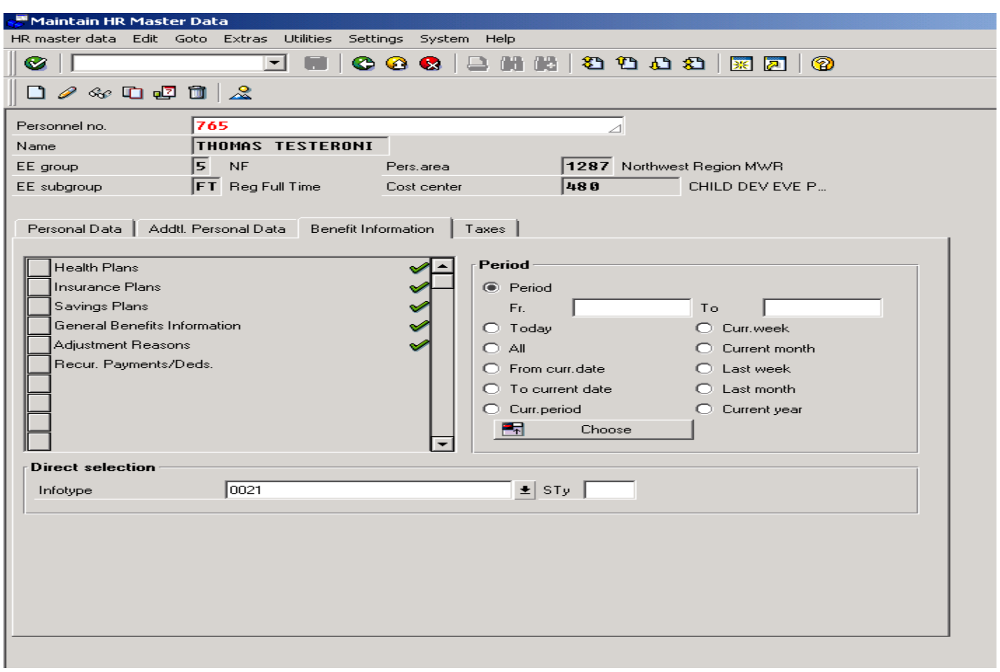
- **Benefit Enrollment**.

Only plans applicable to the life-changing actions may be modified.

To Add a dependent

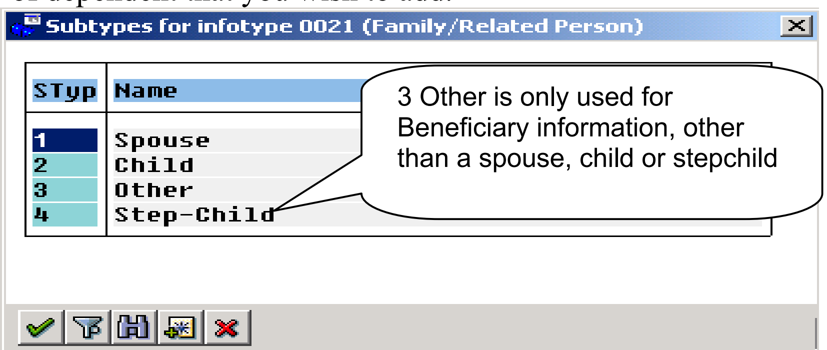
Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > MAINTAIN**

Transaction Code: **PA30**



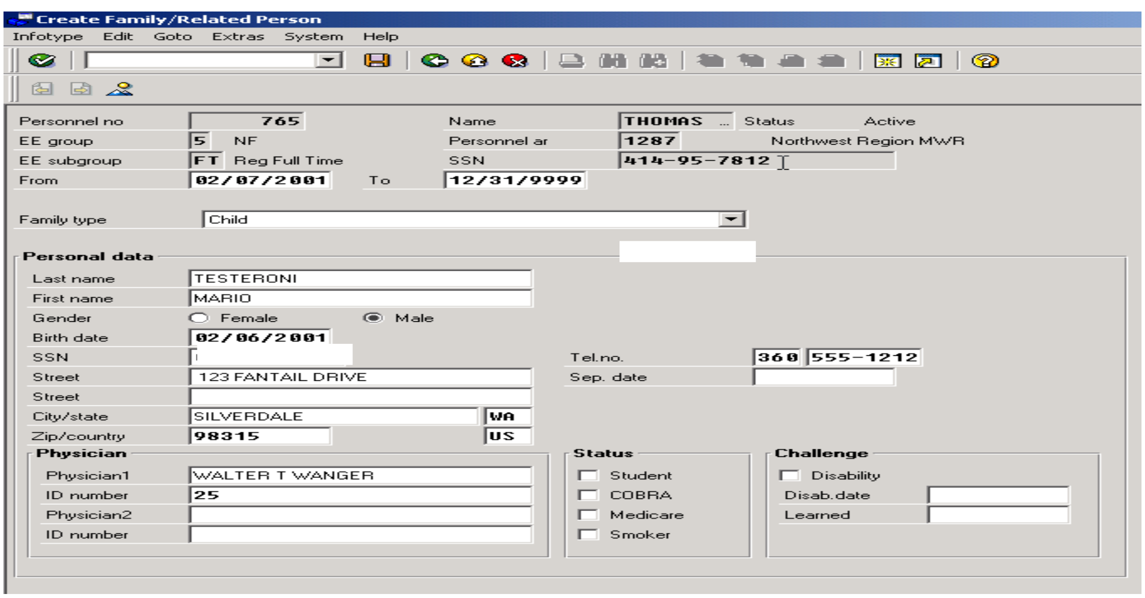
Field Name	Description	R/O/C	User Action/Values
Personnel Number	Personnel number of the employee	R	Enter the personnel number of the employee, if known or use the dropdown arrow to select.
Infotype	The number of the infotype to be created	R	Enter the Infotype number into the Direct Selection field or click on Family Related Person. Enter infotype number 0021 – Family/Related Person.

After clicking the Create icon , you will be shown a pop-up window offering choices as to the type of dependent that you wish to add.



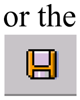
You double click on the selection or choose the subtype (i.e., spouse, child, other, etc.) and click the green check mark. For our example, we are choosing the subtype: Child.

<u>Screen: Infotype 0021 -Create Family/Related Person</u>



The table below will describe the information that we have used to fill out the infotype correctly. In our example, we added a child as a dependent.

Field Name	Description	R/O/C	User Action/Values
From date	Effective date of the benefit	R	Enter the effective date. Leave the "To Date" as the default 12/31/9999
Family type	Relationship	R	This will default based on the subtype chosen on the pop-up window.
Last Name	Last name of the dependent or beneficiary	R	Enter the last name of the dependent
First Name	First name of the dependent or beneficiary	R	Enter the first name of the dependent
Gender	Male or Female	R	Check the radio button next to the correct choice
Birth date	Birth date of the dependent	R	Enter the birth date of the dependent. A beneficiary birth date is NOT required.
SSN	Social Security Number	R	Enter the Social Security Number of the dependent or beneficiary.
Street/City/State/ Zip/Country	Permanent Address	R	Enter the address of the dependent or beneficiary
Physician	The dependent's physician	R	Enter the Primary Care physician of the dependent
ID Number	Physician ID Number	R	Enter the ID number of the physician.
Status	Student	C	Required if dependent is 19 years of age or older and a college student.
Challenge	Whether the dependent is disabled/ handicapped.	C	Check if the dependent is disabled/ handicapped and enter the date of disability.

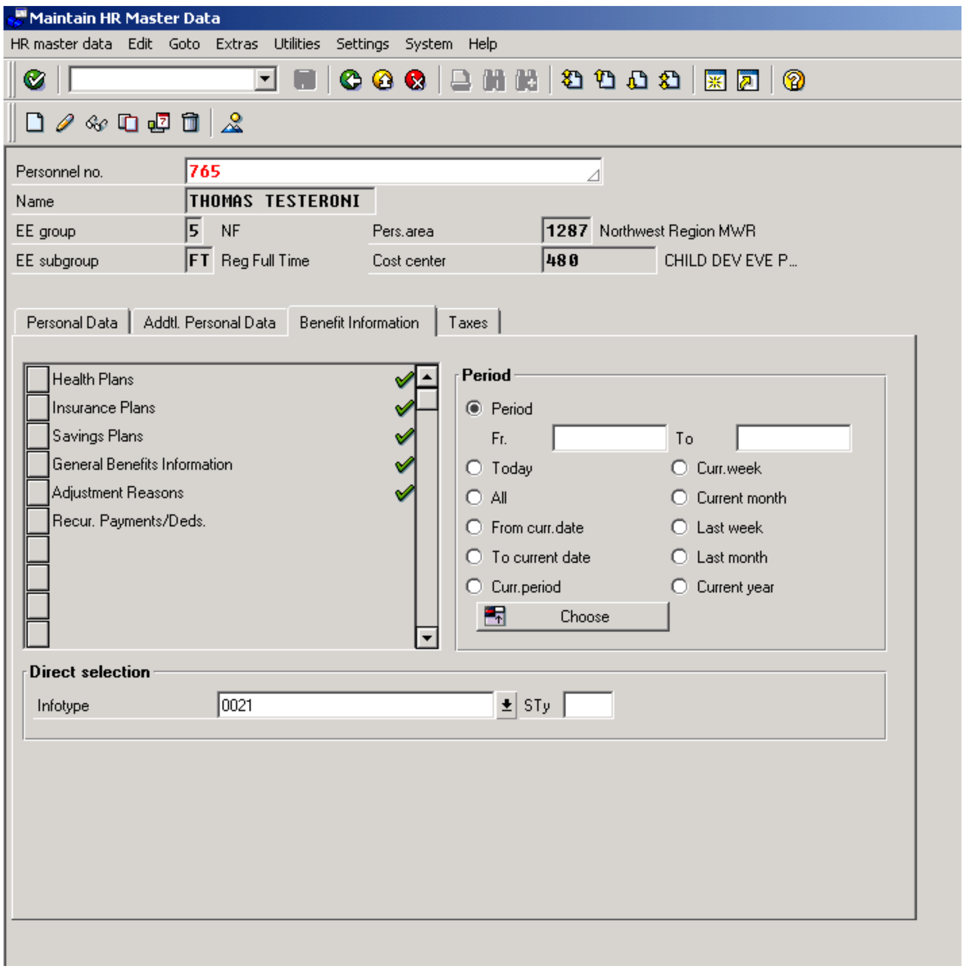
Press the enter key or the green check mark  to verify the accuracy of the entries and click the Save icon  to save the record. Continue adding all family related persons in the same manner or you may use the green arrow  to return to the SAP Easy Access Menu.

To Change dependent information:

This option will be used when an employee has a life-changing action (e.g., divorce, death of a dependent, over-age dependent, etc.).

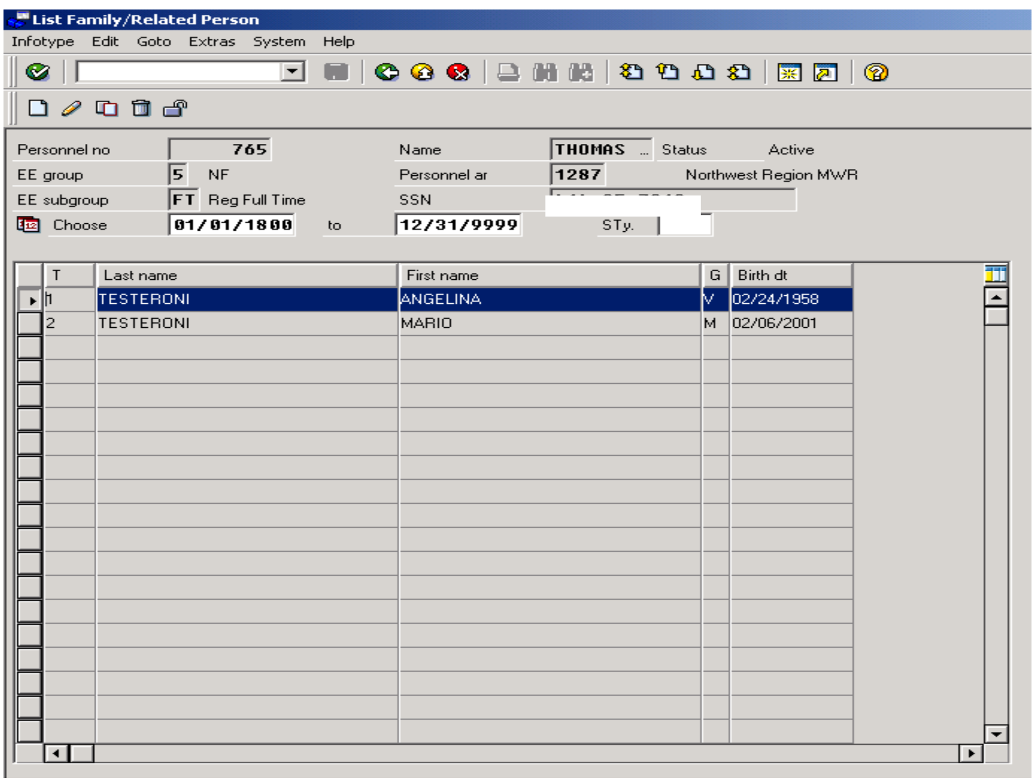
Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > MAINTAIN**

Transaction Code: **PA30**



Field Name	Description	R/O/C	User Action/Values
Personnel Number	Personnel number of the employee	R	Enter the personnel number of the employee, if known. Use the dropdown arrow to select if not known.
Infotype	The number of the infotype to be created	R	Enter the Infotype number into the Direct Selection field or click on Family Related Person. In our example we are entering infotype number 0021 – Family/Related Person. OR you may also click on the box next to the Action Type line labeled Family/Related Person.

Click on the document Overview icon . This accesses the **List Family Related Person** screen as shown on the next page.

