

Benefits Administration – HRG/HRA

EXERCISE DATA SHEET

Lesson 2 – Enrollment (Health & Life)

Exercise 2.1: Benefit Enrollment

Scenario:

A new employee has been hired and completed the benefit applications. After reviewing the forms, access KHRIS to add the dependent and update the smoker status for the employee. Then enroll the new employee in the selected benefit plans and assign the dependents and beneficiaries.

Use the following to complete the exercise:

Transaction	PA30 Maintain HR Master Data
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Data needed to complete the transaction:

Task	Data																														
<i>Maintain HR Master Data screen</i>																															
Personnel No	<table border="1"> <thead> <tr> <th>ID</th> <th>Data</th> </tr> </thead> <tbody> <tr><td>Instructor</td><td>3951</td></tr> <tr><td>Instructor</td><td>3952</td></tr> <tr><td>Instructor</td><td>3953</td></tr> <tr><td>Student 01</td><td>3954</td></tr> <tr><td>Student 02</td><td>3955</td></tr> <tr><td>Student 03</td><td>3956</td></tr> <tr><td>Student 04</td><td>3957</td></tr> <tr><td>Student 05</td><td>3959</td></tr> <tr><td>Student 06</td><td>3960</td></tr> <tr><td>Student 07</td><td>3961</td></tr> <tr><td>Student 08</td><td>3962</td></tr> <tr><td>Student 09</td><td>3951</td></tr> <tr><td>Student 10</td><td>3952</td></tr> <tr><td>Student 11</td><td>3953</td></tr> </tbody> </table>	ID	Data	Instructor	3951	Instructor	3952	Instructor	3953	Student 01	3954	Student 02	3955	Student 03	3956	Student 04	3957	Student 05	3959	Student 06	3960	Student 07	3961	Student 08	3962	Student 09	3951	Student 10	3952	Student 11	3953
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Student 12	3954
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Student 14	3956
Student 15	3957
Student 16	3959
Student 17	3960
Student 18	3961
Student 19	3962
Student 20	3963
Student 21	3964
Student 22	3965
Student 23	3966
Student 24	3967
Student 25	3968

Hit **Enter** or Click  **(A green check by the IT means it contains information)**

Click the **Benefits** tab.

Info type	0021 Family Member/Dependents
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Click **Create**  to enter a new dependent.

Note: No record yet because there is not a green check by it

Subtypes for infotype 0021 Family Member/Dependents

Sub Type	2 – Child
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Click **Continue**  or double click on child

Create 0021 Family Member/Dependent

Start	1/1/2014		
First Name	Sally		
Initials	M		
Gender	Female		
Birth Date	08/06/2003		
SSN	<table border="1" style="width: 100%; text-align: center;"> <tr> <td style="width: 50%;">ID</td> <td style="width: 50%;">Data</td> </tr> </table>	ID	Data
ID	Data		



Instructor	400-55-1111
Instructor	400-55-1112
Instructor	400-55-1113
Student 01	400-55-1115
Student 02	400-55-1116
Student 03	400-55-1117
Student 04	400-55-1118
Student 05	400-55-1119
Student 06	400-55-1120
Student 07	400-55-1121
Student 08	400-55-1122
Student 09	400-55-1123
Student 10	400-55-1124
Student 11	400-55-1125
Student 12	400-55-1126
Student 13	400-55-1127
Student 14	400-55-1128
Student 15	400-55-1129
Student 16	400-55-1130
Student 17	400-55-1131
Student 18	400-55-1132
Student 19	400-55-1133
Student 20	400-55-1134
Student 21	400-55-1135
Student 22	400-55-1136
Student 23	400-55-1137
Student 24	400-55-1138
Student 25	400-55-1139

