

Benefits Administration User Guide

For Insurance Coordinators

Health Insurance and Optional Insurance

Personnel Cabinet
Department of Employee Insurance



Updated January 1, 2025

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.

Use the following matrix for processing:

Actions to be completed by IC	Actions to be uploaded via the online tool
<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"/> Beneficiary Updates	<input type="checkbox"/> Begin/End Leave Without Pay
	<input type="checkbox"/> Dependent Demographic Data Changes
	<input type="checkbox"/> All Reinstatement in Employment
	<input type="checkbox"/> Statement of Health (SOH) – OIB only
	<input type="checkbox"/> Leave Without Pay (LWOP) w/premium-OIB only
	<input type="checkbox"/> All Cancellation of Coverage Requests-OIB only

Note: All applications/documentation to the Department of Employee Insurance (DEI) Enrollment Information Branch (EIB) or Optional Insurance Branch (OIB) should be uploaded using the online upload tool.

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

Department of Employee Insurance
Enrollment Information Branch Manager
502-564-1205
501 High Street, 2nd Floor
Frankfort, KY 40601

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

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

IC RESPONSIBILITIES

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 benefits offered by DEI, an IC is responsible for the following actions:

1. Complete all online training, open enrollment webinars and in-person training conducted by DEI.
 - 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. 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. Annual HIPAA Training – like the HIPAA training you took to gain access to KHRIS and is required yearly to maintain KHRIS access.

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 30-day new hire enrollment/signature deadline, the “First day/Second month” effective date rule, 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 online within 30 days of hire.
4. Provide DEI with updates on the Employee Benefits Enrollment Change Form for employee transfers, begin/end military leave, begin/end LWOP, retirement, and qualifying events in a timely manner. ICs should submit applications, exceptions, death claims, and all supporting documentation to DEI using the [DEI Upload Tool](#). Log in using your KHRIS User ID and password. Once you log in, select the most appropriate upload option.
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, The Benefits Selection Guide, 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, 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, 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?

[Browser Requirements](#)

Log On

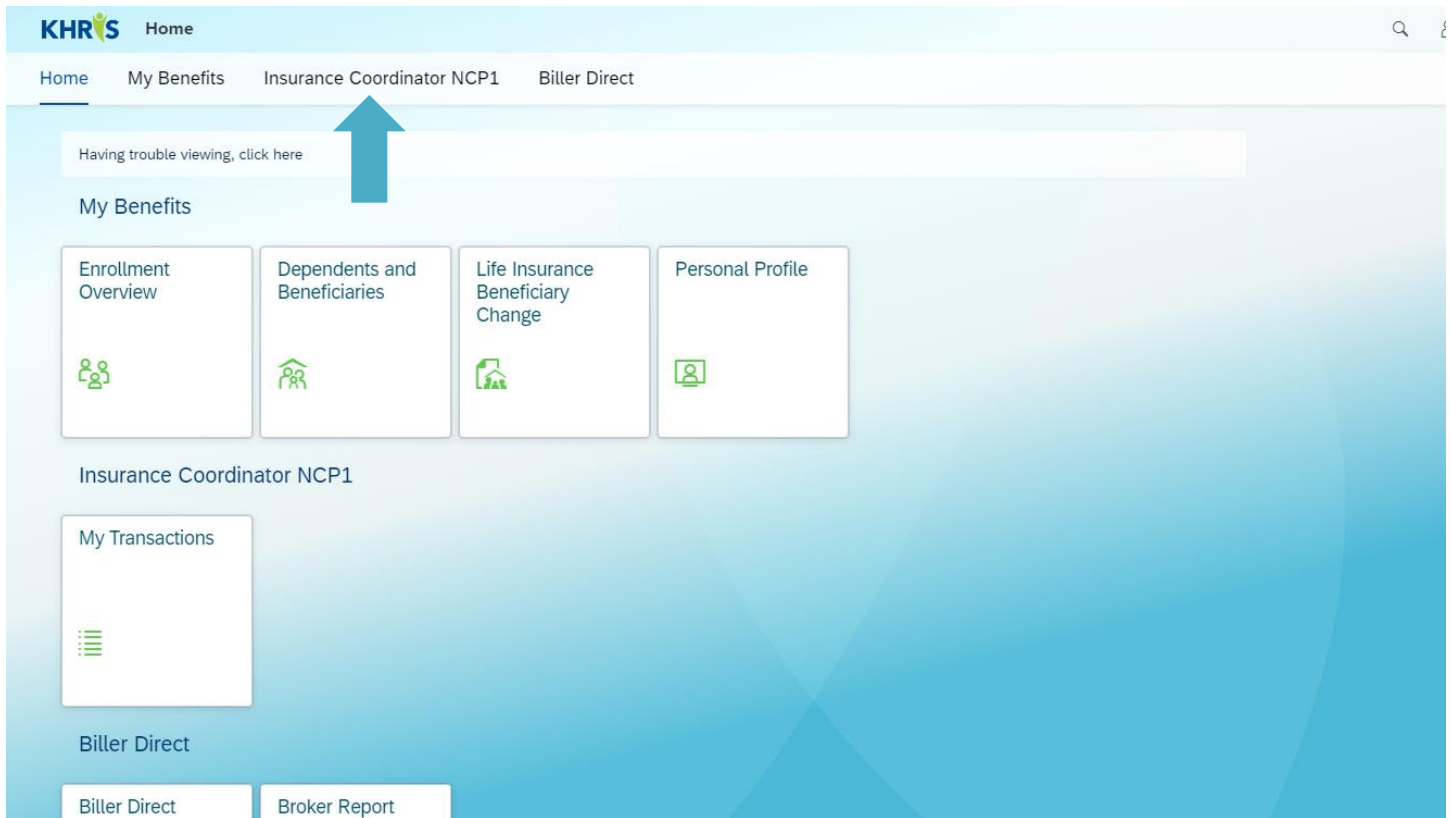




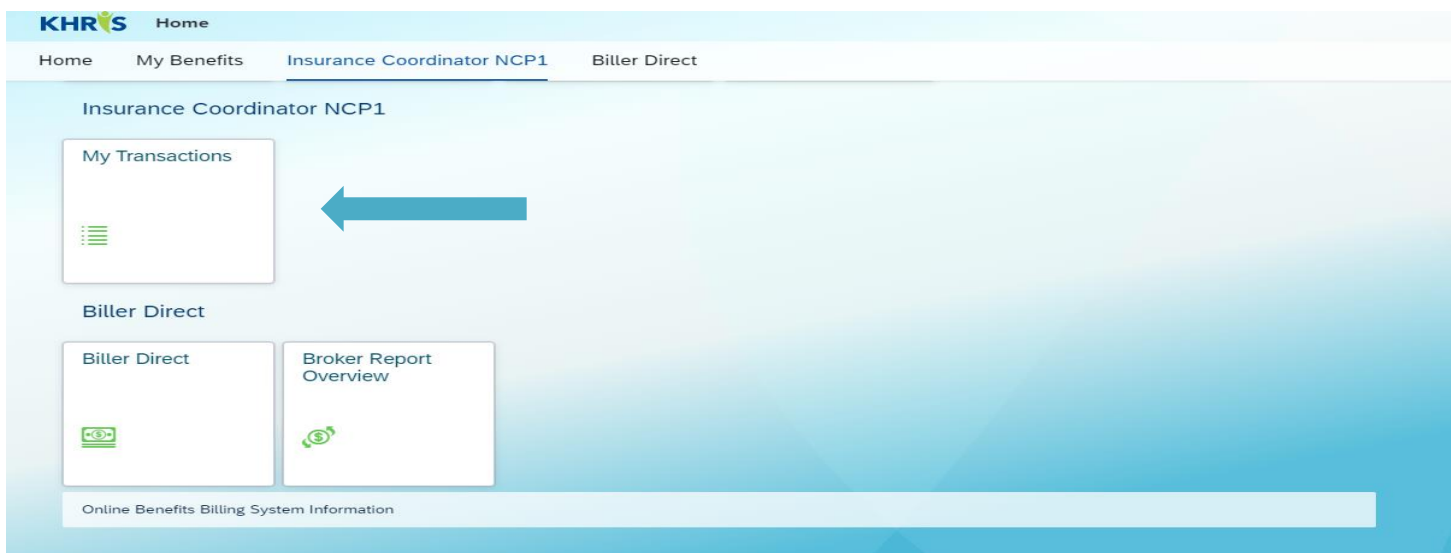
You are accessing a government computer system which is the property of the Commonwealth of Kentucky. It is for authorized use only regardless of time of day, location or method of access. Users (authorized or unauthorized) have no explicit or implicit expectation of privacy. Any or all uses of this 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.



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

<

KHRIS

My Transactions ▾

Q

⌵

Related Links

Search

Q

HRBEN0001 - Enrollment

HRBEN0003 - Participation Monitor

HRBEN0006 - Plan and Participation Over...

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 Letter

ZBNF005 - User Password Reset

ZBNQ0012 - Health Post Tax Participants

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.

ENROLLING A NEW HIRE

A new hire for this process is a newly hired employee never covered under KEHP as a planholder or a dependent. The new hire is not a returning retiree, transfer from another agency who participates with KEHP, or a dependent (spouse/child) covered by KEHP. Applications for anyone who is not considered 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.

The screenshot shows the SAP interface with the 'ZAU_SSN - Social Security Search' transaction selected. A dialog box titled 'Social Security Search' is open. It contains two input fields under the heading 'Search Criteria': 'SSN:' and 'Re-type SSN:'. A blue arrow points to both fields with the text 'Enter SSN in both fields'. At the bottom right of the dialog box, there are two buttons: 'SSN Search' (with a magnifying glass icon) and 'Cancel' (with a red X icon). A blue arrow points to the 'SSN Search' button.

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. 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.

The screenshot displays the KHRIS Social Security Search interface. At the top, the header bar shows the KHRIS logo and the text "ZAU_SSN - Social Security Search". Below this, the SAP logo is visible on the left, and a "Menu" button is on the right. The main content area is titled "Social Security Search" and contains a "Search Criteria" section. This section has two input fields: "SSN:" and "Re-type SSN:". The "SSN:" field is highlighted with a blue box. Below these fields, a message states: "The SSN entered does not exist in the system. Please proceed with your action." A blue arrow points upwards from this message towards the "Re-type SSN:" field. At the bottom right of the form, there are two buttons: "SSN Search" and "Cancel". A blue arrow points downwards from the "SSN Search" button.

Step 2: Dependent SSN Search

Select “ZBNR013-Dependent Search By SSN” from your list of transactions. **Do not** change the reporting period dates; the dates will default to the day you are doing the search. In the “Dependent SSN” field, enter the new employee’s SSN, then select “Execute”.