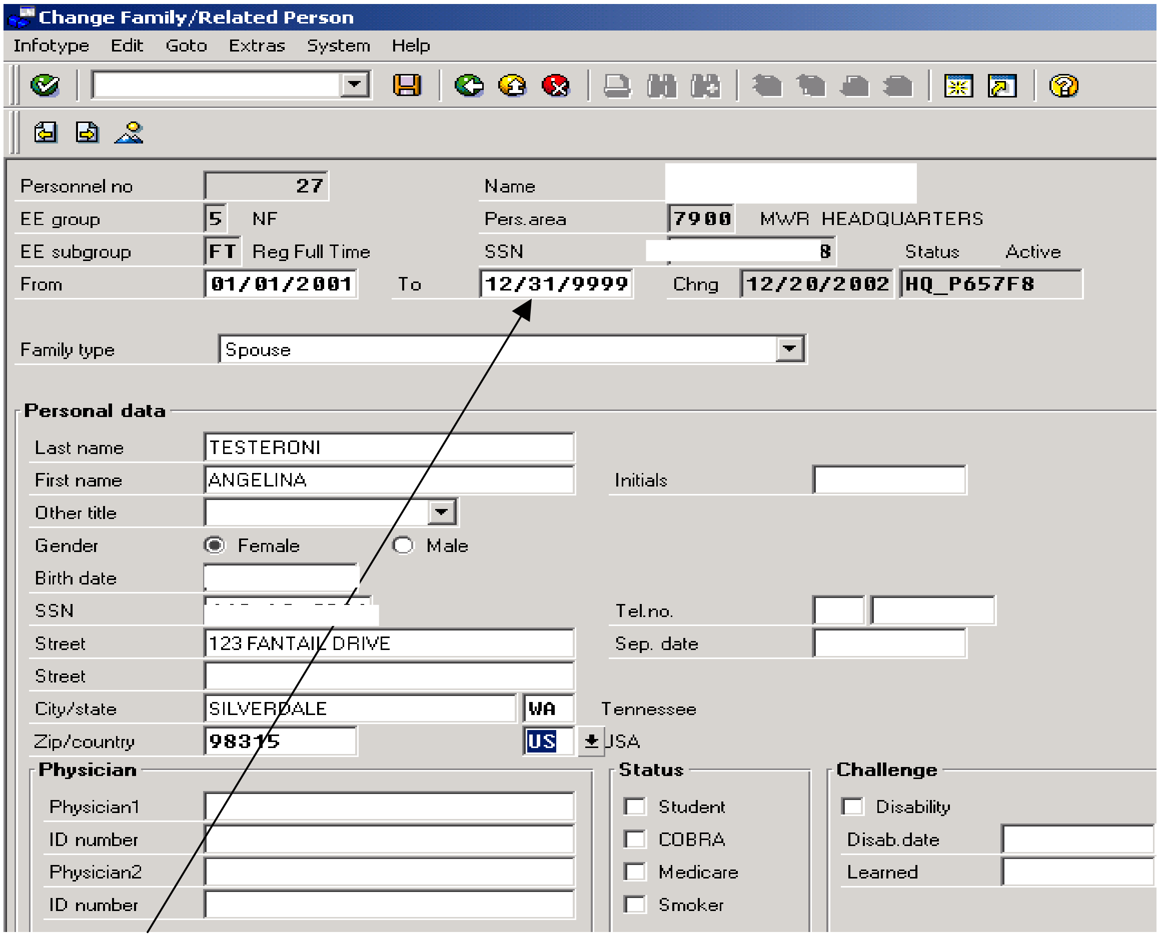


Click the box beside the name of the dependent that you wish to change. In our example, we have checked the box next to the spouse, Angelina Testeroni.

We now click the change icon .

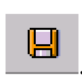
You should now be at the screen titled "**Change Family Related Person**".

Screen: Change Family Related Person



In the "To" field, as shown on the screen, change the field to reflect the date of the change (e.g., the divorce date).

Click the Enter key or the green check mark . You will receive a message stating the date of the record has been delimited. Enter again to accept the change.

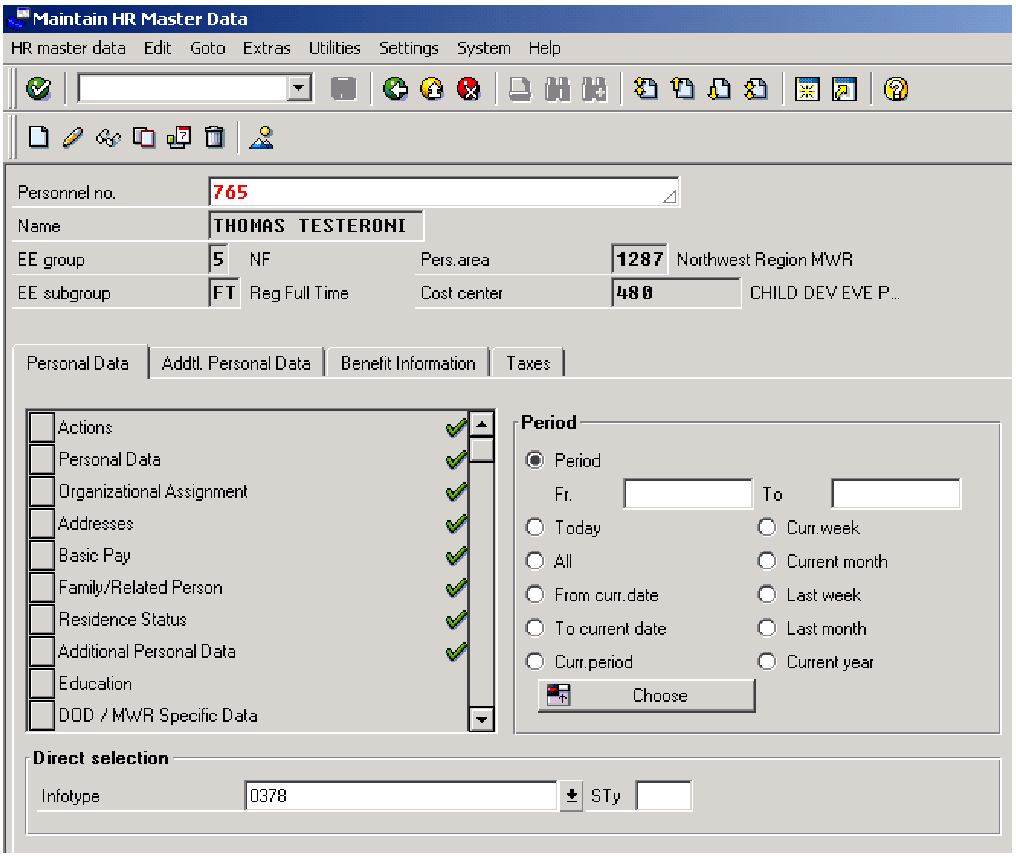
Click on the Save icon .

You will now be back to the **List Family Related Person** screen. You may now use the green back arrow  to return to the **Maintain Master Data** screen.

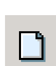
NOTE: A time saving tip for processing a large number of these changes, would be to create/change all the dependents and/or beneficiaries for the employees before proceeding to the next step.

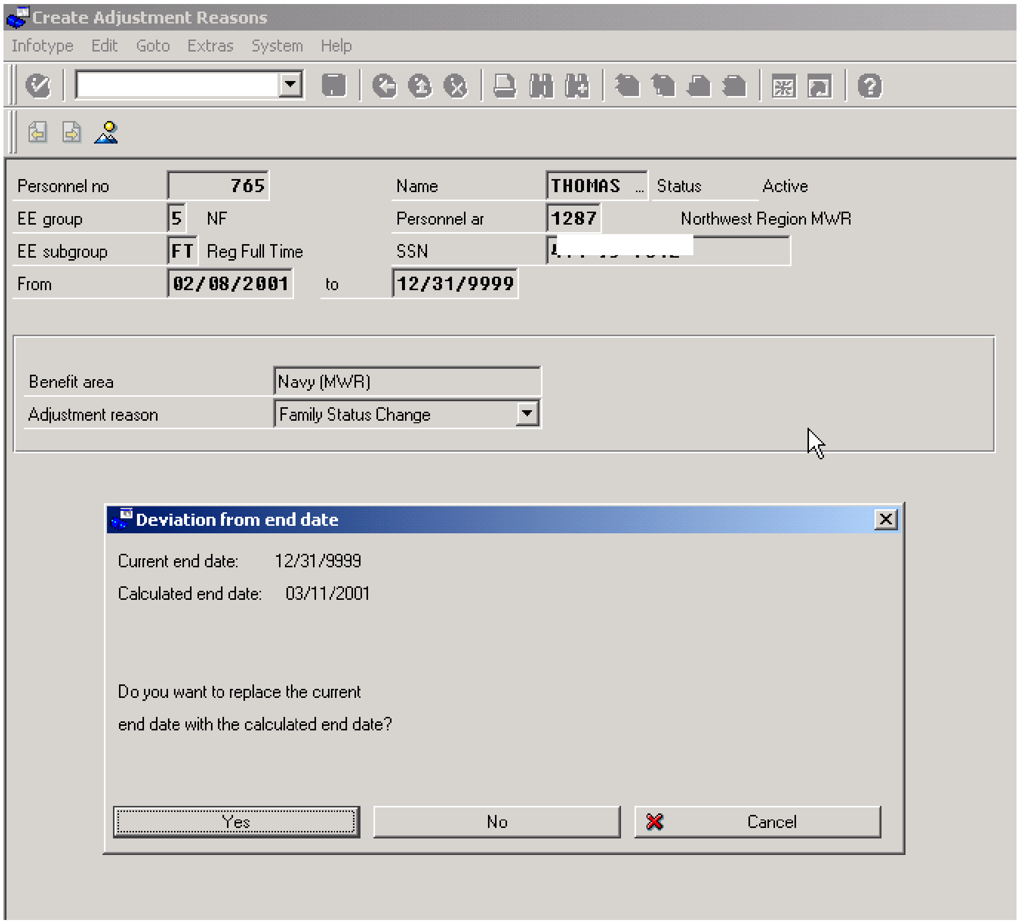
After creating and/or changing all dependents and/or beneficiaries, we must manually create infotype 0378 – Benefit Adjustment Reason.

This infotype will be required before attempting any enrollment into the benefit plans.



Field Name	Description	R/O/C	User Action/Values
Personnel Number	The employee's personnel number	R	Enter the Personnel number of the employee. If you do not know, click the down arrow and do a search based on the employee's social security number.
Infotype	The number of the infotype to be created	R	Enter the infotype – 0378 or click on the Benefit tab and click the box next to the Benefit Adjustment Reason.

Click on the Create icon  on the toolbar. You should now see the screen **"Create Adjustment Reason"**



Enter the information in the fields as specified on the table below.

Field Name	Description	R/O/C	User Actions/Values
From date	Effective date of the benefit change.	R	The field will default from the current date. Enter the effective date of the life-changing action (e.g. birth of a child), It must be within 31 days. Leave "To Date" as 12/31/9999.
Benefit area	Benefit area	R	This will default to Navy MWR and can not be changed.
Adjustment Reason	Reason for the life-changing action	R	Use the dropdown arrow to select **Family Status Change** or **HIPAA Certificate**. A pop-up window labeled "**Deviation from end date**" asks "Do you want to replace the current end date with the calculated end date?" Click on the **YES** button.

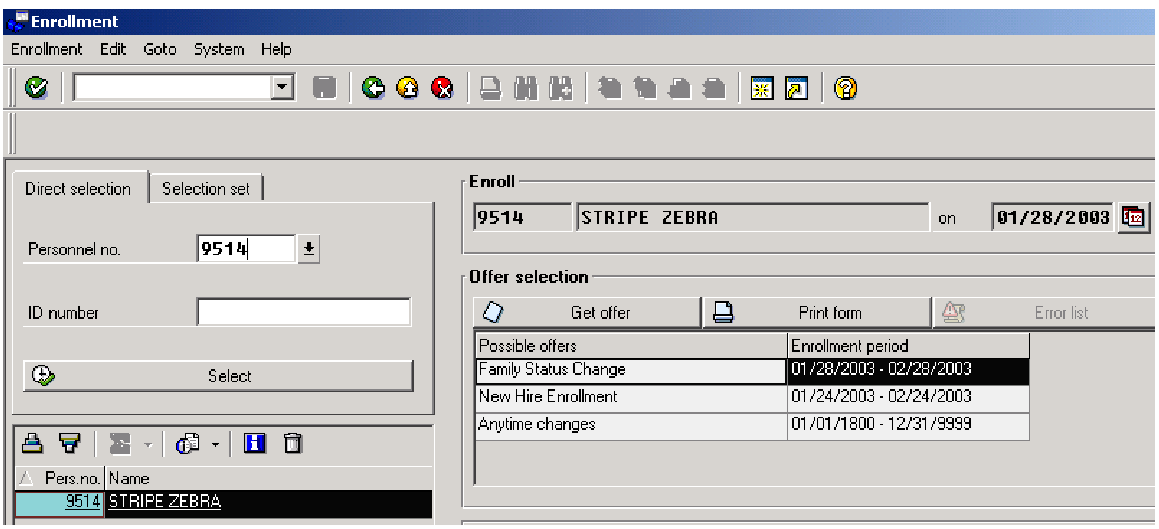
Click the Enter key or the green check mark . Save your entries by clicking on the Save icon .

NOTE: After creating/changing all dependents and/or beneficiaries (using infotype 0021) and the Benefit Adjustment Reason (using infotype 0378), use the menu path below to begin the Benefit Enrollment Process.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > ENROLLMENT**

Transaction Code: **HRBEN0001**

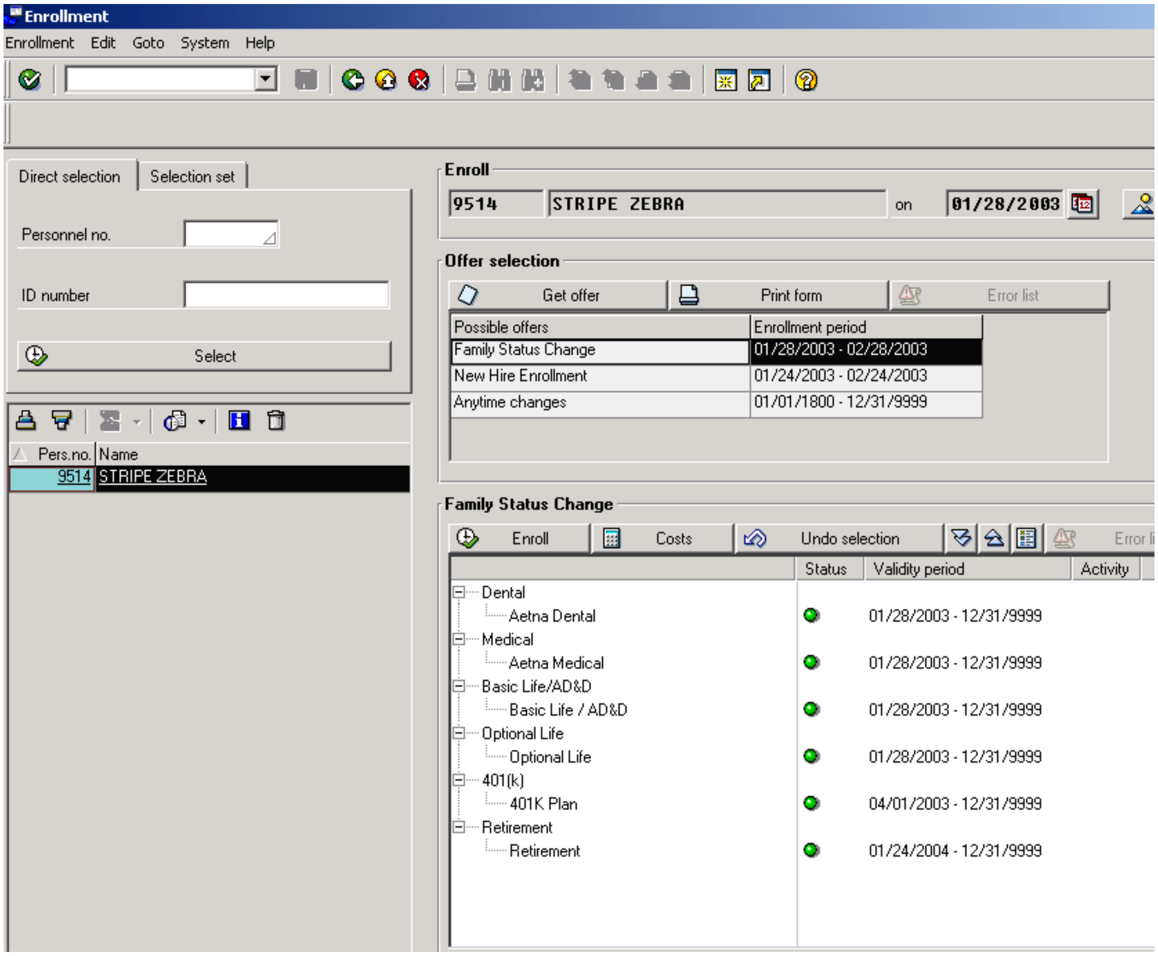
Enter the employee's personnel number and click on enter. The Offer Selection field is shown below.