Click Save 

Maintain HR Master Data screen

Info type

0376 Benefits Medical Information



Click Create	
Change 0376 Benefits Medical Information	
Start	Enter the hire date 1/1/2014.
Tobacco Use	Select the checkbox.
Click Save	
<p>If you get an informational warning, click save again or enter–will now show <u>record created</u></p> <ul style="list-style-type: none"> <u>Red letters are OK</u>, its getting your attention to look at informational warning 	
Maintain HR Master Data screen	
Command Field	HRBEN0001 Enrollment
Hit Enter or Click	
Enrollment screen	
Personnel No	Same as above.
Hit Enter or Click	
Change Selection Date box	
Selection Date <u>MUST</u> be Signature Date	<p>For exercise purposes, we will say employee came back 5 days later with a change: Enter five days from the hire date of 1/1/2014. (Signature date from the New Hire Enrollment app)</p> <p>Click Change Date and enter date. (when you see this box, you must click it to change the date)</p>
Click Continue	
Enrollment screen	
Click New Participant in the offers list	
Click Get offer Get offer	
Click LivingWell PPO (under Medical Plan)	
Maintain Health Plans screen	
Notice the green box...this is what they will automatically get if nothing is entered in the system	
Click the Dependents tab.	



Select check box <input type="checkbox"/> for the child.	
Click the Option tab.	
Dependent Coverage	Parent Plus
Click Accept	
Enrollment screen (Enroll Life)	
Click Basic Life and AD&D . Notice that when you load any dependent in Health, it auto loads that info in Life	
Maintain Insurance Plan screen	
Click the Beneficiaries tab	
Pcnt	100
Click Accept	
Enrollment screen (Enroll Life)	
Click Optional Life 1x Salary 40-59 .	
Maintain Insurance Plan screen	
Click the Beneficiaries tab	
Pcnt	100
Click Accept	
Enrollment screen (Enroll Life)	
Click Dependent Life Plan E . (Only option available for unmarried with dependent.)	
Click Accept	
Enrollment screen (Enroll Health FSA)	
Click Healthcare FSA .	
Maintain Flexible Spending Account screen	
Contribution	1500 *Be conscious of amount elected and # of months left



	<p>in the year</p> <p>*EX: With a \$1500 contribution, they have to split that \$1500 in the last 2 months of the year.</p> <p>*\$750 a month for both November and December</p> <p>*Make sure they are clear on the contribution that will come out of their check to avoid hardship. (co-pays medical and RX)</p>
Click Accept	
Enrollment entry completed	
<i>Enrollment screen</i>	
Click Enroll	Enroll in the middle of the Enrollment screen.
<i>Confirmation of Selected Actions screen</i>	
Click Enroll	Enroll
<i>Enrollment message</i>	
Click Confirmation	Confirmation
<i>Print screen</i>	
Click	Print Preview. Review Confirmation.
<p>There are various ways to print but this is the easiest way...</p> <p>At the top dropdown box, change LOCL to ZPDF (or ZADS if needed), then use the printer button at the bottom of the confirmation page by hovering over the bottom part of the page.</p> <p>*If you need to print at a later date, there are 2 options (show):</p> <p><u>HRBEN0001/Overview/Confirmation/Print Preview/Print from Adobe</u></p> <p><u>HRBEN0015 Print Confirmation Form (call KHRIS Svc Center for assistance if needed)</u></p> <p>Click Print Form, need to enter ZADS or ZPDF</p> <p>Click Display Form – Print Preview, Print from Adobe</p>	
You will not print the confirmation in this training class. Click Back	
<i>Enrollment message</i>	
Click Continue	Continue to close the Enrollment message box.
<i>Enrollment screen</i>	
Click Exit	

Exercise 2.2: Correct an Active Plan

Scenario:

Change the FSA contribution amount for the Healthcare FSA.