< **KHRIS** ZBNR013 - Dependent Search By SSN ▼

Dependent search by SSN

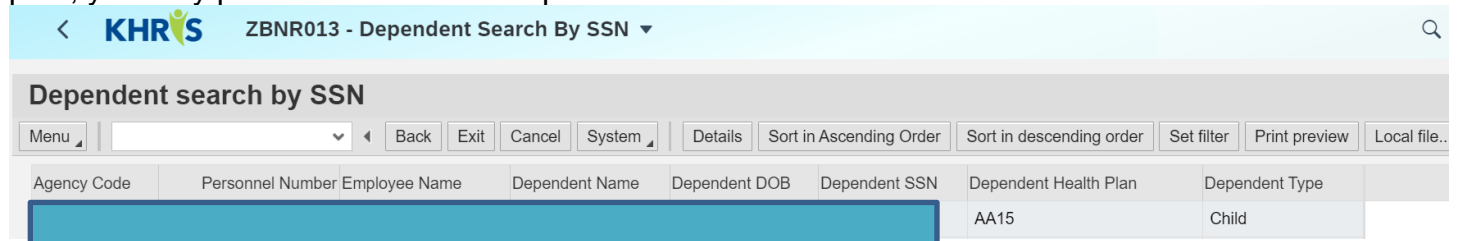
Menu ▾ | ▾ | Save as Variant... | Back | Exit | Cancel | System ▾ | **Execute**

Additional Selection

Reporting Period	03/16/2023	to	03/16/2023	▾
Dependent SSN	▾			
First name	▾			▾
Last name	▾			▾
Date of birth	▾	▾		

Step 2 continued: Dependent SSN Search

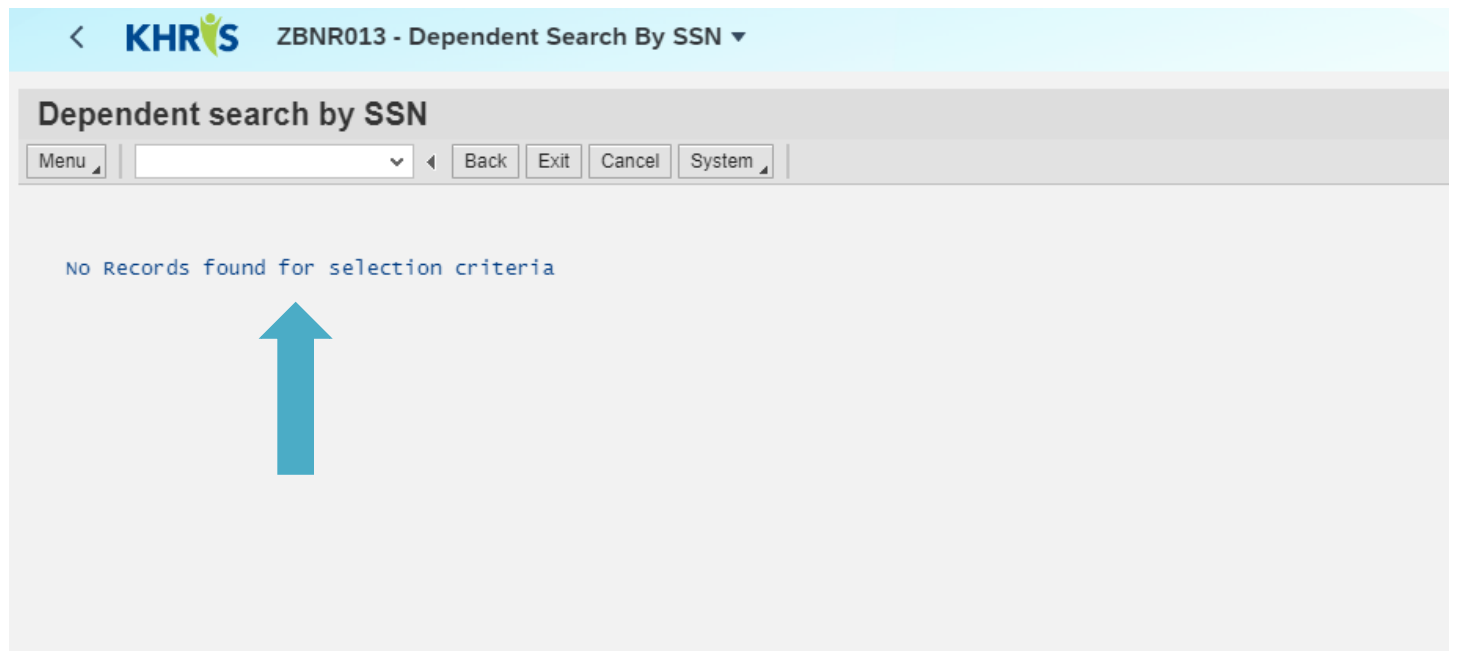
If the SSN you entered matches the SSN of an employee who is already a dependent in KHRIS, then you will get a message telling you that this employee already exists. If the member is electing a plan, send all applications to EIB and OIB for which you get this result. If the member is electing a Waiver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



The screenshot shows the KHRIS interface for 'Dependent Search By SSN'. The header includes the KHRIS logo and the title 'ZBNR013 - Dependent Search By SSN'. Below the header is a search bar with a dropdown menu and buttons for 'Menu', 'Back', 'Exit', 'Cancel', 'System', 'Details', 'Sort in Ascending Order', 'Sort in descending order', 'Set filter', 'Print preview', and 'Local file..'. The main content area displays a table with the following columns: Agency Code, Personnel Number, Employee Name, Dependent Name, Dependent DOB, Dependent SSN, Dependent Health Plan, and Dependent Type. A single record is shown with the values: AA15, Child.

Agency Code	Personnel Number	Employee Name	Dependent Name	Dependent DOB	Dependent SSN	Dependent Health Plan	Dependent Type
						AA15	Child

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.



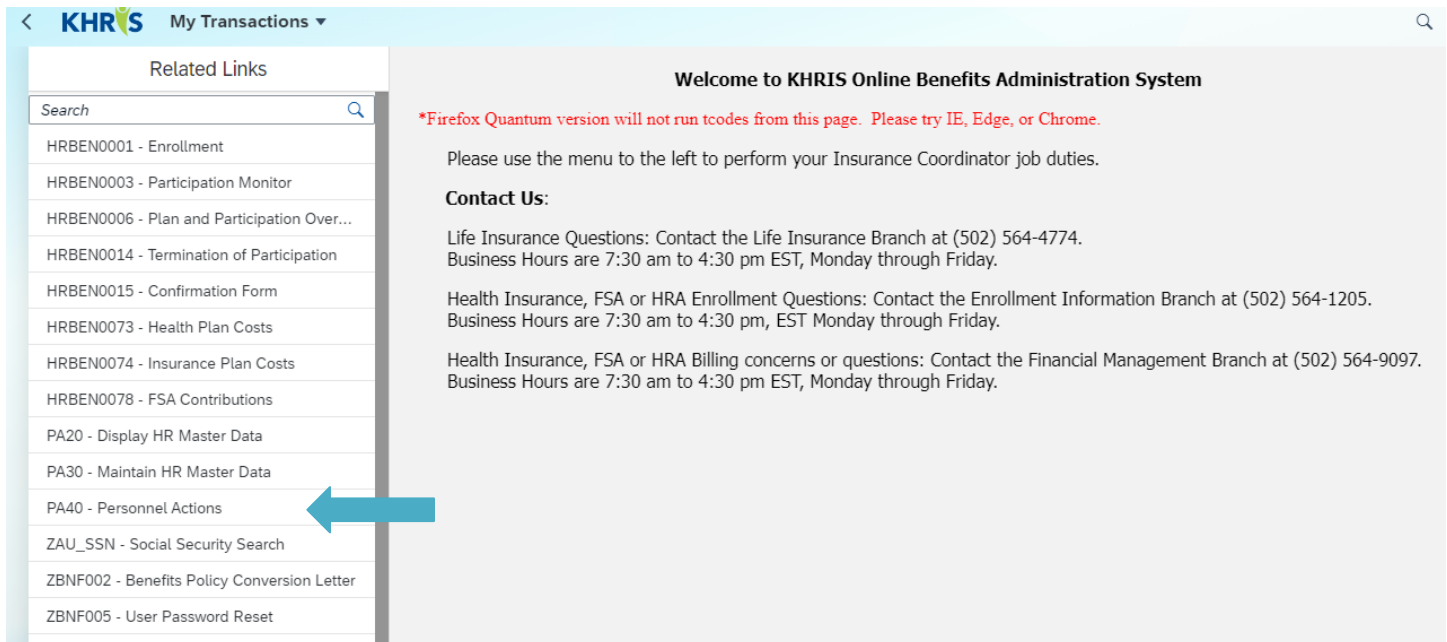
The screenshot shows the KHRIS interface for 'Dependent Search By SSN'. The header includes the KHRIS logo and the title 'ZBNR013 - Dependent Search By SSN'. Below the header is a search bar with a dropdown menu and buttons for 'Menu', 'Back', 'Exit', 'Cancel', 'System', 'Details', 'Sort in Ascending Order', 'Sort in descending order', 'Set filter', 'Print preview', and 'Local file..'. The main content area displays the message 'No Records found for selection criteria'. A large blue arrow points upwards towards the message.

No Records found for selection criteria

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

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”.

[illegible]

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 "Enter" on keyboard

Click "Save"

KHRIS PA40 - Personnel Actions

Create 0000 Actions

Menu | [Dropdown] | Save | Back | Exit | Cancel | System | Previous record | Next record | Overview | Change info group

Pers.No. 3991
 Start 11/01/2024 to 12/31/9999

Personnel action

Action Type BN - Begin Participation
 Reason for Action 01 New Employee
 Reference Pers. Nos. [Empty]

Status

Customer-specific [Dropdown]
 Employment Active
 Special payment [Dropdown]

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

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”

You may need to Click “Enter” to acknowledge the message at the bottom of screen that reads “Enter data for payroll past (retroactive accounting)”

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.

KHRIS PA40 - Personnel Actions

Create 0001 Organizational assignment

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

Personnel No: 3991

Start: 11/01/2024 to 12/31/9999

Status: Active

Enterprise structure

CoCode: COMK Commonwealth of Kentucky

Pers.area: 0004 Benefits Only

Subarea: 2001 Board of Ed.

Cost Ctr: 9200100012 Ashland Ind

Bus. Area: 1000 Commonwealth of Kentucky

Func. Area: [Empty]

Personnel structure

EE group: L External - BN

EE subgroup: 41 24 Non-Paid

Payr.area: SN Non-COMK Paid

Contract: [Dropdown]

Organizational plan



Position: 99999999 Default position

Org. Unit: 10006005 00012 Ashland Independent

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

Personnel No	3991
--------------	------

Position	99999999	Integration: default position
----------	----------	-------------------------------

Status	Active
--------	--------

Start	11/01/2024	To	12/31/9999
-------	------------	----	------------

Name

Last name Wallen

First name

Middle name

Pref 1s Nm	
------------	--

Suffix ▼

Name	
------	--

HR data

SSN ←

Gender	Male	▼
--------	------	---

Date of Birth 08241983

Language English

Marital Status Marr.