Field Name	Description	R/O/C	User Action/Values
Date 	Effective date of the benefits	R	Enter the date of the effective benefit enrollment, either the date of the personnel action or the date of the life-changing action. Click on the calendar to change the date.

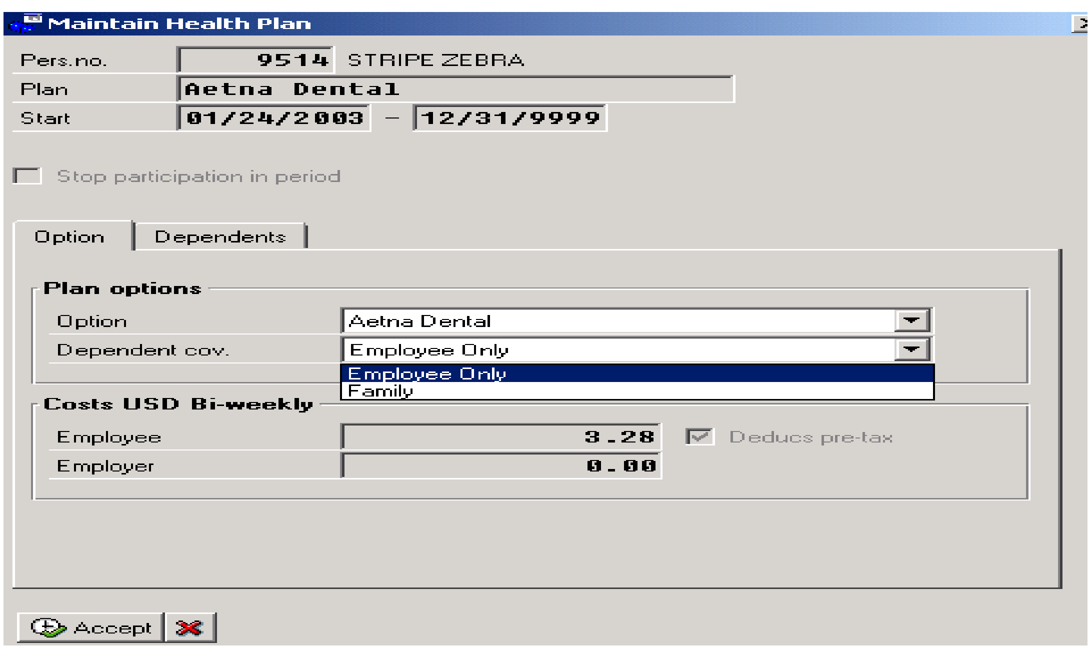
Double click on the offer to open.

The following screen will come up.

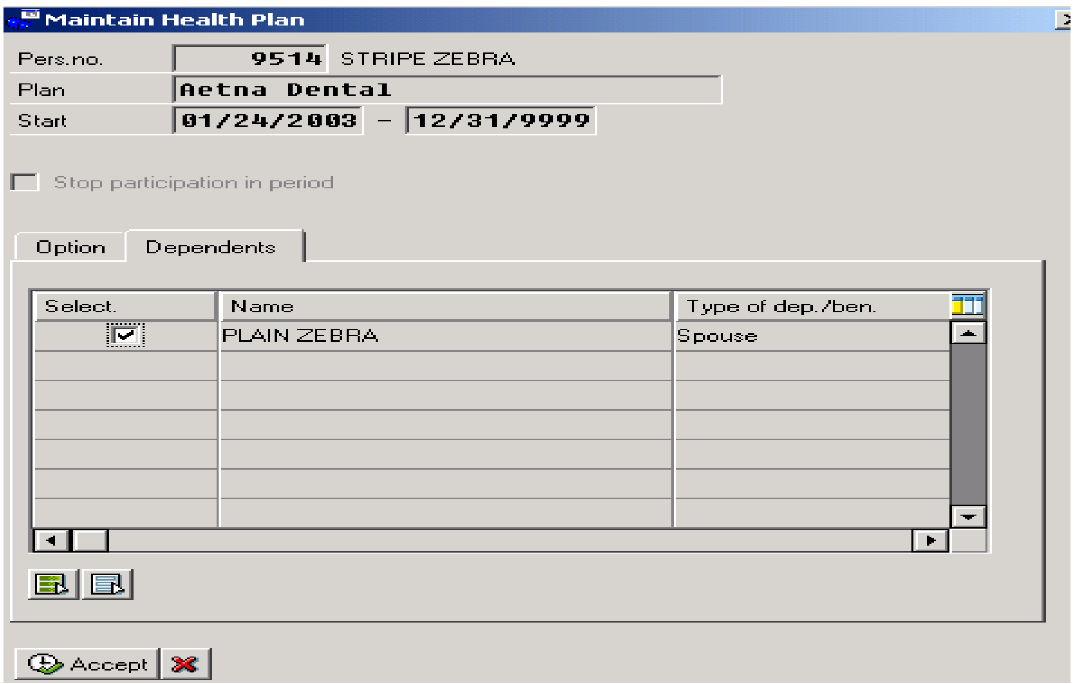


Double click on the benefit name.

The following screen will come up.



Field Name	Description	R/O/C	User Action/Values
Option tab	To select plan option and dependent coverage	R	Option field will default. Click on the dropdown arrow on the field labeled **Dependent cov.,** click on the coverage the employee has selected. The employee cost will automatically appear
Dependent folder tab	Dependents to be covered if applicable	R	Click on the Dependent folder tab to open. Click on the button to the left of each dependent's name.

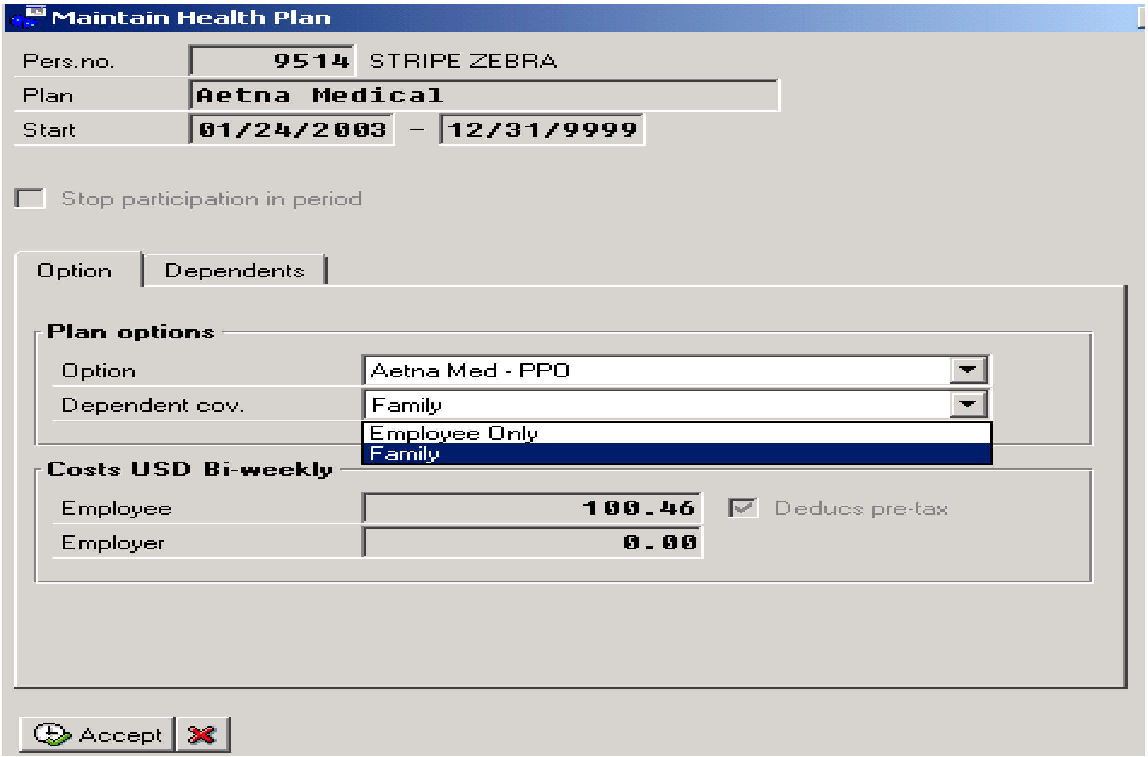


When finished click on the Accept  icon.
You will now be taken back to the New Hire Enrollment screen and a green check shows next to the plan enrolled in.

The procedure for enrolling employees into any of the eligible plans is essentially the same. The first step is to highlight the plan and double click on the line. The next plan to enroll in is medical.

Double click on the medical plan.

The following screen will come up.



Field Name	Description	R/O/C	User Action/Values
Option tab	To select plan option and dependent coverage	R	Option field will default. Click on the dropdown arrow on the field labeled **Dependent cov.,** click on the coverage the employee has selected. The employee cost will automatically appear
Dependent folder tab	Dependents to be covered if applicable	R	Click on the Dependent folder tab to open. Click on the button to the left of each dependent's name.

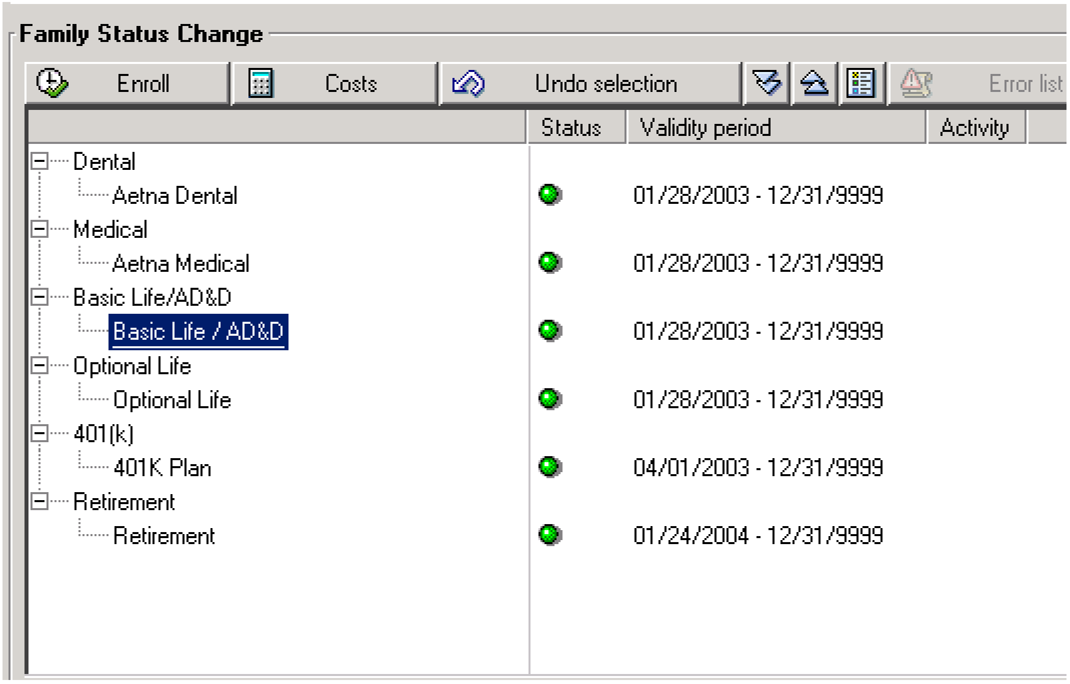
Click the accept icon 

at the bottom of the pop-up enrollment window, the window closes and you will then return to the **New Hire Enrollment** screen.

Family Status changes will only allow for additions or deletions to the existing medical and dental plan and/or adding/deleting the dependent as a beneficiary to an existing benefit.

Highlight and **double click** on the next indented plan in which you changing. Continue this process until all changes have been made.

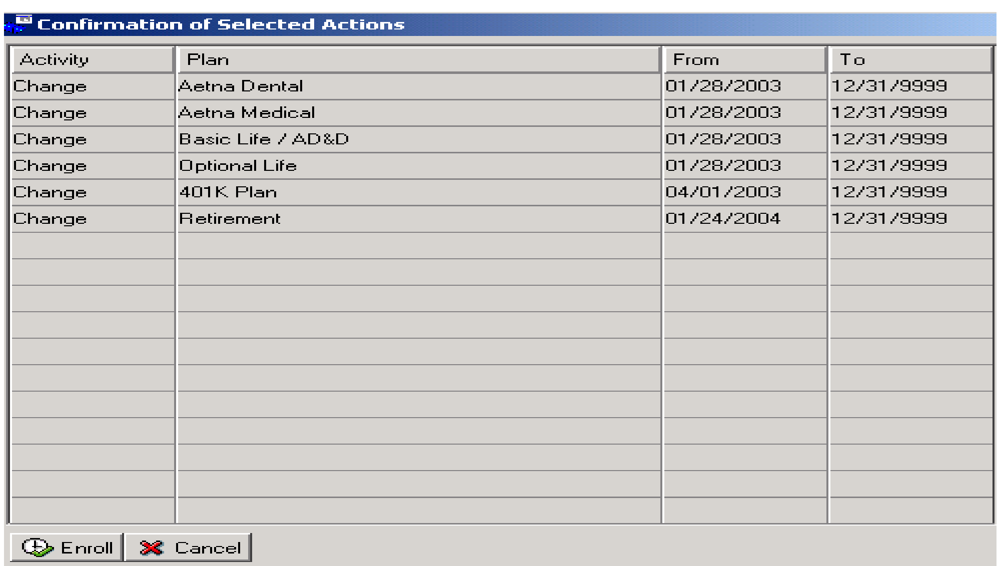
Notice that each time you finished a "**Benefit Change**" and returned to the **"Family Status Enrollment"** screen, a green "check mark" appears to the right of each completed action.



When all the enrollment actions have been completed, click on the Enroll icon 

in the new hire enrollment section.

You will now see a pop-up screen labeled **Confirmation of Selected Actions**. This window will show you a list of all the enrolled benefit changes and their effective dates.



