

# Benefits Administration User Guide For Insurance Coordinators

## Health Insurance and Optional Insurance

Personnel Cabinet  
Department of Employee Insurance



Updated July 27, 2020

This Benefits Administration User Guide is to assist Non-Commonwealth Paid Insurance Coordinators (ICs) with the administration of health and optional insurance plans.

If needed, we will publish updates to this User Guide quarterly, according to changes in processing.

Please use the following matrix for processing:

<b>Actions to be completed by IC</b>	<b>Actions to be sent to DEI via paper application</b>
<input type="checkbox"/> New Hire Enrollment	<input type="checkbox"/> Cross-Reference Payment Options
<input type="checkbox"/> Employee Demographic Updates/Changes	<input type="checkbox"/> Transfers
<input type="checkbox"/> Terminations	<input type="checkbox"/> Qualifying Events
<input type="checkbox"/> Health Benefit Enrollment Reporting	<input type="checkbox"/> Evidence of Insurability (EOI) – OIB only
<input type="checkbox"/> Plan Change History Report	<input type="checkbox"/> Leave Without Pay (LWOP) w/premium-OIB only
<input type="checkbox"/> Insurance Plan Cost Report	<input type="checkbox"/> All Cancellation of Coverage Requests-OIB only
<input type="checkbox"/> Life Policy Conversion Letter(s)	<input type="checkbox"/> End Leave Without Pay
<input type="checkbox"/> Smoker Status Report	<input type="checkbox"/> Dependent Demographic Data Changes
<input type="checkbox"/> Health Post Tax Participant's Report	<input type="checkbox"/> Reinstatement with Break in Employment

**Note: Mail all applications/documentation to the Department of Employee Insurance (DEI) Enrollment Information Branch (EIB) or Optional Insurance Branch (OIB).**

Please send questions and/or suggestions for improvements to this User Guide to:

Department of Employee Insurance  
Enrollment Information Branch Manager  
502-564-1085  
501 High Street, 2<sup>nd</sup> Floor  
Frankfort, KY 40601

Department of Employee Insurance  
Optional Insurance Branch Manager  
502-564-4774  
501 High Street, 2<sup>nd</sup> Floor  
Frankfort, KY 40601

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*All names and other identifying information is fictitious and created specifically for this document.*

This section is to provide you with a guide to your everyday responsibilities as an IC. For you to assist your employees, it is important that you have knowledge of the insurance plans offered, an understanding of how the plans work, know the eligibility requirements and be familiar with the forms used as listed at [KEHP](#) and [OIB](#).

As a representative of an agency that participates in KEHP and OIB, an IC is responsible for the following actions:

1. Complete all online, webinar and in person training conducted by the Department of Employee Insurance (DEI) and Optional Insurance (OIB).
  - a. New IC Training:
    - i. KHRIS Access Training – includes modules on the Health Insurance Portability and Accountability Act (HIPAA) and an overview of KHRIS. You must first complete the [KHRIS Access Request Form](#) to gain access to these training modules.
    - ii. New IC Training – an in person training held at the State Office Building in Frankfort. This training provides hands on experience processing in KHRIS for enrollment, demographic changes, billing, and more. Please contact DEI at 888-581-8834 to enroll.
  - b. Open Enrollment Training – gives you up to date benefit related information for the upcoming plan year.
  - c. Yearly iStep Training that includes HIPAA – similar to the HIPAA training you took to gain access to KHRIS, and is required yearly to maintain KHRIS access.
  - d. Various webinars from DEI and our vendors. Training information is located on the [“Resources for Insurance Coordinators, HRG’s and Billing Liaisons”](#) page.

2. Provide new employee(s) with:
  - a. Current health insurance, waiver, and Flexible Spending Account (FSA) information and application(s). Information on all health related benefits is located on the [KEHP website](#).
  - b. Current optional insurance coverage information and application. Information on all optional insurance benefits is located on the [OIB website](#).
  - c. Information on enrollment requirements
    - i. For example, the 35-day new hire deadline, the “First day/Second month” rule, the cross-reference payment option, and how to elect benefits using KHRIS Employee Self-Service (ESS).
  - d. Information on qualifying events and deadlines
    - i. How to fill out, sign and submit forms to DEI and OIB
    - ii. What supporting documentation is required
    - iii. What and when verification documentation is required
    - iv. Deadlines for signature dates
  - e. Information on COBRA
    - i. COBRA rates are on the [KEHP website](#).
  - f. Open Enrollment information regarding dates, requirements and any benefit/premium changes.
3. Process employee enrollment, termination, demographic changes/updates in KHRIS in a timely manner. This includes new employees who do not turn in an application or complete benefits enrollment within 35 days of hire.
4. Provide DEI and OIB (if applicable) with updates on the Enrollment Change Form for employee transfers, begin/end military leave, begin/end LWOP, retirement, death, cross-reference payment option elections, and qualifying events in a timely manner. New website for ICs/HRGs to submit applications, Exceptions, and supporting documentation to DEI: <https://apps.personnel.ky.gov/DEIFormUpload>. Log in using your KHRIS user id and password. Once you log in: Select Upload New application. NOTE: Life insurance should not be uploaded on this site.
5. Manage monthly bills by reconciling, processing and releasing the life, dental, vision and health premiums, administrative fees, flexible benefits and health reimbursements within Biller Direct if your duties include Billing Liaison.
6. Counsel employees on health and optional insurance and provide resources for additional information such as website addresses, benefits selection guides and customer service numbers for KEHP and vendors.
7. Be familiar with and use the KEHP Administration Manual, Group Life Insurance Certificate Booklet, and this User Guide to complete your responsibilities.

# LOGGING INTO KHRIS

Log into [KHRIS](#).

To login, please use your own KHRIS User ID and Password. New/First time users should click on the “Forgot/Reset Password or New User?” link to create a password. Also, please notice the “Forgot KHRIS User ID” link. Those who have already accessed their KHRIS account but have forgotten or misplaced their User ID can use this link.

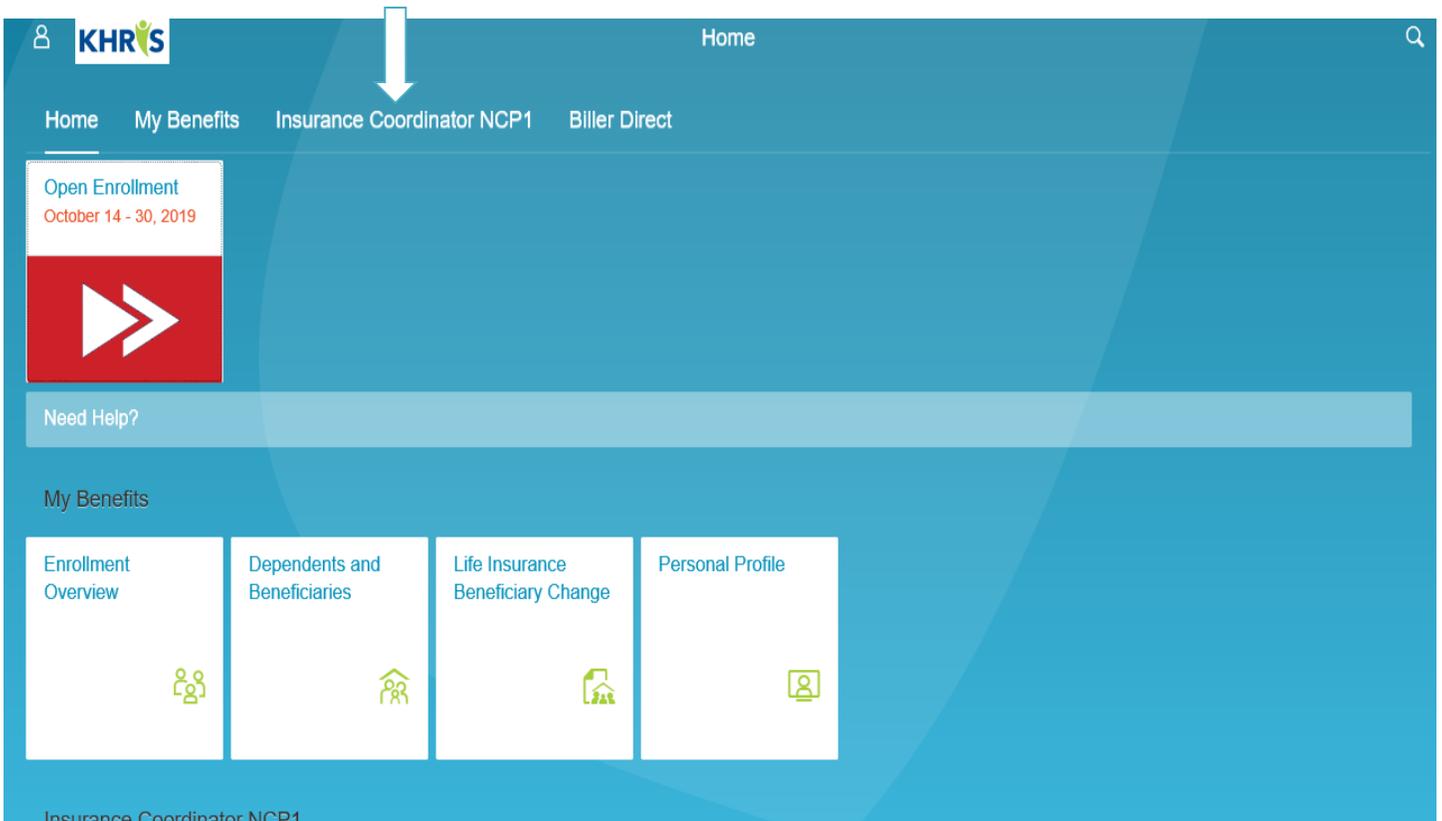
**Welcome** [Need Help?](#)

 KHRIS User ID \*   
Password \*   
  
[Forgot KHRIS User ID?](#)  
[Forgot/Reset Password or New User?](#)  **Connecting the Commonwealth**  
[Browser Requirements](#)

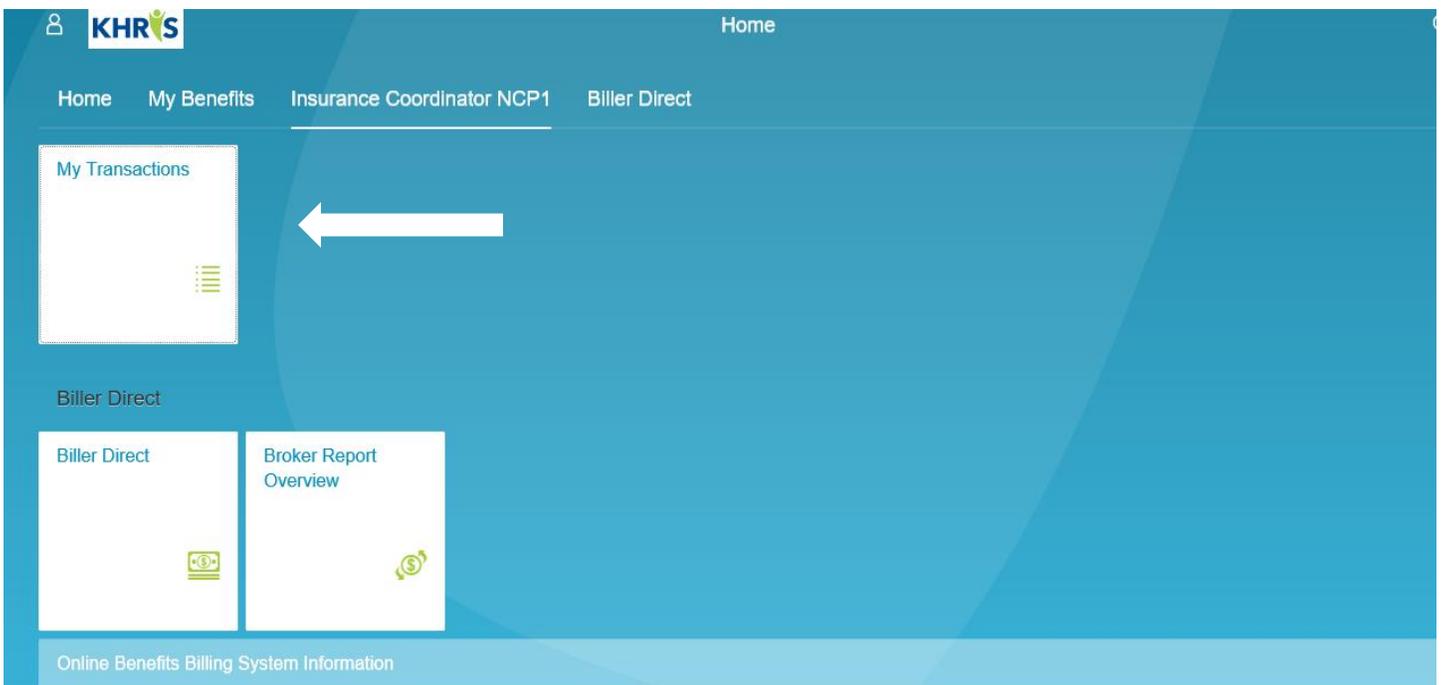
You are accessing a government computer system which is the property of the Commonwealth of Kentucky. It is for authorized use only regardless of time of day, location or method of access. Users (authorized or unauthorized) have no explicit or implicit expectation of privacy. Any or all uses of this system and all files on the system may be intercepted, monitored, recorded, copied, audited, inspected, and disclosed to authorized state government and law enforcement personnel, as well as authorized officials of other agencies, both domestic and foreign. By using this system, the user consents to such at the discretion of the Commonwealth of Kentucky. Unauthorized or improper use of this system may result in administrative disciplinary action and/or civil and criminal penalties. By logging in, you acknowledge your awareness of and consent to these terms and conditions of use. LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

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After you have logged into KHRIS using your KHRIS User ID and password, select the “Insurance Coordinator NCP1” tab.



Then select my Transactions.



Please choose the appropriate transaction from the list on the left to begin processing, displaying screens or running reports.

The screenshot shows the KHRIS Online Benefits Administration System interface. The top navigation bar includes a user profile icon, a home icon, the KHRIS logo, a 'My Transactions' dropdown menu, and a search icon. The left sidebar, titled 'Related Links', features a search bar and a list of transactions. A blue arrow points to the 'PA20 - Display HR Master Data' transaction. The main content area displays a welcome message and contact information.

**Welcome to KHRIS Online Benefits Administration System**

*\*Firefox Quantum version will not run tcodes from this page. Please try IE, Edge, or Chrome.*

Please use the menu to the left to perform your Insurance Coordinator job duties.

**Contact Us:**

Life Insurance Questions: Contact the Life Insurance Branch at (502) 564-4774.  
Business Hours are 7:30 am to 4:30 pm EST, Monday through Friday.

Health Insurance, FSA or HRA Enrollment Questions: Contact the Enrollment Information Branch at (502) 564-1205.  
Business Hours are 7:30 am to 4:30 pm, EST Monday through Friday.

Health Insurance, FSA or HRA Billing concerns or questions: Contact the Financial Management Branch at (502) 564-9097.  
Business Hours are 7:30 am to 4:30 pm EST, Monday through Friday.

**Related Links**

Search

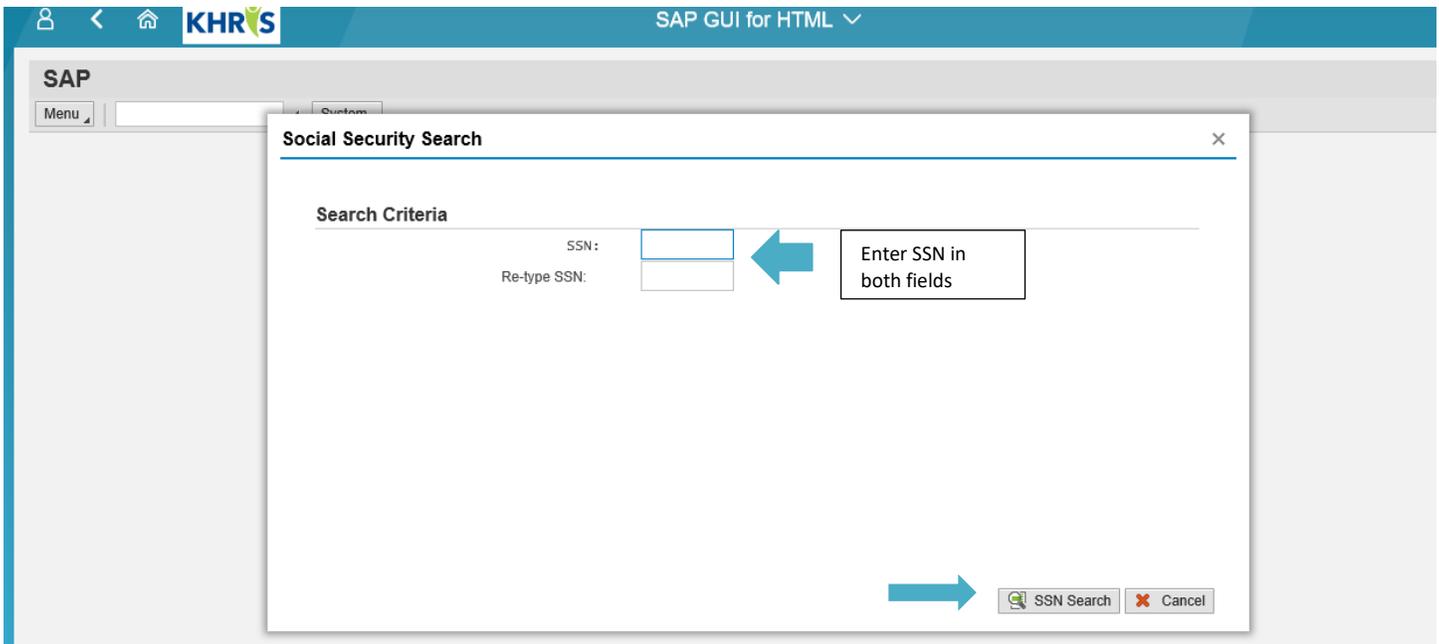
- HRBEN0001 - Enrollment
- HRBEN0003 - Participation Monitor
- HRBEN0006 - Plan and Participation Ov...
- HRBEN0014 - Termination of Participation
- HRBEN0015 - Confirmation Form
- HRBEN0073 - Health Plan Costs
- HRBEN0074 - Insurance Plan Costs
- HRBEN0078 - FSA Contributions
- PA20 - Display HR Master Data
- PA30 - Maintain HR Master Data
- PA40 - Personnel Actions
- ZAU\_SSN - Social Security Search
- ZBNF002 - Benefits Policy Conversion L...
- ZBNF005 - User Password Reset
- ZBNQ0012 - Health Post Tax Participants

# ENROLLING A NEW HIRE

A new hire for this process is a newly hired employee never covered under KEHP as a planholder or dependent. The new hire is not a returning retiree, transfer from another agency who participates with KEHP, dependent (spouse/child) covered by KEHP, or participating in a “new” cross-reference payment option (a newly hired employee who wants to begin a cross-reference payment option with their spouse). Applications for anyone who is not a newly hired employee should be forwarded to EIB and OIB for processing.

## **Step 1: Social Security Search**

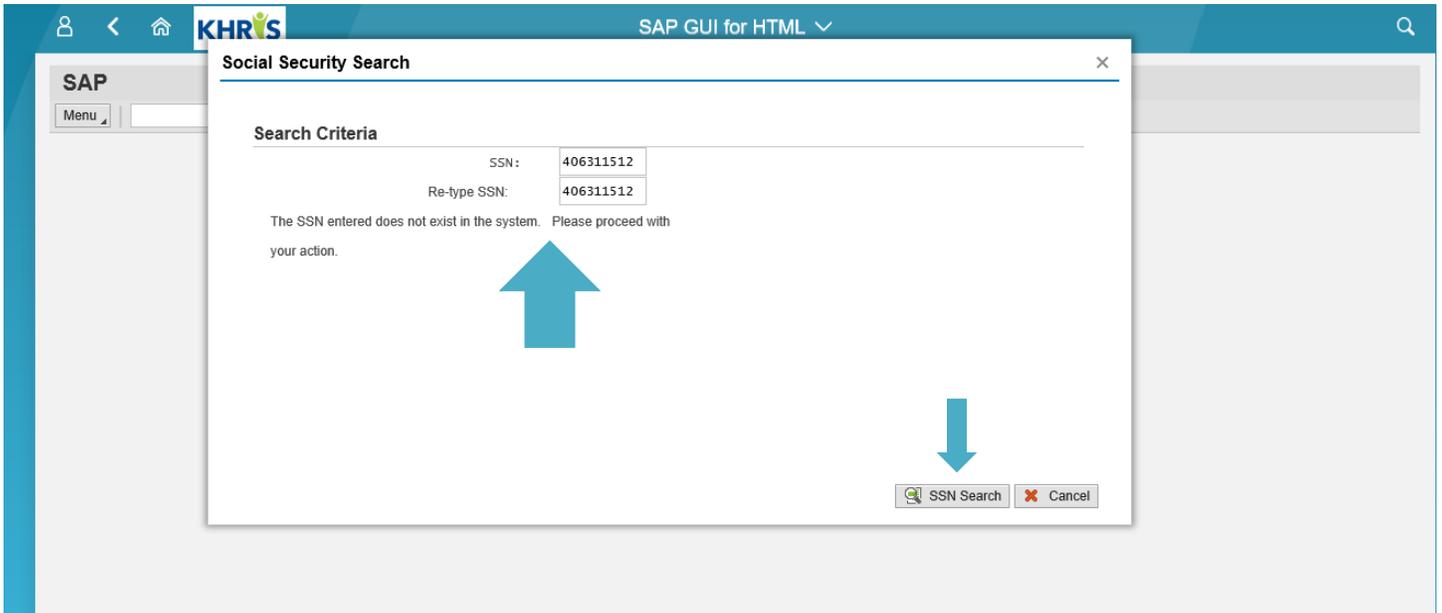
Select Transaction ZAU\_SSN Social Security Search from the menu on the left of your screen. Enter new hire’s SSN in both search fields. Click “SSN Search”. If the name is not found, click “Cancel” to proceed to next step.



## Step 1 continued: SSN Search

If the SSN you entered matches the SSN of an employee who is already a planholder in KHRIS, then you see that this employee already exists. Please send all applications to EIB and OIB for which you get this result.

If KHRIS does not find a match for the new employee's SSN, you will see the following message, and you can proceed to the next step.



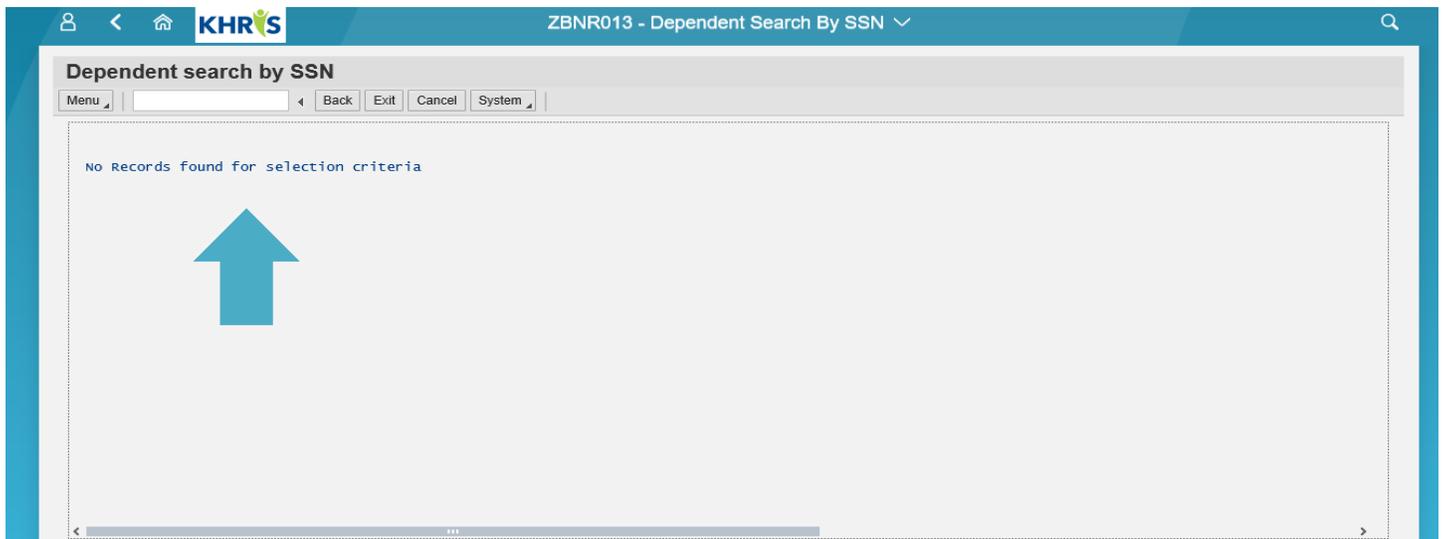
## **Step 2: Dependent SSN Search**

Select “ZBNR013-Dependent Search By SSN” from your list of transactions. **Do not** change the reporting period dates. In the “Dependent SSN” field, enter the new employee’s SSN, then select “Execute”.