Record created

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 | [Dropdown] | **Save** | Back | Exit | Cancel | System | Previous record | Next record | Overview | Foreign address

Personnel No: 3991 | Name: Wallen, Morgan T
Position: 99999999 | Integration: default position
Status: Active
Start: 11/01/2024 to 12/31/9999

Address

Address type: Permanent residence
Care Of: [Empty]
Address line 1: 501 High St
Address line 2: [Empty]
City/county: Frankfort
State/zip code: KY Kentucky 40601
Country Key: USA
Primary/Mobile Telephone Number: 555 555-5555

Communications

Type	Number	Exte
[Empty]	[Empty]	[Empty]
[Empty]	[Empty]	[Empty]
[Empty]	[Empty]	[Empty]
[Empty]	[Empty]	[Empty]

Additional fields

County Code: 037 Franklin

Save your entries

Note: If you get a zip code error, 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”

The screenshot shows the KHRIS PA40 - Personnel Actions interface. At the top, there is a navigation bar with a back arrow, the KHRIS logo, and the title 'PA40 - Personnel Actions'. Below this is a section titled 'Create 0105 Communication'. This section contains a menu dropdown, a search field, and several action buttons: 'Save', 'Back', 'Exit', 'Cancel', 'System', 'Previous record', 'Next record', and 'Overview'. The main form area contains the following fields:

- Personnel No: 3991
- Name: Wallen , Morgan T
- Position: 99999999 Integration: default position
- Status: Active
- Start: 11/01/2024 to 12/31/9999
- Type: 0010 E-mail
- System ID: MW1983@yahoo.com

At the bottom left, there is a green checkmark icon and the text 'Record created'. At the bottom right, there is a small blue icon with the letters 'SA'.


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”

 PA40 - Personnel Actions

Copy 0008 Basic Pay

Menu

Save

Back

Exit

Cancel

System

Previous record

Next record

Overview

Salary amount

Payments and deductions

Personnel No3991NameWallen , Morgan T

EE groupL External - BNPersonnel area0004Benefits OnlyStatusActive

EE subgroup41 24 Non-PaidPers. subarea2001Board of Ed.

Start11/01/2024 to 12/31/9999

Subtype0Basic contract

Pay scale

ReasonCap.util.lvl100.00

PS type99 Non-PaidWkHrs/period86.67

PS Area99 Non-Paid

PS groupNON-PAID Level 01Ann.salaryUSD


Wag...	Wage Type Long Text	O...	Amount	Curre...	In...	A...	Number/Unit	Unit
8002	Salary (Quasi)			USD3		<input checked="" type="checkbox"/>		
				USD3		<input type="checkbox"/>		
				USD3		<input type="checkbox"/>		
				USD3		<input type="checkbox"/>		
				USD3		<input type="checkbox"/>		
				USD3		<input type="checkbox"/>		
				USD3		<input type="checkbox"/>		


IV

11/01/2024 - 12/31/9999

0.000

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

Personnel No: 3991 Name: Wallen, Morgan T
Position: 99999999 Integration: default position
Status: Active
Start: 11/01/2024 to 12/31/9999

0041 Date Specifications

Date type	Date	Date type	Date
Z1 Original Hire Date	11/01/2024	Z2 Current Hire Date	11/01/2024
Increment Date		Z5 Benefits Elig. Date	

Additional fields

Employee Status

Caution: Date types without date specification will be deleted when saved

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

Note: The benefits eligibility date and increment date does not need to be entered. KHRIS will automatically calculate the benefits 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 employees, hazardous duty retirees, and cross-references are processed by EIB) **but** verify the information is correct.

Click “Save”

< **KHRIS** PA40 - Personnel Actions ▾

Create 0171 General Benefits Information

Menu ▾ | ▾ | Save Back Exit Cancel System ▾ | Previous screen Next screen Overview

Personnel No 3991 [] Name Wallen, Morgan T

Payroll area BN Org. unit Ashland Independent

Start 11/01/2024 to 12/31/9999

0171 General Benefits Information

Benefit area	01	Comm of KY
1st Program Grouping	0002	NPHlth/HRA/FSA/L/D/V
2nd Program Grouping	0002	2 Months Start

Additional fields

☐ Hazardous Duty

☐ Member

☐ Spouse/Child

☐ Cross-Reference

✔ Record created

Step 3 continued: Personnel Actions

No information is entered on this screen. View the dates to make sure that the “to” date is 30 days from hire date.

Click “Save”

< **KHRIS** PA40 - Personnel Actions ▾

Create 0378 Adjustment Reasons

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

Personnel No 3991 Name Wallen , Morgan T

Payroll area BN Org. unit Ashland Independent

Start 11/01/2024 to 12/06/2024

Adjustment Reason Data

Benefit area Comm of KY

Adjustment reason New Participant ▾

✓ Record created

SAP

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

STOP HERE At this point, you have created a record for the member, and they have defaulted to the Waiver without HRA and a basic life Insurance plan.

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If the application is signed within 30 days, continue to the next step. 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 tobacco status.

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. Instead, you must type in the command box /nPA40 and once complete, then type in /nPA30 and then /nHRBEN0001 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"

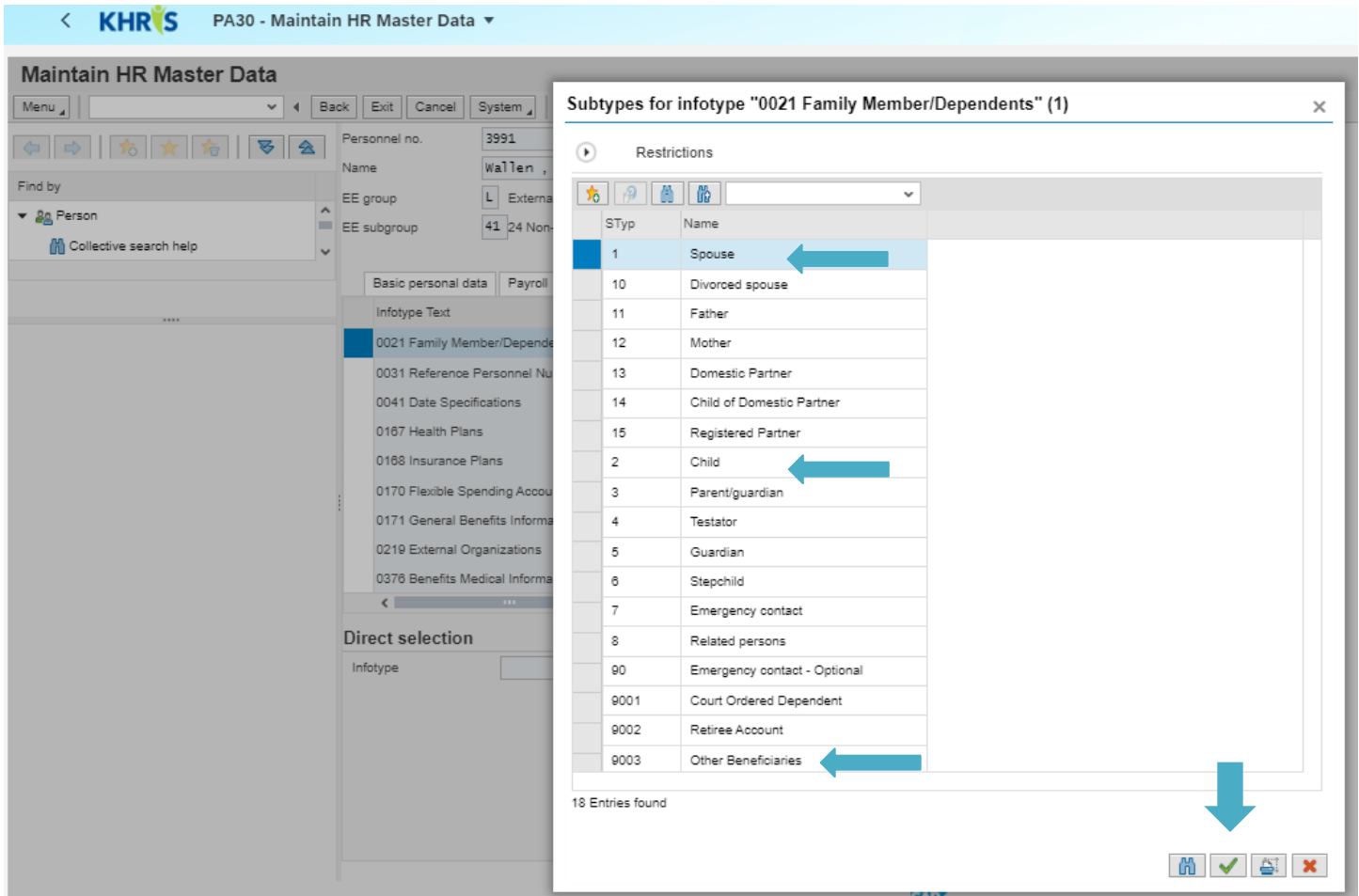
The screenshot shows the SAP PA30 - Maintain HR Master Data interface. The 'Benefits' tab is selected. The 'Personnel no.' field contains '3991'. The 'Name' field contains 'Wallen, Morgan T'. The 'EE group' is 'L External - BN'. The 'EE subgroup' is '41 24 Non-Paid'. The 'Personnel area' is '0004'. The 'Pers. subarea' is '2001'. The 'Status' is 'Active'. The 'Infotype Text' list shows '0021 Family Member/Dependents' highlighted. The 'Period' section shows 'Period' selected with 'From' and 'To' fields. The 'Choose' button is visible.

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 ✓



The screenshot displays the KHRIS PA30 - Maintain HR Master Data interface. The main window shows the 'Maintain HR Master Data' screen with a search bar and a list of infotypes. The 'Infotype Text' section is expanded, showing a list of infotypes. The 'Direct selection' section is also visible, showing the 'Infotype' field.

A modal window titled 'Subtypes for infotype "0021 Family Member/Dependents" (1)' is open, displaying a table of subtypes. The table has two columns: 'STyp' and 'Name'. The subtypes listed are:

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	Parent/guardian
4	Testator
5	Guardian
6	Stepchild
7	Emergency contact
8	Related persons
90	Emergency contact - Optional
9001	Court Ordered Dependent
9002	Retiree Account
9003	Other Beneficiaries

At the bottom of the modal window, it states '18 Entries found'. There are navigation icons at the bottom right of the modal window, including a green checkmark icon.

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 KHRIS PA30 - Maintain HR Master Data screen. The main title is "Create 0021 Family Member/Dependents". The screen is divided into several sections:

- Top Navigation:** Includes buttons for Menu, Save, Back, Exit, Cancel, System, Previous record, Next record, and Overview.
- Find by:** A search bar with "Person" selected and "Collective search help" link.
- Personnel Data:**
 - Personnel No: 3991
 - Name: Wallen, Morgan T
 - 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: 11/01/2024
 - To: 12/31/9999
 - Member: Spouse
 - Number:
- Personal data:**
 - Last name: Wallen
 - First name: Zoey
 - Title: (dropdown)
 - Gender: Female
 - Birth date: 09/23/1985
 - SSN: (redacted)
 - Street: (redacted)
 - Addr Line 2: (redacted)
 - City/State: (redacted)
 - Zip/country: (redacted)
 - Initials: C
 - Ref. Pers. No.: (redacted)
 - Telephone number: (redacted)
 - Smoker: ☐
- Additional fields:**
 - Dependent Verification Fields:**
 - ☐ Verified Eligible
 - Verified Eligible Date: (redacted)
 - ☐ Verified NonEligible
 - Verified NonEligible Date: (redacted)

Repeat the steps above to create additional dependent records.