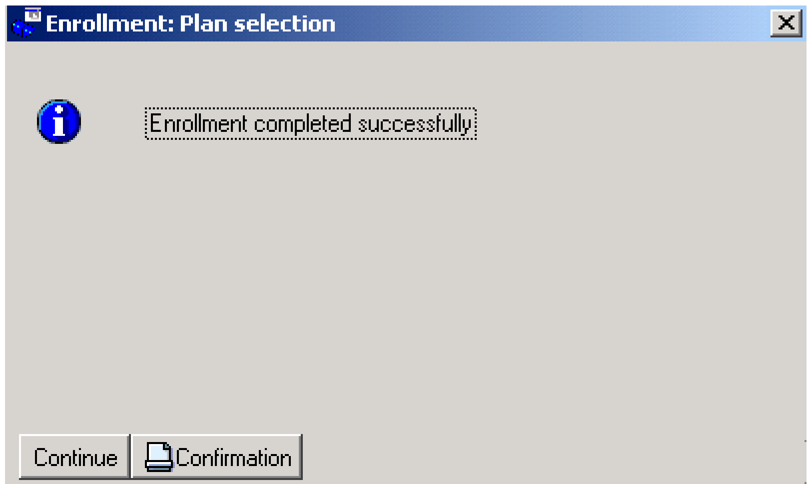
Activity	Plan	From	To
Change	Aetna Dental	01/28/2003	12/31/9999
Change	Aetna Medical	01/28/2003	12/31/9999
Change	Basic Life / AD&D	01/28/2003	12/31/9999
Change	Optional Life	01/28/2003	12/31/9999
Change	401K Plan	04/01/2003	12/31/9999
Change	Retirement	01/24/2004	12/31/9999

If all the information is correct, click on the Enroll pushbutton 

on the bottom of the pop-up window. If not, click Cancel 

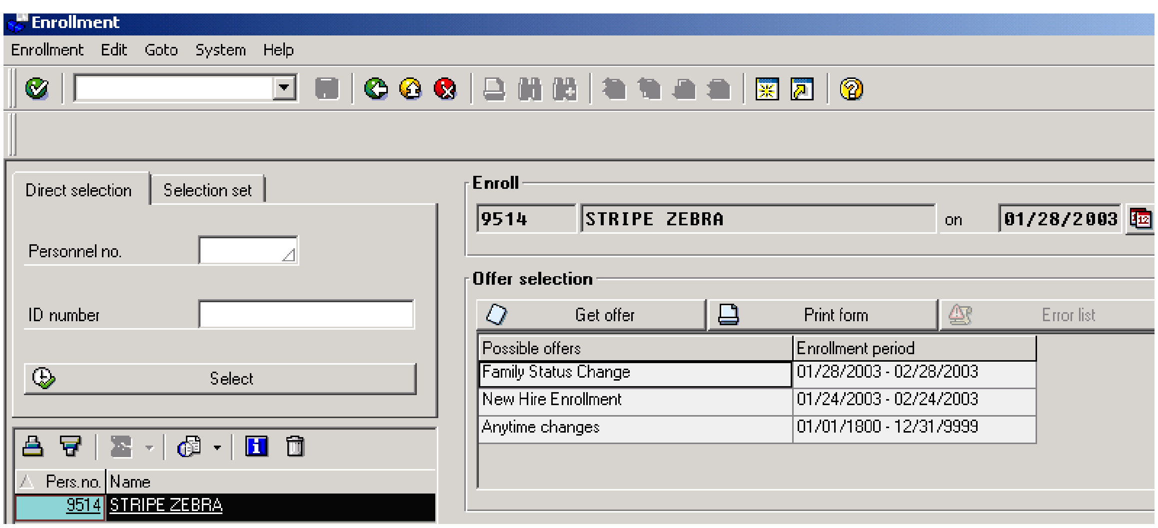
, correct the entry, and click Enroll again.

You will see another popup window verifying that the enrollment has been completed successfully.



At this point, if you are connected to a printer and the employee wants a printed confirmation of all the enrollments, click the Confirmation icon at the bottom of the window or if you are finished, click on the "Continue" button.

You are returned to the **Enrollment** screen

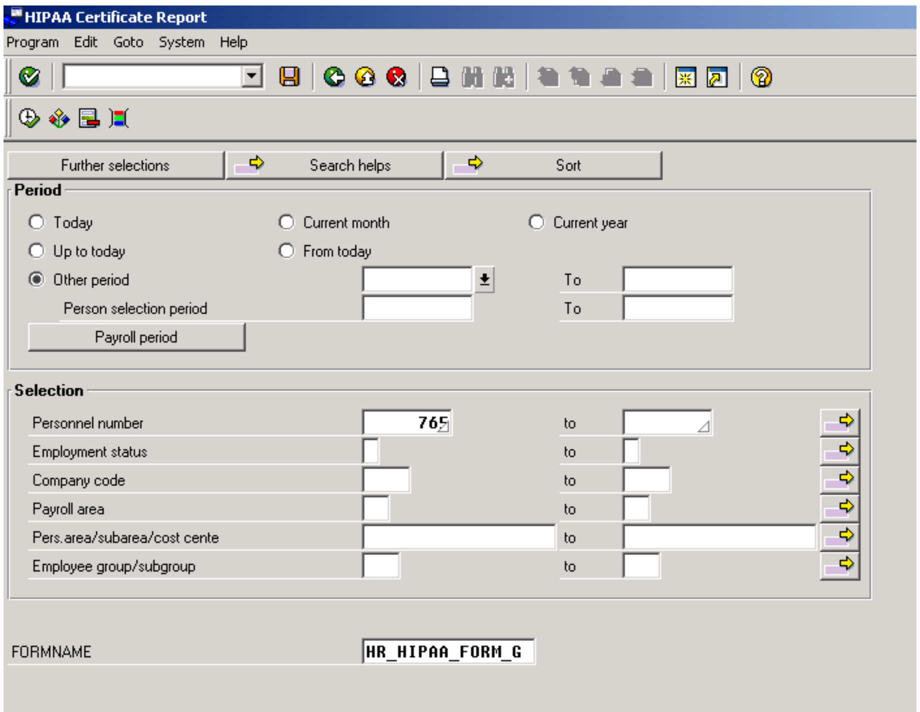


Select the  to return to the **SAP Easy Access Screen**.

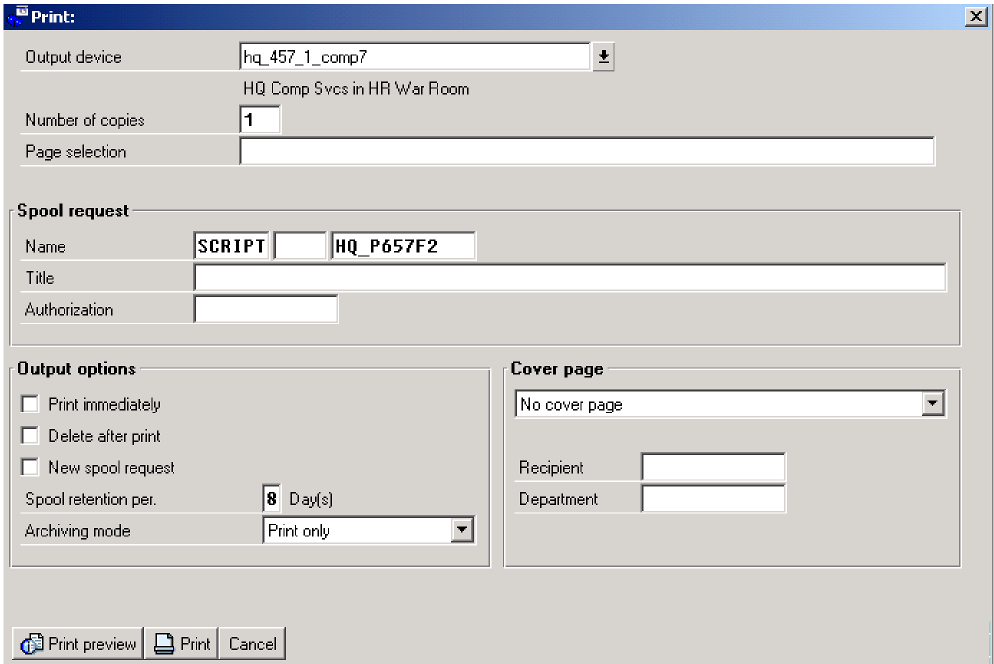
Printing a HIPAA Certificate:

If there is a need to print a Health Insurance Portability & Accountability Act (HIPAA) certificate, follow these steps:

Menu path: HUMAN **RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > FORMS > HIPAA certificate report**



After using the various report options as described in the chapter titled Reports, we decided to print only the HIPAA certificate for Personnel ID Number 765. Click the Execute icon . You will be reminded to specify an Output Device (Printer) before the report will be displayed.



We clicked the Print preview icon to receive the following excerpt from the HIPAA certificate.

Certificate of Creditable Coverage (HIPAA)

Date certificate issued: 02/09/2001

IMPORTANT: This certificate provides evidence of your prior health coverage. You may need to furnish this certificate if you become eligible under a group health plan that excludes coverage for certain medical conditions. This certificate can be provided if medical advice, diagnosis, care or treatment was recommended or received for the condition within the 6-month period prior to your enrollment in the new plan. You may also need this certificate to buy for yourself or your family an insurance policy that does not exclude coverage for medical conditions before you enroll.

Person certified:

Name: TESTERONI, THOMAS **SSN:**

Street address: 122 MAIN STREET
City: MEMPHIS **State:** TN **Zip:** 38133
Country: US

Relationship of certified person to employee: SELF
Emp. Name: TESTERONI, THOMAS **SSN:**

Employee Benefit Termination

Note: When an employee is termed in SAP, the termination action will automatically put the termination date as the "end" date to all active benefit plans.

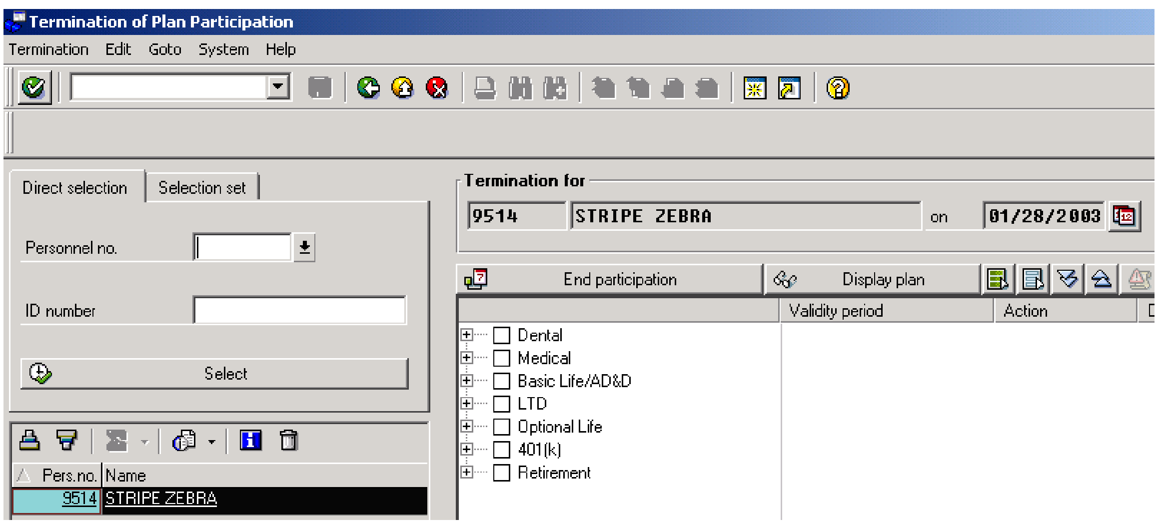
This procedure will outline, in detail, the steps required to terminate an employee's benefit plans. **Use the following menu path to begin the process to terminate benefits for an employee who is not being terminated**.

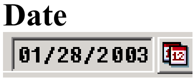
You will still need to print out a benefit confirmation dated with the day after the termination date to reflect all benefits have been termed for the employee.

Menu path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > TERMINATION**

Transaction Code: **HRBEN0014**

Enter the employee's personnel number and enter. The following screen will appear.



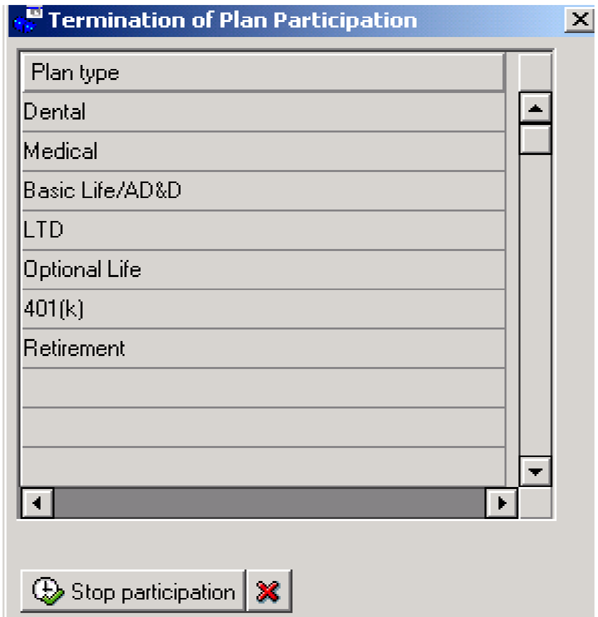
Field Name	Description	R/O/C	User Action/Values
Date 	Date benefits are to be terminated. Please be aware that if a benefit termination is processed during a pay period no deduction will be held from the employee's pay.	R	Date will default to today's date. Click on the calendar icon to change the date. **If a benefit termination is processed during a pay period, no deduction will be held from the employee's pay.**

Click in the box next to the plan the employee wants to terminate.

Click on the End Participation icon 

.

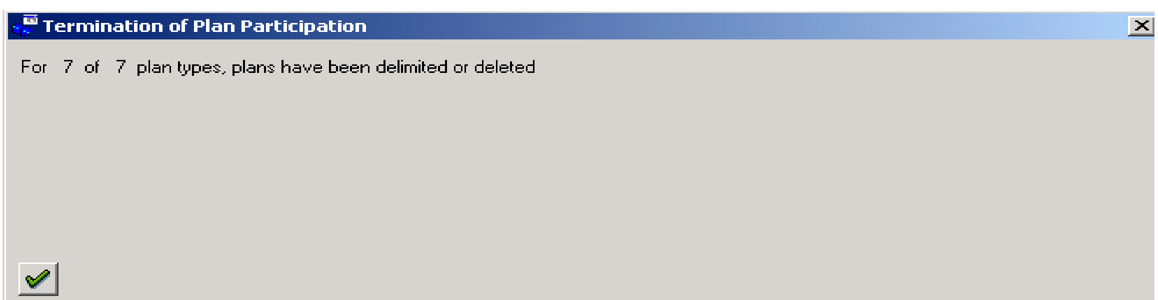
The screen gives you a listing of all the plans in which the employee is terminating.



When finished click on the Stop Participation icon 

.

Another window will open with the message “For XXX of XXX plan types, plans have been delimited or deleted”

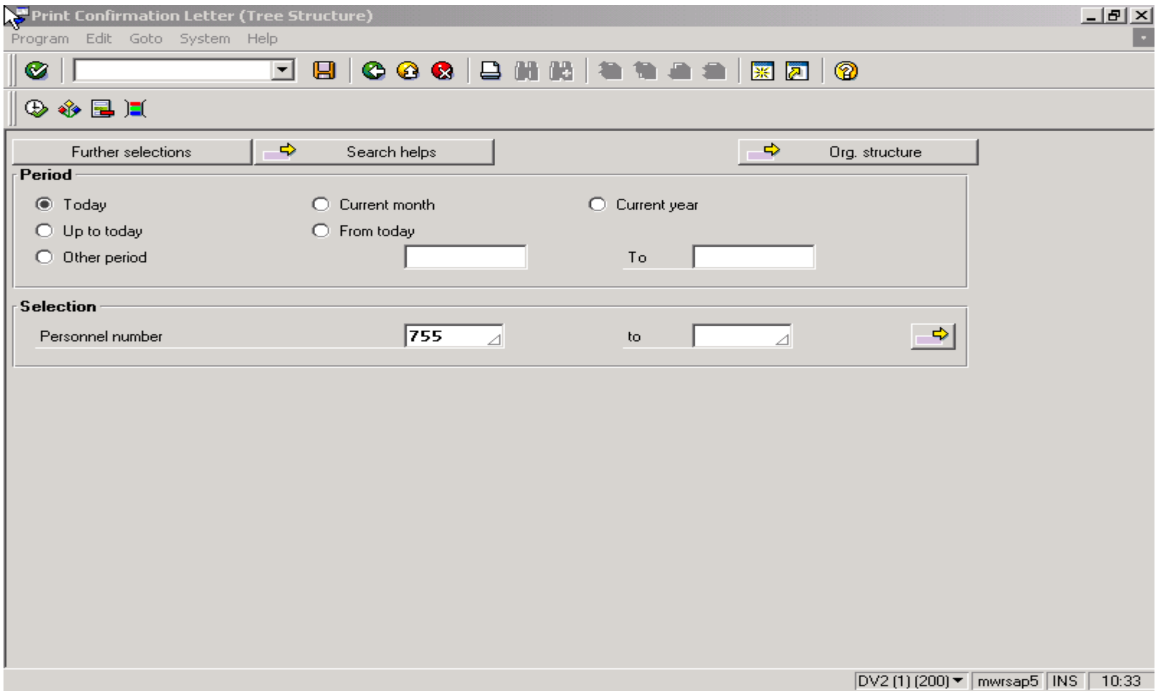


Select the  to return to the **SAP Easy Access Screen**.