Use the following to complete the exercise:

Transaction	HRBEN0001
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Data needed to complete the transaction:

Task	Data																																												
<i>Maintain HR Master Data screen</i>																																													
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Student 19	3960
Student 20	3961
Student 21	3962
Student 22	3963
Student 23	3964
Student 24	3965
Student 25	3966

List 0021 Family Member/Dependents

Hit Enter or Click

Enrollment screen

Personnel No

You can enter manually or on the left hand side of the screen about 1/2 way down to the holding bucket, you will see Pernrs you have used, just click on their pernr/name if its there.

Hit Enter or Click

Change Selection Date box

***We need to change the FSA amount. (1/2 the amount)
*Must use the new signature date on change form when doing update.**

Selection Date

Enter Signature date (10 days after the hire date of 1/01/2014)
Click Change Date and enter date.
(Signature date from the New application with updates must be within the 35 day window)

Click Continue

Enrollment screen

Click **New Participant** in the offers list.

Click **Get offer** **Get offer**

Click **Healthcare FSA**.

Maintain Flexible Spending Account screen

***Changing FSA Amount.
*Your members have 35 days to make changes.
*This member decided they needed to change the \$1500 contribution.**

Contribution

Change to 700

Click **Accept** **Accept**

(Notice green check)

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Enrollment screen

Click **Enroll**  **Enroll** towards the middle of the screen.

Confirmation of Selected Actions screen

Click **Enroll**  **Enroll**.

Enrollment message box

Click **Confirmation**  **Confirmation**.

Print screen

Click  **Print Preview**. **Review** confirmation. Change look to **ZPDF (Output device)**

Click **Back** 

Enrollment message box

Click **Continue**  **Continue** to close the Enrollment message box.

Enrollment screen

Click **Exit** 



Lesson 4 – Leave Without Pay

Exercise 4.1: Terminate Benefits

Scenario:

Terminate benefits for an employee that is going out on leave without pay.

Use the following to complete the exercise:

Transaction

HRBEN0014 Termination of Plans

Data needed to complete the transaction:

Task	Data	
<i>Termination of Plan Participation screen</i>		
Personnel No	ID	Data
	Instructor	980
	Instructor	983
	Instructor	988
	Student 01	992
	Student 02	997
	Student 03	1018
	Student 04	1024
	Student 05	1031
	Student 06	1040
	Student 07	1048
	Student 08	1051
	Student 09	1055
	Student 10	1064
	Student 11	1067
	Student 12	1069
	Student 13	1073
	Student 14	1078
Student 15	1080	
Student 16	1174	
Student 17	1178	



Student 18	1181
Student 19	1183
Student 20	1186
Student 21	1191
Student 22	1194
Student 23	1198
Student 24	1199
Student 25	1202

Hit Enter or Click 

Change Selection Date box (LWOP is by Pay Period)

Selection Date Enter employee's last day of work 11/14/2011
(Termed 11/15, must enter day before)
 Click Change Date  and enter date.

Click Continue 

Termination of Plan Participation screen

Click **Expand All**  to display the entire list of plans.
***Expand to see and verify dates**
***Health terms by pay period (11/15 in this example)**
***Life terms by EOM (11/30 in this example)**

Click **Select All**  to select all the plans in the list.

Click **Stop participation**  Stop participation

Termination of Plan Participation box

Click **Stop participation**  Stop participation

Termination of Plan Participation confirmation box

Click **Continue**  or Enter

Termination of Plan Participation screen

Click **Exit** 



Exercise 4.2: Reinstate Benefits

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Scenario:

Reinstate health benefits for an employee that has returned from LWOP and participated within the same plan year.