Note: If an employee is selecting “single” coverage, this step is not needed for health insurance elections, but this step is required 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 the 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 the dependents listed on their application in this step also.

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 Kim Collins in EIB to enroll the disabled dependent. The disabled dependent’s information should not be entered.

Step 4 continued: Creating Dependent and Beneficiary records

External Organization as Beneficiary record

Note: This step 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 tobacco status.

Bring up Transaction PA30 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 PA30 - Maintain HR Master Data interface. The top bar shows the KHR logo and the title 'PA30 - Maintain HR Master Data'. Below this, a menu bar includes options like 'Menu', 'Back', 'Exit', 'Cancel', 'System', 'Create', 'Change', 'Display', 'Copy', 'Delimit', 'Delete', and 'Overview'. The main area is divided into several sections. On the left, there's a 'Find by' section with a dropdown menu set to 'Person' and a 'Collective search help' button. The central part of the screen shows the 'Maintain HR Master Data' form. It includes fields for 'Personnel no.' (3991), 'Name' (Wallen, Morgan T), 'Status' (Active), 'EE group' (L External - BN), 'Personnel area' (0004), 'Benefits Only', 'EE subgroup' (41 24 Non-Paid), 'Pers. subarea' (2001), and 'Board of Ed.'. Below these fields are tabs for 'Basic personal data', 'Payroll', 'Benefits', 'Time', 'Taxes', and 'Planning Data'. The 'Benefits' tab is selected, and a list of infotypes is displayed. The infotypes listed are: 0031 Reference Personnel Numbers, 0041 Date Specifications, 0167 Health Plans, 0168 Insurance Plans, 0170 Flexible Spending Accounts, 0171 General Benefits Information, 0219 External Organizations (highlighted), 0376 Benefits Medical Information, and 0378 Adjustment Reasons. To the right of the infotype list is a 'Period' section with radio buttons for 'Period', 'Today', 'All', 'From Today', 'Until Today', 'Curr. Period', 'Current Week', 'Current Month', 'Last Week', 'Last Month', and 'Current Year'. At the bottom, there's a 'Direct selection' section with an 'Infotype' field set to '0021 Family Member/Dependents' and an 'STy' field.

Step 4 continued: Creating Dependent and Beneficiary records

External Organization as Beneficiary record

In “Start” date field, enter employee’s hire 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”

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

The screenshot shows the SAP HR Master Data - Create 0219 External Organizations form. The form is divided into three main sections: Personnel data, External organization, and Organization's address. Blue arrows point to specific fields in each section.

Personnel data:

- Personnel No: 3991
- EE group: L External - BN
- EE subgroup: 41 24 Non-Paid
- Start: 11/01/2024
- Name: Wallen, Morgan T
- Personnel area: 0004
- Pers. subarea: 2001
- Status: Active

External organization:

- Organization type: Charity organization
- Organization Name: St Jude
- Tax number: 999999999
- Charitable org. (checkbox): ☐

Organization's address:

- Street and House No.: 405 Main Street
- 2nd Address Line: (empty)
- City: Frankfort
- Region: KY Kentucky
- Postal Code: 40601
- Country Key: USA
- Telephone Number: 555 5555555
- Fax number: (empty)

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 steps while still in Transaction PA30.

Click “Benefits tab”

Select Infotype “0376 Benefits Medical information”

Click “Create”

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

The screenshot shows the SAP PA30 - Maintain HR Master Data interface. The top bar includes the KHRIS logo and the title "PA30 - Maintain HR Master Data". Below this, the "Maintain HR Master Data" section contains a menu bar with buttons: Menu, Back, Exit, Cancel, System, Create, Change, Display, Copy, Delimit, Delete, and Overview. A blue arrow points to the "Create" button.

Below the menu bar, the "Find by" section shows a search for "Person". The main data area displays the following information:

Personnel no.	3991	Status	Active
Name	Wallen , Morgan T		
EE group	L External - BN	Personnel area	0004 Benefits Only
EE subgroup	41 24 Non-Paid	Pers. subarea	2001 Board of Ed.

Below this, the "Benefits" tab is selected. The "Infotype Text" table shows the following data:

Infotype Text	Status
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	✓
0378 Adjustment Reasons	✓

A blue arrow points to the "0376 Benefits Medical Information" row. To the right of the table, the "Period" section shows the "Period" radio button selected, with a "Choose" button below it.

Below the table, the "Direct selection" section shows the "Infotype" field set to "0219 External Organizations" and the "STy" field set to "0004".

At the bottom left, a green checkmark icon indicates "Record created". At the bottom right, the SAP logo is visible.

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 displays the SAP PA30 - Maintain HR Master Data interface. The title bar indicates the user is logged in as KHRIS. The main heading is "Create 0376 Benefits Medical Information". The left sidebar shows a search filter set to "Person" with a "Collective search help" link. The main form area contains the following fields:

Personnel No	3991	Name	Wallen, Morgan T
Payroll area	BN	Org.unit	Ashland Independent
Start	11/01/2024		12/31/9999

Below the form, the "Tobacco use" checkbox is checked. To the right of this checkbox, there is explanatory text: "Prior to 2014: Smoker status for EE only, for past 2 mn" and "2014: Tobacco use for EE and/or covered Spouse/Deps, for past 6 mn". At the bottom left, there is a "LivingWell Non-Fulfilled Previous Year" checkbox. A green checkmark icon and the text "Save your entries" are visible at the bottom left. The SAP logo is at the bottom right.

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. Instead, you must type in the command box /nPA40 and once complete then type in /nPA30 and then /nHRBEN0001 to go from screen to screen.

In the "Personnel No" field, enter employee's Personnel Number (assigned to employee during the PA40 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

Click "Select"

Highlight New Participant (may already be highlighted)

Click "Get Offer"

The screenshot shows the KHRIS PA30 - Maintain HR Master Data screen. The "Enrollment" section is active, displaying the "Enroll" form for Morgan T. Wallen. The "Personnel no." field is populated with 3991, and the "ID number" field is empty. The "Signature date" field is set to 11/01/2024. The "Offer selection" table shows two offers: "New Participant" and "Life Beneficiary Chg". The "New Participant" offer is highlighted. The "Get Offer" button is visible in the "Offer selection" section. A blue arrow points to the "Calendar" icon next to the "Signature date" field. Another blue arrow points to the "Select" button. A third blue arrow points to the "New Participant" offer in the "Offer selection" table.

Possible offers	Enrollment period
New Participant	11/01/2024 - 12/06/2024
Life Beneficiary Chg	01/01/1800 - 12/31/9999

Note: HRBEN0001 uses the signature date entered to validate that the employee signed his/her application within the allotted 30-day period. If the signature date is outside of the 30-day period, the HRBEN0001 transaction will not allow you to enroll the employee for benefits. If application is signed outside of the 30 days of hire, submit an exception form along with an Employee Benefits Enrollment Change Form to the Enrollment Information Branch in DEI and the life application to OIB to 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. Call EIB for assistance at 888-581-8834, option 3.

*Health Departments will only see the “Default Waiver – no VISA/\$\$” option.

Enrollment

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

Direct selection Selection set

Personnel no. []

ID number []

Select

Pers.No. Name

3991	Wallen, Morgan T
------	------------------

Enroll

Name Wallen, Morgan T on 11/01/2024 Overview

Offer selection

Get offer Print form General Notice Error list

Possible offers	Enrollment period
New Participant	11/01/2024 - 12/06/2024
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		01/01/2025 - 12/31/9999	
LivingWell PPO		01/01/2025 - 12/31/9999	
LivingWell Basic CDHP		01/01/2025 - 12/31/9999	
LW High Deductible Health Plan		01/01/2025 - 12/31/9999	
Waiver HRA - with \$		01/01/2025 - 12/31/9999	

SAP

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. A 'Maintain Health Plan' dialog box is open, showing the following details:

- Pers.No.:** 3991 Wallen , Morgan T
- Plan:** LivingWell PPO
- Start:** 01/01/2025 - 12/31/9999
- ☐ Stop participation in period
- Option:** (Selected tab)
- Plan options:**
 - Health Plan Opt:** KEHP
 - Dependent Cover:** Couple
- Costs USD Semi-monthly:**

	Employee	Employer
	325.88	664.93
- ☒ Deductions Pre-

Blue arrows indicate the flow: from the 'Option' tab, to the 'Dependent Cover' dropdown, and finally to the 'Accept' button at the bottom right.

Note: Dependents must be added if the member selects the Waiver 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 on the health insurance

Click “Accept” when done

The screenshot shows the SAP HRBEN0001-Enrollment screen. The 'Maintain Health Plan' dialog box is open, displaying the 'Dependents' tab. The 'Option' tab is also visible. The 'Dependents' tab shows a table with the following data:

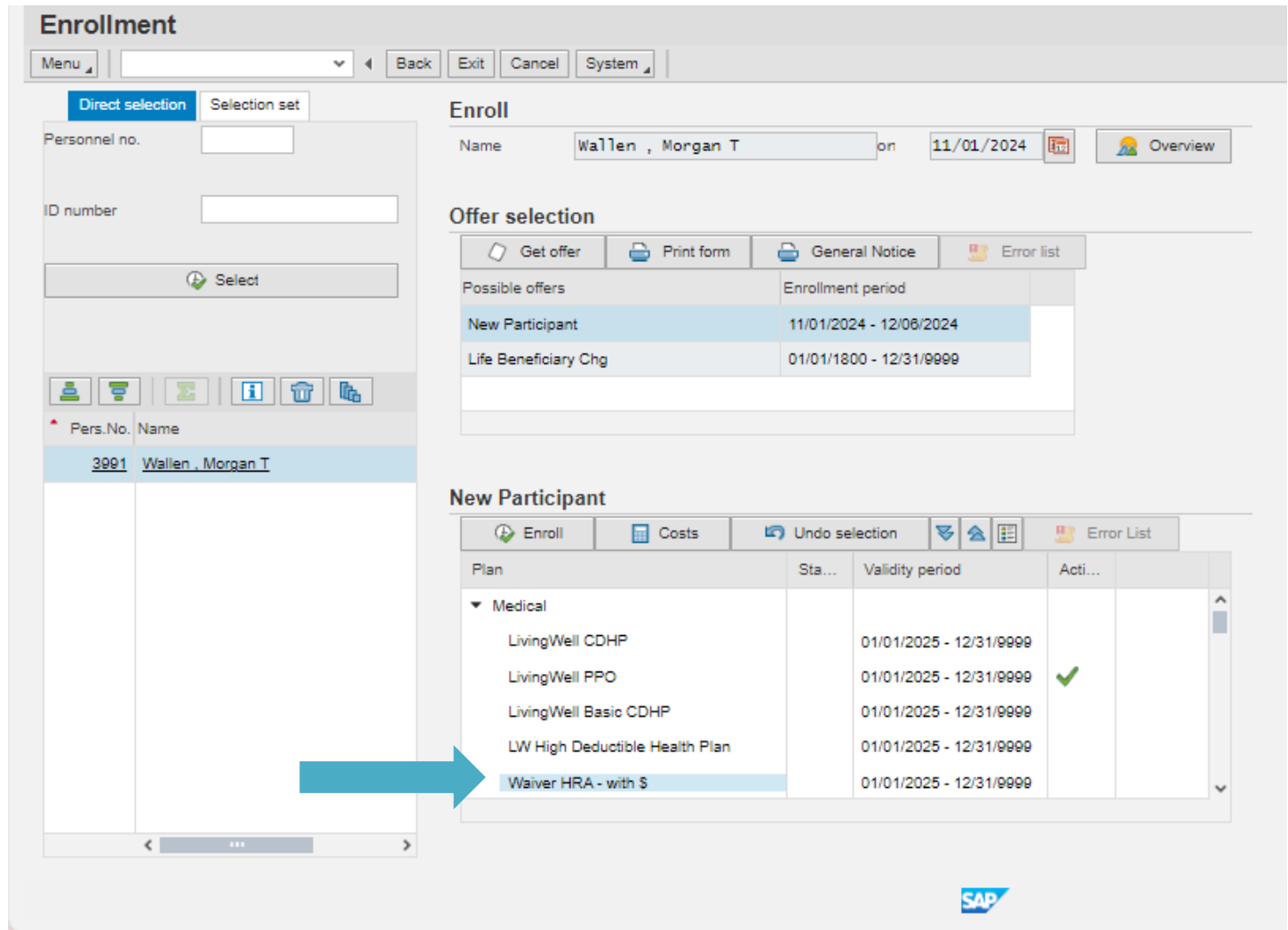
Select.	Name	Type of dep./ben.
<input checked="" type="checkbox"/>	Zoey Wallen	Spouse
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>	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

At the bottom right of the dialog box, there is an 'Accept' button and a red 'X' button. A blue arrow points to the 'Accept' button.

Step 6 continued: HRBEN0001-Enrollment

Follow these steps if the member is electing Waiver General Purpose HRA.

Click on Waiver HRA – with \$.



The screenshot shows the SAP Enrollment interface. On the left, the 'Direct selection' tab is active, showing fields for 'Personnel no.' and 'ID number', a 'Select' button, and a list of personnel. The list contains one entry: '3991 Wallen, Morgan T'. A blue arrow points from this entry to the 'New Participant' section on the right.

Enrollment

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

Enroll

Name: Wallen, Morgan T on 11/01/2024 [Calendar icon] [Overview icon]

Offer selection

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

Possible offers	Enrollment period
New Participant	11/01/2024 - 12/06/2024
Life Beneficiary Chg	01/01/1800 - 12/31/9999

New Participant

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

Plan	Sta...	Validity period	Acti...
Medical			
LivingWell CDHP		01/01/2025 - 12/31/9999	
LivingWell PPO		01/01/2025 - 12/31/9999	✓
LivingWell Basic CDHP		01/01/2025 - 12/31/9999	
LW High Deductible Health Plan		01/01/2025 - 12/31/9999	
Waiver HRA - with \$		01/01/2025 - 12/31/9999	

SAP

Step 6 continued: HRBEN0001-Enrollment

Next select “Source of other Coverage” from drop down.

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

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

The screenshot displays the SAP HRBEN0001-Enrollment screen. The background shows the 'Enrollment' menu with options like 'Direct selection' and 'Selection set'. The 'Maintain Health Plan' dialog box is open, showing the following details:

- Pers.No.:** 3991 Wallen , Morgan T
- Plan:** Waiver HRA - with \$
- Start:** 01/01/2025 - 12/31/9999
- ☐ Stop participation in period

The 'Option' tab is selected, showing the 'Plan options' section:

- Health Plan Opt:** Employer Funded \$175 Monthly
- Dependent Cover:** General Purpose HRA
- Source Other Cover:** Covered with my spouse's employer (does not include TRICARE) (indicated by a blue arrow)

The 'Costs USD Semi-monthly' section shows:

Category	Amount	Deductions Pre-
Employee	0.00	<input checked="" type="checkbox"/>
Employer	87.50	

At the bottom right, there is an 'Accept' button (indicated by a blue arrow) and a red 'X' 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 or on the Waiver General Purpose HRA

Click “Accept” when done

The screenshot shows the SAP HRBEN0001-Enrollment screen. The 'Maintain Health Plan' dialog box is open, displaying the 'Dependents' tab. The dialog box contains the following information:

- Pers.No.: 3991 Wallen, Morgan T
- Plan: Waiver HRA - with \$
- Start: 01/01/2025 - 12/31/9999
- ☐ Stop participation period

The 'Dependents' tab is active, showing a table with the following columns: Select., Name, and Type of dep./ben. The first row shows a checkmark in the 'Select.' column, the name 'Zoey Wallen', and the relationship 'Spouse'.

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

The 'Accept' button is highlighted with a blue arrow.

Step 6 continued: HRBEN0001-Enrollment

To enroll a 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. Call OIB for assistance at 888-581-8834, option 4.

Enrollment

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

Direct selection | Selection set

Personnel no. [Input]
ID number [Input]
[Select]

Pers.No. | Name
3991 | Wallen , Morgan T

Enroll

Name: wallen , Morgan T on 11/01/2024 [Overview]

Offer selection

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

Possible offers	Enrollment period
New Participant	11/01/2024 - 12/06/2024
Life Beneficiary Chg	01/01/1800 - 12/31/9999

New Participant

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

Plan	Sta...	Validity period	Acti...
▼ Dental			
Anthem Dental Bronze		01/01/2025 - 12/31/9999	
Anthem Dental Silver		01/01/2025 - 12/31/9999	
Anthem Dental Gold		01/01/2025 - 12/31/9999	
▼ Vision			
Anthem Vision Bronze		01/01/2025 - 12/31/9999	
Anthem Vision Silver		01/01/2025 - 12/31/9999	
Anthem Vision Gold		01/01/2025 - 12/31/9999	
▼ Basic Life AD&D			
Basic Life and AD&D	■	01/01/2025 - 12/31/9999	

SAP

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”. If they are adding dependents, proceed to the next step.

The screenshot shows the SAP HRBEN0001-Enrollment screen. The background window has a menu bar with 'Menu', 'Back', 'Exit', 'Cancel', and 'System'. Below the menu bar are two tabs: 'Direct selection' and 'Selection set'. The 'Direct selection' tab is active, showing a list of personnel with columns for 'Pers.No.' and 'Name'. The first entry is '3991 Wallen, Morgan T'. To the right of this list is a 'New Participant' section with a 'Get offer' button and a 'Possible offers' list. Below this is a 'New Participant' section with an 'Enroll' button and a 'Plan' list. The 'Plan' list includes 'Dental' (with sub-items 'Anthem Dental' and 'Anthem Vision') and 'Basic Life AD&D' (with sub-item 'Basic Life and Accidental Death and Dismemberment').

The 'Maintain Health Plan' dialog box is open in the foreground. It has a title bar with a close button. The dialog contains the following fields:

- Pers.No.:** 3991 Wallen, Morgan T
- Plan:** Anthem Dental Silver
- Start:** 01/01/2025 - 12/31/9999
- ☐ Stop participation in period
- Option** (selected) / Dependents
- Plan options:**
 - Health Plan Opt:** KEHP
 - Dependent Cover:** Couple
- Costs USD Monthly:**
 - Employee:** 40.62
 - Employer:** 0.00
 - ☒ Deductions Pre-

At the bottom right of the dialog box are two buttons: 'Accept' and 'Cancel'. A blue arrow points from the 'Option' tab to the 'Health Plan Opt' dropdown, and another blue arrow points from the 'Dependent Cover' dropdown 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 on the dental and/or vision plan

Click “Accept” when done

Enrollment

Menu ▾ | ▾ | Back | Exit | Cancel | System ▾

Direct selection | Selection set

Personnel no.

ID number

Select

Pers.No. | Name

3991	Wallen, Morgan T
------	------------------

Enroll

Name

Offer selection

Get offer

Possible offers

New Participant

Life Beneficiary Ch

Maintain Health Plan

Pers.No. 3991 | Wallen, Morgan T

Plan Anthem Dental Silver

Start 01/01/2025 - 12/31/9999

☐ Stop participation period

Option | **Dependents**

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

New Participant

Enroll

Plan

Dental

Anthem Dental

Anthem Dental

Anthem Dental

Vision

Anthem Vision

Anthem Vision

Anthem Vision

Basic Life AD&D

Basic Life and Accidental Death and Dismemberment Insurance

Accept

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 chooses to enroll in)

Enrollment

Menu Back Exit Cancel System

Direct selection Selection set

Personnel no.

ID number

Select

Pers.No. Name

3991 Wallen, Morgan T

Enroll

Name Wallen, Morgan T on 11/01/2024 Overview

Offer selection

Get offer Print form General Notice Error list

Possible offers	Enrollment period
New Participant	11/01/2024 - 12/06/2024
Life Beneficiary Chg	01/01/1800 - 12/31/9999

New Participant

Enroll Costs Undo selection Error List

Plan	Sta...	Validity period	Acti...
Basic Life AD&D		01/01/2025 - 12/31/9999	
Optional Life			
Option 1, \$10K, age 40-59		01/01/2025 - 12/31/9999	
Option 2, \$25K, age 40-59		01/01/2025 - 12/31/9999	
Option 3, \$50K, age 40-59		01/01/2025 - 12/31/9999	
Option 4, \$100K, age 40-59		01/01/2025 - 12/31/9999	
Option 5, \$150K, age 40-59		01/01/2025 - 12/31/9999	
Dependent Life			
Dep Option 1, 10k/2.5k/5k		01/01/2025 - 12/31/9999	

SAP

Note: Basic Life and AD&D is an automatic enrollment for every new employee. However, beneficiaries are not automatically selected. 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 shows the SAP HRBEN0001-Enrollment screen. The 'Enroll' section is active, showing a list of participants. The 'New Participant' section is also visible, showing a list of plans. The 'Maintain Insurance Plan' dialog box is open, showing the 'Beneficiaries' tab. The dialog box contains a table with columns: Name, Type of dependent/benef..., and Con. (Contingent). The table lists two beneficiaries: Zoey Wallen (Spouse) and St Jude (Charity organization). The 'Con.' column has checkboxes. The checkbox for St Jude is checked. A blue arrow points to the 'Accept' button at the bottom right of the dialog box.