## **Step 2 continued: Dependent SSN Search**

If the SSN you entered matches the SSN of an employee who is already a dependent in KHRIS, then you will get a message telling you that this employee already exists. Please send all applications to EIB and OIB for which you get this result.

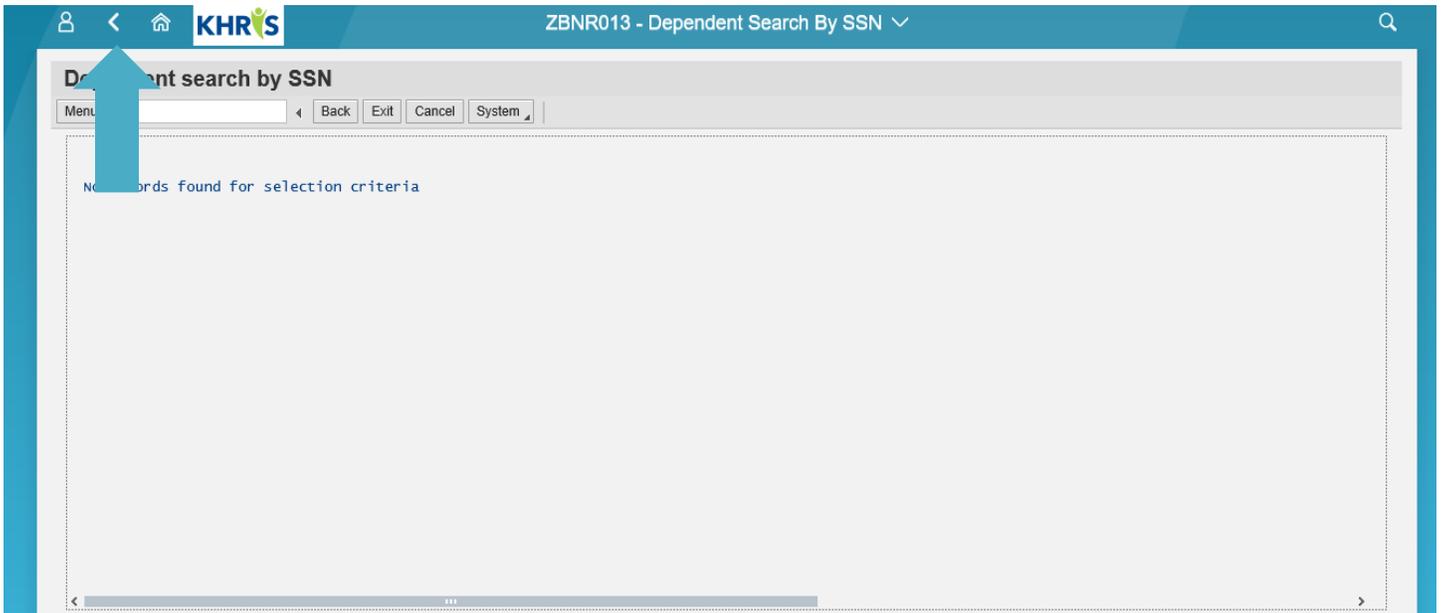
If KHRIS does not find a match for the new employee’s SSN, you will see the following message, and you can proceed to the next step.



**Note:** It is very important that you perform both SSN searches prior to beginning Step 3. You will encounter errors later in your processing steps if you do not.

### Step 3: Personnel Actions

After both SSN searches are performed and no matches were found, select "<" at the top of your screen and then select "PA 40 Personnel Actions", from the Transactions Menu on the left.



### Step 3 continued: Personnel Actions

In the "From" field, enter the employee's date of hire.

In Personnel Actions box, click "Begin Participation" to highlight.

Click "Execute".

The screenshot displays the KHRIS PA40 - Personnel Actions interface. At the top, there is a navigation bar with the KHRIS logo and the title 'PA40 - Personnel Actions'. Below this, a search form is visible with the following elements:

- Menu**: A dropdown menu.
- Buttons**: Back, Exit, Cancel, System, Execute, and SSN Search.
- Find by**: A section with options for 'Collective search help' and 'Search Term'.
- Personnel no.**: A text input field.
- From**: A text input field containing '03012020'.

Below the search form, there is a 'Hit list' section with a table titled 'Personnel Actions'. The table has the following columns: Action Type, Personn..., EE group, and EE subg... The table contains the following rows:

Action Type	Personn...	EE group	EE subg...
BN - Begin Participation			
BN - End Participation			
BN - Begin Leave W / Out Pay			
BN - End Leave W / Out Pay			
BN - Change FSA Billing Freq			

### Step 3 continued: Personnel Actions

Click on the "Reason for Action" field, (drop down box will appear) choose (01) New Employee

In the "Position" field enter 99999999 (always)

In the “Personnel area” field enter 0004 -Benefits Only

In the “Employee group” field enter L -External BN

In the “Employee subgroup” enter 41 -24 Non-paid

Click “Save”

The screenshot shows the 'Create 0000 Actions' form in the KHRIS system. The form is titled 'PA40 - Personnel Actions' and includes a navigation bar with 'Menu', 'Save', 'Back', 'Exit', 'Cancel', 'System', 'Overview', and 'Change info group' buttons. The form is divided into three main sections:

- Personnel action:** Includes 'Action Type' (BN - Begin Participation), 'Reason for Action' (01 BN\_Begin Participation), and 'Reference Pers. Nos.' (empty).
- Status:** Includes 'Customer-specific' (dropdown), 'Employment' (Active), and 'Special payment' (dropdown).
- Organizational assignment:** Includes 'Position' (99999999), 'Personnel area' (0004), 'Employee group' (L), and 'Employee subgroup' (41).

Blue arrows in the image point to the 'BN - Begin Participation' dropdown, the '01 BN\_Begin Participation' reason for action, and the '99999999', '0004', 'L', and '41' input fields.

### Step 3 continued: Personnel Actions

In the “Cost Ctr” field enter Agency’s cost center number (this is specific to your Agency; 9+subarea+company number)

In the “Sub Area” field (use drop down box for type of Agency) enter Agency type (i.e. school board, health dept, etc.)

In the “Position” field enter 99999999 (always)

In the “Org. Unit” field enter Agency’s organizational unit number (this is specific to your Agency; use drop down box to search for org unit by searching org unit short text)

Click “Save”

**Note:** This will be the first screen to show the newly generated KHRIS Personnel Number. Now would be a good time to write down for future use.

The screenshot displays the SAP GUI for HTML interface for creating an organizational assignment. The title bar shows 'SAP GUI for HTML' and the KHRIS logo. The main heading is 'Create 0001 Organizational assignment'. Below the heading is a navigation bar with buttons: Menu, Save, Back, Exit, Cancel, System, Previous record, Next record, Overview, and Org Structure. The 'Start' date is set to 03/01/2020, and the 'to' date is 12/31/9999. The 'Enterprise structure' section includes: CoCode (COMK - Commonwealth of Kentucky), Pers. area (0004 - Benefits Only), Subarea (2001), Cost Ctr (9200100071), and Func. Area. The 'Personnel structure' section includes: EE group (L - External - BN), Payr. area (BN - Non-COMK Paid), EE subgroup (41 - 24 Non-Paid), and Contract. The 'Organizational plan' section includes: Position (99999999) and Org. Unit (10006024). Blue arrows point to the 'Save' button, the end date, the Subarea field, the Cost Ctr field, the Position field, and the Org. Unit field.

### Step 3 continued: Personnel Action

Enter Employee’s Name (last, first and middle initial), SSN, Date of Birth, Gender/Sex and Marital Status

Click “Save”

**Create 0002 Personal data**

Menu | [ ] | Save | Back | Exit | Cancel | System | Previous record | Next record | Overview

Start: 03/01/2020 To: 2/31/9999

**Name**

Last name: Mouse  
 First name: Mickey  
 Middle name: L  
 Suffix: [ ]  
 Name: [ ]

Pref 1s Nm: [ ]

**HR data**

SSN: 406311512  
 Date of Birth: 03271981  
 Language: English  
 Marital Status: Marr.

**Gender**

Female  Male  Undecla

Record created | SAP | 500 (400)

**Note:** Do not forget to include middle initial and suffix (Jr., Sr., III, and IV), if this information is provided on their application.

### Step 3 continued: Personnel Actions

Enter Address (If employee has a P.O. Box, enter it in “Address line 1”)

Enter Telephone Number

Use the Communications section if Employee wants to list additional telephone numbers (use drop down menu for type)

In the “County Code” field select Employee’s home county (use drop down menu)

Click “Save”

**Create 0006 Addresses**

Menu |  | Save | Back | Exit | Cancel | System | Previous record | Next record | Overview | Foreign address

Address line 1: 236 Spring Street

Address line 2:

City/county: Frankfort

State/zip code: KY 40601

Country Key: USA

Telephone Number: 502 6825989

**Communications**

Type	Number	Exte
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

**Additional fields**

County code: 037

**Note:** If you get a zip code error, please use the [USPS.com](https://www.usps.com) website to determine the correct zip code. You can also use [Google.com](https://www.google.com) to search for the correct county of residence.

### Step 3 continued: Personnel Actions

In the “System ID” field, enter Employee’s email address.

Click “Save”

**Create 0105 Communication**

Menu | [ ] | Save | Back | Exit | Cancel | System | Previous record | Next record | Overview

Personnel No: 510634    Name: Mouse, Mickey

Position: 99999999    Integration default position

Status: Active

Start: 03/01/2020 to 12/31/9999

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**0105 Communication**

Type: 0010 E-mail

System ID: mickeymouse@gmail.com

Record created

**Note:** Employee should use the email (preferably work email) that they want to receive health and optional benefit information. If employee does not yet have, or did not supply their email address, select “Next record” to move to the next screen.

### Step 3 continued: Personnel Actions

Click “Save”

Click "Enter" to acknowledge message at bottom of screen

Click "Enter"

**Copy 0008 Basic Pay**

Menu | Save | Back | Exit | Cancel | System | Previous record | Next record | Overview | Salary amount | Payments and deductions

Personnel No: 510634 | Name: Mouse, Mickey  
EE group: L External - BN | Personnel area: 0004 Benefits Only | Status: Active  
EE subgroup: 41 24 Non-Paid | Pers. subarea: 2001 Board of Ed.  
Start: 03/01/2020 to 12/31/9999

Subtype: 0 Basic contract

**Pay scale**

Reason		Cap.util.lvl	100.00
PS type	99 Non-Paid	WkHrs/period	86.67
PS Area	99 Non-Paid		
PS group	NON-PAID Level 01	Ann.salary	USD

Wag...	Wage Type Long Text	O...	Amount	Curre...	In...	A...	Number/Unit	Unit
8002	Salary (Quasi)			USD3		✓		
				USD3		□		

Record created

### Step 3 continued: Personnel Actions

Enter \*Original Hire Date (Z1)

Enter Current Hire Date (Z2)

Click "Save"

Click "Enter"

Click "Enter" to acknowledge message at bottom of screen

**Create 0041 Date Specifications**

Menu | [ ] | Save | Back | Exit | Cancel | System | Previous record | Next record | Overview

Personnel No: 510634    Name: Mouse , Mickey  
Position: 99999999    Integration: default position  
Status: Active  
Start: 03/01/2020 to 12/31/9999

Date type	Date	Date type	Date
Z1 Original Hire Date	03012020	Z2 Current Hire Date	03012020
Z3 Increment Date		Z5 Benefits Elig. Date	

**Additional fields**

At least one infotype was skipped (authorization)

\* Original Hire Date will be the same as the Current Hire Date

**Note:** Benefit eligibility date and increment date does not need to be entered. KHRIS will automatically calculate the Benefit Eligibility date for you. You can verify the accuracy of the date by using the "First day/Second month" rule.

### Step 3 continued: Personnel Actions

No information is to be entered on this screen, (applications for dual employee's, hazardous duty retiree's, and cross-references are processed by EIB) **but** verify the information is correct.

Click "Save"

The screenshot shows the SAP GUI for HTML interface for the 'Create 0171 General Benefits Information' screen. The header includes the KHRIS logo and 'SAP GUI for HTML'. The main content area contains the following data:

Personnel No	510634	406-31-1514	Name	Mouse , Mickey
Payroll area	BN	Org.unit	Bullitt County Bd of Ed	
Start	03/01/2020	to	12/31/9999	

<b>0171 General Benefits Information</b>			
Benefit area	01	Comm of KY	
1st Program Grouping	0002	NPHlth/HRA/FSAL/D/V	
2nd Program Grouping	0002	2 Months Start	

At the bottom left, a green checkmark icon is followed by the text 'Record created'. The SAP logo is visible at the bottom right.

### Step 3 continued: Personnel Actions

No information is entered on this screen. View the dates to make sure that the “to” date is 35 days from hire date.

Click “Save”

The screenshot shows the SAP GUI for HTML interface for creating adjustment reasons. The header includes the KHRIS logo and 'SAP GUI for HTML'. The main title is 'Create 0378 Adjustment Reasons'. Below the title is a navigation bar with buttons: Menu, Save, Back, Exit, Cancel, System, Previous record, Next record, and Overview. The 'Save' button is highlighted with a blue arrow. The form contains the following data:

Personnel No	510634	406-31-1514	Name	Mouse , Mickey
Payroll area	BN	Org.unit	Bullitt County Bd of Ed	
Start	03/01/2020	to	04/05/2020	

**Adjustment Reason Data**

Benefit area	Comm of KY
Adjustment reason	New Participant

At the bottom left, there is a green checkmark icon and the text 'Record created'. At the bottom right, there is the SAP logo.

You will know that this step is complete once KHRIS brings you back to the PA40 home page as shown below.

**Personnel Actions**

Menu |  | Back | Exit | Cancel | System | Execute | SSN Search

Find by: [Collective search help](#) | [Search Term](#)

**Hit list**

Personnel number	Name
510634	Mouse, Mickey

Personnel no. 510634  
 Name Mouse, Mickey  
 EE group L External - BN  
 EE subgroup 41 24 Non-Paid  
 From 03/01/2020

Personnel area 0004 Benefits Only  
 Pers. subarea 2001 Board of Ed.

**Personnel Actions**

Action Type	Personn...	EE group	EE subg...
BN - Begin Participation			
BN - End Participation			
BN - Begin Leave W / Out Pay			
BN - End Leave W / Out Pay			

Record created

## Step 4: Creating Dependent and Beneficiary records

This step is to be completed using Transaction PA30 under Benefits tab to add Dependents, Beneficiaries, and/or smoking status.

Bring up Transaction PA 30 from the My Transaction Menu

Don't hit the < or the home button. Once you complete the PA40 action, you must NOT click on the < and not the Home button. If you click on either it locks the PERNR up. Instead you must type in the PA40 and once complete then type in PA30 and then HRBEN0001 to go from screen to screen.

Bring up the employee's record by entering their Personnel number (created in Step 3) into the "Personnel no." field

Hit enter on your keyboard

Click on the "Benefits" tab

Click Infotype 0021 "Family Members/Dependents" to highlight the line

Click "Create"

The screenshot shows the SAP PA30 - Maintain HR Master Data interface. The 'Benefits' tab is selected, and the 'Infotype text' list shows '0021 Family Member/Dependents' highlighted. The 'Personnel no.' field contains '510634' and the 'Name' field contains 'Mouse, Mickey'. The 'Status' is 'Active'. The 'EE group' is 'L External - BN' and the 'EE subgroup' is '41 24 Non-Paid'. The 'Personnel area' is '0004' and the 'Pers. subarea' is '2001'. The 'Period' section is visible with 'Period' selected and 'From' and 'To' fields.

**Note:** If you did not write down the Personnel Number in Step 3, you can search for the member using their SSN or first and last name by clicking on the icon to the right of the "Personnel no." field

### Step 4 continued: Creating Dependent and Beneficiary records

Select the appropriate category for the dependent/beneficiary record you are creating. You should only use “Spouse”, “Child” or “Other Beneficiary” (for Life Insurance only). KHRIS will not recognize any other category in this list for KEHP purposes.

Click the category twice, or click once, then click the ✓

**Subtypes for infotype "0021 Family Member/Dependents" (1)**

STyp	Name
1	Spouse
10	Divorced spouse
11	Father
12	Mother
13	Domestic Partner
14	Child of Domestic Partner
15	Registered Partner
2	Child
3	Legal guardian
4	Testator
5	Guardian
6	Stepchild
7	Emergency contact - Primary
8	Related persons
90	Emergency contact - Optional
9001	Court Ordered Dependent
9002	Retiree Account
9003	Other Beneficiaries

18 Entries found

Navigation bar: [Home] [Back] [Green Checkmark] [Left Arrow] [Close]

## Step 4 continued: Creating Dependent and Beneficiary records

Enter the hire date in the “Start” date field (12/31/9999 will already be entered in the “To” field)

Enter first and last name, middle initial and title (Jr., Sr., III, and IV), gender/sex, date of birth and SSN

Hit enter on your keyboard (to make sure there are no errors)

Click “Save”

The screenshot shows the SAP GUI for HTML interface for creating a dependent record. The title bar indicates 'SAP GUI for HTML'. The main heading is 'Create 0021 Family Member/Dependents'. The form contains the following data:

Personnel No	510634	Name	Mouse , Mickey		
EE group	L External - BN	Personnel area	0004 Benefits Only	Status	Active
EE subgroup	41 24 Non-Paid	Pers. subarea	2001 Board of Ed.		
Start	03/01/2020	To	12/31/9999		
Member	Spouse	Number			
<b>Personal data</b>					
Last name	Mouse	Initials			
First name	Minnie				
Title					
Gender	<input checked="" type="radio"/> Female <input type="radio"/> Male				
Birth date	04/23/1982	Ref.Pers.No.			
SSN	235-66-9983	Telephone number			
Street					
Addr Line 2					

Repeat the steps above to create additional dependent records.

**Note:** If employee is selecting “single” coverage, this step is not needed. BUT DO continue with this step to add Beneficiaries for Life Insurance plan(s). (The same screens used to add dependents for the health, dental, and vision plans would be used to add beneficiary information for the Life Insurance plan.) If employee is adding an External Organization, i.e. charitable organization as a Beneficiary, see page 28 for instructions.

If the employee is selecting Waiver w/HRA, you will add their dependents here.

If the employee has a disabled dependent, you can still process the application. HOWEVER, do not add the disabled dependent to the plan. The application must be forwarded to the attention of Jeff Wiley in EIB to enroll the disabled dependent. The disabled dependent’s information should not be entered.

## Step 4 continued: Creating an External Organization as Beneficiary record

**Note:** This process is used if an employee wants to have an External Organization (i.e. trust fund, charitable organization) without designating dependents/others as a Beneficiary for life insurance benefits.

This step is to be completed using Transaction PA30 under Benefits tab to add Dependents, Beneficiaries, and/or smoking status.

Bring up Transaction PA 30 from the menu on the left

Bring up the employee's record by entering their Personnel number (created in Step 3) into the "Personnel no." field

Hit enter on your keyboard

Click on the "Benefits" tab

Select Infotype "0219 External Organizations"

Click "Create"

The screenshot displays the SAP GUI for HTML interface for 'Maintain HR Master Data'. The top navigation bar includes the KHRIS logo and 'SAP GUI for HTML'. The main area shows the 'Benefits' tab selected, with a list of infotypes. The '0219 External Organizations' infotype is highlighted. The 'Period' section on the right allows for selecting a date range. A 'Record created' message is visible at the bottom left.

Infotype text	St.
0021 Family Member/Dependents	✓
0031 Reference Personnel Numbers	✓
0041 Date Specifications	✓
0167 Health Plans	✓
0168 Insurance Plans	✓
0170 Flexible Spending Accounts	✓
0171 General Benefits Information	✓
<b>0219 External Organizations</b>	
0376 Benefits Medical Information	✓

Personnel no. 510634  
Name Mouse, Mickey  
EE group L External - BN  
EE subgroup 41 24 Non-Paid  
Personnel area 0004  
Pers. subarea 2001  
Status Active  
Benefits Only  
Board of Ed.

Basic personal data | Payroll | **Benefits** | Time | Taxes | Planning Data

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

Record created

## Step 4 continued: Creating an External Organization as Beneficiary record

In “Start” date field, enter employee’s signature date (from application)

In the “External organization” box, (use the drop down menu) select either Charity Organization or Trust Fund

Enter the name, Tax ID. Address and phone number for the organization. You must have the Tax ID for the organization, or you will not be able to select it as a beneficiary in later steps

Click “Save”

The screenshot shows the SAP PA30 - Maintain HR Master Data interface for creating an external organization. The form is titled "Create 0219 External Organizations" and includes the following fields and values:

- EE subgroup: 41 24 Non-Paid
- Pers. subarea: 2001 Board of Ed.
- Start: 03/01/2020 to 12/31/9999
- External organization type: Charity organization (dropdown menu)
- Organization Name: Saint Jude
- Tax number: 11385698
- Charitable org. (checkbox): unchecked
- Organization's address:
  - Street and House No.: 326 Brave Street
  - 2nd Address Line: (empty)
  - City: Frankfort
  - Region: KY Kentucky
  - Postal Code: 40601
  - Country Key: USA (dropdown menu)
  - Telephone Number: 270 659-2541

Blue arrows point to the "Charity organization" dropdown, the "Saint Jude" text field, the "11385698" text field, the "USA" dropdown, and the "40601" text field.

**Note:** Use the drop down box for the “Country Key” field. Select USA. **Do this prior to selecting the Region/State.**

## Step 5: Adding Tobacco Use Status

After creating dependent/beneficiary records, you must indicate whether the member is a tobacco user by completing the following step while still in Transaction PA 30.

Click “Benefits tab”

Select Infotype “0376 Benefits Medical information”

Click “Create”

The screenshot displays the SAP PA30 - Maintain HR Master Data interface. The top navigation bar includes the KHRIS logo and the title "PA30 - Maintain HR Master Data". Below this, a menu bar contains buttons for "Menu", "Back", "Exit", "Cancel", "System", "Create", "Change", "Display", "Copy", "Delimit", "Delete", and "Overview".

The main data area shows the following information:

Personnel no.	510634	
Name	Mouse , Mickey	
Status	Active	
EE group	L External - BN	Personnel area 0004 Benefits Only
EE subgroup	41 24 Non-Paid	Pers. subarea 2001 Board of Ed.

Below the data area, there are tabs for "Basic personal data", "Payroll", "Benefits", "Time", "Taxes", and "Planning Data". The "Benefits" tab is selected.