Use the following to complete the exercise:

Transaction	PA30 Maintain HR Master Data
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Data needed to complete the transaction:

Task	Data
------	------

Maintain HR Master Data screen

Personnel No

Note:
This will be a different number

ID	Data
Instructor	1677
Instructor	1684
Instructor	1628
Student 01	1630
Student 02	1633
Student 03	1636
Student 04	1639
Student 05	1640
Student 06	1641
Student 07	1642
Student 08	1645
Student 09	1650
Student 10	1691
Student 11	1652
Student 12	1653
Student 13	1655
Student 14	1657
Student 15	1671
Student 16	1673
Student 17	1681
Student 18	1687
Student 19	1690





	<table border="1"> <tr><td>Student 20</td><td>1693</td></tr> <tr><td>Student 21</td><td>1695</td></tr> <tr><td>Student 22</td><td>1697</td></tr> <tr><td>Student 23</td><td>1698</td></tr> <tr><td>Student 24</td><td>1699</td></tr> <tr><td>Student 25</td><td>1700</td></tr> </table>	Student 20	1693	Student 21	1695	Student 22	1697	Student 23	1698	Student 24	1699	Student 25	1700
Student 20	1693												
Student 21	1695												
Student 22	1697												
Student 23	1698												
Student 24	1699												
Student 25	1700												
Hit Enter or Click													
Click the Benefits tab.													
Info type	0378 Adjustment Reasons												
Click Create	(Will be reinstating benefits and adjusting the record)												
<i>Create 0378 Adjustment Reasons screen</i>													
Start Use current year	<ul style="list-style-type: none"> • If today's date is between 1st – 15th enter the 16th of this month. • If today's date is between 16th – Last day of the month, enter 1st of the next month. 												
To	Use same date as you did for "Start" above – 16th or 1st												
Benefit Area should say: <u>Comm of KY</u>													
Adjustment Reason (Returning from LWOP)	Reinstatement *Use drop down or type in R												
Click Save													
<i>Deviation from end date message box</i>													
Click No	<input type="button" value="No"/>												
<i>Maintain HR Master Data screen</i>													
Click the Benefits tab.													
Info type	0167 Health Plans												
Click Overview	(To view all records at one time)												
<i>List 0167 Health Plans screen (Reinstate Health)</i>													
Click <input type="checkbox"/> to select the plan with the most recent end date.													
Click Copy	(takes you back to the 167 main screen once you copy)												



Copy 0167 Health Plans screen	
Start Use current year	<ul style="list-style-type: none"> If today's date is between 1st – 15th enter the 16th of this month. If today's date is between 16th – Last day of the month, enter 1st of the next month.
To	12/31/9999 *They were on LWOP, no end date *We are reinstating, so we don't need an end date
Click Save (You will see the new record that was created on 0167 Health Plans List)	
Click Back	
Maintain HR Master Data screen (Reinstate Life)	
NOTE: <ul style="list-style-type: none"> If the employee continued life while on LWOP, contact GLI for the reinstatement. In this example, the employee has not paid for life benefits while on LWOP. 	
Info type	0168 Insurance Plans *On LWOP Basic Life Plan, can continue for \$1.34 monthly
Click Overview	
List 0168 Insurance Plans screen	
Click <input type="checkbox"/> to select the plan(s) with the most recent end date.	
Click Copy	
Copy 0168 Insurance Plans screen	
Start Use current year	Enter the first day of second month from reinstatement date. (Reinstate Date 16th or 1st)
To	12/31/9999
Click Save (Record Created)	
List 0168 Insurance Plans screen	
Click Back	
Click Exit	

Lesson 7 – Life Insurance

Exercise 7.1: Maintain Life Beneficiary

Scenario: *Note: Changes can be made at ANY time

Add or change the beneficiary to an employee's life plan. In this example, add a child and the employee's mother.

Use the following to complete the exercise:

Transaction	PA30 Maintain HR Master Data
Transaction	HRBEN0001 Enrollment

(Command Field)

Data needed to complete the transaction:

Task	Data	
Maintain HR Master Data		
Personnel No Note: Number will be different	ID	Data
	Instructor	910
	Instructor	3081
	Instructor	919
	Student 01	923
	Student 02	924
	Student 03	928
	Student 04	931
	Student 05	932
	Student 06	933
	Student 07	935
	Student 08	938
	Student 09	939
	Student 10	940
	Student 11	942
	Student 12	995
	Student 13	998
Student 14	1004	
Student 15	1007	
Student 16	1011	



Student 17	1012
Student 18	1017
Student 19	1022
Student 20	1026
Student 21	1030
Student 22	1033
Student 23	1037
Student 24	1042
Student 25	1045

Hit **Enter** or Click

Click the **Benefits** tab.