Name	Type of dependent/benef...	Con.
100 Zoey Wallen	Spouse	<input type="checkbox"/>
100 St Jude	Charity organization	<input checked="" type="checkbox"/>

Accept

Note: Percentages for both Primary and Contingent beneficiaries must equal 100%. You do not have to enter beneficiaries for optional dependent plans the member may elected. The member is automatically the beneficiary for optional dependent plans.

Step 6 continued: HRBEN0001-Enrollment

To enroll in Flexible Spending Accounts, select “Healthcare FSA or Child and Adult Daycare FSA” Only do this step if **the member has completed the FSA section on the Employee Benefits Enrollment Change Form**. 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 HRBEN0001-Enrollment interface. The main window is titled 'Enrollment' and includes a 'Menu' dropdown, 'Back', 'Exit', 'Cancel', and 'System' buttons. The 'Direct selection' tab is active, showing fields for 'Personnel no.' and 'ID number', a 'Select' button, and a list of personnel with '3991 Wallen, Morgan T' selected. The 'Enroll' section shows 'Name: Wallen, Morgan T' and 'on: 11/01/2024'. The 'Offer selection' section has a 'Get offer' button and a list of 'Possible offers' with 'New Participant' selected. The 'New Participant' section shows a list of plans, with 'Healthcare FSA' selected. A dialog box titled 'Maintain Flexible Spending Account' is open, showing 'Pers.No.: 3991 Wallen, Morgan T', 'Plan: Healthcare FSA', and 'Start: 01/01/2025 - 12/31/9999'. The 'Target contribution period 01/01/2025-12/31/2025' is displayed, and the 'Contribution' field is set to '3200 USD'. The 'Accept' button is highlighted with a blue arrow.

Plan	Dep Option	Contribution	Period	Status
Healthcare FSA	Dep Option 2, 2			
	Dep Option 3, 5			
	Dep Option 4, 1			
	Dep Option 5, 2			
	Dep Option 6, 50k/0/0		01/01/2025 - 12/31/9999	✓
	Dep Option 7, 0/2.5k/5k		01/01/2025 - 12/31/9999	
	Dep Option 8, 0/2.5k/10k		01/01/2025 - 12/31/9999	
	Healthcare FSA		01/01/2025 - 12/31/9999	

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 member’s contributions are divided equally between the 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

Enrollment

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

Direct selection | Selection set

Personnel no. [Input]
ID number [Input]
[Select]

[Icons: Person, Calendar, Hourglass, Info, Trash, Bar Chart]

Pers.No. Name
3991 Wallen, Morgan T

Enroll

Name Wallen, Morgan T on 11/01/2024 [Calendar] [Overview]

Offer selection

[Get offer]
Possible offers
New Participant
Life Beneficiary Chg

New Participant

[Enroll]
Plan
Dep Option 3, 5
Dep Option 4, 1
Dep Option 5, 2
Dep Option 6, 5
Dep Option 7, 0/2.5k/5k
Dep Option 8, 0/2.5k/10k
Healthcare FSA
Healthcare FSA
Dep Care FSA

Maintain Flexible Spending Account

Pers.No. 3991 Wallen, Morgan T
Plan Child & Adult Daycare FSA
Start 01/01/2025 - 12/31/9999
☐ Stop participation in period
Target contribution period 01/01/2025-12/31/2025
Contribution [Input: 2500] USD
[Accept] [X]

SAP

Step 6 continued: HRBEN0001-Enrollment

Select “Enroll”







Enrollment

Menu | |

Direct selection | Selection set

Personnel no.

ID number



Pers.No. Name

3991 Wallen , Morgan T

Enroll

Name on

Offer selection

Possible offers	Enrollment period
New Participant	11/01/2024 - 12/06/2024
Life Beneficiary Chg	01/01/1800 - 12/31/9999

New Participant

Plan	Sta...	Validity period	Acti...
Anthem Vision Gold		01/01/2025 - 12/31/9999	
▼ Basic Life AD&D			
Basic Life and AD&D	<input checked="" type="checkbox"/>	01/01/2025 - 12/31/9999	✓
▼ Optional Life			
Option 1, \$10K, age 40-59		01/01/2025 - 12/31/9999	
Option 2, \$25K, age 40-59		01/01/2025 - 12/31/9999	✓
Option 3, \$50K, age 40-59		01/01/2025 - 12/31/9999	
Option 4, \$100K, age 40-59		01/01/2025 - 12/31/9999	
Option 5, \$150K, age 40-59		01/01/2025 - 12/31/9999	

Page | 47

Step 6 continued: HRBEN0001-Enrollment

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

Enrollment

Menu

Back

Exit

Cancel

Direct selection

Selection set

Personnel no.

ID number

Select

Pers.No.

Name

3991

Wallen, Morgan T

Enroll

Name

Offer select

Get

Possible offer

New Participant

Life Beneficiaries

New Participant

Enroll

Plan

Anthem

Basic Life

Optional

Option

Option

Option

Option

Option

Confirmation of Selected Actions

List of Plans

Activity	Plan	From	To
Change	Waiver HRA - with \$	01/01/2025	12/31/9999
Create	Anthem Dental Silver	01/01/2025	12/31/9999
Change	Basic Life and AD&D	01/01/2025	12/31/9999
Create	Option 2, \$25K, age 40-59	01/01/2025	12/31/9999
Create	Dep Option 6, 50k/0/0	01/01/2025	12/31/9999
Create	Healthcare FSA	01/01/2025	12/31/9999
Create	Child & Adult Daycare FSA	01/01/2025	12/31/9999

Enroll

Cancel

Note: Verify that all benefit elections (health, dental, vision, life, FSA) that the member elected on their applications are shown here on this screen.

Step 6 continued: HRBEN0001-Enrollment

You will receive acknowledgement “Enrollment completed successfully”

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

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

The screenshot displays the SAP HRBEN0001-Enrollment interface. A modal window titled "Enrollment" is centered on the screen, displaying the message "Enrollment completed successfully" with an information icon. Below the message, there are two buttons: "Continue" and "Confirmation". A large blue arrow points down towards the "Confirmation" button. The background interface shows the "Enroll" section with fields for "Name" (Wallen, Morgan T) and "on" (11/01/2024). The "Offer selection" section includes buttons for "Get offer", "Print form", "General Notice", and "Error list". The "Possible offers" section lists "New Participant" and "Life Beneficiary". The "New Participant" section shows a table with columns for "Plan", "Option", and "Effective Date". The table lists five options, all with an effective date of 01/01/2025 - 12/31/9999. The first option is selected, and a green checkmark is visible next to the second option.

Plan	Option	Effective Date
Basic Life A	Option 1, \$10K, age 40-59	01/01/2025 - 12/31/9999
Basic Life A	Option 2, \$25K, age 40-59	01/01/2025 - 12/31/9999
Basic Life A	Option 3, \$50K, age 40-59	01/01/2025 - 12/31/9999
Basic Life A	Option 4, \$100K, age 40-59	01/01/2025 - 12/31/9999
Basic Life A	Option 5, \$150K, age 40-59	01/01/2025 - 12/31/9999

Step 6 continued: HRBEN0001-Enrollment

Change “Output Device” to ZPDF

Click “Print Preview”

The screenshot shows the SAP Enrollment screen with the 'Print' dialog box open. The dialog box contains the following sections:

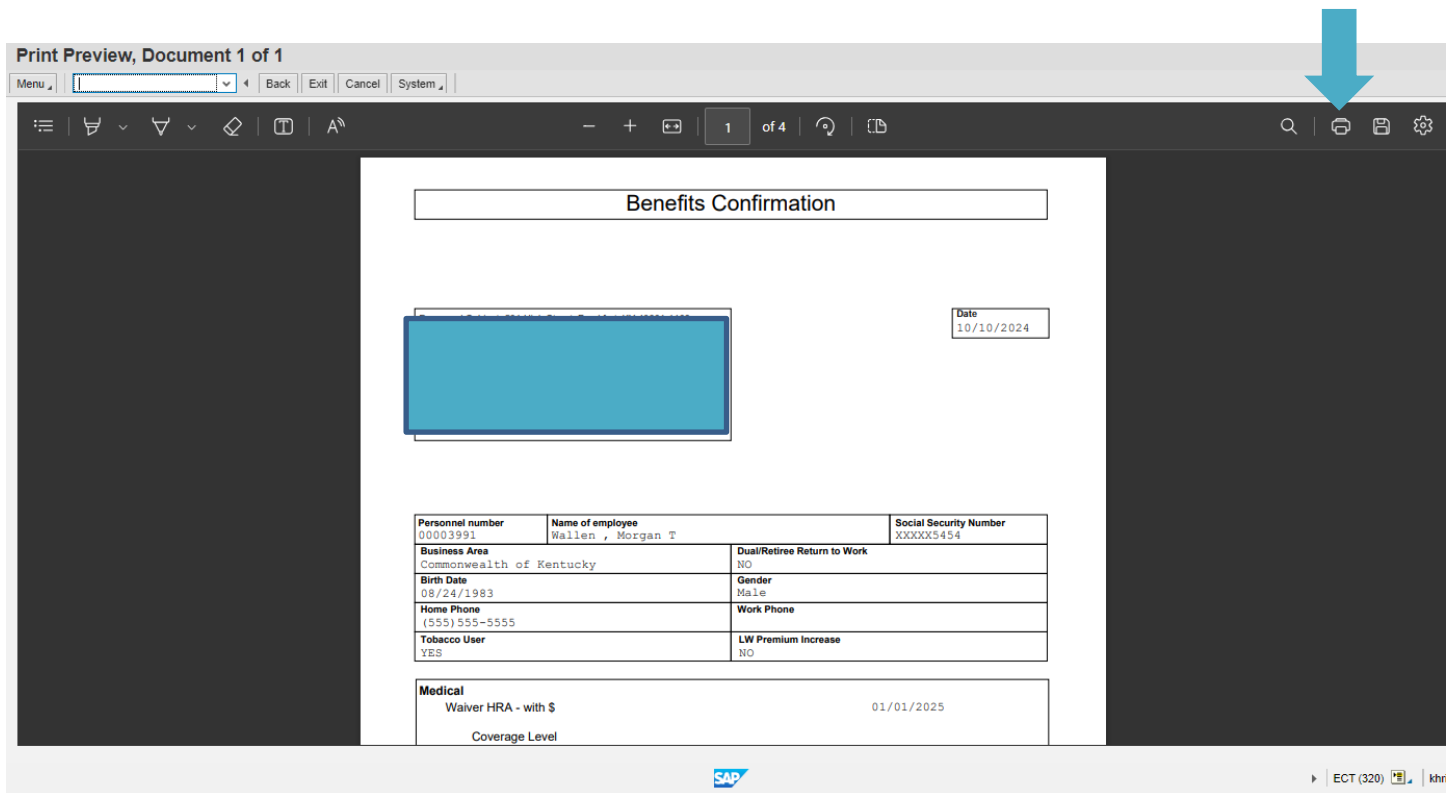
- Print:**
 - Output Device: ZPDF (indicated by a blue arrow)
 - Frontend Printer: [Dropdown menu]
- Spool Request**
 - Name: PBFORM LOCL BN_STUDENT01
 - Cover Page Text: [Text field]
 - Authorization: [Text field]
- Spool Control**
 - ☒ Print Immediately
 - ☒ Delete After Output
 - ☐ New Spool Request
 - ☐ Close Spool Request
 - Spool Retention: 8 Day(s)
 - Storage Mode: Print only
- Number of Copies**
 - Number of Copies: 1
- Cover Page Settings**
 - SAP Cover Page: [Dropdown menu]
 - Recipient: [Text field]
 - Department: [Text field]

At the bottom of the dialog, there are three buttons: Print, Print Preview (highlighted with a blue arrow), and Additional Options. The SAP logo is visible in the bottom right corner of the main screen.