Print a Confirmation of Termination Form

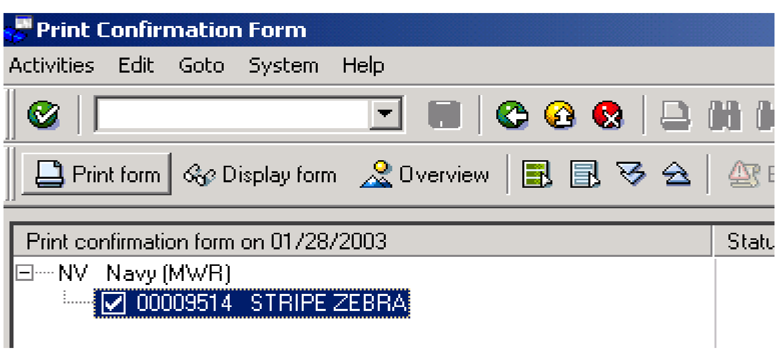
You can print a confirmation of the Termination of Employee Benefits. Follow these steps:

HUMAN RESOURCES>PERSONNEL MANAGEMENT>BENEFITS>FORMS> CONFIRMATION



Enter the date benefits were terminated and the personnel number.

Click the Execute icon .



Place a check mark next to the employee's name and click on the display form  icon. Click on the print icon .

The termination process has been completed. Use the Exit icon to return to the SAP Easy Access screen. If there is a need to print a HIPAA certificate, follow these instructions:

1. In the command field, enter /NTHIPAA. Press the Enter key or click the green check mark.

2. You are at the HIPAA Log of Issued Certificates screen. Click on the Issue cert. push button. You will be shown the HIPAA Certificate report screen. Follow the guidelines from the previous chapter.

3. Enter the individual personnel number of run multiple ones by following the general report methods and techniques.

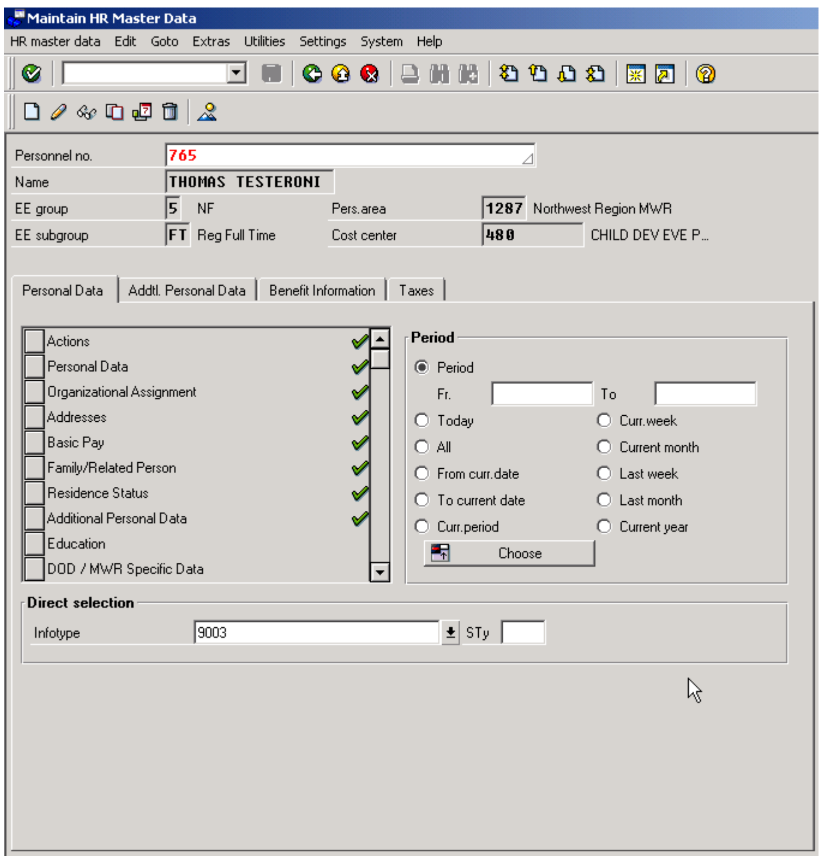
Rehire Enrollment Information

This procedure will outline, in detail, the three steps required prior to enrolling a rehired employee into the benefit plans for which they are eligible.

Use the following menu path to begin the process.

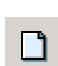
Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > MAINTAIN**

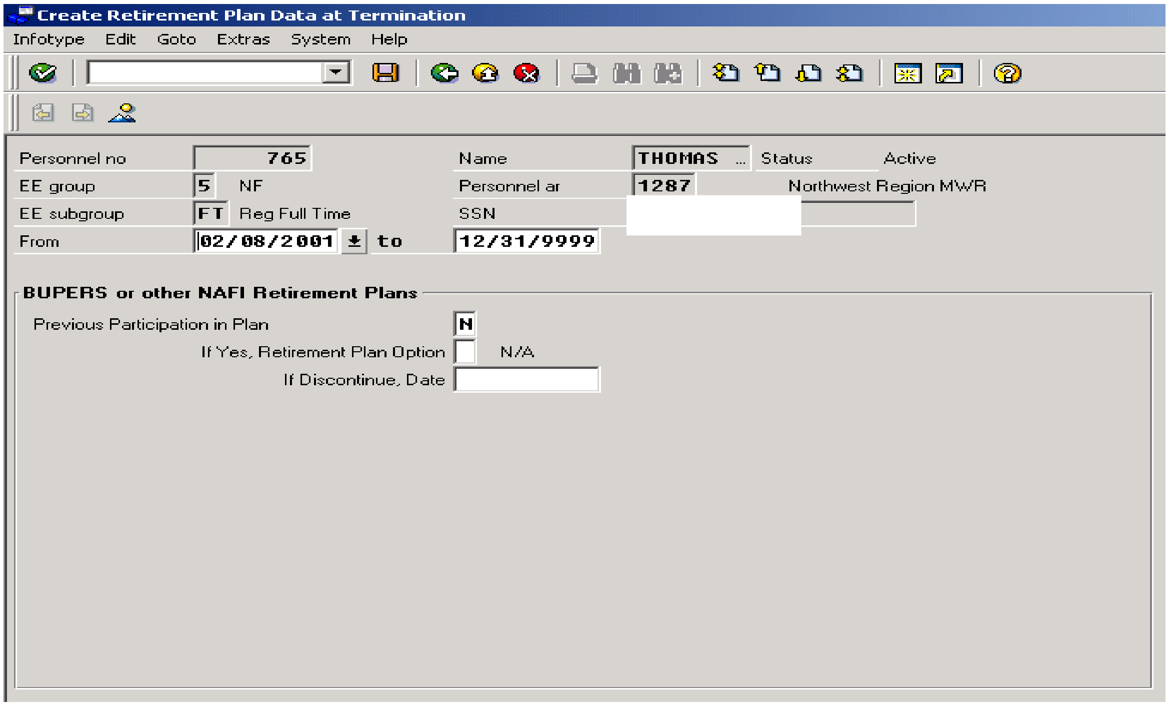
Transaction code: **PA30**



We have entered a Personnel ID number in the Direct selection part of the window, and the infotype that we wish to create, in this case, infotype 9003 – <u>Retirement Plan Data at Termination.</u>

This step is critical for an employee in order to capture the information that is on the retirement application concerning previous retirement information, if applicable.

Click the Create Icon  on the toolbar.



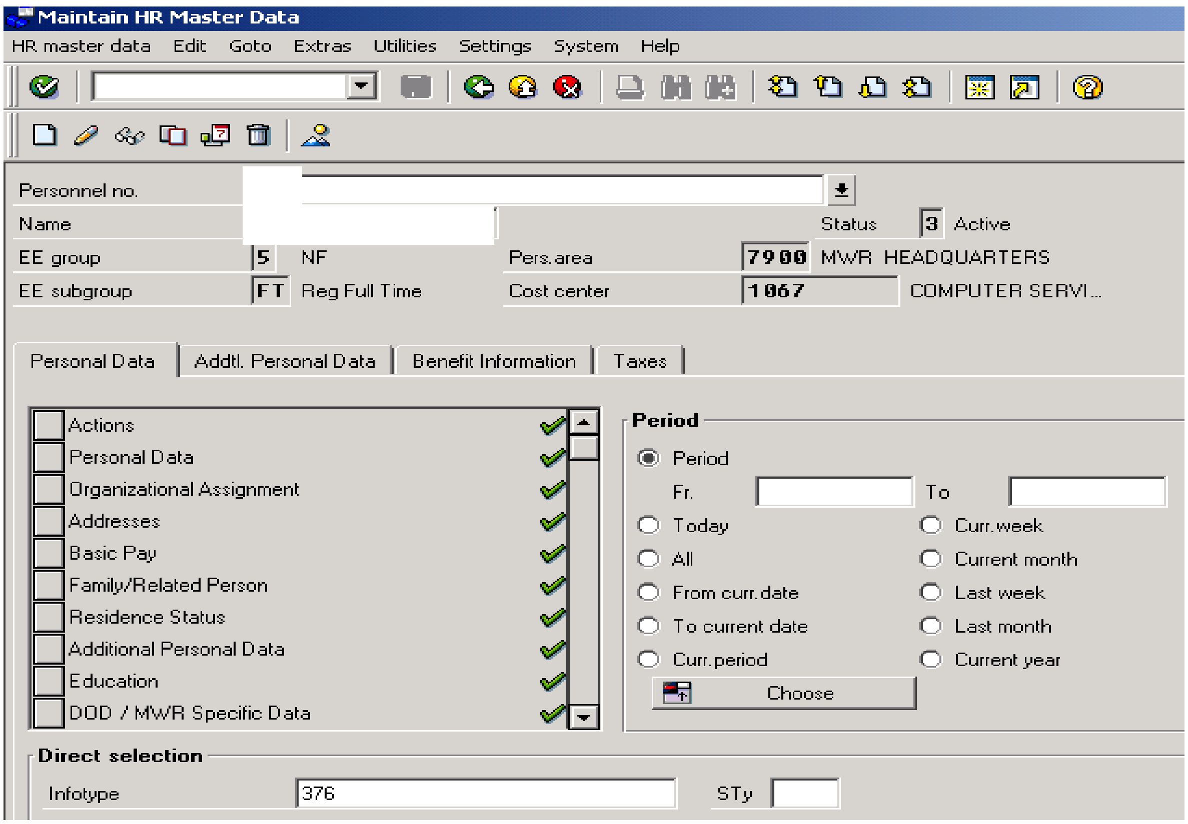
Field Name	Description	R/O/C	User Action/Values
From Date	The starting date of the plan enrollment	R	Enter the Starting date or use the dropdown arrow to select
To Date	The end date of the employee participation	R	The field will default to 12/31/9999. **Do Not Change**
Previous participation in plan	Were they in the plan before?	R	Enter Y or N to answer whether the employee was in the plan before
If Yes, Retirement plan option	User defined	C	If the answer to the previous question was Yes, use the dropdown arrow to select the appropriate answer from the following choices: A – Cash Surrender B – Paid up Annuity D – Discontinue
If discontinue, Date	User defined	C	If the answer to the previous question was “Discontinue”, you must enter the date of the discontinuance. The employee may stop a Retirement Plan deduction at any time voluntarily.

When the inputs are correct, click the Enter icon 

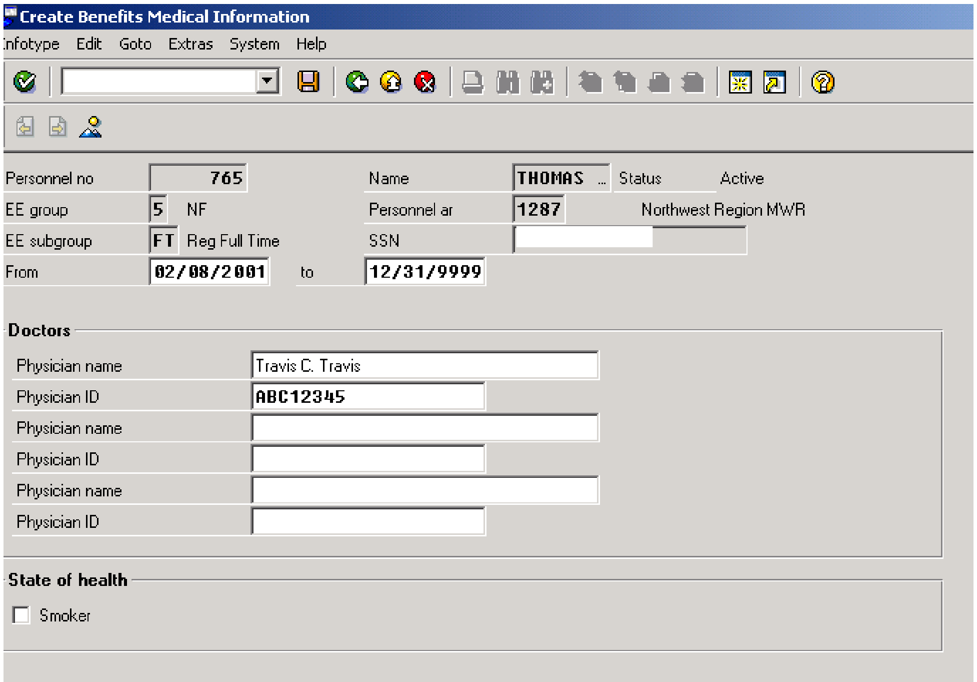
You will be reminded to save your entries. Do so by clicking on the Save icon .

The **second of the three infotypes** to be manually created is infotype 0376 – Benefits Medical Information. This is where the employee's physician name and other related information is stored if applicable.

The number 0376 is entered directly into the infotype field in the Direct selection part of the window as we have done with the first infotype.



Click the Create icon again to open the following pop up window.



At the <u>Create Benefits Medical Information</u> screen, the following inputs are required.

Field Name	Description	R/O/C	User Action/Values
From	Date of the benefit enrollment	R	Enter the begin date of the enrollment
Physician's Name	Name of the Primary Care Physician	R	Enter the Primary Care Physician name
Physician ID	ID Number of the Primary Care Physician	R	Enter the ID Number

Click the enter icon to validate the entries and the click the Save icon to save the transaction.

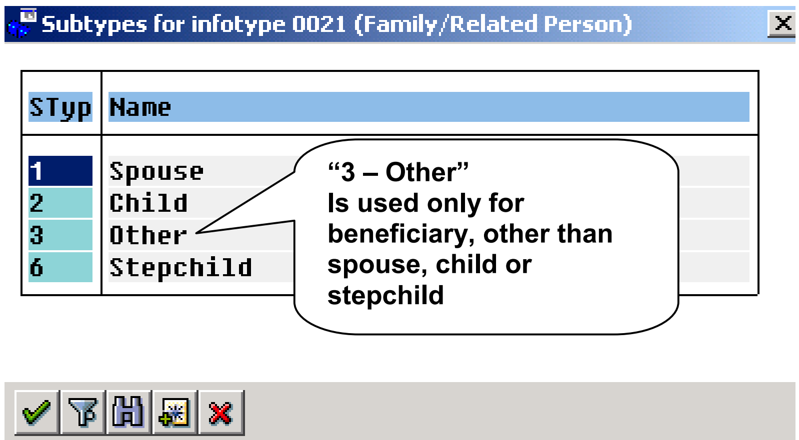
NOTE: The physician is only used for initial enrollment into SAP. The physician name will be maintained with the provider from that point on.

