



PARTICIPATION REPORT

BEN-14 | TRANSACTION HRBEN0072

BN

The purpose of this Business Process Procedure is to explain how to display a list of employees participating in specific benefits plans in the Integrated HR-Payroll System.

Trigger: A requirement to display employees participating in specified benefit plans on a given day or during a certain period of time.

Business Process Procedure Overview:

This report shows the employees who are participating in specified benefit plans on a given date or during a certain period of time.

Run the report for the current day or a Period of your choice.

Restrict data selection using the following parameters:

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

The report lists participating employees per plan and the following information:

- The employee's date of entry (hire date)
- The first date of participation in the relevant plan

The start and end date of the plan infotype.

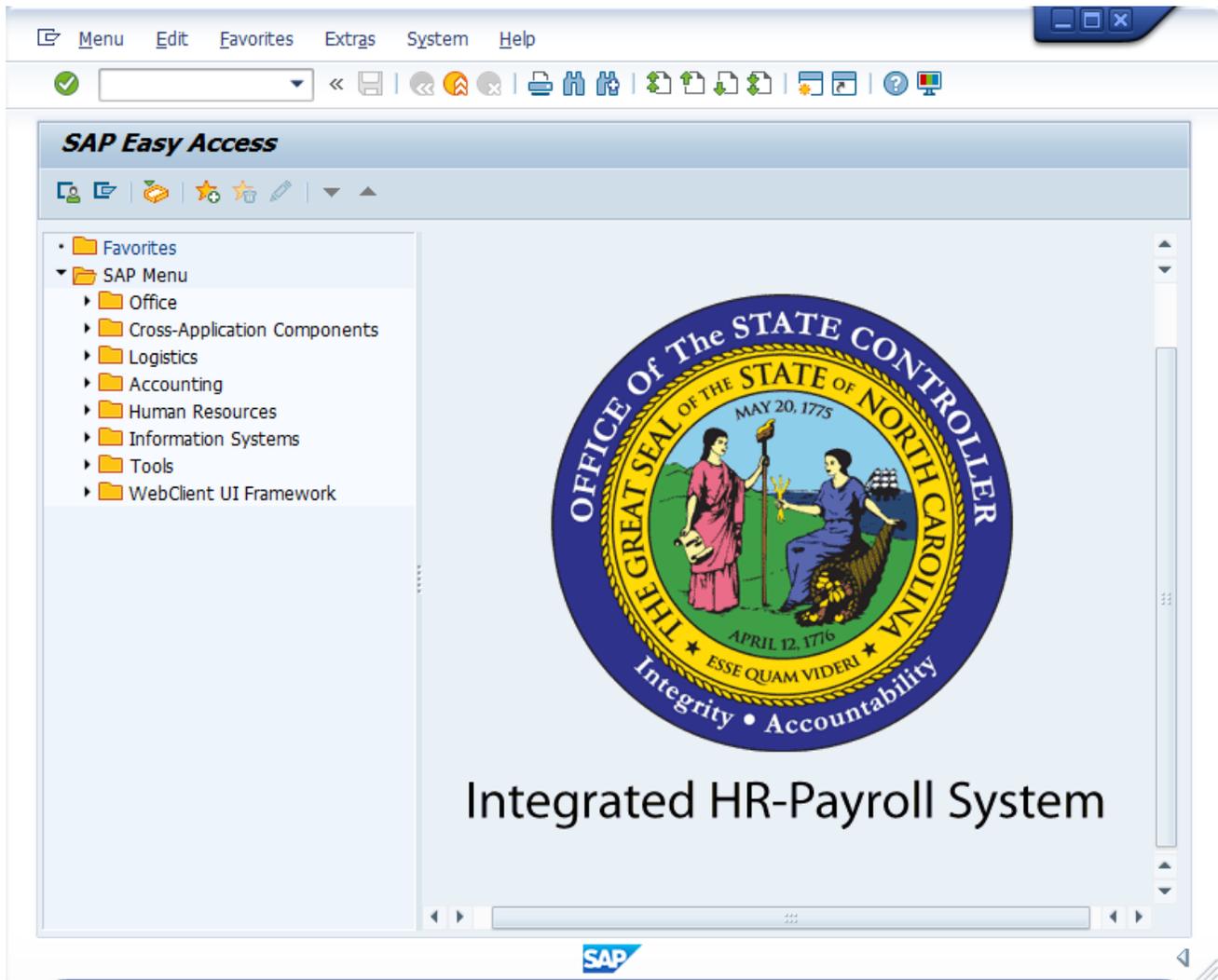
Access Transaction:

Via Menu Path: SAP menu >> Human Resources >> Personnel Management >> Benefits >> Info System >> Reports >> Participation >> HRBEN0072 – Participation

NOTE: Your menu path may contain this custom transaction code depending on your security roles.

Via Transaction Code: HRBEN0072

Procedure



1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. Example: HRBEN0072

2. Click the **Enter**  button.

You may want to enter this transaction code in your Favorites Folder.

From the menu at the top of the screen:

- Choose Favorites > Insert Transaction
- Type in HRBEN0072
- Click Enter



Information

To see the transaction code displayed in front of the link in you favorites from the menu at the top of the screen:

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

3. Update the following field:

Field Name	Description	Values
Personnel Number	Unique number identifying an individual’s master record data in the system.	Enter value in Command. Example: 80001035

Additional filter criteria, such as date range(s) or multiple personnel numbers, may be chosen here as well.