Note: You must click “Print Preview” to view the confirmation page before you can print. **You cannot print from this screen.**

Step 6 continued: HRBEN0001-Enrollment

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



Print Preview, Document 1 of 1

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

1 of 4

Benefits Confirmation

Date: 10/10/2024

Personnel number 00003991	Name of employee Wallen, Morgan T	Social Security Number XXXXX5454
Business Area Commonwealth of Kentucky	Dual/Retiree Return to Work NO	
Birth Date 08/24/1983	Gender Male	
Home Phone (555)555-5555	Work Phone	
Tobacco User YES	LW Premium Increase NO	

Medical Waiver HRA - with \$ Coverage Level	01/01/2025
---	------------

SAP | ECT (320) | khr

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

Employee Demographic Changes/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: PA30 Maintain HR Master Data

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

Maintain HR Master Data

Menu | [Dropdown] | Back | Exit | Cancel | System | Create | Change | Display | Copy | Delimit | Delete | Overview

Personnel no. 3991

Name wallen , Morgan T Status Active

EE group L External - BN Personnel area 0004 Benefits Only

EE subgroup 41 24 Non-Paid Pers. subarea 2001 Board of Ed.

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

Infotype Text Status

0000 Actions	✓
0001 Organizational assignment	✓
0002 Personal data	✓
0006 Addresses	✓
0007 Planned Working Time	✓
0008 Basic Pay	✓
0009 Bank Details	
0019 Monitoring of Tasks	
0031 Reference Personnel Numbers	

Period

☒ Period

From [] To []

☐ Today ☐ Current Week

☐ All ☐ Current Month

☐ From Today ☐ Last Week

☐ Until Today ☐ Last Month

☐ Curr. Period ☐ Current Year

Direct selection

Infotype [] STy []

SAP

Step 1 continued: PA30 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

Maintain HR Master Data

Menu | [Dropdown] | Back | Exit | Cancel | System | **Create** | **Change** | **Display** | Copy | Delimit | Delete | Overview

Personnel no. 3991

Name Wallen, Morgan T Status Active

EE group L External - BN Personnel area 0004 Benefits Only

EE subgroup 41 24 Non-Paid Pers. subarea 2001 Board of Ed.

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

Infotype Text	Status
0000 Actions	✓
0001 Organizational assignment	✓
0002 Personal data	✓
0006 Addresses	✓
0007 Planned Working Time	✓
0008 Basic Pay	✓
0009 Bank Details	
0019 Monitoring of Tasks	
0031 Reference Personnel Numbers	

Period

☒ Period

From [] To []

☐ Today ☐ Current Week

☐ All ☐ Current Month

☐ From Today ☐ Last Week

☐ Until Today ☐ Last Month

☐ Curr. Period ☐ Current Year

Direct selection

Infotype [] STY []

SAP

Note: Only choose “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: PA30 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 | Save | Back | Exit | Cancel | System | Previous record | Next record | Overview

Personnel No: 3991 | Name: wallen , Morgan T

Position: 99999999 | Integration: default position

Status: Active

Start: 08/24/1983 | To: 12/31/9999 | Changed on: 10/09/2024 | BN_STUDENT01

Name

Last name: Wallen

First name: Morgan

Middle name: T

Suffix: | Pref 1s Nm: |

Name: Wallen , Morgan T

HR data

SSN: | Gender: Male

Date of Birth: 08/24/1984

Language: English

Marital Status: Marr.

SAP

Step 1 continued: PA30 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 the date request is signed

In this example we will use copy.

Highlight Addresses and then select copy.

Maintain HR Master Data

Menu | [Dropdown] | Back | Exit | Cancel | System | Create | Change | Display | Copy | Delimit | Delete | Overview

Personnel no. 3991
Name wallen, Morgan T
Status Active
EE group L External - BN
EE subgroup 41 24 Non-Paid
Personnel area 0004
Pers. subarea 2001
Benefits Only
Board of Ed.

Find by
Person
Collective search help

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

Infotype Text	Status
0000 Actions	✓
0001 Organizational assignment	✓
0002 Personal data	✓
0006 Addresses	✓
0007 Planned Working Time	✓
0008 Basic Pay	✓
0009 Bank Details	
0019 Monitoring of Tasks	
0031 Reference Personnel Numbers	

Period
From [] To []
☒ Period
☐ Today
☐ All
☐ From Today
☐ Until Today
☐ Curr. Period
☐ Current Week
☐ Current Month
☐ Last Week
☐ Last Month
☐ Current Year
Choose

Direct selection
Infotype 0002 Personal data
STY []

✓ Record changed

SAP

Step 1 continued: PA30 Maintain HR Master Data

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

Either click twice, or click once then click ✓

Maintain HR Master Data

Personnel no. 3991

Find by: Person

Basic personal data

Infotype Text

0000 Actions

0001 Organizational

0002 Personal data

0006 Addresses

0007 Planned Work

0008 Basic Pay

0009 Bank Details

0019 Monitoring of T

0031 Reference Per

Direct selection

Infotype

Subtypes for infotype "0006 Addresses" (1)

Restrictions

STyp	Name
1	Permanent residence
4	Emergency address
5	Mailing address
6	Nursing address
7	
HU01	Dependant's address
HU02	Address of Spouse
R1	Place of Residence Provided by Employer
R2	Hotel Accommodation Provided by Employer
RUBP	Birthplace
SA4	
SA5	Mandate Organization(SA PBS)
SA6	Secondment Organization(SA PBS)
Z001	Work Address

14 Entries found

Selection icons: [Icon] [Checkmark] [X]

Step 1 continued: PA30 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, 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 'Copy 0006 Addresses' transaction. The form is divided into several sections:

- Header:** Includes a menu bar with 'Save', 'Back', 'Exit', 'Cancel', 'System', 'Previous record', 'Next record', and 'Overview'.
- Personnel Data:** Personnel No. 3991, Name wallen, Morgan T, Position 99999999, Status Active, Start 11/16/2024 to 12/31/9999.
- Address Section:** Address type: Permanent residence, Care Of: (empty), Address line 1: 245 Walnut Lane, Address line 2: (empty), City/county: Frankfort, State/zip code: KY Kentucky 40601, Country Key: USA.
- Communications Section:** Four rows for entering telephone numbers with Type, Number, and Exte fields.
- Additional fields Section:** County Code: 037 Franklin.

Blue arrows indicate the following actions:

- Arrow pointing to the 'Save' button in the header.
- Arrow pointing to the 'Find by' dropdown menu on the left.
- Arrow pointing to the 'Address' section.
- Arrow pointing to the 'Additional fields' section.

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 Participation

State Boards of Education should utilize MUNIS to enter a termination or should follow the steps below to enter the termination through KHRIS.

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 shows the SAP 'Display HR Master Data' interface. At the top, there's a title bar 'Display HR Master Data' and a menu bar with options like 'Menu', 'Back', 'Exit', 'Cancel', 'System', 'Display', 'Overview', and 'Refresh Data'. Below the menu bar, there's a search area with 'Personnel no.' set to '3991' and a blue arrow pointing to it. The 'Name' field shows 'wallen , Morgan T'. To the right, 'Status' is 'Active'. Below this, 'EE group' is 'L External - BN' and 'EE subgroup' is '41 24 Non-Paid'. Further right, 'Personnel area' is '0004' and 'Pers. subarea' is '2001'. Below these fields, there's a list of infotypes with a 'Status' column. The infotypes listed are: 0000 Actions (checked), 0001 Organizational assignment (checked), 0002 Personal data (checked), 0006 Addresses (checked), 0007 Planned Working Time (checked), 0008 Basic Pay (checked), 0009 Bank Details, 0019 Monitoring of Tasks, and 0031 Reference Personnel Numbers. To the right of this list is a 'Period' section with radio buttons for 'Period', 'Today', 'All', 'From Today', 'Until Today', 'Curr. Period', 'Current Week', 'Current Month', 'Last Week', 'Last Month', and 'Current Year'. A 'Choose' button is at the bottom of the 'Period' section. At the bottom of the screen, there's a 'Direct selection' section with an 'Infotype' field and a 'STY' field. The SAP logo is in the bottom right corner.

Infotype Text	Status
0000 Actions	✓
0001 Organizational assignment	✓
0002 Personal data	✓
0006 Addresses	✓
0007 Planned Working Time	✓
0008 Basic Pay	✓
0009 Bank Details	
0019 Monitoring of Tasks	
0031 Reference Personnel Numbers	

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.

Display HR Master Data

Menu | [Dropdown] | Back | Exit | Cancel | System | **Display** | Overview | Refresh Data

Personnel no. 3991
Name Wallen, Morgan T
EE group L External - BN
EE subgroup 41 24 Non-Paid

Status Active
Benefits Only
Board of Ed.

Personnel area 0004
Pers. subarea 2001

Find by: Person
Collective search help

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

Infotype Text	Status
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	✓

Period
From [] To []
Today | Current Week
All | Current Month
From Today | Last Week
Until Today | Last Month
Curr. Period | Current Year
Choose

Direct selection
Infotype [] Sty []

SAP

Note: Complete the above steps to make sure you have the correct Personnel No. and to verify that the health, dental, vision, life, 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. Forward to EIB for processing.

Step 1 continued: Verify Plan Information

In this example using Infotype 0167 Health Plans, the 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 LivingWell Basic CDHP Prime, Default LivingWell Basic 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.

Display 0167 Health Plans

Menu ▾

Back

Exit

Cancel

System ▾

Previous record

Next record

Overview

Find by

Person

Collective search help

Personnel No 3991 [redacted] Name Wallen , Morgan T

Payroll area BN Org. unit Ashland Independent

Tobacco X

Start 01/01/2025 to 12/31/9999 chng 10/10/2024 BN_STUDENT01

Plan AB33 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

AB33

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)



Step 2: PA40 End Participation/Benefit Eligibility

Once you check plans in PA20, DO NOT click on the < nor the Home button. Instead, you must type in the command box /nPA40.

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.