The "Hit list" on the left shows a list of infotypes with their status:

Infotype text	St.
0021 Family Member/Dependents	✓
0031 Reference Personnel Numbers	✓
0041 Date Specifications	✓
0167 Health Plans	✓
0168 Insurance Plans	✓
0170 Flexible Spending Accounts	✓
0171 General Benefits Information	✓
0219 External Organizations	✓
0376 Benefits Medical Information	✓

The "Period" section on the right includes options for "Period", "Today", "All", "From curr.date", "To Current Date", "Current Period", "Curr.week", "Current month", "Last week", "Last month", and "Current Year". A "Choose" button is also present.

A green checkmark and the text "Record created" are visible at the bottom left of the interface.

## Step 5 continued: Adding Tobacco Use Status

Change “Start Date” to hire date

Put a ✓ in the “Tobacco Use” box if the member is a tobacco user. Leave box empty if they are not a tobacco user

Click “Save”

The screenshot shows the 'Create 0376 Benefits Medical Information' form in the KHRIS system. The form is for employee Mickey Mouse (Personnel No: 510634 406-31-1514) at Bullitt County Bd of Ed. The Start date is 03012020. The 'Tobacco use' checkbox is checked. The form also includes a 'Hit list' section and a 'LivingWell Non-Fulfilled Previous Year' checkbox.

**Note:** This step only needs to be completed for tobacco users.

**STOP HERE** if you are entering an application on behalf of a new employee who **HAS NOT** turned in their application within 35 days of their hire date. They must be enrolled in the Default plan, designated by KEHP. If a new employee fails to turn in an application, **they MUST still be entered** into KHRIS. By stopping at this step, you will have created a record for the member and assigned them a Default health plan and a Basic Life Insurance plan. Make sure to advise your new employees of this policy so that they can expect health premiums to be deducted from their paychecks.

**If application is signed within 35 days please continue on to the step.**

## Step 6: HRBEN0001-Enrollment

Bring up Transaction HRBEN0001 – Enrollment

Don't hit the < or the home button. Once you complete the PA40 action, you must NOT click on the < and not the Home button. If you click on either it locks the PERNR up. Instead you must type in the PA40 and once complete then type in PA30 and then HRBEN0001 to go from screen to screen.

In the "Personnel No" field, enter employee's Personnel Number (assigned to employee during the PA 40 step). If you did not write it down, you can enter the employee's SSN in the "ID Number" field.

Select "Calendar" by clicking on the calendar icon to the far right of the field, enter Signature Date on employee's application. (If signature date precedes the hire date, **THEN** use the hire date in this field).

Click Green Check Mark

Highlight New Participant (may already be highlighted)

Click "Get Offer"

Enrollment

Menu | [ ] | Back | Exit | Cancel | System

Direct selection

Personnel no. [ ]

ID number [ ]

Select

Pers.No. Name

510634	Mouse, Mickey
--------	---------------

Enroll

Name: Mouse, Mickey on: 03/01/2020 [Calendar] [Overview]

Offer selection

Get offer | Print form | General Notice | Error list

Possible offers	Enrollment period
New Participant	03/01/2020 - 04/05/2020
Life Beneficiary Chg	01/01/1800 - 12/31/9999

Offer

SAP

**Note:** HRBEN0001 uses the signature date entered to validate that the employee signed his/her application within the allotted 35-day period. If the signature date is outside of the 35-day period, the HRBEN0001 transaction will not allow you to enroll the employee for benefits. If application is signed outside of the 35 days of hire, please submit an Exception form with application to MSB and the life application to OIB for process.

### **Step 6 continued: HRBEN0001-Enrollment**

Click on the health insurance plan chosen on application to select it

**NOTE:** If you do not see all four health insurance plans and all three waiver options, an error has occurred somewhere in one of the steps. Please call EIB for assistance at 888-581-8834.

\*Health Departments will only see the "Waiver no HRA" option.

My Transactions - My Transact... HRBEN0001 - Enrollment - ...

### Enrollment

Menu [ ] [Back] [Exit] [Cancel] [System]

**Direct selection**

Personnel no. [ ]

ID number [ ]

[Select]

[Person] [Print] [Refresh] [Info] [Trash]

Pers.No.	Name
510834	Mouse, Mickey

**Enroll**

Name: Mouse, Mickey on 03/01/2020 [Overview]

**Offer selection**

[Get offer] [Print form] [General Notice] [Error list]

Possible offers	Enrollment period
New Participant	03/01/2020 - 04/05/2020
Life Beneficiary Chg	01/01/1800 - 12/31/9999

**New Participant**

[Enroll] [Costs] [Undo selection] [Error List]

Plan	Sta...	Validity period	Acti...
Medical			
LivingWell CDHP		05/01/2020 - 12/31/9999	
LivingWell PPO		05/01/2020 - 12/31/9999	
LivingWell Basic CDHP		05/01/2020 - 12/31/9999	
LW Limited High Deductible		05/01/2020 - 12/31/9999	
Waiver HRA - with \$		05/01/2020 - 12/31/9999	
Waiver Dental/Vis HRA with \$		05/01/2020 - 12/31/9999	
Waiver without HRA - no \$		05/01/2020 - 12/31/9999	
Default LW Ltd High Deductible	●	05/01/2020 - 12/31/9999	
Dental			

**Step 6 continued: HRBEN0001-Enrollment**

Select appropriate plan level (Parent Plus if only adding children to plan, Couple if only adding spouse, Family if adding children and spouse.).

If member is not adding dependents and chose a single plan, just click "Accept"

The screenshot displays the SAP HRBEN0001 - Enrollment - ... window. The main window is titled "Enrollment" and shows a "Direct selection" tab. The "Enroll" section is active, displaying the name "Mouse, Mickey" and the date "03/01/2020". The "Offer selection" section shows "Possible offers" with "New Participant" selected. The "New Participant" section is open, showing a list of plans under "Medical" and "Dental". The "Maintain Health Plan" dialog box is open, showing the "Option" tab. The dialog box contains the following information:

- Pers.No.: 510634 Mouse, Mickey
- Plan: Livingwe11 CDHP
- Start: 05/01/2020 - 12/31/9999
- Stop participation in period
- Plan options:
  - Health Plan Opt: KEHP
  - Dependent Cover: Couple
- Costs USD Semi-monthly:
 

Employee	156.88	<input checked="" type="checkbox"/> Deductions Pre-
Employer	514.51	
- Buttons: Accept, X

**Note:** Dependents must be added if the member selects Waiver with (General Purpose) HRA using these same steps.

## Step 6 continued: HRBEN0001-Enrollment

Click on the “Dependent” tab to see a list of eligible dependents

**This is the step where dependents are added to the plan.**

Place a ✓ in the box beside the name of each dependent listed on the application to be covered by health insurance

Click “Accept” when done

The screenshot displays the SAP HRBEN0001 - Enrollment interface. The main window is titled "Enrollment" and shows the "Enroll" section for "Mouse, Mickey" on "03/01/2020". The "Offer selection" section is active, showing "Possible offers" with "New Participant" selected. The "New Participant" section is also visible, showing a list of plans under "Medical" and "Dental".

A "Maintain Health Plan" dialog box is open, showing details for "Pers.No. S10634 Mouse, Mickey" and "Plan LivingWell CDHP". The "Start" date is "05/01/2020" and the "End" date is "12/31/9999". The "Option" tab is selected, and the "Dependents" sub-tab is active. A table lists dependents:

Select	Name	Type of dep./ben.
<input checked="" type="checkbox"/>	Minnie Mouse	Spouse
<input type="checkbox"/>		

A blue arrow points to the "Dependents" sub-tab, and another blue arrow points to the "Accept" button at the bottom right of the dialog box.

## Step 6 continued: HRBEN0001-Enrollment

Follow these steps if member is electing Waiver with (General Purpose) HRA.

Click on Waiver with (General Purpose) HRA

The screenshot shows the SAP HRBEN0001 - Enrollment - ... interface. The main window is titled 'Enrollment' and contains several sections:

- Direct selection:** Includes fields for 'Personnel no.' and 'ID number', a 'Select' button, and a list of personnel with '510634 Mouse\_Mickey' selected.
- Enroll:** Shows 'Name: Mouse, Mickey', 'on: 03/01/2020', and an 'Overview' button.
- Offer selection:** Includes buttons for 'Get offer', 'Print form', 'General Notice', and 'Error list'. A table shows possible offers:

Possible offers	Enrollment period
New Participant	03/01/2020 - 04/05/2020
Life Beneficiary Chg	01/01/1800 - 12/31/9999
- New Participant:** Includes buttons for 'Enroll', 'Costs', 'Undo selection', and 'Error List'. A table lists available plans:

Plan	Sta...	Validity period	Acti...
Medical			
LivingWell CDHP		05/01/2020 - 12/31/9999	
LivingWell PPO		05/01/2020 - 12/31/9999	
LivingWell Basic CDHP		05/01/2020 - 12/31/9999	
LW Limited High Deductible		05/01/2020 - 12/31/9999	
Waiver HRA - with \$		05/01/2020 - 12/31/9999	
Waiver Dental/Vis HRA with \$		05/01/2020 - 12/31/9999	
Waiver without HRA - no \$		05/01/2020 - 12/31/9999	
Default LW Ltd High Deductible	●	05/01/2020 - 12/31/9999	
Dental			

A blue arrow points to the 'Waiver HRA - with \$' option in the 'Medical' plan list.

Next select "Source of other Coverage" from drop down.

If member is not electing to add any dependents please select Accept.

If member is electing to add dependents please continue to next step.

### Enrollment

Menu [ ] [Back] [Exit] [Cancel] [System]

#### Direct selection

Personnel no. [ ]

ID number [ ]

Select



\* Pers.No. Name

510634 Mouse , Mickey

#### Enroll

Name Mouse , Mickey on 03/01/2020 Overview

#### Offer selection

Get offer Print form

Possible offers

New Participant

Life Beneficiary Chg

#### New Participant

Enroll Costs

Plan

Medical

- LivingWell CDHP
- LivingWell PPO
- LivingWell Basic CDHP
- LW Limited High Deductible
- Waiver HRA - with \$
- Waiver Dental/Vis HRA with \$
- Waiver without HRA - no \$
- Default LW Ltd High Deductible

Dental

### Maintain Health Plan

Pers.No. 510634 Mouse , Mickey  
Plan Waiver HRA - with \$  
Start 05/01/2020 - 12/31/9999

Stop participation in period

Option Dependents

#### Plan options

Health Plan Opt Employer Funded \$175 Monthly  
Dependent Cover General Purpose HRA  
Sor Other Cover Covered with my spouse's employer (does not include TRICARE)

#### Costs USD Semi-monthly

Employee	0,00	<input checked="" type="checkbox"/> Deductions Pre-
Employer	87,50	

Accept



## Step 6 continued: HRBEN0001-Enrollment

Click on the “Dependent” tab to see a list of eligible dependents

**This is the step where dependents are added to the plan.**

Place a ✓ in the box beside the name of each dependent listed on the application to be covered by health insurance

Click “Accept” when done

The screenshot displays the SAP HRBEN0001 - Enrollment interface. The main window is titled "Enrollment" and shows the "Enroll" section for "Mouse, Mickey" on "03/01/2020". The "Offer selection" section is active, showing "New Participant" as the selected option. The "New Participant" section is expanded, showing a list of plans under "Medical". The "Waiver HRA - with \$" plan is selected. The "Maintain Health Plan" dialog box is open, showing the "Dependents" tab. The dialog box displays the following information:

- Pers.No.: 510634 Mouse, Mickey
- Plan: Waiver HRA - with \$
- Start: 05/01/2020 - 12/31/9999
- Stop participation in ...

The "Dependents" tab is selected, and the following table is displayed:

Select.	Name	Type of dep./ben.
<input checked="" type="checkbox"/>	Minnie Mouse	Spouse
<input type="checkbox"/>		

The "Accept" button is highlighted with a blue arrow. The SAP logo is visible in the bottom right corner.

## Step 6 continued: HRBEN0001-Enrollment

To enroll member in Optional Dental or Vision Plans (if applicable), continue on the same screen.

Select the “Dental or Vision” plan member elected to enroll in.

**NOTE:** If you do not see any dental or vision plans, an error has occurred somewhere in one of the steps. Please call OIB for assistance at 888-581-8834.

The screenshot displays the SAP HRBEN0001 - Enrollment interface. The top navigation bar includes 'Menu', 'Back', 'Exit', 'Cancel', and 'System'. The main area is divided into several sections:

- Direct selection:** Fields for 'Personnel no.' and 'ID number' with a 'Select' button below them.
- Enroll:** Shows 'Name' as 'Mouse, Mickey' and 'on' date as '03/01/2020'. Includes an 'Overview' button.
- Offer selection:** Contains buttons for 'Get offer', 'Print form', 'General Notice', and 'Error list'. Below is a table of possible offers:

Possible offers	Enrollment period
New Participant	03/01/2020 - 04/05/2020
Life Beneficiary Chg	01/01/1800 - 12/31/9999

- New Participant:** Contains buttons for 'Enroll', 'Costs', 'Undo selection', and 'Error List'. Below is a table of available plans:

Plan	Sta...	Validity period	Acti...
▼ Dental			
Anthem Dental Bronze		05/01/2020 - 12/31/9999	
Anthem Dental Silver		05/01/2020 - 12/31/9999	
Anthem Dental Gold		05/01/2020 - 12/31/9999	
▼ Vision			
Anthem Vision Bronze		05/01/2020 - 12/31/9999	
Anthem Vision Silver		05/01/2020 - 12/31/9999	
Anthem Vision Gold		05/01/2020 - 12/31/9999	
▼ Basic Life AD&D			
Basic Life and AD&D	●	05/01/2020 - 12/31/9999	

Two blue arrows point to the 'Anthem Dental Bronze' and 'Anthem Vision Bronze' rows in the 'New Participant' table.

## Step 6 continued: HRBEN0001-Enrollment

Select appropriate plan level (Parent Plus if only adding children to plan, Couple if only adding spouse, Family if adding children and spouse.).

If member is not adding dependents and chose a single plan, just click "Accept"

The screenshot displays the SAP HRBEN0001-Enrollment interface. The main window is titled "Enrollment" and shows a list of personnel. The "New Participant" section is active, displaying a list of offers under "Offer selection". The "New Participant" section is also visible, showing a list of plans under "Plan".

The "Maintain Health Plan" dialog box is open, showing the following details:

- Pers.No.: 510634 Mouse, Mickey
- Plan: Anthem Dental Silver
- Start: 05/01/2020 - 12/31/9999
- Stop participation in period
- Option (selected) | Dependents
- Plan options:
  - Health Plan Opt: KEHP
  - Dependent Cover: Couple
- Costs USD Monthly:

	Employee	Employer
	36.14	0.00

 Deductions Pre-
- Buttons: Accept, X

Blue arrows indicate the flow: from the "Option" button in the dialog to the "Option" tab, from the "Dependent Cover" dropdown to the "Couple" selection, and from the "Accept" button to the "Accept" button.

## Step 6 continued: HRBEN0001-Enrollment

Click on the “Dependent” tab to see a list of eligible dependents

**This is the step where dependents are added to the plan.**

Place a ✓ in the box beside the name of each dependent listed on the application to be covered by health insurance

Click “Accept” when done

The screenshot displays the SAP HRBEN0001-Enrollment interface. The main window is titled "Enrollment" and shows the "Enroll" process for "Mouse, Mickey" on "03/01/2020". The "Offer selection" section is active, showing "New Participant" and "Life Beneficiary Chg" options. The "New Participant" section is expanded, showing a list of plans under "Dental", "Vision", and "Basic Life AD&D". The "Anthem Dental Silver" plan is selected. A "Maintain Health Plan" dialog box is open, showing the "Dependents" tab. The dialog box displays the following information:

- Pers.No.: 510634 Mouse, Mickey
- Plan: Anthem Dental Silver
- Start: 05/01/2020 - 12/31/9999
- Option: Dependents

Select.	Name	Type of dep./ben.
<input checked="" type="checkbox"/>	Minnie Mouse	Spouse
<input type="checkbox"/>		

The "Accept" button is highlighted with a blue arrow. The SAP logo is visible in the bottom right corner.

## Step 6 continued: HRBEN0001-Enrollment

To enroll beneficiaries in the Life Insurance Basic AD&D and/or Optional (if applicable), continue on same screen

Select “Basic Life AD&D” (or any of the Optional Life plans the member choses to enroll in)

The screenshot displays the SAP HRBEN0001 Enrollment interface. The main window is titled "Enrollment" and contains several sections:

- Direct selection:** Includes fields for "Personnel no." and "ID number", a "Select" button, and a list of personnel. The list shows "510834 Mickey\_Mickey" selected.
- Enroll:** Shows the participant's name "Mouse, Mickey" and the enrollment date "03/01/2020".
- Offer selection:** A table showing possible offers and their enrollment periods.
- New Participant:** A table listing available life insurance plans.

Possible offers	Enrollment period
New Participant	03/01/2020 - 04/05/2020
Life Beneficiary Chg	01/01/1800 - 12/31/9999

Plan	Sta...	Validity period	Acti...
Basic Life and AD&D	■	05/01/2020 - 12/31/9999	
Optional Life			
Optional Life \$5,000 < 40		05/01/2020 - 12/31/9999	
Optional Life \$10,000 < 40		05/01/2020 - 12/31/9999	
Optional Life \$25,000 < 40		05/01/2020 - 12/31/9999	
Optional Life \$50,000 < 40		05/01/2020 - 12/31/9999	
Optional Life \$100,000 < 40		05/01/2020 - 12/31/9999	
Optional Life \$150,000 < 40		05/01/2020 - 12/31/9999	
Dependent Life			
Dependent Life Plan A		05/01/2020 - 12/31/9999	

**NOTE:** Basic Life and AD&D is an automatic enrollment for every new employee. However, beneficiaries are not automatically selected. Please follow these instructions to select beneficiaries.

## Step 6 continued: HRBEN0001-Enrollment

Click the “Beneficiaries” tab

Assign percentages for the Primary beneficiaries.

Place  next to Contingent beneficiaries

Select “Accept”

The screenshot displays the SAP HRBEN0001-Enrollment interface. The main window shows the 'Enroll' screen for Mickey Mouse (Personnel No. 510634). The 'Offer selection' section shows 'New Participant' and 'Life Beneficiary Chg'. The 'New Participant' section shows the 'Basic Life and AD&D' plan selected. The 'Maintain Insurance Plan' dialog box is open, showing the 'Beneficiaries' tab. The dialog contains a table with the following data:

Point	Name	Type of dependent/ben...	Con.
100	Minnie Mouse	Spouse	<input type="checkbox"/>
100	Saint Jude	Charity organization	<input checked="" type="checkbox"/>

The 'Accept' button is located at the bottom right of the dialog box. Blue arrows point to the 'Beneficiaries' tab and the 'Con.' checkbox for Saint Jude.

**Note:** Percentages for both Primary and Contingent beneficiaries must equal 100%. You do not have to enter beneficiaries for dependent coverage member may elect due to the member is automatically the beneficiary.

## Step 6 continued: HRBEN0001-Enrollment

To enroll in Flexible Spending Accounts (both healthcare and dependent care) select “Healthcare FSA or Child and Adult Daycare FSA” Only do this step if **the member has filled out an FSA application**. If not, proceed to the next step

In the “Contribution” field, enter the full **annual** amount selected by the employee

Click “Accept”

The screenshot displays the SAP Enrollment interface. On the left, a 'Direct selection' panel shows the personnel number '510634' and name 'Mouse, Mickey'. The main 'Enroll' section shows the offer selection for 'New Participant' with an enrollment period of '03/01/2020 - 04/05/2020'. A 'New Participant' table lists various plans, with 'Healthcare FSA' selected. A modal dialog box titled 'Maintain Flexible Spending Account' is open, showing the following details:

- Pers.No.: 510634 Mouse, Mickey
- Plan: Healthcare FSA
- Start: 05/01/2020 - 12/31/9999
- Target contribution period: 01/01/2020-12/31/2020
- Contribution: 700.00 USD

Blue arrows point to the '700.00' value in the contribution field and the 'Accept' button in the dialog box.

**NOTE:** The annual amount of the FSA contribution pertains to one calendar year. The FSA plan will end on December 31. Divide the annual contribution amount by the number of paychecks left in the year. This will be the member’s per-paycheck amount. In addition, KHRIS may change the contribution amount that you input by rounding down a few cents. This is just a mathematical adjustment made by KHRIS to ensure the members contributions are divided equally among his remaining paychecks for the year.

\*Health Departments do not complete this step to enroll their employees in FSA benefits.

## Step 6 continued: HRBEN0001-Enrollment

Screens for Child and Adult Daycare FSA are identical to screens for Healthcare FSA

The screenshot displays the SAP HRBEN0001-Enrollment interface. The main window is titled "Enrollment" and shows the "Enroll" process for Mickey Mouse (Personnel no. 510634). The "Offer selection" section is active, and the "New Participant" section is selected. The "Child & Adult Daycare FSA" plan is highlighted in the list of offers. A "Maintain Flexible Spending Account" dialog box is open, showing the contribution amount of 1000 USD for the target contribution period 01/01/2020-12/31/2020. The dialog box also shows the start date 05/01/2020 and the end date 12/31/9999. The "Accept" button is visible in the dialog box.

Possible offers	Enrollment period
New Participant	03/01/2020 - 04/05/2020
Life Beneficiary Chg	01/01/1800

Plan	Sta...
Dependent Life Plan C	
Dependent Life Plan D	
Dependent Life Plan E	
Dependent Life Plan F	
Dependent Life Plan G	
Dependent Life Plan H	
Healthcare FSA	
Healthcare FSA	
Dep Care FSA	
Child & Adult Daycare FSA	

Target contribution period	Contribution
01/01/2020 - 12/31/2020	1000 USD

## Step 6 continued: HRBEN0001-Enrollment

Select "Enroll"

**Enrollment**

Menu  Back Exit Cancel System

**Direct selection**

Personnel no.

ID number

Select

Pers.No. Name

510834	Mouse, Mickey
--------	---------------

**Enroll**

Name  on  Overview

**Offer selection**

Get offer Print form General Notice Error list

Possible offers	Enrollment period
New Participant	03/01/2020 - 04/05/2020
Life Beneficiary Chg	01/01/1800 - 12/31/9999

**New Participant**

Enroll Costs Undo selection Error List

Plan	Sta...	Validity period	Acti...
Medical			
LivingWell CDHP		05/01/2020 - 12/31/9999	
LivingWell PPO		05/01/2020 - 12/31/9999	
LivingWell Basic CDHP		05/01/2020 - 12/31/9999	
LW Limited High Deductible		05/01/2020 - 12/31/9999	
Waiver HRA - with \$		05/01/2020 - 12/31/9999	✓
Waiver Dental/Vis HRA with \$		05/01/2020 - 12/31/9999	
Waiver without HRA - no \$		05/01/2020 - 12/31/9999	
Default LW Ltd High Deductible	●	05/01/2020 - 12/31/9999	
Dental			

SAP

**Step 6 continued: HRBEN0001-Enrollment**

Select "Enroll" again when the "Confirmation of Selected Actions" window pops up.

**Enrollment**

Menu  Back Exit Cancel System

**Direct selection**

Personnel no.

ID number

Select

Personnel icons

\* Pers.No. Name

Pers.No.	Name
510834	Mouse , Mickey

**Enroll**

Name  on  Overview

**Offer selection**

Get offer Print form

Possible offers

Offer	Enroll
New Participant	03/01/2020
Life Beneficiary Chg	01/01/2020

**New Participant**

Enroll Costs Un

Plan

- Medical
  - LivingWell CDHP
  - LivingWell PPO
  - LivingWell Basic CDHP
  - LW Limited High Deductible
  - Waiver HRA - with \$
  - Waiver Dental/Vis HRA with \$
  - Waiver without HRA - no \$
  - Default LW Ltd High Deductible
- Dental

**Confirmation of Selected Actions**

**List of Plans**

Activity	Plan	From	To
Change	Waiver HRA - with \$	05/01/2020	12/31/9999
Create	Anthem Dental Silver	05/01/2020	12/31/9999
Create	Anthem Vision Silver	05/01/2020	12/31/9999
Change	Basic Life and AD&D	05/01/2020	12/31/9999
Create	Optional Life \$50,000 < 40	05/01/2020	12/31/9999
Create	Dependent Life Plan D	05/01/2020	12/31/9999
Create	Healthcare FSA	05/01/2020	12/31/9999
Create	Child & Adult Daycare FSA	05/01/2020	12/31/9999

Enroll Cancel

**NOTE:** Verify that all benefit elections (health, dental, vision, life, FSA) that the member wants to enroll in are in this list.