All dependent information will be kept in SAP except the physician information. Any Add, Change or Stopping of dependents will go through the Human Resources module.

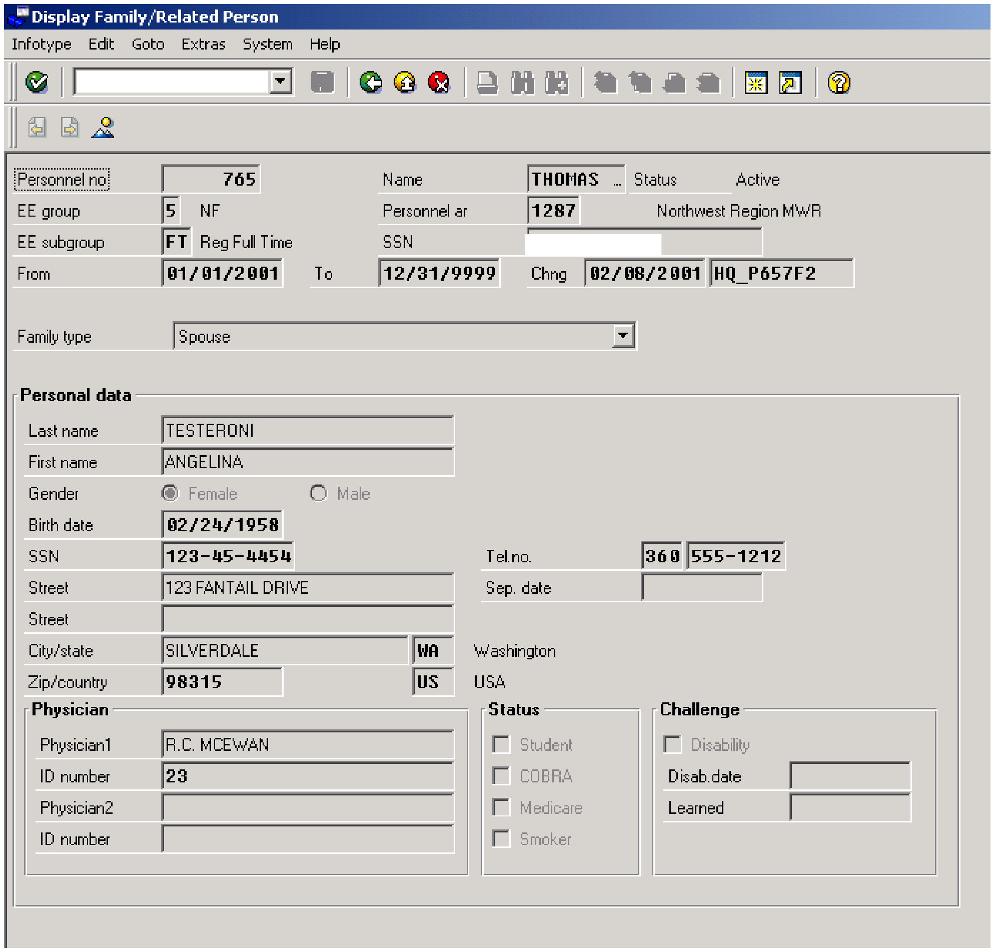
The initial beneficiary must be in SAP, but the provider will do changes to an existing beneficiary.

The **third and final** of the manually entered infotypes is 0021 – Family/Related Person. Directly enter infotype 0021 into the field as we have done for the two previous infotypes and click the Create icon .

With this infotype, you will see an interim pop-up window asking for additional information as shown below.



Choose the Family/Related person that we are creating the infotype for. In the example that we are using, we highlight 1 – Spouse and click the green check mark.



Field Name	Description	R/O/C	User Actions/Values
From Date	Effective date of the benefit enrollment	R	Enter the effective date and leave the “To Date” as 12/31/9999”
Family type	Relationship	R	This field will be defaulted based on the subtype chosen in the pop-up window menu
Last Name	Last name of the beneficiary or dependent	R	Enter the last name.
First Name	First name of the beneficiary or dependent	R	Enter the first name
Gender	Female or male	R	Click the radio button next to the correct selection
Birth Date	Birth date of dependent. Birth date of “other” beneficiary not required	R	Enter the birth date as required.

SSN	Social Security Number	R	Enter the Social Security Number of the dependent or beneficiary
Street/City/State Zip/Country	Permanent Address	R	Address of the dependent or beneficiary
Physician	Physician of the dependent	R	Enter the Primary Care Physician of the dependent
ID Number	Physician ID number	R	Enter the dependent's Primary Care Physician ID Number.
Status	Student	C	Required if dependent is 19 years of age or older.
Challenge	Whether the dependent is disabled/ handicapped.	C	Check if the dependent is disabled/ handicapped.

Once the screen is completed, Click the enter icon to validate the entries and the click the Save icon to save the transaction.

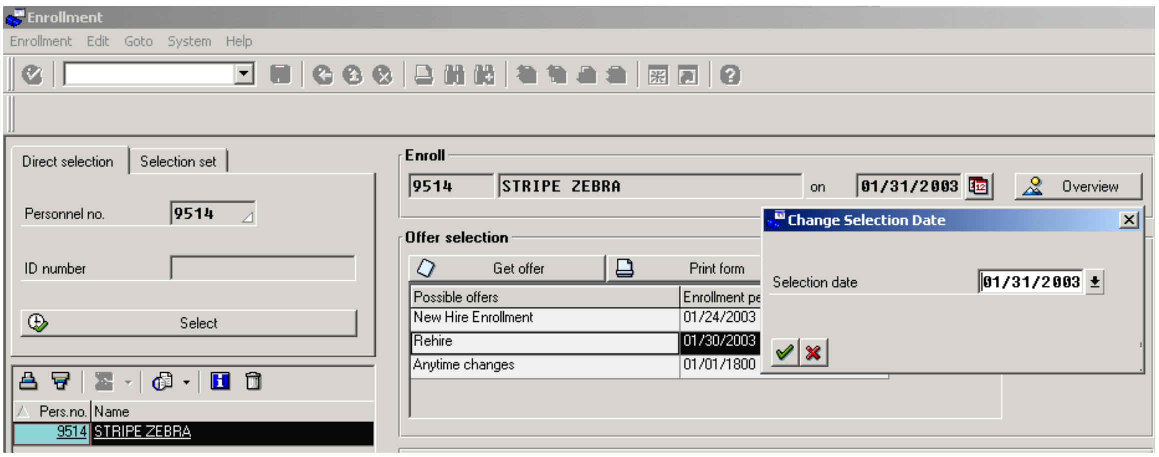
After completing all the dependents and/or beneficiaries, follow the menu path or transaction code to begin the actual Benefit Enrollment process. (See next page.)

Rehire Benefit Enrollment

NOTE: Before enrolling in benefits make sure all Family Related persons have been created.

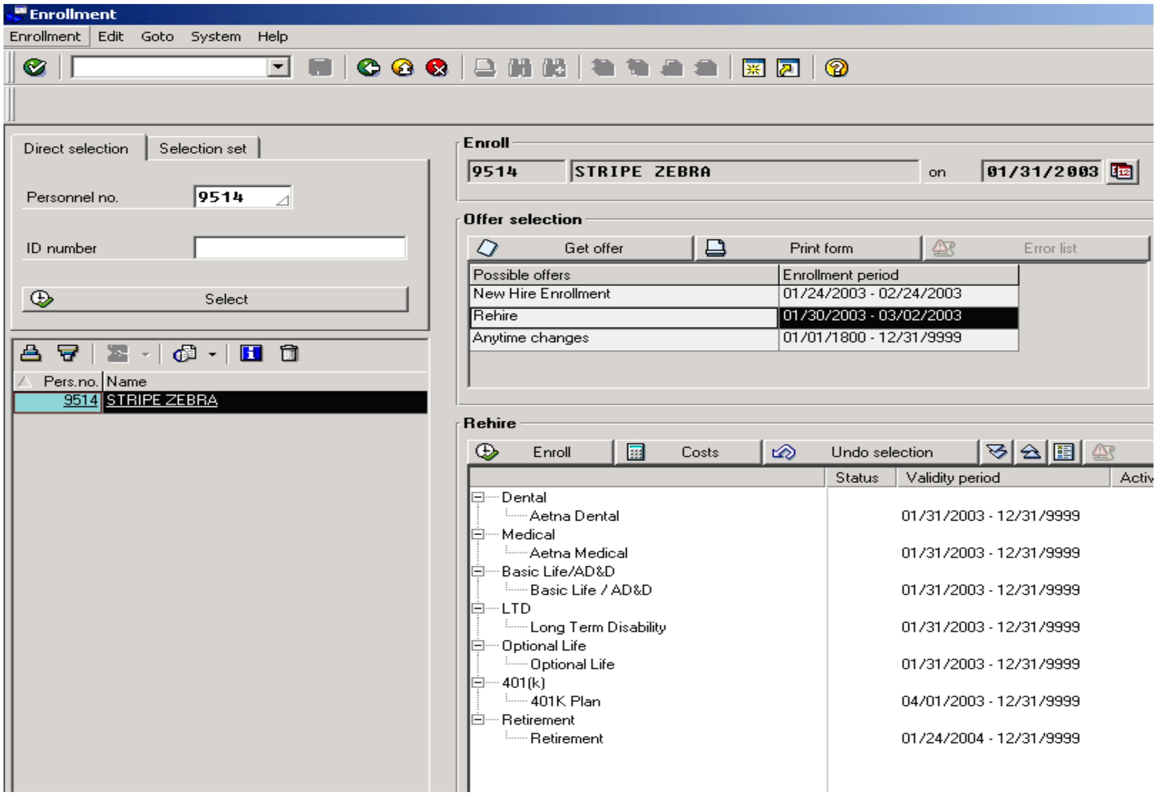
Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > ENROLLMENT**

Transaction Code: **HRBEN0001**
You will see the opening screen. Enter the employee's personnel number and hit enter. Enter information into the field(s) as specified in the table below.



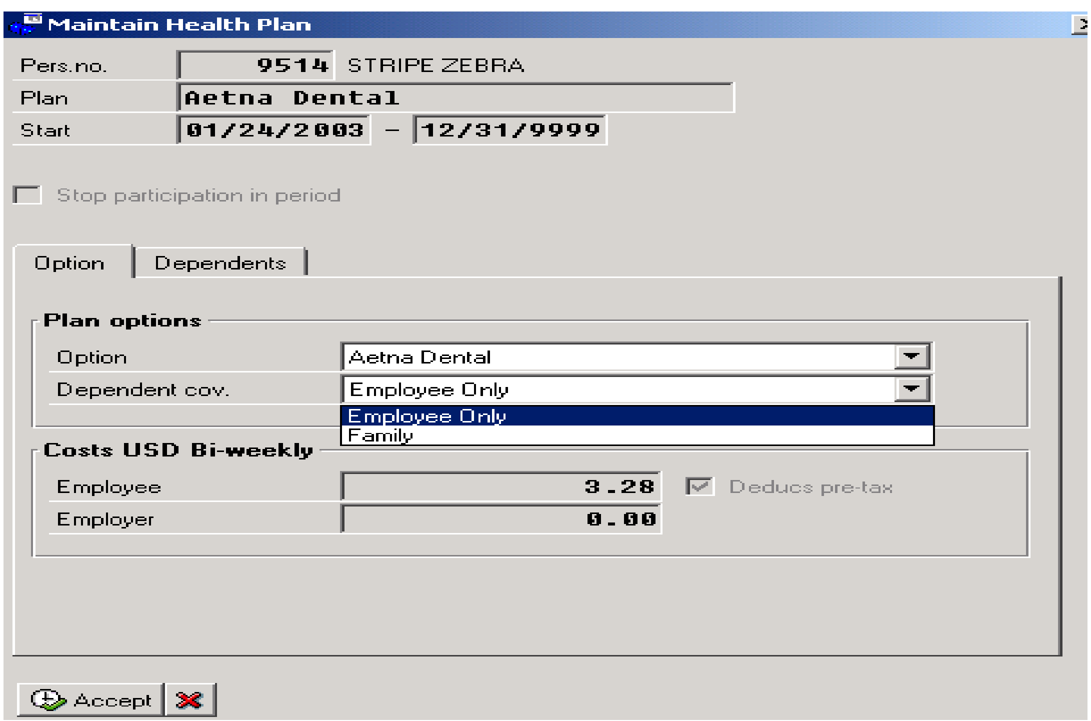
Field Name	Description	R/O/C	User Action/Values
Date 01/31/2003	Effective date of the benefits	R	Date defaults to the current date. Click on the calendar icon to change the date to the effective date of the benefit enrollment. **This date must be the date the employee signed the forms.** Enrollment MUST be within 31 days of the rehire date.

Double click on Rehire or click on Rehire and Get Offer icon Get offer. The following screen will come up.

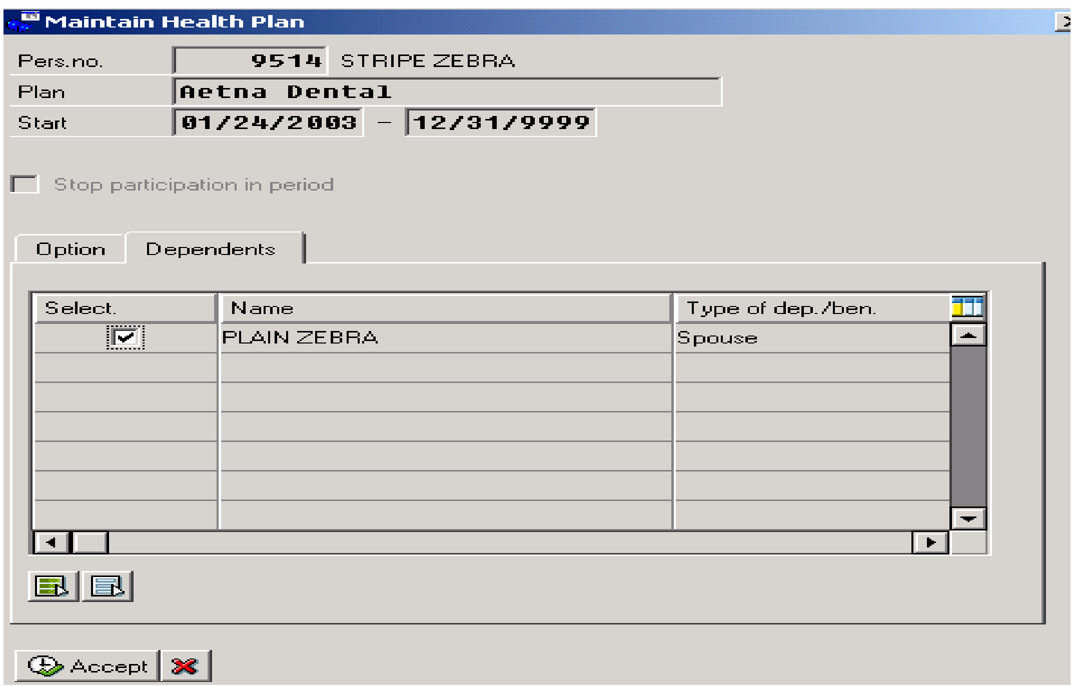


Double click on the benefit name.