Info type 0021 Family Member/Dependents

Click **Create** to enter a new dependent.

Subtypes for infotype 0021 Family Member/Dependents

Sub Type 2 – Child

Click **Continue** . Or **Double Click** on Child

Create 0021 Family Member/Dependents (Adding newborns information in system)

Start Enter today's date. **(Use current year)**

First Name Sally

Initials M

Gender Female

Birth Date Five days prior to today's date.

SSN 999-99-9999
***It will not show in report without SSN in there.**
***Newborns don't have a SSN right away**

Click **Save** **(Notice green checkmark – information has now been entered)**

Maintain HR Master Data screen (Adding the employees mother information in system)

Infotype 0021 Family Member/Dependents

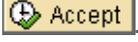
Click **Create** to enter a new dependent.



Subtypes for infotype 0021 Family Member/Dependents																																																	
Sub Type	9003 Other beneficiaries Because its not a spouse or a child																																																
Click Continue <input checked="" type="checkbox"/>																																																	
List 0021 Family Member/Dependents																																																	
Start	Enter today's date																																																
Last Name	Smith																																																
First Name	Joan																																																
Birth Date	01/10/1945																																																
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	Student 18	400-55-1199																																															
	Student 19	400-55-1200																																															
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Student 21	400-55-1202																																																
Student 22	400-55-1203																																																





	Student 23	400-55-1204
	Student 24	400-55-1205
	Student 25	400-55-1206
Street	141 Hall Dr	
City	Bowling Green	
State	KY	
Zip	42101	
Country	US	
Relationship to the employee	Mother	
Click Save 		
Maintain HR Master Data screen		
Command field	HRBEN0001 Enrollment	
Hit Enter or Click 		
Enrollment screen		
Personnel No	Same as above.	
Hit Enter or Click 		
Click Life Beneficiary Change in the Possible offers list.		
Click Get offer 		
Click Basic Life and AD&D .		
Maintain Insurance Plan screen		
Click the Beneficiaries tab 		
Pcnt (for child)	100	
Con (for child) Child is contingent in case something happens to the mom	Select the check box. (Not best practice to have under aged children to be primary since there is a lot of paperwork and legal documents involved.)	
Pcnt (for employee's Mother)	100	
Click Accept 		

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Enrollment screen

Click **Enroll**  **Enroll** in the middle of the screen.

Confirmation of Selected Actions screen

Click **Enroll**  **Enroll**

Enrollment message

Click **Confirmation**  **Confirmation**

Print screen

Click  **Print Preview**. **Review** confirmation. Change look to **ZPDF**

You will not print the confirmation in this training class. Click **Back** 

Enrollment message

Click **Continue**  **Continue** to close the Enrollment box.

Enrollment screen

Click **Exit** 



Exercise 7.2: Create External Organizations Beneficiary

Scenario:

Designate a beneficiary for the life insurance plans offered by external organization (charity organization, business and/or trust funds) for a benefit participants.