## Step 6 continued: HRBEN0001-Enrollment

You will receive acknowledgement “Enrollment completed successfully”

Select “Confirmation” to print off a confirmation sheet for your records, or to give to your new employee.

Select “Continue” if you wish not to print a confirmation

The screenshot displays the HRBEN0001-Enrollment system interface. The main window is titled "Enrollment" and shows the "Enroll" section for a participant named "Mouse, Mickey" on 03/01/2020. The "Offer selection" section is active, showing a table of possible offers:

Possible offers	Enrollment period
New Participant	03/01/2020 - 04/05/2020
Life Beneficiary Chg	01/01

The "New Participant" offer is selected. Below this, the "New Participant" section shows a list of medical plans:

- LivingWell CDHP
- LivingWell PPO
- LivingWell Basic CDHP
- LW Limited High Deductible

A modal dialog box titled "Enrollment" is overlaid on the screen, displaying the message "Enrollment completed successfully". At the bottom of the dialog, there are two buttons: "Continue" and "Confirmation". A blue arrow points to the "Confirmation" button.

## Step 6 continued: HRBEN0001-Enrollment

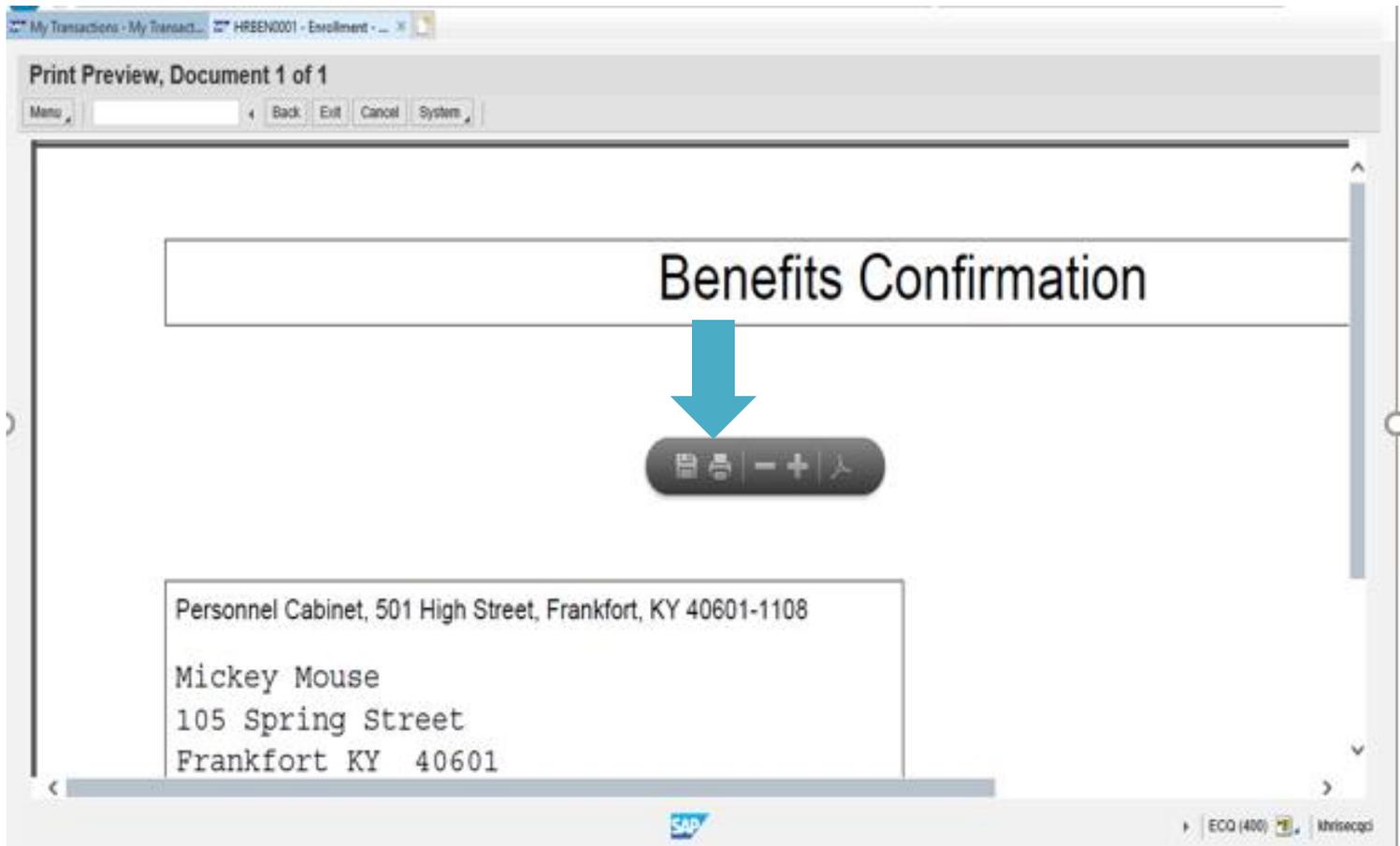
Change “Output Device” to ZPDF

Click “Print Preview”



## Step 6 continued: HRBEN0001-Enrollment

Once you see the Confirmation Sheet, click on the Printer icon to print the document.



**NOTE:** This screen uses Adobe Acrobat Reader. If you do not have this program downloaded on your computer, this screen will not show. Go to [get.Adobe.com](http://get.Adobe.com) to download and install the free program.

## Employee Demographic Updates/Corrections

This transaction will allow you to correct and/or update employee demographic data such as names, gender, social security number, birthday, marital status and address. Any corrections for dependents must be sent to the Enrollment Information Branch.

### Step 1: PA 30 Maintain HR Master Data

This step is to be completed

In the "Personnel No." field, enter Employee's Personnel Number or use the search options to find it.

Click "Enter" to bring up the employee's record

Select "Basic personal data" tab

The screenshot displays the SAP PA30 - Maintain HR Master Data interface. The top navigation bar includes a user icon, a home icon, the KHRIS logo, and the transaction name "PA30 - Maintain HR Master Data". Below the navigation bar, the main header reads "Maintain HR Master Data". A menu bar contains buttons for "Menu", "Back", "Exit", "Cancel", "System", "Create", "Change", "Display", "Copy", "Delimit", "Delete", and "Overview".

The main data area shows the following information:

- Personnel no.: 510634
- Name: Mouse, Mickey
- Status: Active
- EE group: L External - BN
- Personnel area: 0004
- Benefits Only
- EE subgroup: 41 24 Non-Paid
- Pers. subarea: 2001
- Board of Ed.

A blue arrow points to the "Basic personal data" tab, which is currently selected. Other tabs include "Payroll", "Benefits", "Time", "Taxes", and "Planning Data".

Below the tabs, there is a "Hit list" section with a search icon and a "Collective search help" link. The hit list table has columns for "Personnel number" and "Name".

To the right of the hit list is a "Period" selection area with the following options:

- Period
- From: [ ] To: [ ]
- Today
- Curr. week
- All
- Current month
- From curr. date
- Last week
- To Current Date
- Last month
- Current Period
- Current Year

A "Choose" button is located below the period selection options. The SAP logo is visible in the bottom right corner of the interface.

## Step 1 continued: PA 30 Maintain HR Master Data

Select Infotype “0002 Personal Data” (highlight)

Click “Change” -if you are correcting an error

Click “Copy” -if you are updating information

The screenshot displays the SAP PA30 - Maintain HR Master Data interface. At the top, the title bar reads "PA30 - Maintain HR Master Data". Below the title bar, there is a menu bar with buttons: Menu, Back, Exit, Cancel, System, Create, Change, Display, Copy, Delimit, Delete, and Overview. The main area is divided into several sections:

- Personnel Data:** Personnel no. 510634, Name Mouse, Mickey, Status Active.
- EE Data:** EE group L External - BN, EE subgroup 41 24 Non-Paid.
- Personnel Area:** Personnel area 0004 Benefits Only, Pers. subarea 2001 Board of Ed.
- Hit list:** A list of infotypes with their status (St.). The infotype "0002 Personal data" is highlighted with a blue bar and a green checkmark. Other infotypes include 0000 Actions, 0001 Organizational assignment, 0006 Addresses, 0007 Planned Working Time, 0008 Basic Pay, 0009 Bank Details, 0019 Monitoring of Tasks, and 0031 Reference Personnel Numbers.
- Period:** A section for selecting a date range or current period. It includes radio buttons for "Period", "Today", "All", "From curr. date", "Current Period", "Curr. week", "Current month", "Last week", and "Current Year". A "Choose" button is also present.

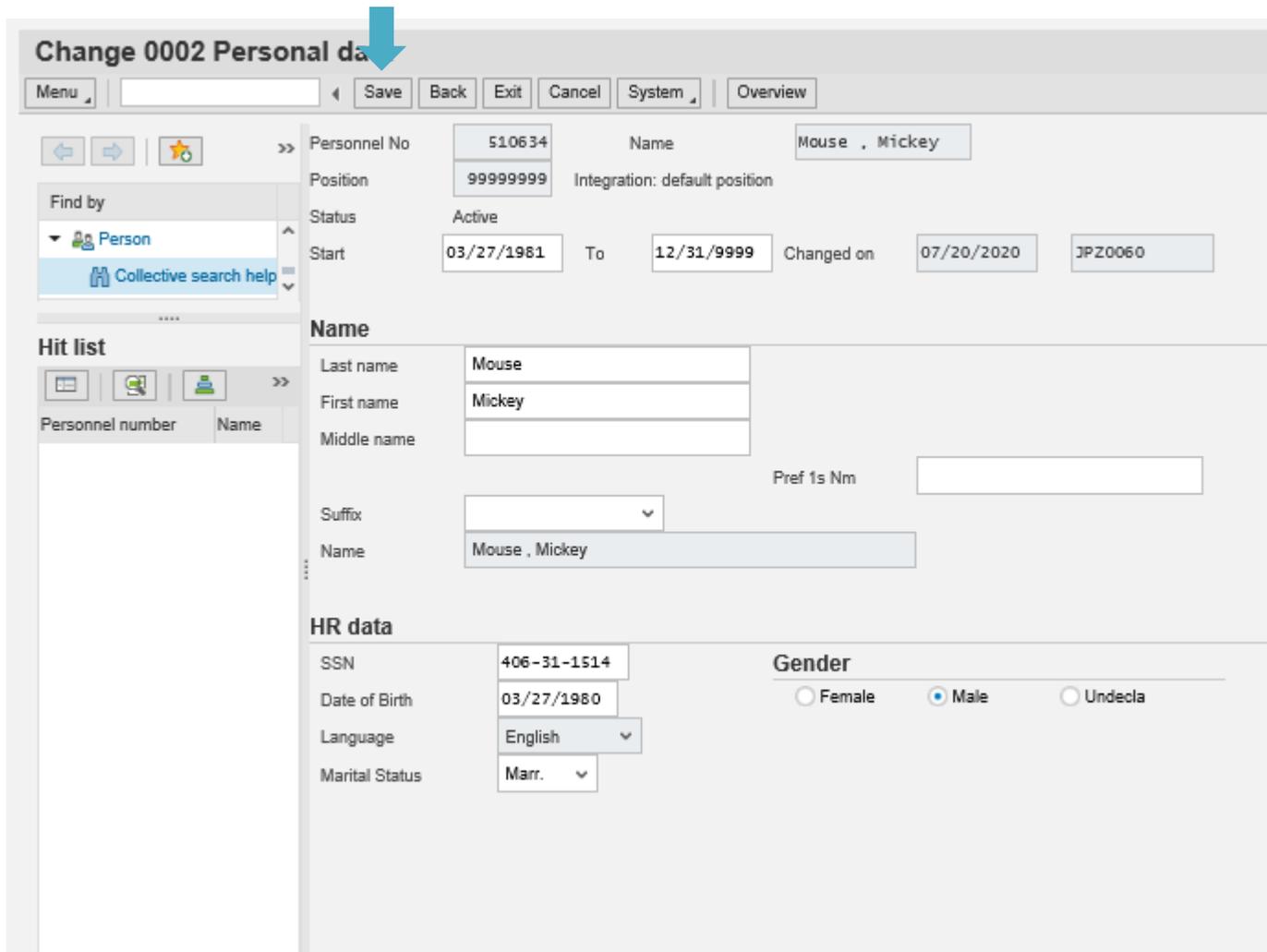
**NOTE:** Only chose “Change” if you are correcting data that has been wrong since the employee’s initial entry into KHRIS. If you are updating a name due to a name change, make sure the employee has a new social security card, marriage certificate or court order reflecting the name change. If you are correcting information and clicked “Change”, do not change the “Start Date”. If you are updating the information and clicked “Copy”, enter today’s date in the “Start Date” field. Update any applicable demographic data.

## Step 1 continued: PA 30 Maintain HR Master Data

Change/Update all applicable data (name, date of birth, marital status, etc.)

In this instance, the employee's date of birth was **corrected**, so the **“Change”** function was used.

Click “Save”



**Change 0002 Personal data**

Menu |  |     System |

Personnel No: 510634 Name: Mouse , Mickey  
Position: 99999999 Integration: default position  
Status: Active  
Start: 03/27/1981 To: 12/31/9999 Changed on: 07/20/2020 JPZ0060

**Name**

Last name: Mouse  
First name: Mickey  
Middle name:   
Suffix:   
Name: Mouse , Mickey  
Pref 1s Nm:

**HR data**

SSN: 406-31-1514  
Date of Birth: 03/27/1980  
Language: English  
Marital Status: Marr.  
Gender:  Female  Male  Undecla

## Step 1 continued: PA 30 Maintain HR Master Data

For address changes/updates, select Infotype “0006 Addresses” (also under the “Basic Personal Data” tab)

Click “Change” -if you are correcting an error – do not change the start date

Click “Copy” -if you are updating information – change start date to today’s date

In this example we will use copy.

Highlight Addresses and then select copy.

The screenshot displays the KHRIS PA30 - Maintain HR Master Data interface. At the top, the title bar reads "PA30 - Maintain HR Master Data". Below it, a menu bar contains buttons: Menu, Back, Exit, Cancel, System, Create, Change, Display, Copy, Delimit, Delete, and Overview. The main content area shows personnel details for Mickey Mouse (Personnel no. 510634). The "Hit list" on the left side lists various infotypes, with "0006 Addresses" highlighted. A "Direct selection" section at the bottom shows "0002 Personal data" selected. A "Period" selection dialog is also visible, with options for "Today", "Curr.week", "All", "Current month", "From curr.date", "Last week", "To Current Date", "Last month", "Current Period", and "Current Year".

## Step 1 continued: PA 30 Maintain HR Master Data

In the “Subtypes for Infotype “0006 Addressess” window, select “Permanent residence”

Either click twice, or click once then click ✓

The screenshot shows the SAP GUI for HTML interface for 'Maintain HR Master Data'. A pop-up window titled 'Subtypes for infotype "0006 Addressess" (1)' is open, displaying a table of restrictions. The table has two columns: 'STyp' and 'Name'. The first row, '1 Permanent residence', is highlighted. A blue arrow points to this row. Below the table, a green checkmark icon is highlighted with another blue arrow, indicating the selection process.

STyp	Name
1	Permanent residence
4	ESS Required
5	ESS Required
6	ESS Required
7	
HU01	Dependant's address
HU02	
R1	Place of Residence Provided by Employer
R2	Hotel Accommodation Provided by Employer
SA4	
SA5	Mandate Organization(SA PBS)
SA6	Secondment Organization(SA PBS)
SK01	Address for payment form SK01
SKMV	Work location
Z001	Work Address

## Step 1 continued: PA 30 Maintain HR Master Data

In this example, we used the “Copy” function to update new address information. Make sure that the city, zip code and county code all match. You will get an error if they do not.

Update all pertinent address information

Hit “Enter” on your keyboard to check for errors. **If you get a zip code or county code error, please use the [USPS.com](https://www.usps.com) website to determine the correct zip code. You can also use [Google.com](https://www.google.com) to search for the correct county of residence.**

Click “Save”

The screenshot shows the SAP GUI for HTML interface for the 'Copy 0006 Addresses' transaction. The top bar includes the KHRIS logo and 'SAP GUI for HTML'. The main area is divided into several sections:

- Header:** 'Copy 0006 Addresses' with a menu and buttons for 'Save', 'Back', 'Exit', 'Cancel', 'System', and 'Overview'.
- Personnel Data:** Personnel No. 510634, Name: Mouse, Mickey; Position: 99999999; Status: Active; Start: 03/16/2020 to 12/31/9999.
- Address Section:** Address type: Permanent residence; Care Of: ; Address line 1: 105 James Drive; Address line 2: ; City/country: Shelbyville; State/zip code: KY Kentucky 40065; Country Key: USA; Telephone Number: 502 652-9563.
- Communications Table:**

Type	Number	Exte
OTHR	502 330-5859	
- Additional fields:** County code: 106, Shelby.

Blue arrows in the image point to the 'Save' button, the 'Address line 1' field, and the 'County code' field.

**NOTE:** If there was not a telephone number already listed, you can enter it during this transaction. The first telephone number listed should be the primary phone number. If employee has multiple numbers to enter, use the “Communications” area to enter multiple numbers. Use the drop down menu next to “Type” field to select option (work, cell, other, etc.). If applicable, enter extension for work numbers. Repeat this step if needed to add additional phone numbers.

**PROCESS COMPLETE**

## Terminating Benefit Participation

### Step 1: Verify Plan Information

Bring up Transaction PA20 under “My Transactions”

In the “Personnel No.” field, enter employee’s Personnel Number, or use the search options to find it

Hit “Enter” on your keyboard to bring up the employee’s record

The screenshot displays the SAP PA20 - Display HR Master Data interface. The top navigation bar includes the KHRIS logo and the title "PA20 - Display HR Master Data". The main content area is titled "Display HR Master Data" and features a menu bar with options like "Back", "Exit", "Cancel", "System", "Display", "Overview", and "Refresh Data".

Key fields and values are as follows:

- Personnel no.:** S10634 (highlighted with a blue arrow)
- Name:** Mouse, Mickey
- EE group:** L External - BN
- EE subgroup:** 41 24 Non-Paid
- Personnel area:** 0004
- Pers. subarea:** 2001
- Status:** Benefits Only
- Active:** Board of Ed.

The interface also includes a "Hit list" on the left side, a "Period" selection section with radio buttons, and a "Direct selection" section at the bottom.

## Step 1 continued: Verify Plan Information

Select the “Benefits” Tab

Click on “0167 Health Plans”, and then click “Display” to view health, dental, and vision insurance plans information. Make sure the plan has not been terminated, that there is no future dated termination, and that this is not a Cross-Reference plan (if it is, **DO NOT TERM**. Send to EIB instead)

Click on “0168 Insurance Plans”, and then click “Display” to check the life insurance plan

Click on “0170 Flexible Spending Accounts”, and then click “Display” to check flexible spending accounts.

The screenshot shows the SAP HR Master Data interface. At the top, the title bar reads "PA20 - Display HR Master Data". Below it, the main header is "Display HR Master Data". The interface includes a menu bar with "Menu", "Back", "Exit", "Cancel", "System", "Display", "Overview", and "Refresh Data". The main content area displays personnel information for Personnel No. 510634, Name Mickey Mouse, EE group L External - BN, EE subgroup 41 24 Non-Paid, Personnel area 0004 Benefits Only, and Pers. subarea 2001 Board of Ed. The "Benefits" tab is selected, showing a list of benefit infotypes with checkmarks in the "St." column. Three blue arrows point to the following infotypes: 0167 Health Plans, 0168 Insurance Plans, and 0170 Flexible Spending Accounts. Other infotypes include 0021 Family Member/Dependents, 0031 Reference Personnel Numbers, 0041 Date Specifications, 0171 General Benefits Information, 0219 External Organizations, and 0378 Benefits Medical Information. The "Period" section is also visible, with options for "Today", "All", "From curr.date", "To Current Date", "Current Period", "Curr.week", "Current month", "Last week", and "Current Year".

**Note:** Complete the above steps to make sure you have the correct Personnel No. and to verify that the health plan, dental plan vision plan life plan(s) and FSA(s) have not been terminated. If the plan has been terminated and all information (dates) are correct, then nothing needs to be done. **DO NOT TERM** if health plan is in the Cross-Reference payment option. Please forward to the EIB for processing.

Terminating Benefit Participation

## Step 1 continued: Verify Plan Information

In this example using Infotype 0167 Health Plans, this health plan has not been terminated yet, nor is there a future term date (as indicated by the 12/31/9999 in the “to” date. That means this plan is still active. If it were termed, you would see a plan termination date in the “to” field). This is not a cross-reference plan (or you would see “Prime” or “Sec” at the end of the benefit plan. Ex: Default Standard PPO Prime, Living Well CHDP Sec.). You will also view dental and vision plans using Infotype 0167 Health Plans.

You can now check the Life insurance plan(s) in Infotype 0168 and the FSA contribution(s) in Infotype 0170. If you know the member has no FSA(s), you can go to the next step

The screenshot shows the SAP HR Master Data interface for Infotype 0167 Health Plans. The header includes the KHR logo and the title 'PA20 - Display HR Master Data'. The main content area is titled 'Display 0167 Health Plans' and contains a search bar, navigation buttons (Back, Exit, Cancel, System, Previous record, Next record, Overview), and a data entry form. The form displays the following information:

- Personnel No: 510634 406-31-1514 Name: Mouse, Mickey
- Payroll area: BN Org. unit: Bullitt County Bd of Ed
- Start: 05/01/2020 to 12/31/9999 Chng: 07/22/2020 JPZ0060
- Plan: A574 Waiver HRA - with \$

A blue arrow points to the '12/31/9999' date field. Below the form are tabs for 'Plan data', 'Administration', 'Costs', 'Dependents', and 'Additional data'. The 'Plan data' tab is active, showing the following details:

General plan data	
Benefit area	01 Comm of KY
Plan type	A001 Medical
Benefit plan	A574 Waiver HRA - with \$
Health Plan Option	0001 Employer Funded \$175 Monthly
Dependent Coverage	0007 General Purpose HRA

Planning Parameters	
Cost Rule Variant	0006 Waive Coverage

**Additional fields**

- Declaration of Min. Essential Health Insurance Coverage
- Source of Other Coverage: Covered with my spouse's employer (does not include TRICARE)

The SAP logo is visible in the bottom right corner of the interface.

## Step 2: PA 40 End Participation/Benefit Eligibility

You will need to select “<” in the left hand corner of your screen to return to My Transactions to select Transaction **PA40 Personnel Actions**.