The following screen will come up.



Field Name	Description	R/O/C	User Action/Values
Option tab	To select plan option and dependent coverage	R	Option field will default. Click on the dropdown arrow on the field labeled **Dependent cov.,** click on the coverage the employee has selected. The employee cost will automatically appear
Dependent folder tab	Dependents to be covered if applicable	R	Click on the Dependent folder tab to open. Click on the button to the left of each dependent's name. **If there are no dependents, this tab will not appear**. If no dependents are checked, they will not be enrolled through the interface.

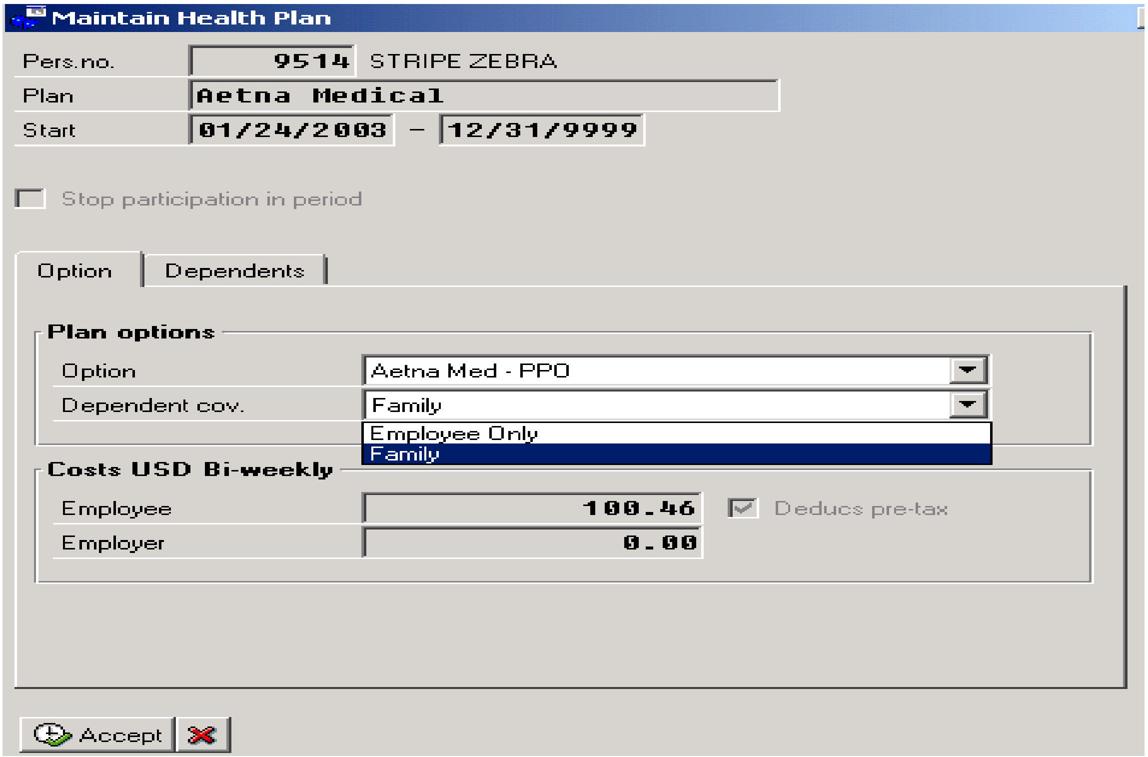


When finished click on the Accept  icon.
You will now be taken back to the Rehire Enrollment screen and a green check shows next to the plan enrolled in.

The procedure for enrolling employees into any of the eligible plans is essentially the same. The first step is to highlight the plan and double click on the line. The next plan to enroll in is medical.

Double click on the medical plan.

The following screen will come up.

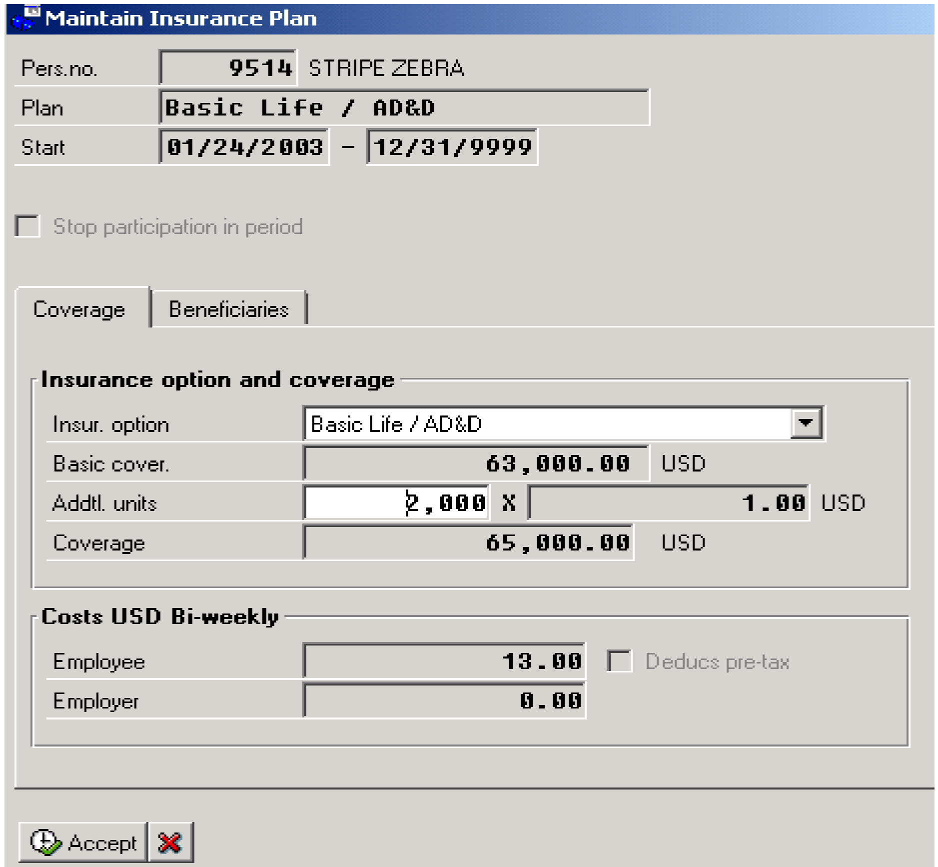


Field Name	Description	R/O/C	User Action/Values
Option tab	To select plan option and dependent coverage	R	Option field will default. Click on the dropdown arrow on the field labeled **Dependent cov.,** click on the coverage the employee has selected. The employee cost will automatically appear
Dependent folder tab	Dependents to be covered if applicable	R	Click on the Dependent folder tab to open. Click on the button to the left of each dependent's name. **If there are no dependents, this tab will not appear**. If no dependents are checked, they will not be enrolled through the interface.

Click the accept icon 

at the bottom of the pop-up enrollment window, the window closes and you will then return to the **Rehire Enrollment** screen.

Highlight and **double click** on the next indented plan in which you are enrolling the employee. We are showing the selection of Basic Life Insurance.



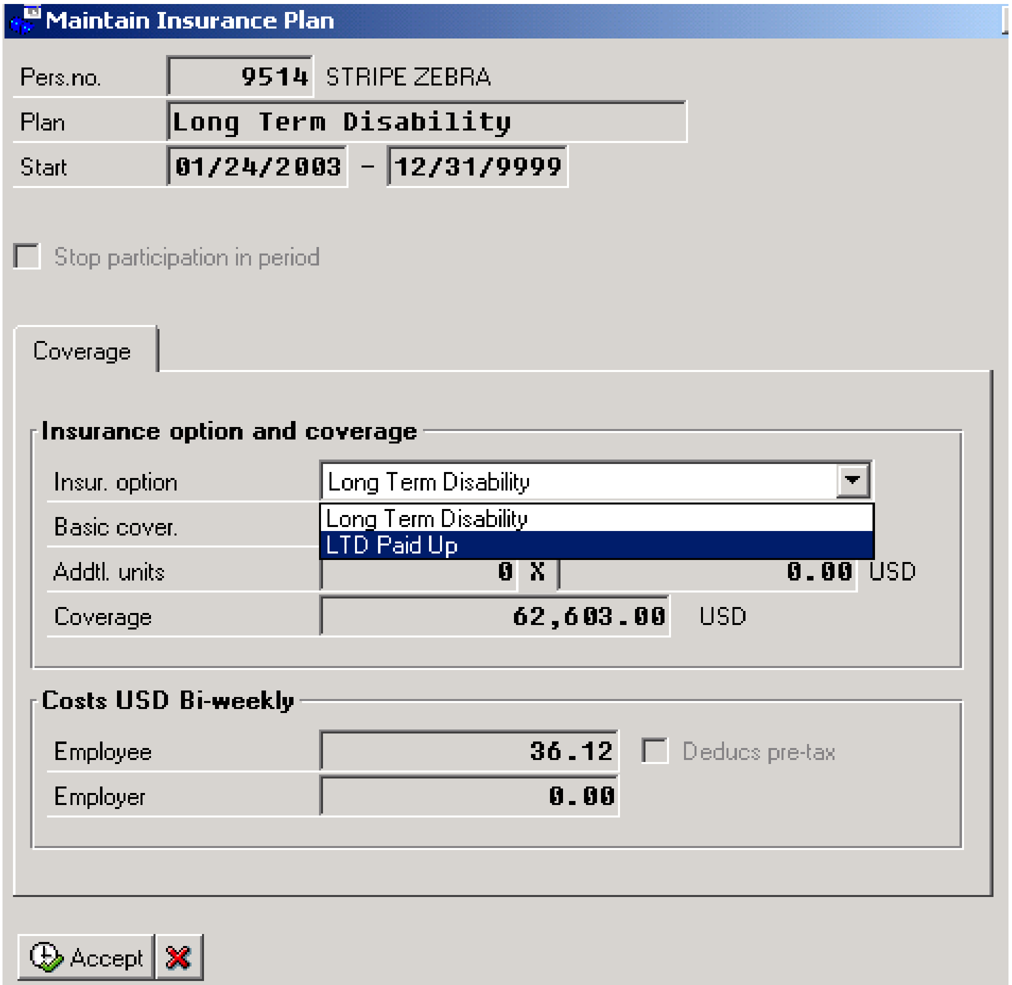
Enter and check the information as specified in the table below:

Field Name	Description	R/O/C	User Action/Values
Coverage tab	To select Basic Life/AD&D coverage	R	Insurance option defaults this plan. **Input 2000** into the "**Addtl units**" field. **This field is configured to accept nothing else**. You will note that the Employee cost will automatically appear.
Beneficiaries tab	Input field	R	Click on the "Beneficiary Folder" and enter the percentage % of the benefit to be assigned each dependent.

Click the accept icon 

on the bottom of the pop-up window, the window will close and you will be returned to the "Rehire Enrollment" screen.
Continue to highlight and double click on each of the indented plans in which you are enrolling an employee and proceed with each benefit enrollment following the same procedures as described above.

For example, for **Long Term Disability Insurance**:

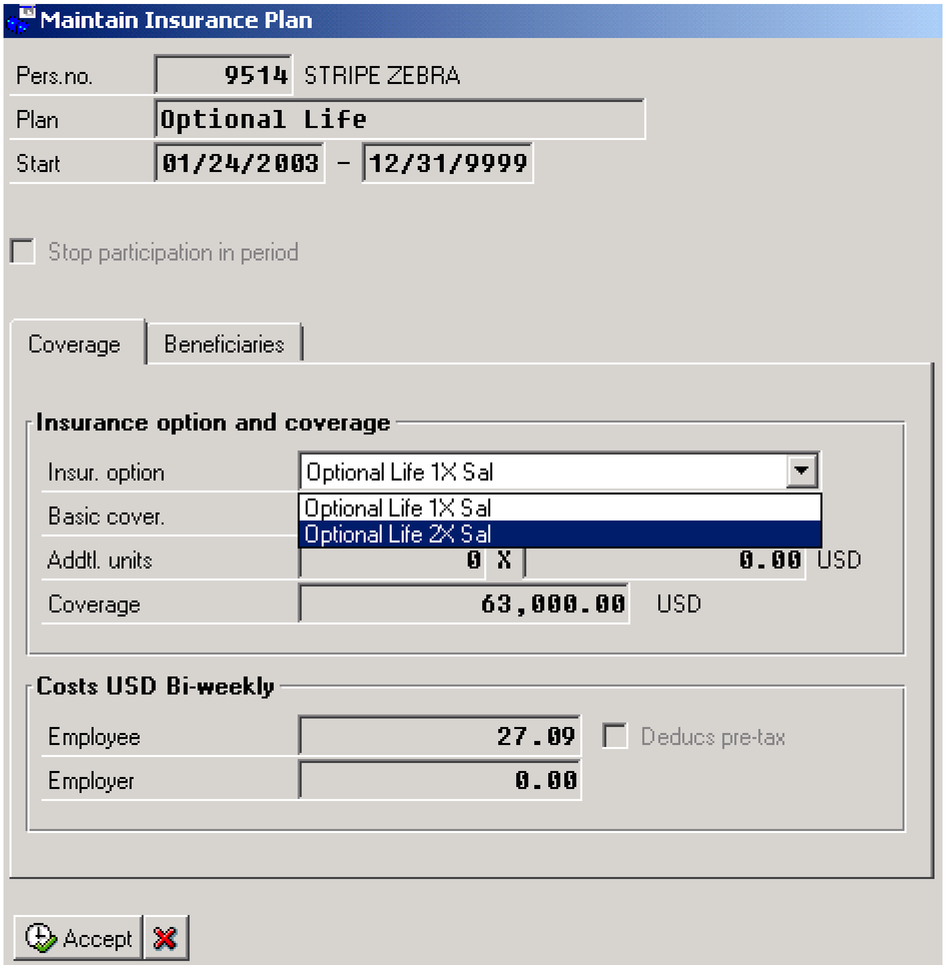


Click on the dropdown arrow on the **Insurance Option** line. Select either Long Term Disability or LTD Paid up.

Note: If choosing the Long-Term Disability option, the employee cost will appear. If choosing the Paid up option, the amount will be zero.

Click the accept icon Accept on the bottom of the pop-up window, the window will close and you will be returned to the Rehire Enrollment screen.