Participation



Further selections 
Search helps 
Org. structure 

Period

Today
 Current month
 Current year
 Up to today
 From today
 Other period

Period  To

Selection

Personnel Number 

Additional selection

Benefit area	<input style="width: 100%;" type="text" value="NC"/>				
1st Program Grouping	<input style="width: 100%;" type="text"/>	to	<input style="width: 100%;" type="text"/>		
2nd Program Grouping	<input style="width: 100%;" type="text"/>	to	<input style="width: 100%;" type="text"/>		
Benefit plan	<input style="width: 100%;" type="text"/>	to	<input style="width: 100%;" type="text"/>		

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

5. Click the desired line to select it and see more details.

The overview of benefit plans for the filter criteria chosen is displayed. For more detailed information for any line item, highlight a line and click Details.

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

Plan	Benefit plan text	Pers.No.	Name	G	Birth date	Entry	Part.date	1st PG	2.PG	1st ProgrGroup. Text	2nd ProgrGroup. Text	Start	End
401K	401(K) Savings Plan	80001035	Marvin Tillman	M	07/31/1965	01/01/2008		FULL	B014	Full Benefits Elg	Reg State Employees	12/01/2015	12/31/9999
LIFK	Child(ren) Life Insurance	80001035	Marvin Tillman	M	07/31/1965	01/01/2008	01/01/2014	FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2021	12/31/9999
ENHC	Enhanced 80/20 Plan	80001035	Marvin Tillman	M	07/31/1965	01/01/2008	01/01/2018	FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2021	12/31/9999
ADD	NC Flex AD&D Insurance	80001035	Marvin Tillman	M	07/31/1965	01/01/2008	02/01/2008	FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2021	12/31/9999
CANC	NC Flex Cancer Insurance	80001035	Marvin Tillman	M	07/31/1965	01/01/2008	02/01/2008	FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2021	12/31/9999
ADDC	NC Flex Core AD&D Insurance	80001035	Marvin Tillman	M	07/31/1965	01/01/2008	01/01/2014	FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2021	12/31/9999
DENT	NC Flex Dental Plan	80001035	Marvin Tillman	M	07/31/1965	01/01/2008	02/01/2008	FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2021	12/31/9999
DCSA	NC Flex Dependent Care FSA	80001035	Marvin Tillman	M	07/31/1965	01/01/2008	02/01/2008	FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2021	12/31/9999
HCSA	NC Flex Health Care FSA	80001035	Marvin Tillman	M	07/31/1965	01/01/2008	02/01/2008	FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2021	12/31/9999
LIFE	NC Flex Life Insurance	80001035	Marvin Tillman	M	07/31/1965	01/01/2008	02/01/2008	FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2021	12/31/9999
VIS	NC Flex Vision Plan	80001035	Marvin Tillman	M	07/31/1965	01/01/2008	02/01/2008	FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2021	12/31/9999
LIFS	Spouse Life Insurance	80001035	Marvin Tillman	M	07/31/1965	01/01/2008	01/01/2014	FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2021	12/31/9999
TSER	TSERS - Retirement Plan	80001035	Marvin Tillman	M	07/31/1965	01/01/2008		FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2008	12/31/9999

7. Review this data as appropriate and close the window when finished.

Group description	Cell Content
Benefit plan	TSER
Benefit plan text	TSERS - Retirement Plan
Personnel Number	80001035
Name of employee or applicant	Marvin Tillman
Last name	Tillman
Gender	M
First name	Marvin
Date of birth	07/31/1965
Entry Date	01/01/2008
1st Program Grouping	FULL
2nd Program Grouping	B014
1st ProgrGroup. Text	Full Benefits Elg
2nd ProgrGroup. Text	Reg State Employees
Start exist. record	01/01/2008
End existing record	12/31/9999

8. Click the Close window (Enter) button.

This data can be printed or exported to MS Excel.

Participation

Key date 06/24/2021
Benefit area NC State of NC

Plan	Benefit plan text	Pers.No.	Name	G	Birth date	Entry	Part.date	1st PG	2.PG	1st ProgrGroup. Text	2nd ProgrGroup. Text	Start	End
401K	401(K) Savings Plan	80001035	Marvin Tillman	M	07/31/1965	01/01/2008		FULL	B014	Full Benefits Elg	Reg State Employees	12/01/2015	12/31/9999
VIS	NC Flex Vision Plan	80001035	Marvin Tillman	M	07/31/1965	01/01/2008	02/01/2008	FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2021	12/31/9999
LIFS	Spouse Life Insurance	80001035	Marvin Tillman	M	07/31/1965	01/01/2008	01/01/2014	FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2021	12/31/9999
TSER	TSERS - Retirement Plan	80001035	Marvin Tillman	M	07/31/1965	01/01/2008		FULL	B014	Full Benefits Elg	Reg State Employees	01/01/2008	12/31/9999

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

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

The system task is complete.

Change Record

- 9/29/16 – New BPP format; updated all screen captures due to SAP upgrade to SAPGUI 7.40 – L. Brown
- 3/19/21 – Updated format, assigned reference number, and made accessible – C. Ennis
- 6/24/2021 – Updated images, alt text, and image layout. L. Lee