If your employee’s record does not automatically pull up, enter their Personnel Number in the “Personnel No.” field, and then hit “Enter” on your keyboard

The screenshot shows the SAP PA40 Personnel Actions interface. The top navigation bar includes the KHR logo and the title "PA40 - Personnel Actions". The main area is titled "Personnel Actions" and contains a search form. A blue arrow points to the "Personnel no." field, which contains the value "510634". Below the search form, the system has returned search results for "Mouse, Mickey". The results show the following details:

Field	Value	Field	Value	Status	Active
Personnel no.	510634	Name	Mouse, Mickey		
EE group	L External - BN	Personnel area	0004	Benefits Only	
EE subgroup	41 24 Non-Paid	Pers. subarea	2001	Board of Ed.	
From					

Below the search results is a table titled "Personnel Actions" with the following columns: Action Type, Personn..., EE group, and EE subg... The table lists several action types:

Action Type	Personn...	EE group	EE subg...
BN - Begin Participation			
BN - End Participation			
BN - Begin Leave W / Out Pay			
BN - End Leave W / Out Pay			
BN - Change FSA Billing Freq			
BN - Rehire			

## Step 2 continued: PA 40 Ending Participation/Benefit Eligibility

In the “From” field enter the day **AFTER** the employee’s last day of work (i.e. if employee’s last day of work is 07/15/2020; you will enter 07/16/2020)

Terminating Benefit Participation

Select "End Participation"

Click "Execute"

The screenshot displays the SAP PA40 - Personnel Actions interface. At the top, the title bar reads "PA40 - Personnel Actions". Below this, a menu bar contains buttons for "Menu", "Back", "Exit", "Cancel", "System", "Execute", and "SSN Search". A blue arrow points to the "Execute" button. The main area is divided into several sections:

- Find by:** A dropdown menu set to "Person" with a "Collective search help" link below it.
- Hit list:** A table with columns "Personnel number" and "Name". It is currently empty.
- Personnel no.:** 510634
- Name:** Mouse, Mickey
- EE group:** L External - BN
- EE subgroup:** 41 24 Non-Paid
- From:** 07162020 (indicated by a blue arrow)
- Personnel area:** 0004
- Pers. subarea:** 2001
- Status:** Active
- Benefits Only:** Board of Ed.

The **Personnel Actions** table is the central focus, with the following data:

Action Type	Personn...	EE group	EE subg...
BN - Begin Participation			
<b>BN - End Participation</b>			
BN - Begin Leave W / Out Pay			
BN - End Leave W / Out Pay			
BN - Change FSA Billing Freq			
BN - Rehire			

A blue arrow points to the "BN - End Participation" row, which is highlighted in blue. The SAP logo is visible in the bottom right corner.

Terminating Benefit Participation

### Step 3: PA 40 Personnel Actions

At this screen, you will **ONLY** enter 99999999 in the Position Field. The day AFTER last day worked will populate in the “Start” field.

Hit “Enter” on your keyboard to make sure there are no errors

Click “Save”

**Copy 0000 Actions**

Menu | Save | Back | Exit | Cancel | System | Overview | Execute info group | Change info group

Pers.No. 510634  
Name Mouse, Mickey  
EE group L External - BN Personnel ar 0004 Benefits Only  
EE subgroup 41 24 Non-Paid  
Start 07/16/2020 to 12/31/9999

**Personnel action**  
Action Type BN - End Participation  
Reason for Action BN\_End Participation

**Status**  
Customer-specific  
Employment Withdrawn  
Special payment

**Organizational assignment**  
Position 99999999  
Personnel area 0004 Benefits Only  
Employee group L External - BN  
Employee subgroup 41 24 Non-Paid

**Additional actions**

Start Date	Act.	Action Type	ActR	Reason for action

Save your entries

SAP

You will enter eight 9's in the Position Field only and then save.

### Step 3 continued: PA 40 Personnel Actions

At this screen, you will **NOT** enter any information. The day AFTER last day worked will automatically populate in the “Start” field.

Hit “Enter” on your keyboard to make sure there are no errors

Click “Save”

The screenshot shows the SAP PA40 - Personnel Actions interface. The main title is "Copy 0001 Organizational Assignment". A blue arrow points to the "Save" button in the top navigation bar. The form contains the following data:

Personnel No	510634	Name	Mouse, Mickey		
EE group	L External - BN	Personnel area	0004 Benefits Only	Status	Withdrawn
EE subgroup	41 24 Non-Paid	Pers. subarea	2001 Board of Ed.		
Start	07/16/2020	to	12/31/9999		

**Enterprise structure**

CoCode	COMK	Commonwealth of Kentucky			
Pers.area	0004	Benefits Only	Subarea	2001	Board of Ed.
Cost Ctr	9200100071	Bullitt Co BOE	Bus. Area	1000	Commonwealth of Kentucky
Func. Area					

**Personnel structure**

EE group	L	External - BN	Payr.area	BN	Non-COMK Paid
EE subgroup	41	24 Non-Paid	Contract		

**Organizational plan**

Position	99999999	Integration: default posi	
Org. Unit	10006024	00071	Bullitt County Bd of Ed

Record created

### Step 3 continued: PA 40 Personnel Actions

When you have completed this step, the system will return you to the first screen you started with.

The screenshot shows the SAP PA40 Personnel Actions interface. The top navigation bar includes the KHRIS logo and the title 'PA40 - Personnel Actions'. The main area is titled 'Personnel Actions' and contains a search bar with buttons for 'Back', 'Exit', 'Cancel', 'System', 'Execute', and 'SSN Search'. On the left, there is a 'Find by' section with 'Collective search help' and 'Search Term' options, and a 'Hit list' table with columns for 'Personnel number' and 'Name'. The central form displays the following data:

Personnel no.	510634	Status	Withdrawn
Name	Mouse , Mickey	Personnel area	0004
EE group	L External - BN	Pers. subarea	2001
EE subgroup	41 24 Non-Paid	Benefits Only	Board of Ed.
From	07/16/2020		

Below the form is a table titled 'Personnel Actions' with columns for 'Action Type', 'Personn...', 'EE group', and 'EE subg...'. The table lists several action types, with 'BN - End Participation' highlighted in blue.

Action Type	Personn...	EE group	EE subg...
BN - Begin Participation			
BN - End Participation			
BN - Begin Leave W / Out Pay			
BN - End Leave W / Out Pay			
BN - Change FSA Billing Freq			
BN - Rehire			

At the bottom left, a green checkmark indicates 'Record created'. The SAP logo is visible at the bottom right.

## Step 4: HRBEN0014 Termination of Participation

Bring up the HRBEN0014 transaction by selecting “<” in the left hand corner of your screen and selecting HRBEN0014 from My Transactions.

Enter employee’s Personnel Number in the “Personnel No.” field.

Go to the calendar selection and enter last day worked (i.e. last day of work is 07/15/2020)

Click “Select”

The screenshot displays the SAP GUI for HTML interface for the 'Termination of Plan Participation' transaction. The top navigation bar includes the KHR logo and 'SAP GUI for HTML'. The main title is 'Termination of Plan Participation'. Below the title, there is a menu bar with 'Menu', 'Back', 'Exit', 'Cancel', and 'System'. The 'Direct selection' panel on the left contains a 'Personnel no.' field with the value '501634' and an 'ID number' field. A 'Select' button is located below these fields. The main area shows 'Termination for' with a 'Name' field and a date field set to '07/15/2020'. Below this, there are buttons for 'Stop participation', 'Display Plan', and 'Error List'. A table with columns 'Validity period', 'Action', and 'Date' is visible. A blue arrow points to the 'Select' button, and another blue arrow points to the date field.

Click on "Expand" – This will allow the date information to be seen to make sure termination dates are correct

The screenshot shows the SAP GUI for HTML interface for 'Termination of Plan Participation'. The header includes the KHRIS logo and 'SAP GUI for HTML'. The main area is divided into a left sidebar and a main content area. The sidebar contains input fields for 'Personnel no.' and 'ID number', and a table listing personnel with '510834' and 'Mouse, Mickey' selected. The main content area has a 'Termination for' section with 'Name: Mouse, Mickey' and 'on: 07/15/2020'. Below this is a table of plans to be terminated, with columns for 'Validity period', 'Action', and 'Date'. A blue arrow points to the date field '07/15/2020'.

	Validity period	Action	Date
<input type="checkbox"/> Medical Waiver HRA - with \$	05/01/2020 - 12/31/9999	Terminate on	07/15/2020
<input type="checkbox"/> Dental Anthem Dental Silver	05/01/2020 - 12/31/9999	Terminate on	07/31/2020
<input type="checkbox"/> Vision Anthem Vision Silver	05/01/2020 - 12/31/9999	Terminate on	07/31/2020
<input type="checkbox"/> Basic Life AD&D Basic Life and AD&D	05/01/2020 - 12/31/9999	Terminate on	07/31/2020
<input type="checkbox"/> Optional Life Optional Life \$50,000 < 40	05/01/2020 - 12/31/9999	Terminate on	07/31/2020
<input type="checkbox"/> Dependent Life Dependent Life Plan D	05/01/2020 - 12/31/9999	Terminate on	07/31/2020
<input type="checkbox"/> Healthcare FSA Healthcare FSA	05/01/2020 - 12/31/9999	Terminate on	07/15/2020
<input type="checkbox"/> Dep Care FSA Child & Adult Daycare FSA	05/01/2020 - 12/31/9999	Terminate on	07/15/2020

Click "Select all" this will select all health, dental, vision and life plans for termination.

Click "Stop Participation"

The screenshot shows the SAP GUI for HTML interface for 'Termination of Plan Participation'. The top header includes the KHRYS logo and 'SAP GUI for HTML'. The main area is divided into a left sidebar and a main content area. The sidebar contains fields for 'Personnel no.' and 'ID number', a 'Select' button, and a table with one entry: '510834 Mouse, Mickey'. The main content area has a 'Termination for' section with 'Name: Mouse, Mickey' and 'on: 07/15/2020'. Below this is a toolbar with buttons for 'Stop participation', 'Display Plan', and 'Error List'. A table lists various plans with columns for 'Validity period', 'Action', and 'Date'. A blue arrow points to the 'Stop participation' button in the toolbar.

	Validity period	Action	Date
<input checked="" type="checkbox"/> Medical Waiver HRA - with \$	05/01/2020 - 12/31/9999	Terminate on	07/15/2020
<input checked="" type="checkbox"/> Dental Anthem Dental Silver	05/01/2020 - 12/31/9999	Terminate on	07/31/2020
<input checked="" type="checkbox"/> Vision Anthem Vision Silver	05/01/2020 - 12/31/9999	Terminate on	07/31/2020
<input checked="" type="checkbox"/> Basic Life AD&D Basic Life and AD&D	05/01/2020 - 12/31/9999	Terminate on	07/31/2020
<input checked="" type="checkbox"/> Optional Life Optional Life \$50,000 < 40	05/01/2020 - 12/31/9999	Terminate on	07/31/2020
<input checked="" type="checkbox"/> Dependent Life Dependent Life Plan D	05/01/2020 - 12/31/9999	Terminate on	07/31/2020
<input checked="" type="checkbox"/> Healthcare FSA Healthcare FSA	05/01/2020 - 12/31/9999	Terminate on	07/15/2020
<input checked="" type="checkbox"/> Dep Care FSA Child & Adult Daycare FSA	05/01/2020 - 12/31/9999	Terminate on	07/15/2020

Select "Stop participation"

The screenshot displays the SAP GUI for HTML interface for terminating plan participation. The main window is titled "Termination of Plan Participation" and shows the user "Mouse, Mickey" with a termination date of "07/15/2020". A list of plan types is shown, including Medical, Dental, Vision, Basic Life AD&D, Optional Life, Dependent Life, Healthcare FSA, and Dep Care FSA. A modal window titled "Termination of Plan Participation" is open, showing a list of plan types with "Medical" selected. A blue arrow points to the "Stop participation" button in the modal window.

Plan type	Date
Medical	07/15/2020
Dental	07/31/2020
Vision	07/31/2020
Basic Life AD&D	07/31/2020
Optional Life	07/31/2020
Dependent Life	07/31/2020
Healthcare FSA	07/15/2020
Dep Care FSA	07/15/2020

Terminating Benefit Participation

Click ✓

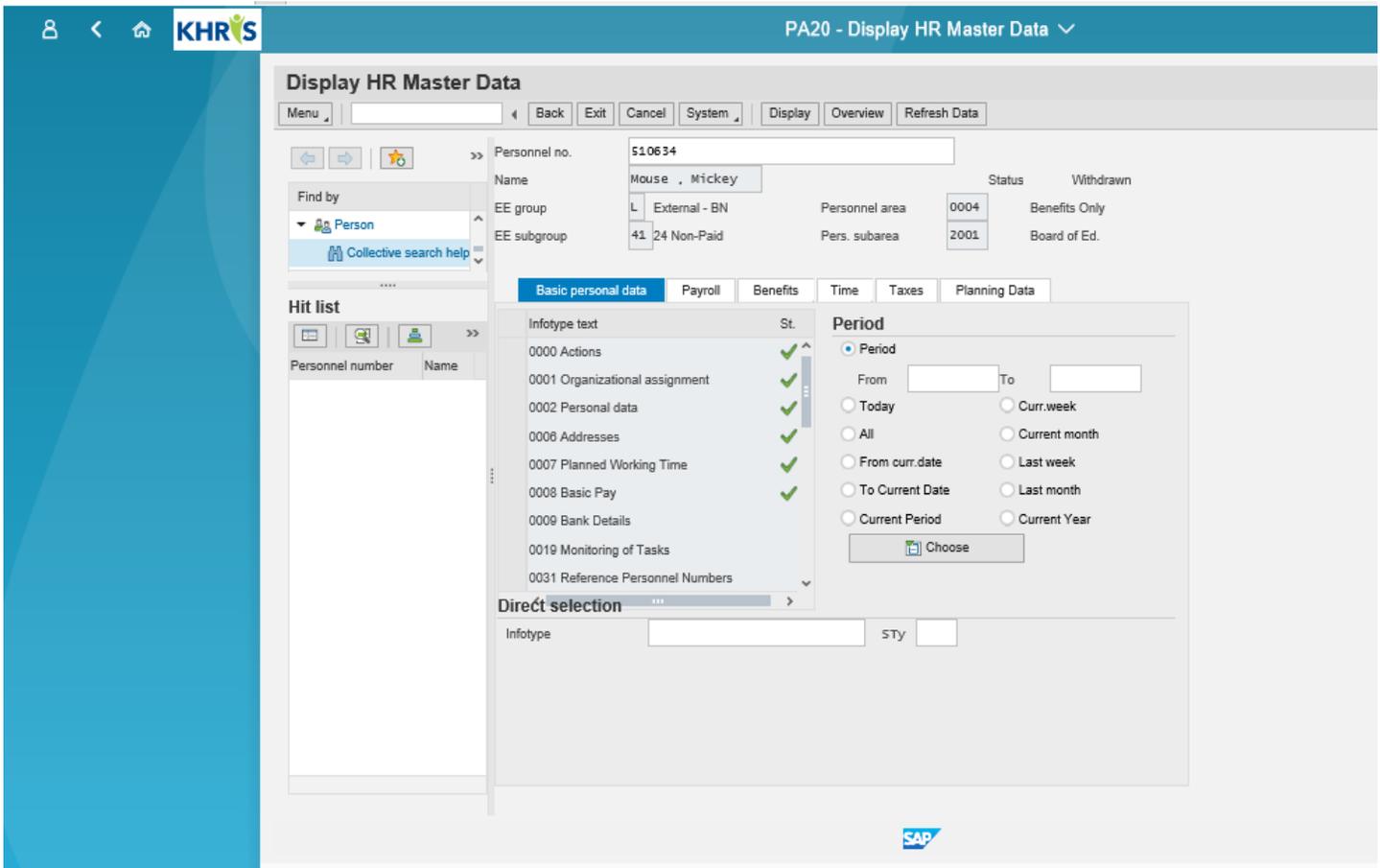
The screenshot shows the SAP GUI for HTML interface for 'Termination of Plan Participation'. The main window displays the termination details for Mickey Mouse (Personnel no. 510534) on 07/15/2020. A confirmation dialog box is overlaid on the screen, showing a message: 'For 8 of 8 plan types, plans have been delimited or deleted'. The dialog box has a green checkmark button at the bottom right, which is highlighted by a blue arrow. The background window shows a table of plan types being terminated:

Plan Type	Validity period	Action	Date
Medical			
Healthcare FSA	05/01/2020 - 12/31/9999	Terminate on	07/15/2020
Dep Care FSA	05/01/2020 - 12/31/9999	Terminate on	07/15/2020

To verify that health plan, dental plan, vision plan, life plans and flexible spending accounts have been terminated; go back to **PA 20 Display HR Master Data** (select “<” at the top left and select from **My Transactions**)

In the Personnel No. field enter Employee’s Personnel No.

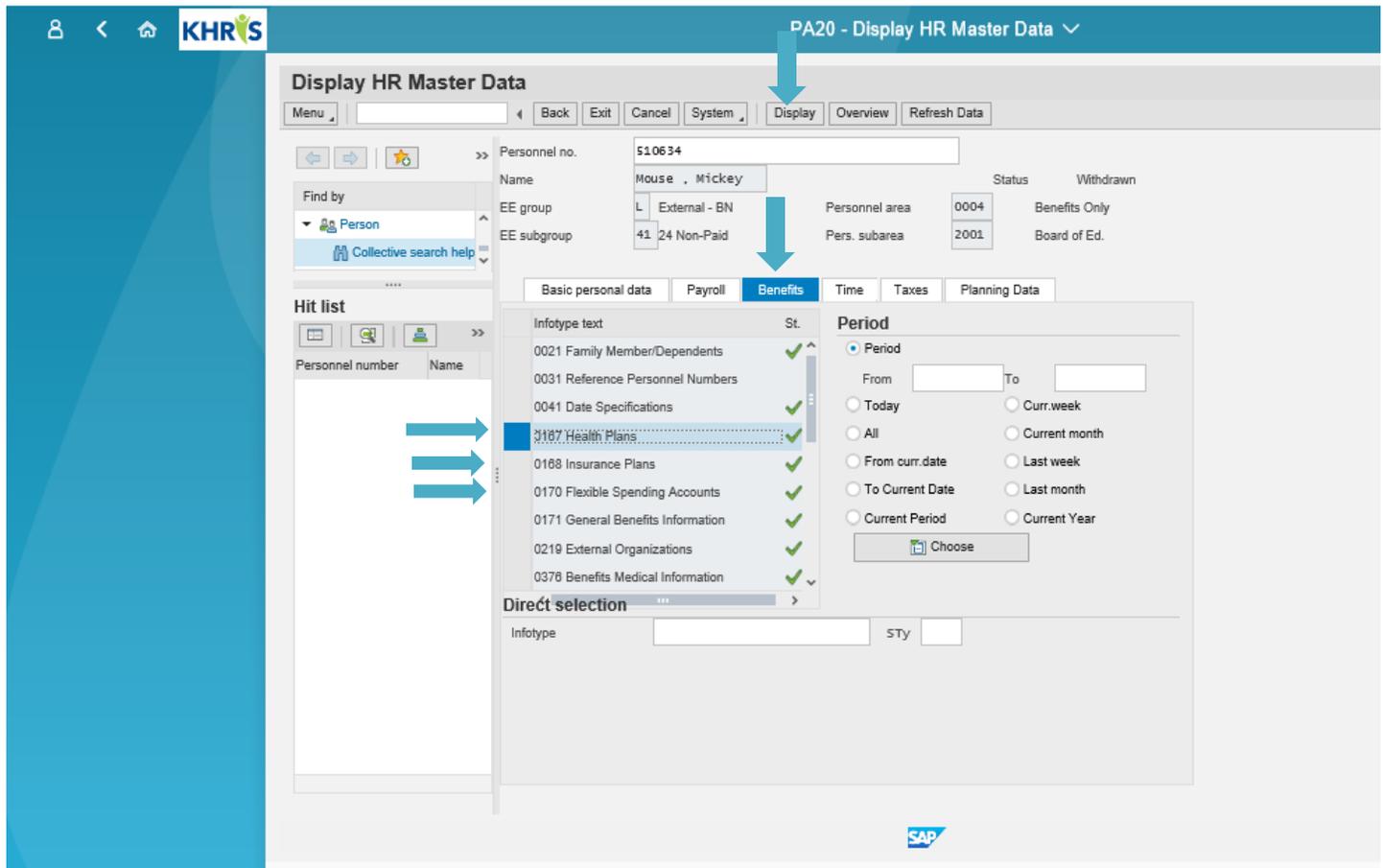
Click “Enter” on keyboard



Select the “Benefits” tab

Click on “0167 Health Plans” then after checking the health, dental, and vision plan click on “168 Insurance Plans” to check the life insurance plan, and then if applicable, click on “0170 Flexible Spending Accounts” to check any of the flexible spending plans

Click “Display”



The “To” date will be the last date of coverage (termination)

Terminating Benefit Participation

PA20 - Display HR Master Data

### Display 0167 Health Plans

Menu | Back | Exit | Cancel | System | Previous record | Next record | Overview

Personnel No: 510634 406-31-1514 Name: Mouse, Mickey

Payroll area: BN Org. unit: Bullitt County Bd of Ed

Start: 05/01/2020 to 07/15/2020 Chng: 07/22/2020 JPZ0060

Plan: A574 Waiver HRA - with \$

Plan data | Administration | Costs | Dependents | Additional data

#### General plan data

Benefit area	01	Comm of KY
Plan type	A001	Medical
Benefit plan	A574	Waiver HRA - with \$
Health Plan Option	0001	Employer Funded \$175 Monthly
Dependent Coverage	0007	General Purpose HRA

#### Planning Parameters

Cost Rule Variant	0006	Waive Coverage
-------------------	------	----------------

#### Additional fields

Declaration of Min. Essential Health Insurance Coverage

Source of Other Coverage: Covered with my spouse's employer (does not include TRICARE)



**Transaction is complete**

## Health Benefit Enrollment Reporting

### Step 1: Select HRBEN0073 Health Plan Costs (select from My Transactions Menu)

**Note:** This report can be used to gather current or future health, dental, and vision plan enrollment information. The report should be ran in the morning or late afternoon when there are fewer users in the KHRIS system.

Click "Search helps" tab

The screenshot shows the SAP HRBEN0073 - Health Plan Costs report selection screen. The interface includes a top navigation bar with the KHRIS logo and the report title. Below the title is a menu bar with options like 'Save as Variant...', 'Back', 'Exit', 'Cancel', 'System', 'Execute', and 'Get Variant...'. The main area is divided into sections: 'Key date' with radio buttons for 'Today' and 'Other keydate', and a 'Key Date' input field; 'Selection' with a 'Personnel Number' input field and a search icon; and 'Additional selection' with fields for 'Benefit area' (containing '01'), '1st Program Grouping', '2nd Program Grouping', and 'Benefit plan', each with a 'to' field and a search icon. A blue arrow points to the 'Search helps' tab in the 'Further selections' area. The SAP logo is visible in the bottom right corner.