Recommended: Employee can go in ESS under External Org to make changes

Use the following to complete the exercise:

Transaction	PA30 Maintain HR Master Data
Transaction	HRBEN0001 Enrollment

(Command Field)

Data needed to complete the transaction:

Task	Data																																												
<i>Maintain HR Master Data screen</i>																																													
Personnel No	<table border="1"><thead><tr><th>ID</th><th>Data</th></tr></thead><tbody><tr><td>Instructor</td><td>910</td></tr><tr><td>Instructor</td><td>3081</td></tr><tr><td>Instructor</td><td>919</td></tr><tr><td>Student 01</td><td>923</td></tr><tr><td>Student 02</td><td>924</td></tr><tr><td>Student 03</td><td>928</td></tr><tr><td>Student 04</td><td>931</td></tr><tr><td>Student 05</td><td>932</td></tr><tr><td>Student 06</td><td>933</td></tr><tr><td>Student 07</td><td>935</td></tr><tr><td>Student 08</td><td>938</td></tr><tr><td>Student 09</td><td>939</td></tr><tr><td>Student 10</td><td>940</td></tr><tr><td>Student 11</td><td>942</td></tr><tr><td>Student 12</td><td>995</td></tr><tr><td>Student 13</td><td>998</td></tr><tr><td>Student 14</td><td>1004</td></tr><tr><td>Student 15</td><td>1007</td></tr><tr><td>Student 16</td><td>1011</td></tr><tr><td>Student 17</td><td>1012</td></tr><tr><td>Student 18</td><td>1017</td></tr></tbody></table>	ID	Data	Instructor	910	Instructor	3081	Instructor	919	Student 01	923	Student 02	924	Student 03	928	Student 04	931	Student 05	932	Student 06	933	Student 07	935	Student 08	938	Student 09	939	Student 10	940	Student 11	942	Student 12	995	Student 13	998	Student 14	1004	Student 15	1007	Student 16	1011	Student 17	1012	Student 18	1017
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Student 19	1022
Student 20	1026
Student 21	1030
Student 22	1033
Student 23	1037
Student 24	1042
Student 25	1045

Hit **Enter** or Click

Infotype 0219 External organizations

Click **Create** to enter a new dependent.

Create 0219 External Organization screen **Set up Trust Fund Information**
You will always use the date signed on the form

Start
Use current year Enter Signature date (5 days prior to todays date)
Click Change Date and enter date.

Organization Type Trust Fund **(Use the down arrow)**

Organization Name Smith Family Trust

Tax number 01-23456

Street and House No.
***Will be the employees address unless its a trust at a bank** 211 James St

City Bowling Green

Region KY

Postal Code 42101

Country Key USA

Telephone Number 270-555-1212

Click **Save**

Maintain HR Master Data screen

Command field HRBEN0001 Enrollment



Enter Personnel No.	Same as above
Hit Enter or Click	
Change Selection Date box You will always use the date signed on the form	
Selection Date Use current year	Enter Signature date (5 days prior to todays date) Click Change Date and enter date.
Click Continue	
Enrollment screen	
Click Life Beneficiary Change in the Possible offers list.	
Click Get offer Get offer	
Click Basic Life and AD&D.	
Maintain Insurance Plan screen	
Click the Beneficiaries tab	
Pcnt (for child)	0
Con (for child)	Remove the checkbox, if there is one there. If Beneficiary is under 18, the money will stay in the Trust that Life Insurance puts them in
Pcnt (for Other Beneficiary)	100 (Mom)
Con (for Other Beneficiary)	Select the check box.
Pcnt (for Trust Fund)	100
Click Accept	
Enrollment screen	
Click Enroll in the middle of the screen.	
Confirmation of Selected Actions	
Click Enroll	
Enrollment Message	
Click Confirmation	
Print screen	
Click Print Preview. Review confirmation.	

You will not print the confirmation in this training class. Click Back 

Enrollment Message

Click Continue  to close the Enrollment box.

Enrollment screen

Click Exit 



Lesson 8 – Other Processes

Exercise 8.1: Plan Change History Report

Scenario:

Monitor changes to employee benefit plans, dependents, rates (deductions) and other employee information.

Use the following to complete the exercise:

Transaction	ZBNR006 Plan Change History Report
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Data needed to complete the transaction:

Task	Data																																										
<i>Plan Change History Report screen</i>																																											
Period	Current Year																																										
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Click **Execute** 

Click **Exit** 