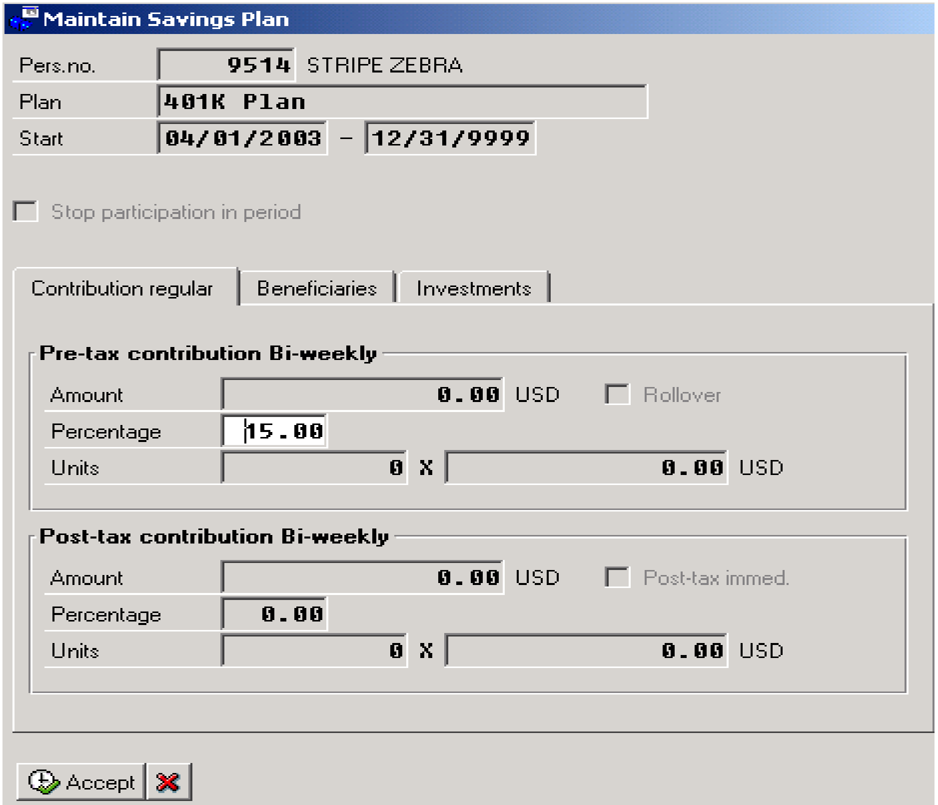
The next example of the procedures is illustrated using the **Optional Life** enrollment.



Select either Optional Life 1X Salary or Optional Life 2X Salary. Click on the "Beneficiary tab" and enter the % of the benefit to be assigned to each beneficiary. Click the Accept 

icon and you will be returned to the Rehire Enrollment screen.

The next example of the procedures is illustrated using the **401K Savings Plan** enrollment.

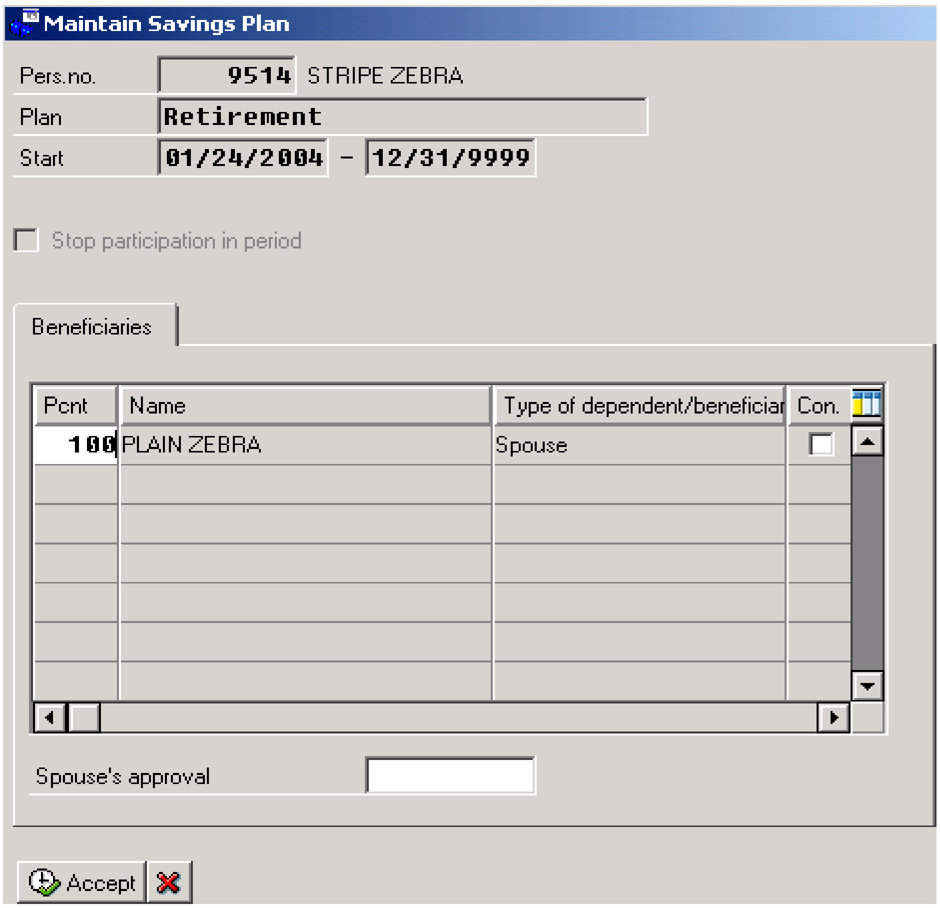


The input for this **Maintain Savings Plan** screen is explained in the table below.

Tab Names	Description	R/O/C	User Action/Values
Contributions Regular	Pre-tax, bi-weekly contribution	R	Percentage. Enter a percentage % amount.
Investments	Input field. **This must be selected for new enrollments only.** Changes will be handled directly by the vendor.	R	Click on the **Investments** tab. Enter the percentage of investments applicable to each plan. Percentages must total 100%
Beneficiaries	Input field. **This must be selected for new enrollments only.** Changes will be handled directly by the vendor.	R	Click on the **Beneficiaries** tab. Enter the % of the benefit to be distributed to each beneficiary. If the beneficiary is someone other than a spouse, the date the spouse signs the 401k consent must be entered in the Spousal Consent field.

Click the Accept icon Accept on the bottom of the pop-up window, the window will close, and you will be returned to the Rehire Enrollment screen.

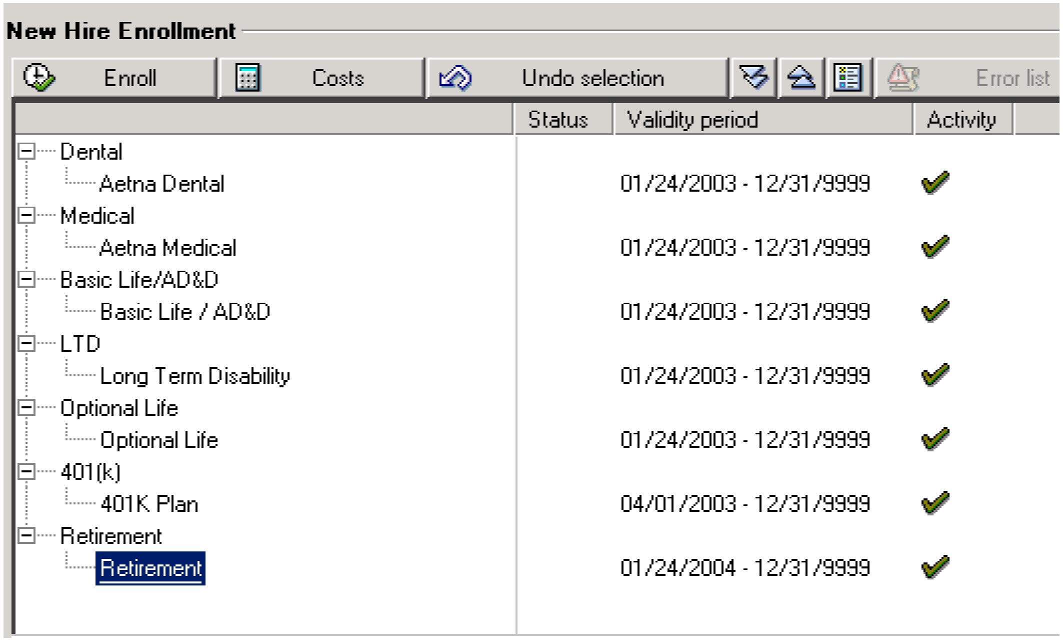
The next example shows the Retirement option.



If the employee is married and the beneficiary is someone other than spouse, you must have written spouse approval. Enter the date the form was signed in the "Spouse's approval" field.

Enter the percentage for each beneficiary, designate a contingent beneficiary by clicking the checkbox (if desired), then click the Accept Accept icon.

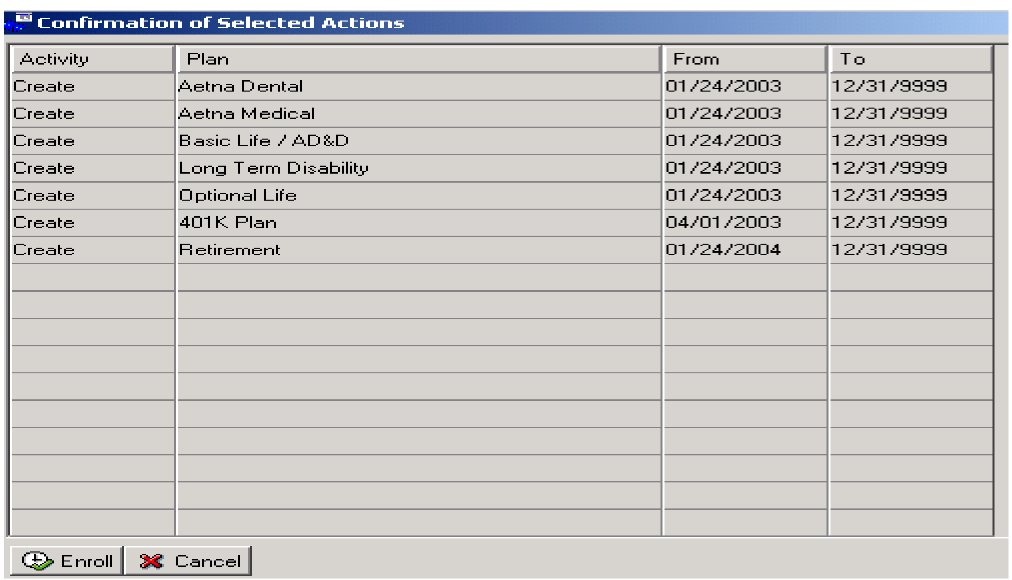
Notice that each time you finished a "**Benefit Enrollment**" and returned to the **Rehire Enrollment** screen, a green "check mark" appears to the right of each completed action.



When all the enrollment actions have been completed, click on the Enroll icon 

in the new hire enrollment section.

You will now see a pop-up screen labeled **Confirmation of Selected Actions**. This window will show you a list of all the enrolled benefits and their effective dates.



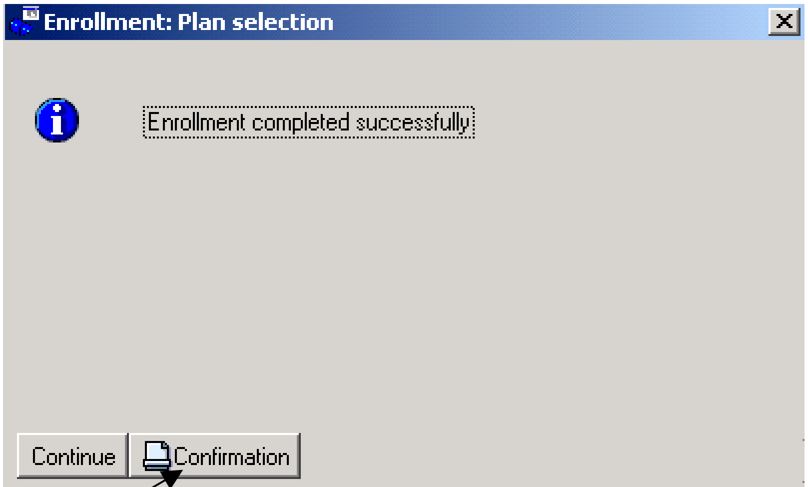
Activity	Plan	From	To
Create	Aetna Dental	01/24/2003	12/31/9999
Create	Aetna Medical	01/24/2003	12/31/9999
Create	Basic Life / AD&D	01/24/2003	12/31/9999
Create	Long Term Disability	01/24/2003	12/31/9999
Create	Optional Life	01/24/2003	12/31/9999
Create	401K Plan	04/01/2003	12/31/9999
Create	Retirement	01/24/2004	12/31/9999

If all the information is correct, click on the Enroll pushbutton 

on the bottom of the pop-up window. If not, click Cancel 

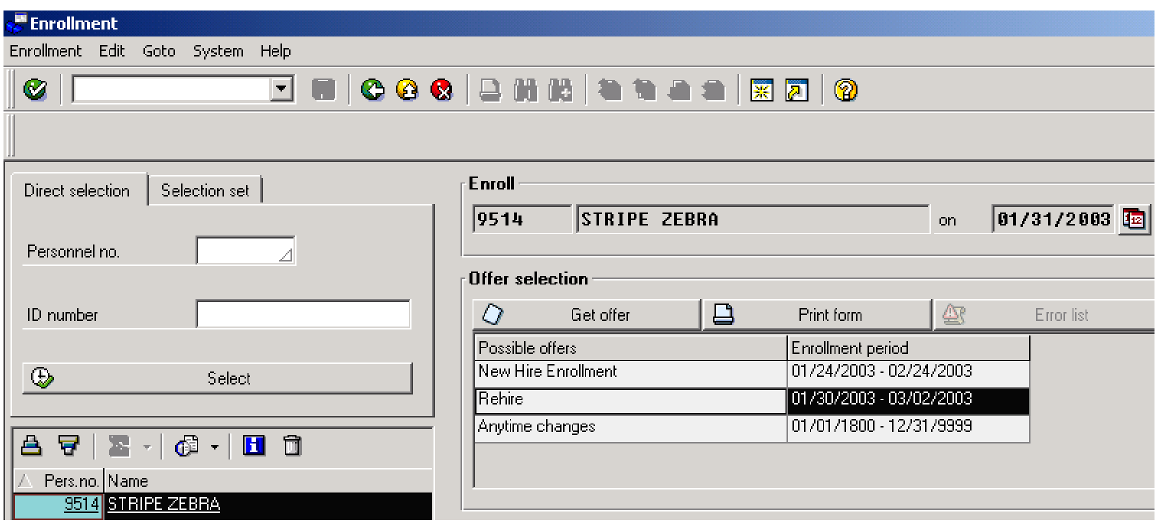
, correct the entry, and click Enroll again.

You will see another popup window verifying that the enrollment has been completed successfully.



At this point, if you are connected to a printer and the employee wants a printed confirmation of all the enrollments, click the Confirmation icon at the bottom of the window or if you are finished, click on the "Continue" button.

You are returned to the **Enrollment** screen



Select the  to return to the **SAP Easy Access Screen**.

Evidence of Insurability

Life and disability enrollments that require Evidence of Insurability approval from Aetna will require an infotype 378 –Adjustment Reason to be created with the adjustment reason "evidence of insure". This is done after Aetna has accepted the evidence of insurability. After the adjustment reason has been created you will follow the steps below using the "evidence of insure" option during the enrollment process.

<u>Evidence of Insurability</u>

- Create family related persons if necessary. Follow the instructions for adding family related persons beginning on page 2 of this chapter.

> **NOTE:** A time saving tip would be to create all the dependents and/or beneficiaries for the employees you are planning to enroll into benefits before starting the benefit enrollment process.

- Create infotype 0378 – Adjustment Reason – Evidence of Insure using the effective date of the approval from Aetna.

Use the following menu path to begin the benefit enrollment process for life or disability insurance.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > ENROLLMENT**

Follow the instructions for benefit enrollment beginning on page 5 of this chapter using the reason "Evidence of Insure".

Employee Benefits Open Enrollment

The Open Enrollment period is created by Headquarters.

The Open Enrollment period is a period of time, usually from mid November until the end of December.

The SAP HR Team will notify you when the Open Enrollment period is opened for benefit enrollment.

- Create family related persons if necessary. Follow the instructions for adding family related persons beginning on page 2 of this chapter.

Use the following menu path to begin the benefit enrollment process during the open season.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > ENROLLMENT**

Follow the instructions for benefit enrollment beginning on page 5 of this chapter using the reason "Open Enrollment".