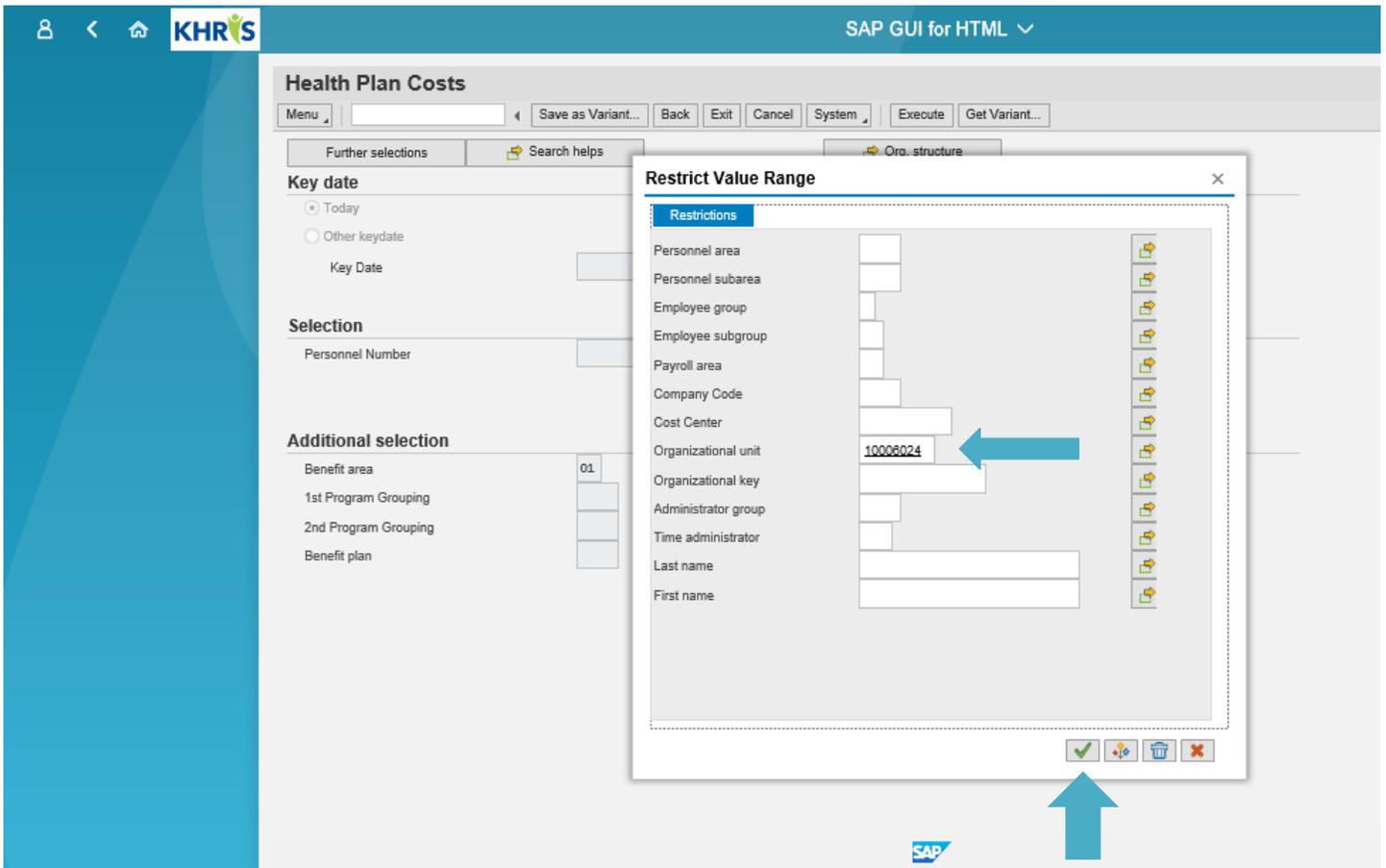
Select "K –Organizational Assignment"

The screenshot shows the SAP GUI for HTML interface. The main window is titled "Health Plan Costs" and contains several sections: "Further selections", "Key date" (with radio buttons for "Today" and "Other keydate"), "Selection" (with "Personnel Number" selected), and "Additional selection" (with "Benefit area", "1st Program Grouping", "2nd Program Grouping", and "Benefit plan" listed). A modal dialog box titled "Restrict Value Range (1)" is open, displaying a table of organizational assignment codes. The table has two columns: "HKy" and "Short text". The row for code "K" is highlighted, and a blue arrow points to it from the right. At the bottom of the dialog, there is a search bar containing a green checkmark icon, with another blue arrow pointing to it from below. The dialog also shows "37 Entries found" and navigation buttons.

HKy	Short text
A	Ownership matchcode (non applicable)
B	PDC error indicator
C	Personnel ID Number
D	Part-time employees (D)
E	Buyer
F	Construction industry - organizational assignment
G	Date of birth
H	Sickness cert.data (A)
I	IC number
J	Last name - first name - birth name
K	Organizational assignment
L	Time Data Administrator
M	Schedules
O	HR Master Record: Infotype 0302 (Additional Actions)
P	Last name - First name (KR) Person ID
Q	Constituent Services Number (NL)
R	Employee's application number
S	Personnel numbers with trip data by organiz. assignment
T	Personnel numbers with trip data

Click ✓

Enter **your** Agency's "Organizational Unit Number" in the Organizational Unit field (drop down menu can be used to select your org unit number)



Click ✓

**Note:** This will take you back to the Health Plans Costs screen. After you enter your Agency's Organizational number, the "Search help" field will change to "Search help K". This indicates that the report generated will only pertain to your Agency.

To run a report on **current elections**, under the Key date box, select "Today"

Use other key date to select next plan year, example 01/01/2020.

**Note:** Only use personnel number field if you need information for a particular Employee. Otherwise, this step will obtain a complete listing of your Employees. For future dates, select other key date and enter the date (ex. 01/01/2020).

Click “Execute”

The screenshot shows the SAP GUI interface for the 'Health Plan Costs' report. The top bar includes the KHRIS logo and 'SAP GUI for HTML'. Below the title bar, there are buttons for 'Save as Variant...', 'Back', 'Exit', 'Cancel', 'System', 'Execute', and 'Get Variant...'. A blue arrow points to the 'Execute' button. The main area is divided into sections: 'Key date' with radio buttons for 'Today' and 'Other keydate', and a 'Key Date' input field; 'Selection' with a 'Personnel Number' input field and an 'Org. structure' button; and 'Additional selection' with fields for 'Benefit area' (containing '01'), '1st Program Grouping', '2nd Program Grouping', and 'Benefit plan', each with a 'to' field and an 'Org. structure' button.

**Note:** If a Benefits Error Message pops up, click the check mark to continue. In addition, you can run this report on one employee by entering their KHRIS Personnel Number in the “Personnel Number” field prior to clicking on the “Execute” button.

Once the report generates, you can export it to Excel

**Health Plan Costs**

Key date 07/22/2020  
Benefit area 01 Comm of KY

Pers.No.	Name	ID number	Part.date	Benefit plan text	Dep.	Dep.coverage text	Tobacco	LivingWell Non-Fulfilled Previous Yr
			01/01/2020	LivingWell CDHP	0003	Parent Plus		
			01/01/2020	Waiver HRA - with \$	0007	General Purpose HRA		
			01/01/2020	Waiver Dental/Vis HRA with \$	0006	Waive Coverage		
			04/01/2020	LivingWell CDHP	0001	Single		
			01/01/2020	Waiver Dental/Vis HRA with \$	0006	Waive Coverage		
			01/01/2020	Waiver Dental/Vis HRA with \$	0006	Waive Coverage		
			02/01/2020	LivingWell Basic CDHP	0003	Parent Plus		
			01/01/2020	Waiver Dental/Vis HRA with \$	0006	Waive Coverage		
			01/01/2020	Waiver HRA - with \$	0007	General Purpose HRA		
			01/01/2020	Waiver HRA - with \$	0007	General Purpose HRA		
			01/01/2020	Waiver Dental/Vis HRA with \$	0006	Waive Coverage		
			01/01/2020	LivingWell CDHP	0003	Parent Plus		
			01/01/2020	LivingWell CDHP	0001	Single	X	
			04/01/2020	LivingWell CDHP	0001	Single		
			01/01/2020	LivingWell CDHP	0003	Parent Plus		
			01/01/2020	Waiver HRA - with \$	0007	General Purpose HRA		
			01/01/2020	LivingWell CDHP	0001	Single		

SAP | ECQ (400) | khriseqqi

Click Menu

Click List

Click Export

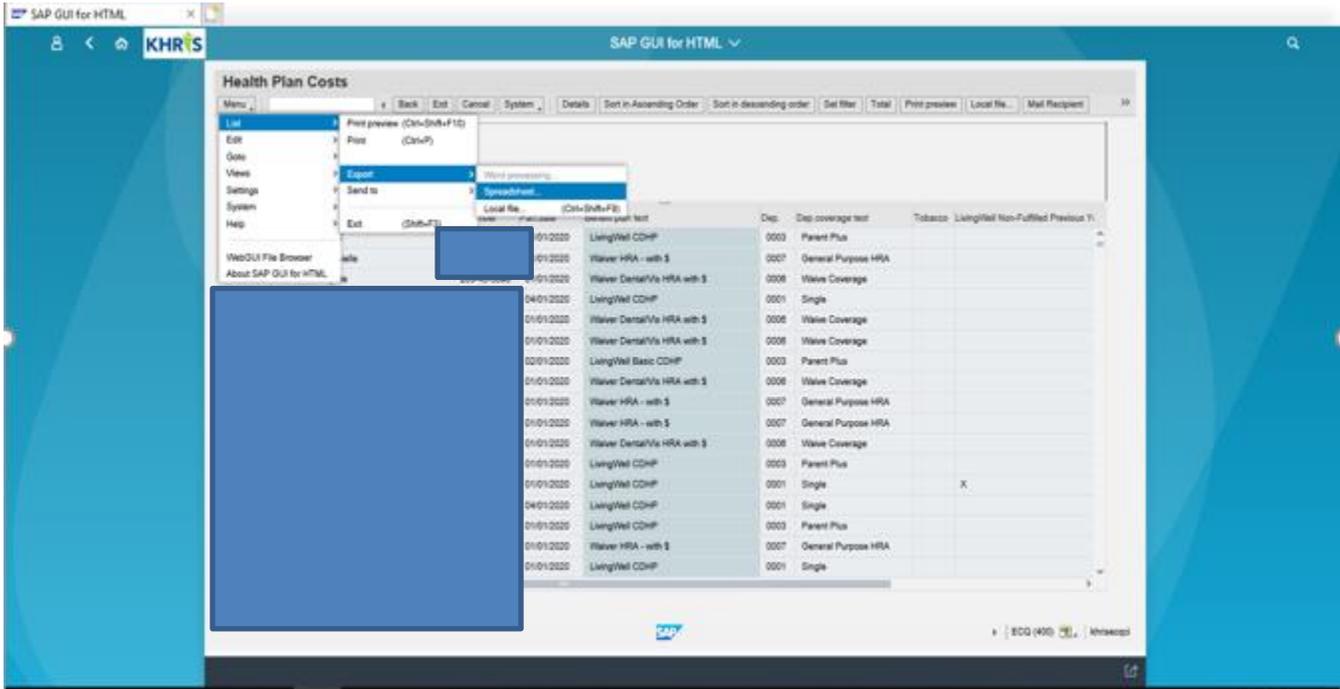
Click Spreadsheet

Click Run

Select where you want to save the file (example desktop)

Enter a file name

Click Save



**Transaction Complete**

## Plan Change History Report

This report allows you to see changes made to your agency's population (changed made by you, another agency IC or EIB) based on a number of criteria. As with other reporting in KHRIS, running during non-peak times (early morning or evenings) will help with getting results without timing out of the system.

### Step 1: Select ZBNR006 Plan Change History (select from menu on left)

Click "Search helps" tab

The screenshot displays the SAP ZBNR006 - Plan Change History report interface. The top navigation bar includes the KHRIS logo and the report title. Below the title, there are several tabs: "Further selections", "Search helps" (highlighted with a blue arrow), and "Sort order". The "Search helps" tab is active, showing a form with the following sections:

- Period:** Radio buttons for "Today", "Up to today", "Other period", "Current month", "From today", and "Current year". Below these are input fields for "Data Selection Period" and "Person selection period", each with "To" fields. A "Payroll period" button is also present.
- Selection:** A list of selection criteria with input fields and icons: "Personnel Number", "Employment status", "Company Code", "Personnel area", "Personnel subarea", "Payroll area", "Pers.area/subarea/cost center", and "Employee group/subgroup".
- Additional data:** A "Layout variant" input field.

The bottom right corner of the interface shows the SAP logo, the user ID "khriseqqi", and the system version "ECQ (400)".

Select "K – Organizational Assignment"

Click ✓

SAP GUI for HTML

### Plan Change History

Further selections

Period

- Today
- Up to today
- Other period

Data Selection Period

Person selection period

Payroll period

Selection

- Personnel Number
- Employment status
- Company Code
- Personnel area
- Personnel subarea
- Payroll area
- Pers.area/subarea/cost center
- Employee group/subgroup

Layout variant

Additional data

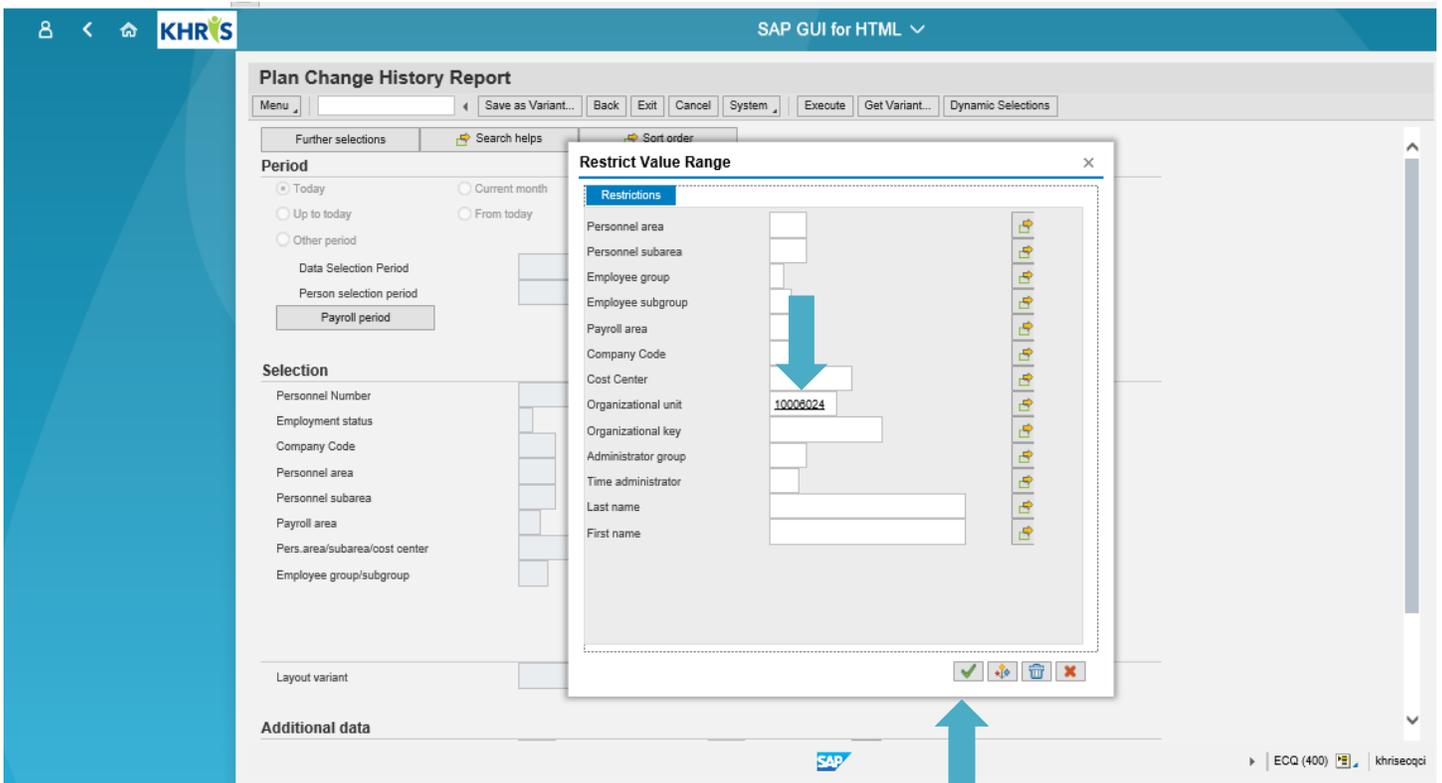
#### Restrict Value Range (1)

HKy	Short text
A	Ownership matchcode (non applicable)
B	PDC error indicator
C	Personnel ID Number
D	Part-time employees (D)
E	Buyer
F	Construction industry - organizational assignment
G	Date of birth
H	Sickness cert.data (A)
I	IC number
J	Last name - first name - birth name
K	Organizational assignment
L	Time Data Administrator
M	Schedules
O	HR Master Record: Infotype 0302 (Additional Actions)
P	Last name - First name (KR) Person ID
Q	Constituent Services Number (NL)
R	Employee's application number
S	Personnel numbers with trip data by organiz. assignment
T	Personnel numbers with trip data

37 Entries found

ECQ (400)

Enter **your** Agency's "Organizational Unit Number in the Organizational Unit field



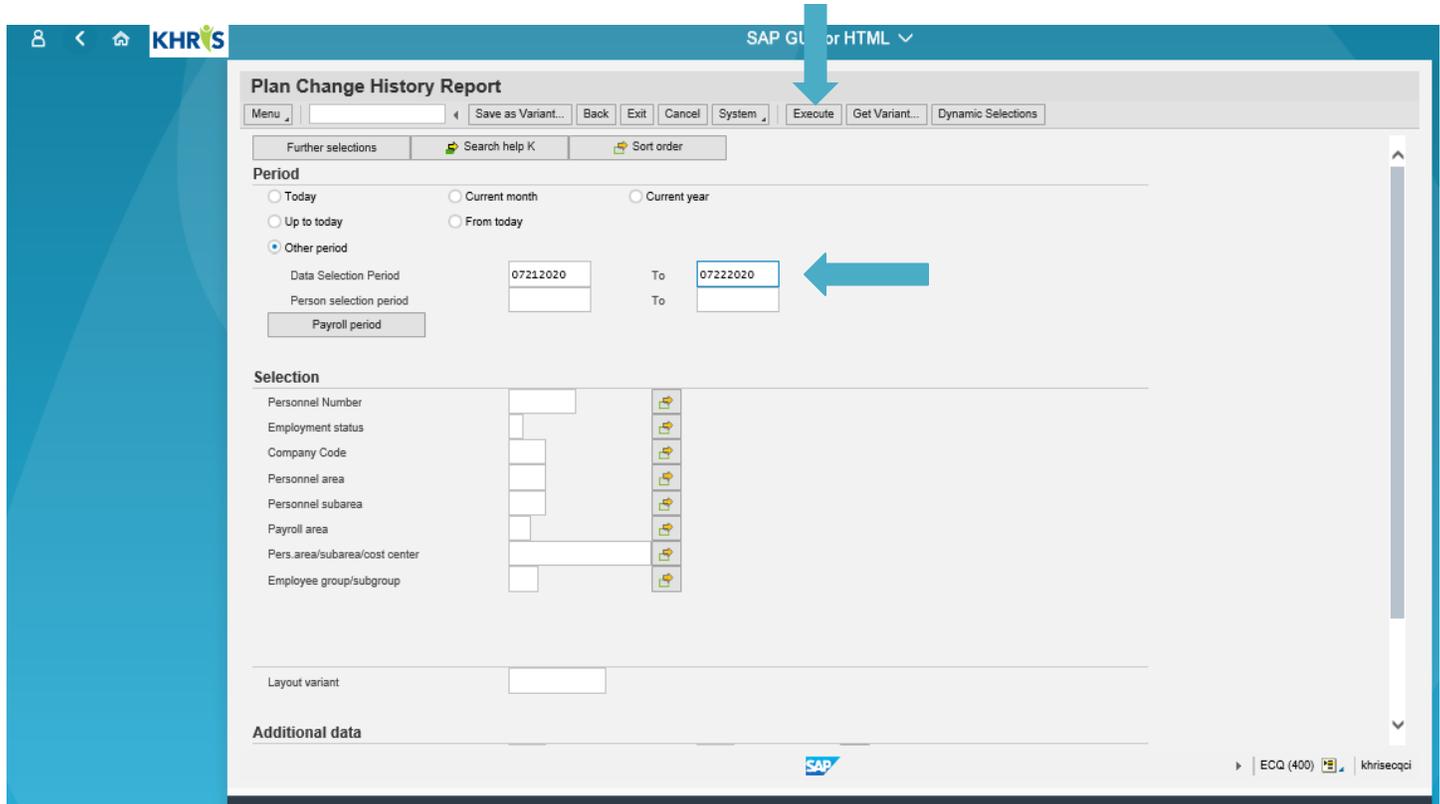
Click ✓

**Note:** This will take you back to the Plan Change History Report screen. After the Agency's Organizational number has been entered, the "Search helps" field will change to "Search helps K". This indicates that the report generated will only pertain to your Agency.

You can run the report based on different periods. These periods indicate the effective date of the change. You can choose any of the radio buttons.

If you want to see changes for a certain period, you need to click “Other Period”.

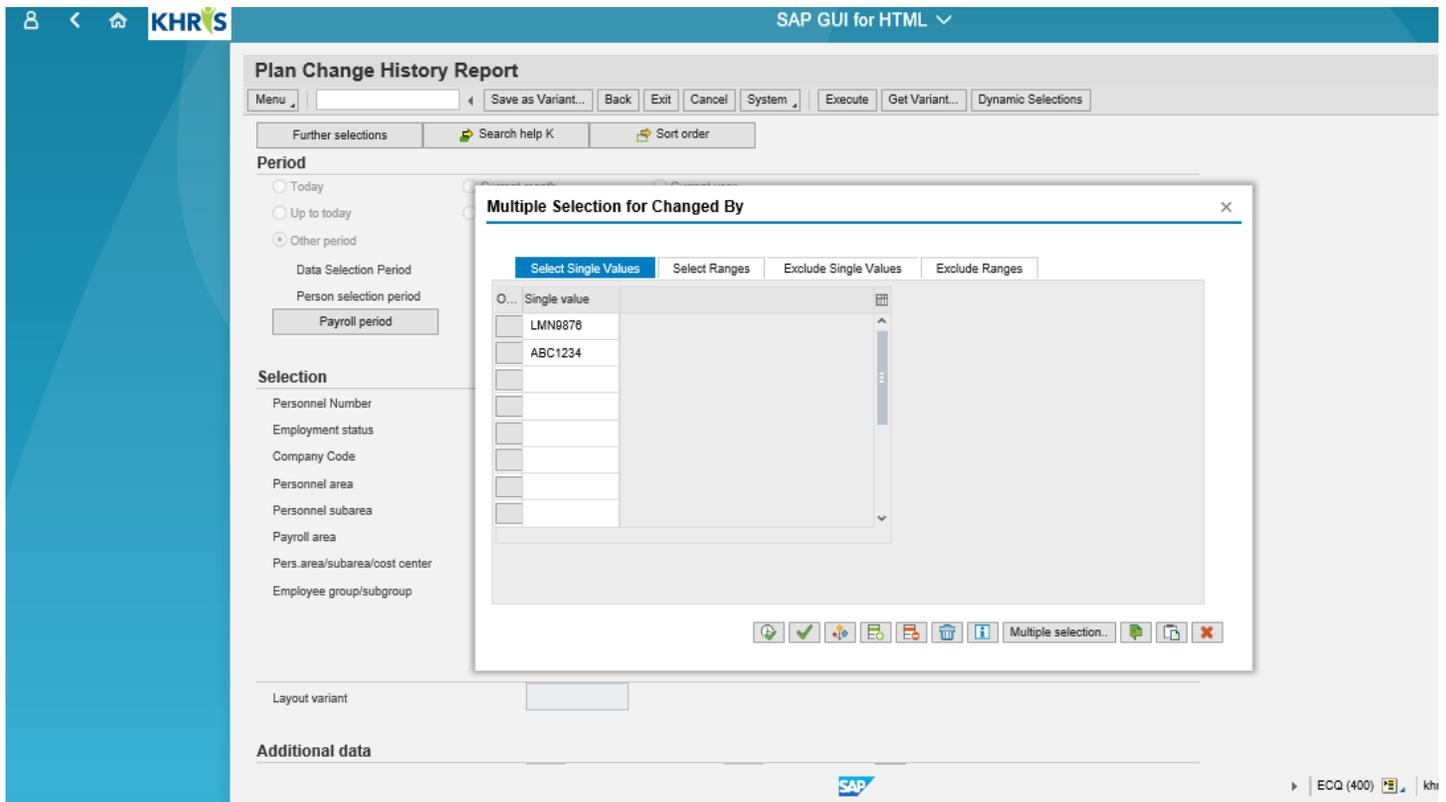
In the “Data Selection Period” boxes enter the period you want to show on your report.



You can also run this for one day by using the same day in both boxes.

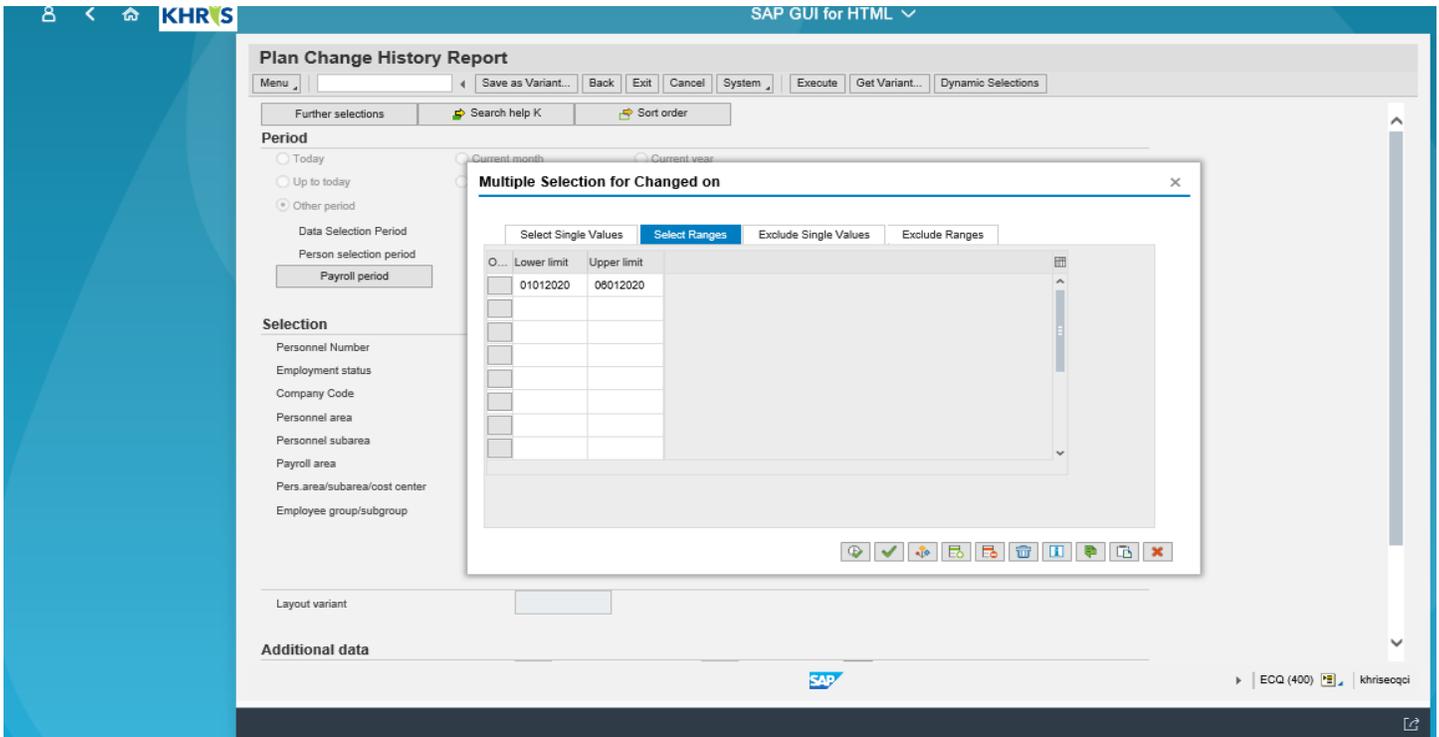
Once you have chosen a period you can click “Execute”

“Changed By Data” can be used by entering a specific USER ID ABC1234, if you want to see more than one user (if there are multiple ICs that do entry at your agency) Click on the Multiple Selection (**Note:** This shows when you put your “mouse” on top of the yellow arrow in the Additional data box. Click yellow arrow by “Changed By”)



If you want to see changes made by any users leave this field blank. If you want to see changes made due to a file upload, enter BATCH\_BN in the “Changed By” field

Use “Changed on” dates in order to capture changes processed within a particular date range. For example, if you want to see changes processed in KHRIS in from January 1, 2020 through May 2020, use, 01/01/2020 in the first data box and 06/01/2020 in the “to” box. You can also use the “Multiple Selection” choice to choose specific dates or multiple ranges.



If you want to see changes made on any date, leave these boxes blank. However, it is advisable to use at least one-selection criteria. Running the report without any defined criteria will take extended amounts of time and may cause you to time out. The more you define criteria the more specific your report will be.

As an example, this report is asking for changes made by a particular user between 07/21/2020 and 07/22/2020.

The screenshot displays the SAP GUI for HTML interface for the 'Plan Change History Report'. The header includes the KHRIS logo and 'SAP GUI for HTML'. The report title is 'Plan Change History Report'. Below the title is a menu bar with options: Menu, Save as Variant..., Back, Exit, Cancel, System, Execute, Get Variant..., and Dynamic Selections. The main configuration area is divided into several sections:

- Data Selection Period:** 'Data Selection Period' is set to 07/21/2020 and 'To' is 07/22/2020. 'Person selection period' and 'Payroll period' are currently empty.
- Selection:** This section contains several input fields with associated icons:
  - Personnel Number
  - Employment status
  - Company Code
  - Personnel area
  - Personnel subarea
  - Payroll area
  - Pers.area/subarea/cost center
  - Employee group/subgroup
- Layout variant:** An empty input field.
- Additional data:** This section includes:
  - Plan type
  - Benefit plan
  - Changed By: JPZ0060
  - Changed on: 07/21/2020 to 07/22/2020

The bottom right corner shows the SAP logo and user information: ECQ (400) | khrioeqci.

After the criteria you want to report on is entered, click "Execute".

The report generated will look like this:

**Plan Change History Report**

Changes in Benefit Elections

Evaluation Period  
 Program: ZBNR006\_PLAN\_CHANGE\_HISTORY  
 System: ECQ Client: 400  
 Date: 07/22/2020 Time: 12:30:05

Plan	Text	Text	Org. Unit	Object name	Pemp Name	From	To	Infotype	Changed On	Changed By
B704	Basic Life and AD&D		10008024	Bullitt County Bd of Ed		05/01/2020	07/31/2020	0168	07/22/2020	Freda Holderman
	Basic Life and AD&D									
	Dependent Life Plan D		10008024	Bullitt County Bd of Ed		05/01/2020	07/31/2020	0168	07/22/2020	Freda Holderman
	Dependent Life Plan D									
	Optional Life \$50,000 < 40		10008024	Bullitt County Bd of Ed		05/01/2020	07/31/2020	0168	07/22/2020	Freda Holderman
	Optional Life \$50,000 < 40									
B704										
F512	Anthem Dental Silver	Single	10008024	Bullitt County Bd of Ed		05/01/2020	07/31/2020	0167	07/22/2020	Freda Holderman
	Anthem Dental Silver									
	Anthem Vision Silver	Single	10008024	Bullitt County Bd of Ed		05/01/2020	07/31/2020	0167	07/22/2020	Freda Holderman
	Anthem Vision Silver									
F512										

SAP | ECQ (400) | khriseqci

You can download this to an excel spreadsheet

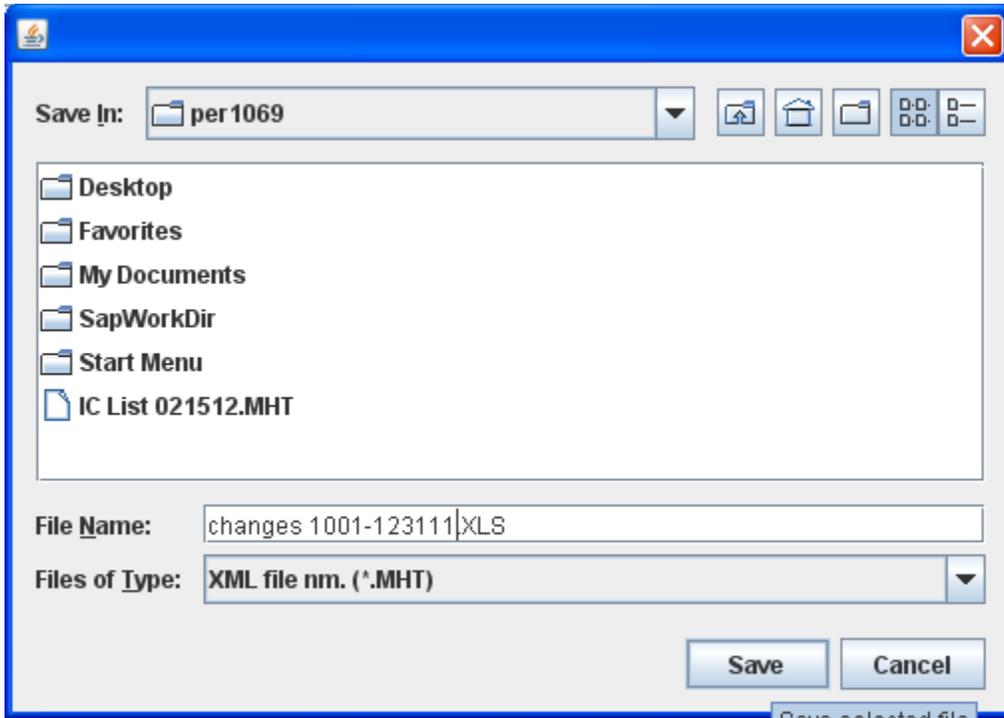


**Note:** If you get a security information notification that states, “The application’s digital signature has been verified. Do you want to run the application?” “✓ (box should be checked) Always trust content from this publisher.”

Click “Run”



Change the file name to a suitable name and save the file in a folder.



From there you can open in Microsoft excel and manipulate the data.

## Insurance Plan Cost Report

### Step 1: Select HRBEN0074 Insurance Plan Costs (select from menu on left)

**Note:** This report can be used to review or to make sure Employees are enrolled in the correct plans. The report should be ran in the morning or late afternoon when there are fewer users in the KHRIS system.

Click "Search helps" tab

The screenshot shows the SAP HRBEN0074 - Insurance Plan Costs report configuration interface. The top navigation bar includes the KHRIS logo and the report title. Below the title is a toolbar with buttons for 'Menu', 'Save as Variant...', 'Back', 'Exit', 'Cancel', 'System', 'Execute', and 'Get Variant...'. The main area is divided into sections: 'Further selections' with 'Search helps' and 'Org. structure' buttons; 'Key date' with radio buttons for 'Today' and 'Other keydate', and a 'Key Date' input field; 'Selection' with a 'Personnel Number' input field and a selection icon; and 'Additional selection' with fields for 'Benefit area' (containing '01'), '1st Program Grouping', '2nd Program Grouping', and 'Benefit plan', each with a 'to' field and a selection icon. The SAP logo is visible in the bottom right corner.

Select "K –Organizational Assignment"

Insurance Plan Costs

Menu

Further selections

**Key date**

Today

Other keydate

Key Date

**Selection**

Personnel Number

**Additional selection**

Benefit area

1st Program Grouping

2nd Program Grouping

Benefit plan

Strict Value Range (1)

HKy	Short text
A	Ownership matchcode (non applicable)
B	PDC error indicator
C	Personnel ID Number
D	Part-time employees (D)
E	Buyer
F	Construction industry - organizational assignment
G	Date of birth
H	Sickness cert.data (A)
I	IC number
J	Last name - First name - birth name
<b>K</b>	<b>Organizational assignment</b>
L	Time Data Administrator
M	Schedules
O	HR Master Record: Infotype 0302 (Additional Actions)
P	Last name - First name (KR)
	Person ID
Q	Constituent Services Number (NL)
R	Employee application number
S	Personnel numbers with trip data by organiz. assignment

Click ✓

Enter **your** Agency's "Organizational Unit Number" in the Organizational Unit field

The screenshot shows the SAP GUI for HTML interface. The main window is titled "Insurance Plan Costs" and contains several sections: "Key date" with radio buttons for "Today" and "Other keydate", a "Selection" section with a "Personnel Number" field, and an "Additional selection" section with fields for "Benefit area" (value 01), "1st Program Grouping", "2nd Program Grouping", and "Benefit plan". A "Restrict Value Range" dialog box is open in the foreground, listing various restriction fields. The "Organizational unit" field is highlighted with a blue arrow and contains the value "10006024". A callout box with a black border and white background points to this field, containing the text: "Enter Agency's organizational unit number (you can use drop down box to select your organization) and click check mark". At the bottom of the dialog box, there are four buttons: a green checkmark, a blue search icon, a blue trash can icon, and a red X icon. A blue arrow points to the checkmark button.

Click ✓

**Note:** This will take you back to the Insurance Plans Costs screen. After you enter your Agency's Organizational number, the "Search help" field will change to "Search help K". This indicates that the report generated and will only pertain to your Agency.

To run a report on **current elections**, under the Key date box, select “Today”

To run a report for **future elections**, under the “Key date field, select “Other key date”

Enter the date for which you are gathering election data in the “Key date” field

Note: Only use the “Personnel number” field if you need information for a particular Employee. Otherwise, this step will obtain a complete listing of your Employees.

Click “Execute”

The screenshot displays the SAP GUI for HTML interface for the 'Insurance Plan Costs' report. The top navigation bar includes 'SAP GUI for HTML' and a dropdown arrow. Below the title, there is a menu bar with buttons: 'Menu', 'Save as Variant...', 'Back', 'Exit', 'Cancel', 'System', 'Execute', and 'Get Variant...'. A blue arrow points to the 'Execute' button. Below the menu bar are three buttons: 'Further selections', 'Search help K', and 'Org. structure'. The main area is divided into three sections: 'Key date', 'Selection', and 'Additional selection'. In the 'Key date' section, 'Today' is selected with a radio button, and there is an empty 'Key Date' input field. In the 'Selection' section, there is an empty 'Personnel Number' input field with an 'Org. structure' icon. In the 'Additional selection' section, 'Benefit area' is set to '01', and there are three rows for '1st Program Grouping', '2nd Program Grouping', and 'Benefit plan', each with a 'to' field and an 'Org. structure' icon. The SAP logo is visible in the bottom right corner.

**Note:** This is what the generated report should look like. If you scroll down, you will find Optional and Dependent coverage information with the proper plans and premiums.

**Insurance Plan Costs**

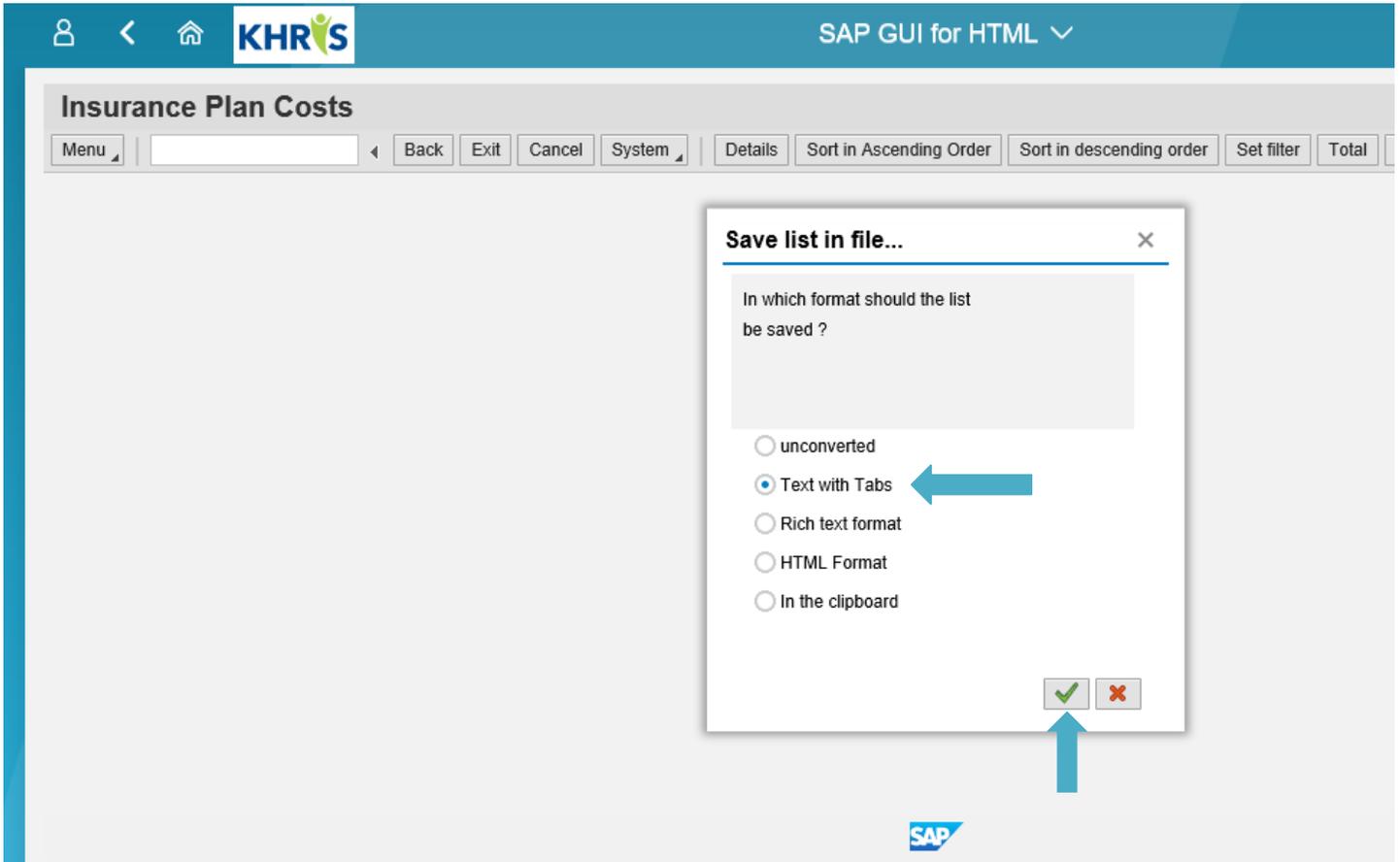
Key date 07/22/2020  
Benefit area 01 Comm of KY

Per	Period text	Plan	Benefit plan text	Entry	Part.date	Option	Insurance opti
2	Semi-monthly	B501	Basic Life and AD&D	10/10/2011	12/01/2011	0001	\$20,000
2		B501		03/01/2011	04/01/2011	0001	\$20,000
2		B501		02/18/2020	04/01/2020	0001	\$20,000
2		B501		02/06/2018	04/01/2018	0001	\$20,000
2		B501		03/01/2011	01/01/2010	0001	\$20,000
2		B501		08/06/2018	10/01/2018	0001	\$20,000
2		B501		09/01/2018	09/01/2018	0001	\$20,000
2		B501		02/17/2020	04/01/2020	0001	\$20,000
2		B501		02/26/2013	04/01/2013	0001	\$20,000

The columns that will be **useful** are: Benefit Plan Text (Plan types: Basic, Optional and Dependent); Pers. No.; Name; ID Number (Social Security Number); G (Gender); Entry; Part.date (Participation Date); Insurance Option Text (Coverage Volume); EE Cost; ER Credit; Ins. Coverage; and Birth date.

If you wish to print the report you will need to export to Excel.

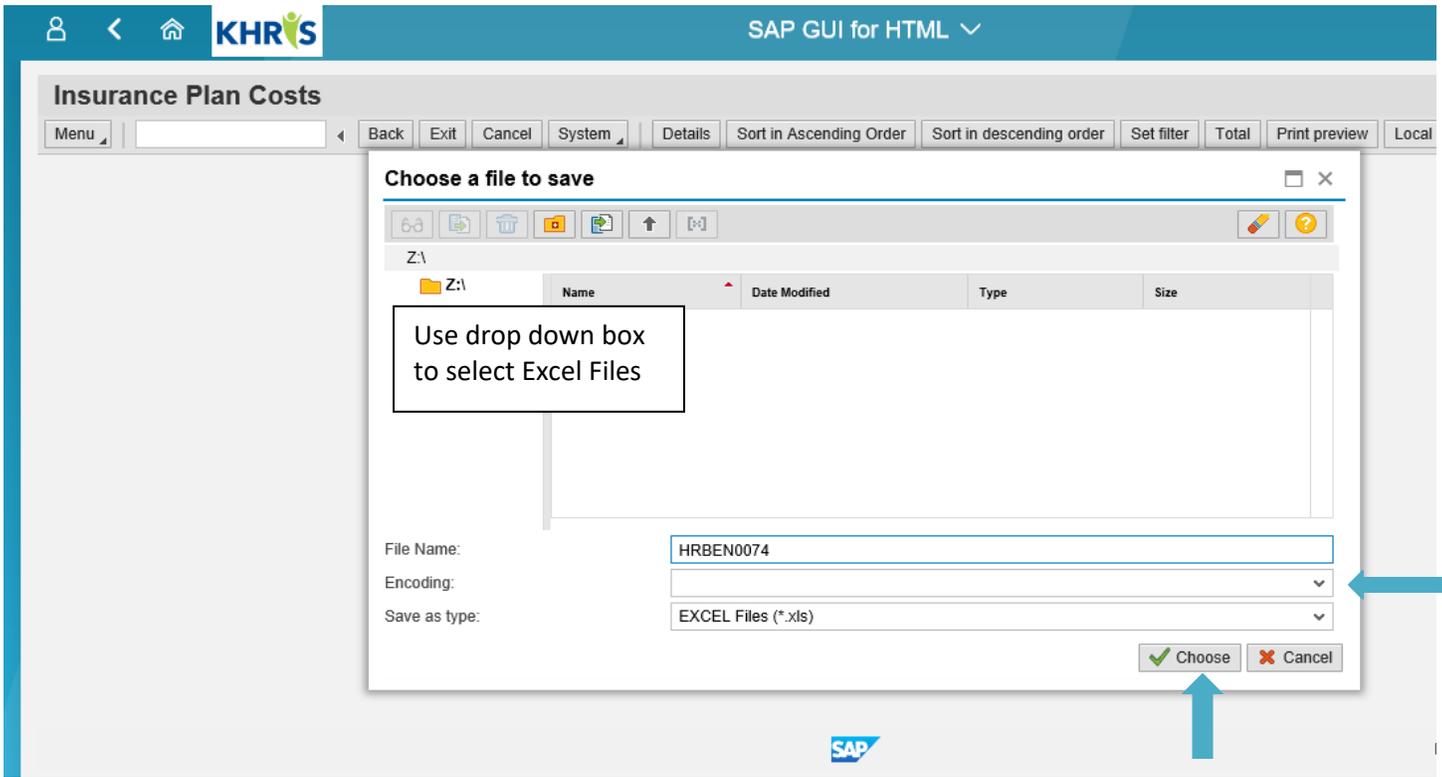
To Export to Excel  
Click Menu  
List  
Export  
Local file  
Select "Text with Tabs"  
Click ✓



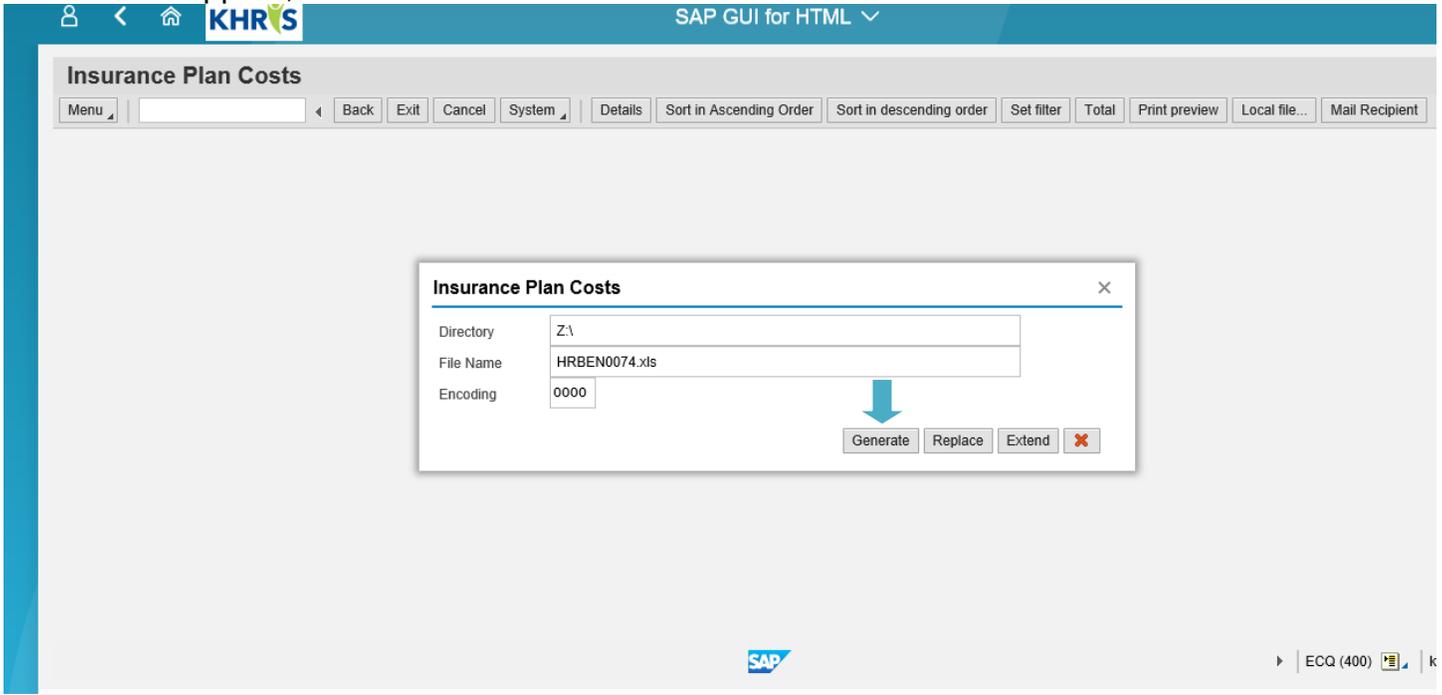
Click on "Drop down box"

Name the file and change file type to Excel for spreadsheet

Click Choose ✓



This box will appear, click Generate.



After you select generate, the Insurance Plan Cost Report will be saved in Excel Format on your computer.

Note: This will allow you to open the excel report and allow printing.

**Transaction Complete**

## Life Insurance Benefits Policy Letter Conversion

### Step 1: ZBNF002 - Benefits Policy Conversion Letter (select from My Transactions Menu)

The screenshot shows the SAP ZBNF002 - Benefits Policy Conversion Letter transaction. The interface includes a top navigation bar with the KHRIS logo and the transaction name. Below the navigation bar is a menu bar with options like 'Save as Variant...', 'Back', 'Exit', 'Cancel', 'System', 'Execute', 'Get Variant...', 'Sort Order', 'Selection Fields', 'Dynamic Selections', 'OrgStructure', and 'Search Help'. The main area is divided into sections: 'Period' with a 'Reporting Period' dropdown set to 'All'; 'Selection Criteria' with a list of criteria (Personnel Number, Employment Status, Personnel area, Personnel subarea, Employee group, Employee subgroup) each with a selection icon; and two text input fields for 'Insurance Coordinator Name' and 'Insurance Coordinator Title'. The SAP logo is visible at the bottom center, and the user ID 'khriseqci' is shown at the bottom right.

In the “Reporting Period” field, do not make any changes – it will state “All”

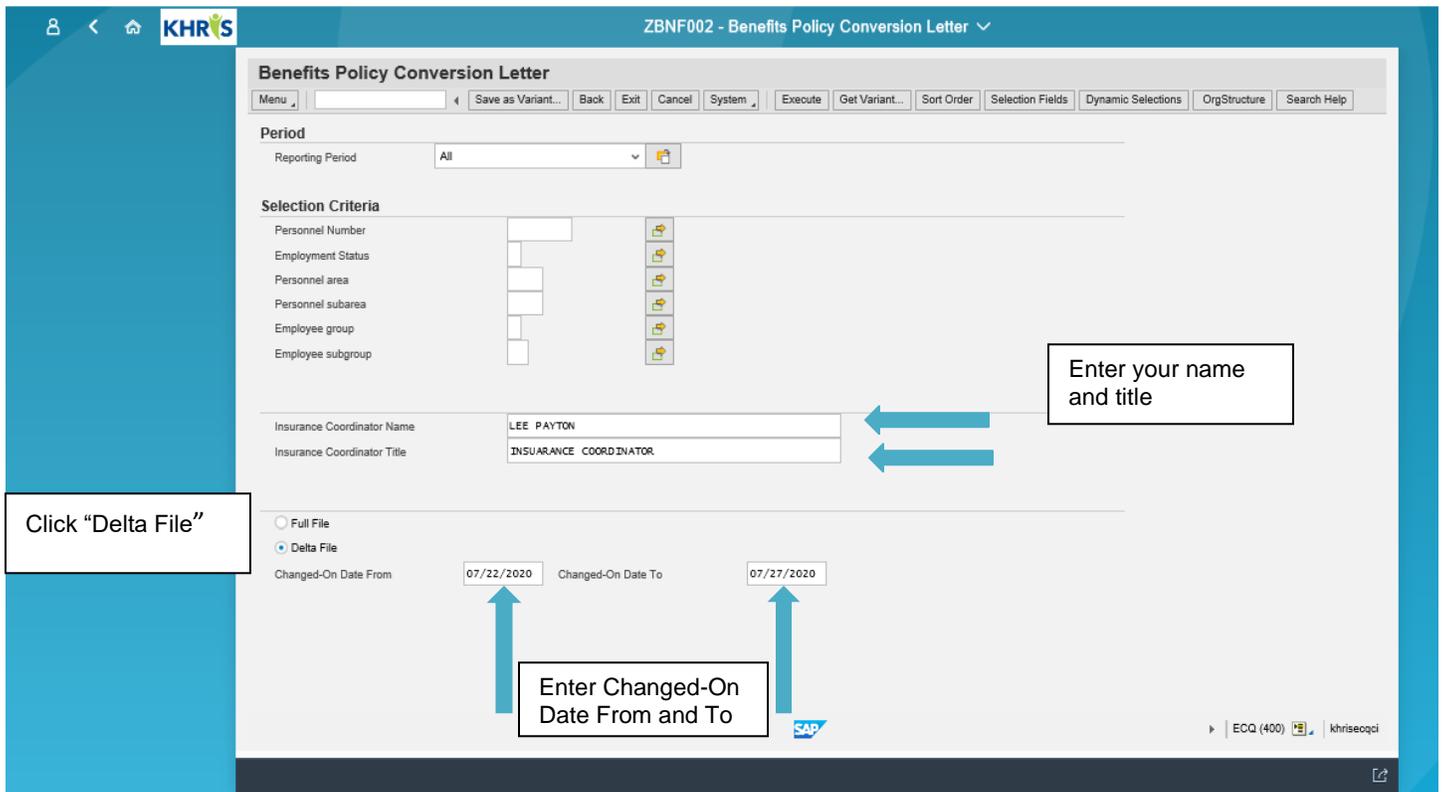
In the “Insurance Coordinator field”, enter your name

In the “Insurance Coordinator Title” field, enter your title

Click on “Delta File”

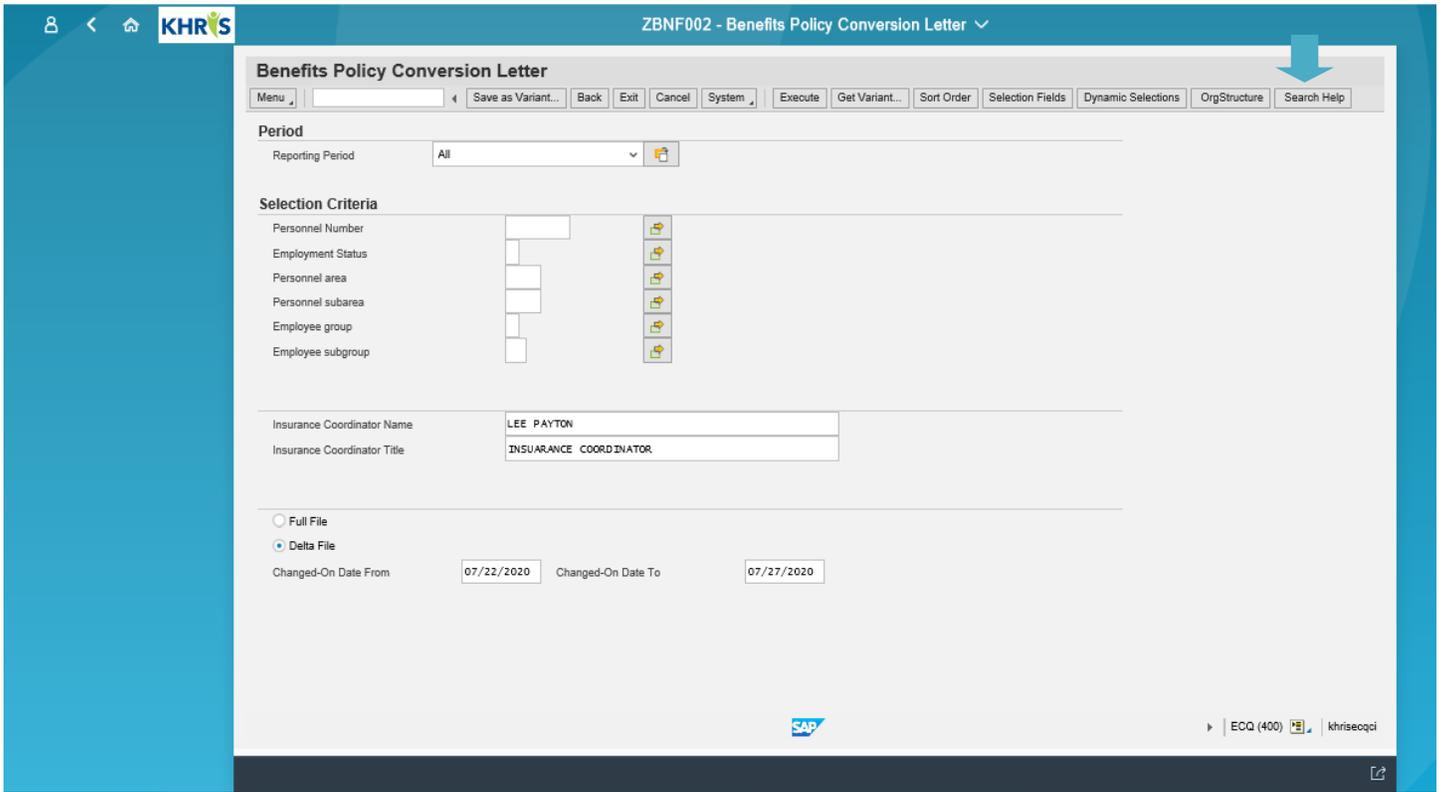
Enter your dates in the date range. If you are running the letter for one individual, then enter the date you termed that individual in KHRIS. If you are running the letter for multiple individuals that you’ve termed over a period of time, then enter the date range for that period of time.

Example: You began terming benefits in KHRIS for several people who are no longer employed with your agency on 07/22/2020 and you finished all of your terms on 07/27/2020. You want to create letters for all of them. The dates you would enter in the are 07/22/2020 in the “Changed-on Date From” field and 07/27/2020 in the Changed-On Date To” field



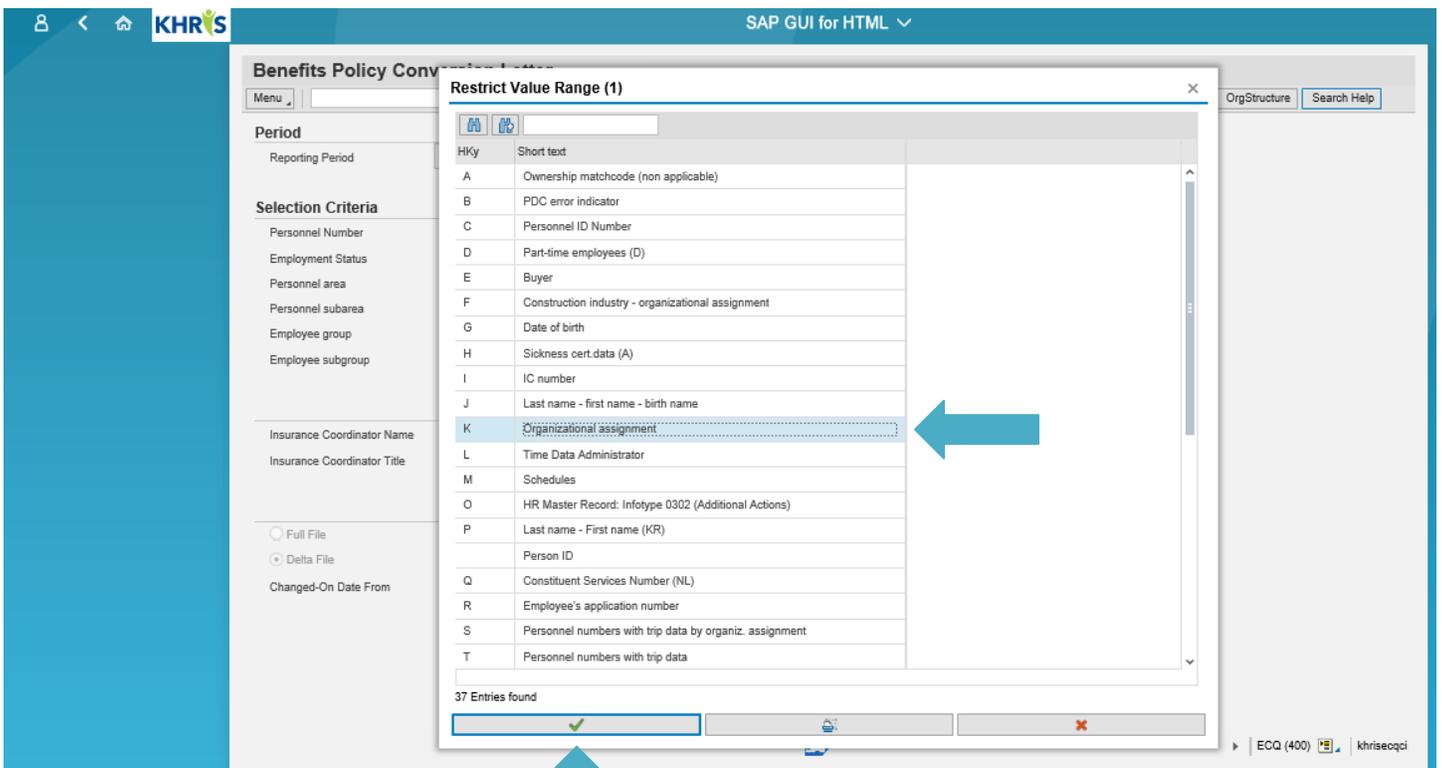
**Note:** This process should take place **every Friday** of the week (example on **Friday 07/01/2020** you are using **Changed-on Date From 07/01/2020** to **Changed-On Date To 07/07/2020**). This will pick up Employee (s) that has termed during the week. In turn, the conversion letter will be mailed in a timely manner. **\*\*\*\***The Employee only has **31 days** to convert their conversion to an individual whole life plan.

Click "Search Help"



Select "K Organizational assignment"

Click ✓



In "Organizational unit" field, put in your Agency's organizational unit number or use drop down box

Click ✓

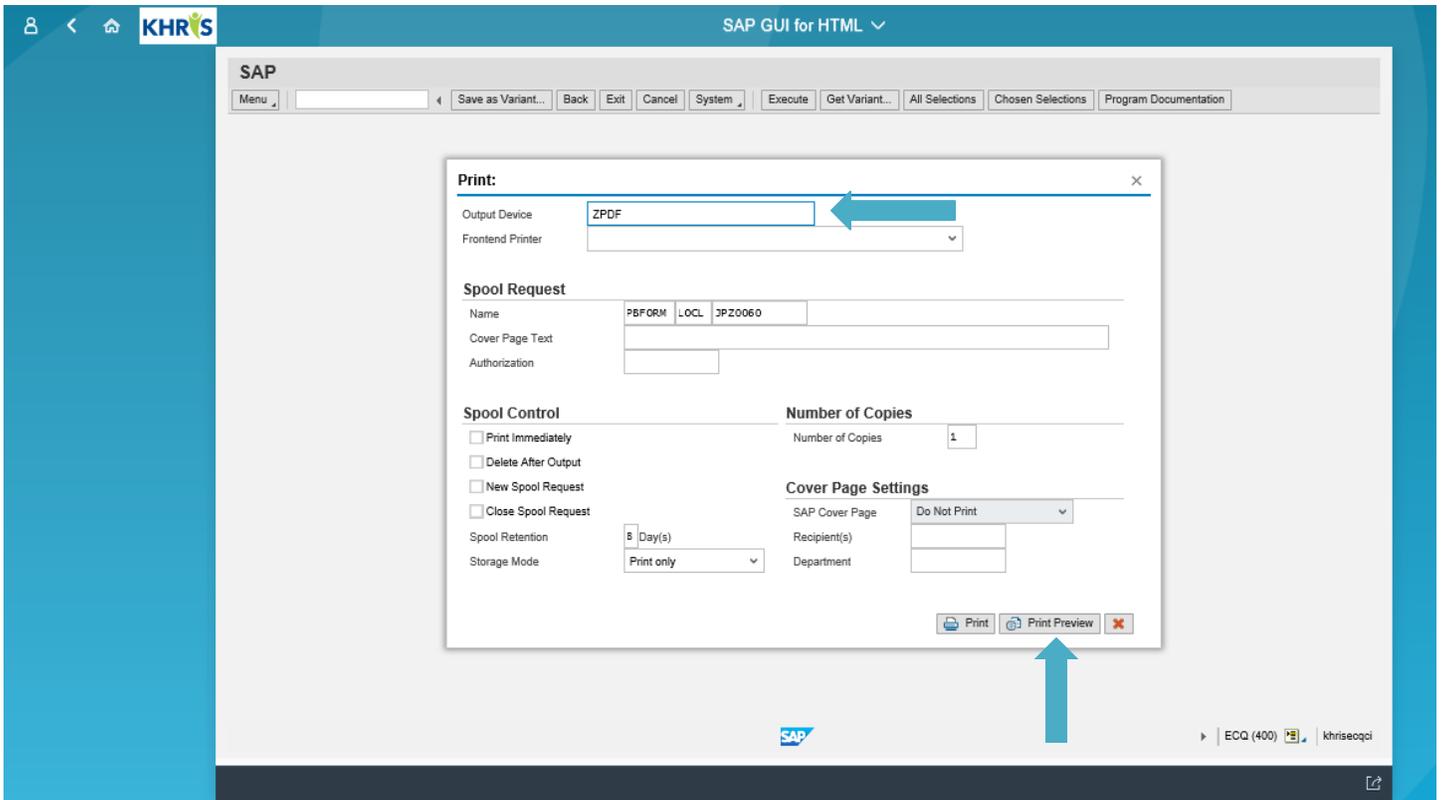
The screenshot shows the SAP GUI for HTML interface for the 'Benefits Policy Conversion Letter' transaction. The main screen has a menu bar with options like 'Save as Variant...', 'Back', 'Exit', 'Cancel', 'System', 'Execute', 'Get Variant...', 'Sort Order', 'Selection Fields', 'Dynamic Selections', 'OrgStructure', and 'Search Help'. The 'Period' section shows 'Reporting Period' set to 'All'. The 'Selection Criteria' section includes fields for 'Personnel Number', 'Employment Status', 'Personnel area', 'Personnel subarea', 'Employee group', and 'Employee subgroup'. The 'Insurance Coordinator Name' is 'LEE PAY' and the 'Insurance Coordinator Title' is 'INSURARA'. The 'Changed-On Date From' is '07/22/2020'. A 'Restrict Value Range' dialog box is open, showing a list of fields with input boxes. The 'Organizational unit' field is filled with '10000024'. A blue arrow points to the 'Execute' button at the bottom of the dialog. The SAP logo and user information 'ECQ (400) | khriseoqi' are visible at the bottom.

Click "Execute"

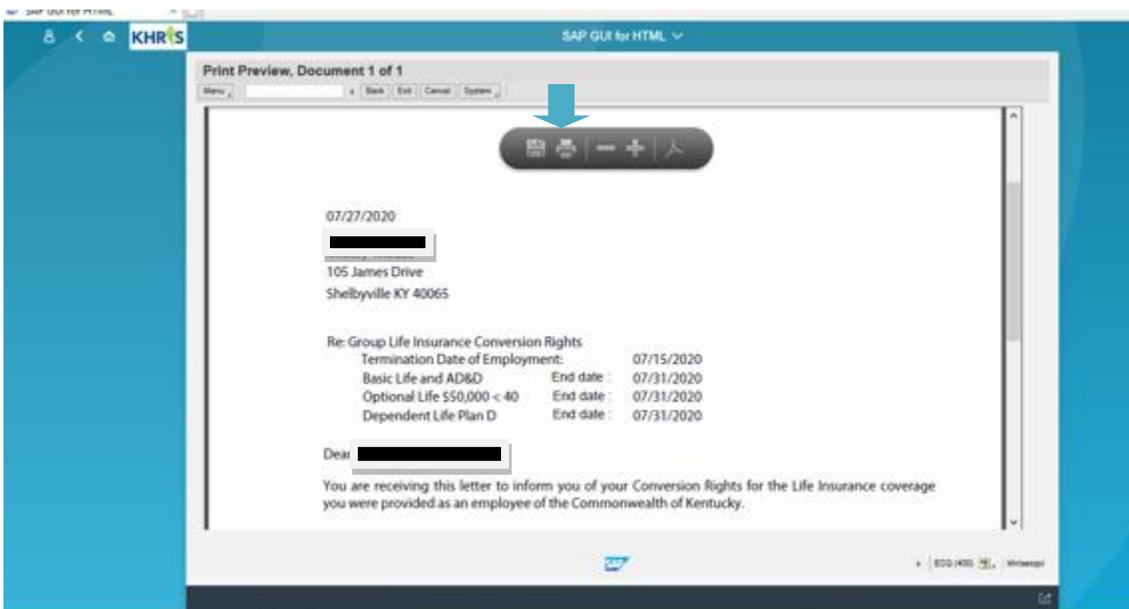
The screenshot shows the same SAP GUI for HTML interface after clicking the 'Execute' button. The 'Restrict Value Range' dialog box is no longer present. The 'Reporting Period' is now a dropdown menu set to 'All'. The 'Insurance Coordinator Name' is 'LEE PAYTON' and the 'Insurance Coordinator Title' is 'INSURANCE COORDINATOR'. The 'Changed-On Date From' is '07/22/2020' and the 'Changed-On Date To' is '07/27/2020'. A blue arrow points to the 'Execute' button in the menu bar. The SAP logo and user information 'ECQ (400) | khriseoqi' are visible at the bottom.

Change “Output Device” to ZPDF

Click “Print Preview”



Example of the letter you will get from the transaction:



Click “Print” to print the letter

Life Insurance Benefits Policy Letter Conversion

**Note:** If you process a term on the current day and want to generate a letter immediately you would follow the below steps:

In the “Reporting Period” field, use the drop down box and select “Today”

In the “Personnel Number” field, enter the Employee’s Personnel Number

In the “Insurance Coordinator field”, enter your name

In the “Insurance Coordinator Title” field, enter your title

Select “Full File”

Click “Execute”

The screenshot shows the SAP interface for the 'Benefits Policy Conversion Letter' transaction. The top navigation bar includes the KHRIS logo and the text 'SAP GUI for HTML'. Below the title bar, there is a menu bar with options: Menu, Save as Variant..., Back, Exit, Cancel, System, Execute, Get Variant..., Sort Order, Selection Fields, Dynamic Selections, OrgStructure, and Search Help. The main form is divided into several sections:

- Period:** Reporting Period is set to 'Today'.
- Selection Criteria:** Personnel Number is filled with a redacted value. Other fields (Employment Status, Personnel area, Personnel subarea, Employee group, Employee subgroup) are empty.
- Insurance Coordinator:** Insurance Coordinator Name is 'LEE PAYTON' and Insurance Coordinator Title is 'INSURANCE COORDINATOR'.
- File Type:** 'Full File' is selected, and 'Delta File' is unselected.

Blue arrows point to the 'Execute' button, the 'Reporting Period' dropdown, the 'Personnel Number' field, the 'Insurance Coordinator Name' field, the 'Insurance Coordinator Title' field, and the 'Full File' radio button.

**Transaction Complete**