[illegible]

Step 2 continued: PA40 End Participation/Benefit Eligibility

In the “From” field enter the day **AFTER** the employee’s last day of work (i.e., if the employee’s last day of work is 03/15/2023; you will enter 03/16/2023)

Select “End Participation”

Click “Execute”

Personnel Actions

Menu | [Dropdown] | [Back] [Exit] [Cancel] [System] [Execute] [SSN Search]

Find by: Person [Collective search help]

Personnel no. 3991
Name Wallen, Morgan T
EE group L External - BN
EE subgroup 41 24 Non-Paid
Personnel area 0004
Pers. subarea 2001
Status Active
Benefits Only
Board of Ed.
From 01/02/2025

Personnel Actions

Action Type	Personne...	EE group	EE subgr...
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 3: PA40 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 | [Dropdown] | Save | Back | Exit | Cancel | System | Previous record | Next record | Overview | Execute info group | Change info group

Pers. No. 3991
Name Wallen, Morgan T
EE group L External - BN Personnel ar 0004 Benefits Only
EE subgroup 41 24 Non-Paid
Start 01/02/2025 to 12/31/9999

Personnel action
Action Type BN - End Participation
Reason for Action ☐ BN_End Participation

Status
Customer-specific [Dropdown]
Employment Withdrawn
Special payment [Dropdown]

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

SAP

Step 3 continued: PA40 Personnel Actions

You **ONLY** need to click Save on your keyboard

Copy 0001 Organizational assignment

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

Personnel No: 3991 Name: Wallen, Morgan T

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: 01/02/2025 to 12/31/9999

Enterprise structure

CoCode: COMK Commonwealth of Kentucky

Pers.area: 0004 Benefits Only Subarea: 2001 Board of Ed.

Cost Ctr: 9200100012 Ashland Ind Bus. Area: 1000 Commonwealth of Kentucky

Func. Area: [Empty]

Personnel structure

EE group: L External - BN Payr.area: BN Non-COMK Paid

EE subgroup: 41 24 Non-Paid Contract: [Dropdown]

Organizational plan

Position: 99999999 Default position

Org. Unit: 10006005 00012
Ashland Independent

Record created



SAP

Step 3 continued: PA40 Personnel Actions

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

[illegible]

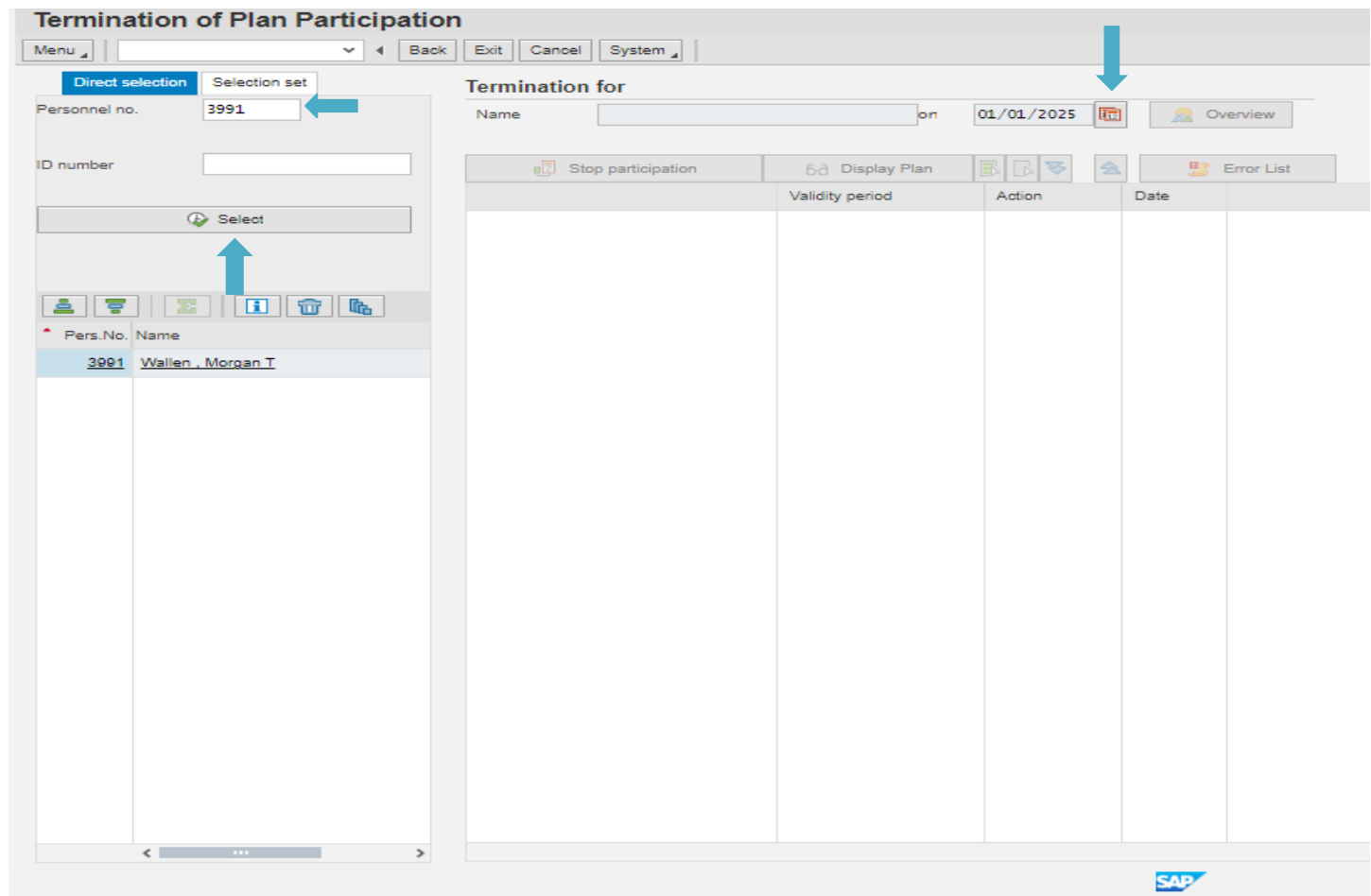
Step 4: HRBEN0014 Termination of Participation

Once you complete the PA40 action, do not hit the  (back button) or the  (home button). If you click either, it locks the PERNR. Instead, you must type in the command box /nHRBEN0014 to go from screen to screen.

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 01/01/2025)

Click "Select"









Termination of Plan Participation

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

Direct selection | Selection set

Personnel no. ID number



 Select






    

* Pers.No. Name

3991	Wallen, Morgan T
------	------------------

Termination for

Name on   Overview

 Stop participation  Display Plan    Error List

Validity period	Action	Date	
-----------------	--------	------	--

SAP

Step 4 continued: HRBEN0014 Termination of Participation

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

Termination of Plan Participation

Menu

Direct selection

Selection set

Personnel no.

ID number

Pers.No.

Name

3991

Wallen , Morgan T

Termination for

Name on

Stop participation

Display Plan

Error List

	Validity period	Action	Date
▼ <input type="checkbox"/> Medical			
Waiver HRA - with \$	01/01/2025 - 12/31/9999	Terminate on	01/15/2025
▼ <input type="checkbox"/> Dental			
Anthem Dental Silver	01/01/2025 - 12/31/9999	Terminate on	01/31/2025
▼ <input type="checkbox"/> Basic Life AD&D			
Basic Life and AD&D	01/01/2025 - 12/31/9999	Terminate on	01/31/2025
▼ <input type="checkbox"/> Optional Life			
Option 2, \$25K, age 40-59	01/01/2025 - 12/31/9999	Terminate on	01/31/2025
▼ <input type="checkbox"/> Dependent Life			
Dep Option 6, 50k/0/0	01/01/2025 - 12/31/9999	Terminate on	01/31/2025
▼ <input type="checkbox"/> Healthcare FSA			
Healthcare FSA	01/01/2025 - 12/31/9999	Terminate on	01/15/2025
▼ <input type="checkbox"/> Dep Care FSA			
Child & Adult Daycare FSA	01/01/2025 - 12/31/9999	Terminate on	01/15/2025

Step 4 continued: HRBEN0014 Termination of Participation

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

Click “Stop Participation”

Termination of Plan Participation

Menu

Direct selection

Selection set

Personnel no.

ID number

Pers.No.

Name

3991

Wallen, Morgan T

Termination for

Name on

	Validity period	Action	Date
▼ <input checked="" type="checkbox"/> Medical			
Waiver HRA - with \$	01/01/2025 - 12/31/9999	Terminate on	01/15/2025
▼ <input checked="" type="checkbox"/> Dental			
Anthem Dental Silver	01/01/2025 - 12/31/9999	Terminate on	01/31/2025
▼ <input checked="" type="checkbox"/> Basic Life AD&D			
Basic Life and AD&D	01/01/2025 - 12/31/9999	Terminate on	01/31/2025
▼ <input checked="" type="checkbox"/> Optional Life			
Option 2, \$25K, age 40-59	01/01/2025 - 12/31/9999	Terminate on	01/31/2025
▼ <input checked="" type="checkbox"/> Dependent Life			
Dep Option 6, 50k/0/0	01/01/2025 - 12/31/9999	Terminate on	01/31/2025
▼ <input checked="" type="checkbox"/> Healthcare FSA			
Healthcare FSA	01/01/2025 - 12/31/9999	Terminate on	01/15/2025
▼ <input checked="" type="checkbox"/> Dep Care FSA			
Child & Adult Daycare FSA	01/01/2025 - 12/31/9999	Terminate on	01/15/2025

Step 4 continued: HRBEN0014 Termination of Participation

Select “Stop participation”

Termination of Plan Participation

Menu

Direct selection **Selection set**

Personnel no.

ID number

* Pers.No. Name

Pers.No.	Name
3991	Wallen , Morgan T

Termination for


Name on

	Validity period	Action	Date
<input checked="" type="checkbox"/> Medical			
Waiver HRA - with S	01/01/2025 - 12/31/9999		
<input checked="" type="checkbox"/> Dental			
Anthem Dental Silver	01/01/2025 - 12/31/9999		
<input checked="" type="checkbox"/> Basic Life AD&D			
Basic Life and AD&D	01/01/2025 - 12/31/9999		
<input checked="" type="checkbox"/> Optional Life			
Option 2, \$25K, age 40-59	01/01/2025 - 12/31/9999		
<input checked="" type="checkbox"/> Dependent Life			
Dep Option 6, 50k/0/0	01/01/2025 - 12/31/9999		
<input checked="" type="checkbox"/> Healthcare FSA			
Healthcare FSA	01/01/2025 - 12/31/9999		
<input checked="" type="checkbox"/> Dep Care FSA			
Child & Adult Daycare FSA	01/01/2025 - 12/31/9999		

Termination of Plan Participation

Plan type

- Medical
- Dental
- Basic Life AD&D
- Optional Life
- Dependent Life
- Healthcare FSA
- Dep Care FSA



SAP

Step 4 continued: HRBEN0014 Termination of Participation

Click ✓

The screenshot shows the SAP 'Termination of Plan Participation' transaction. On the left, a list of personnel is shown with '3991 Wallen, Morgan T.' selected. The main area displays a list of plans to be terminated, including Medical, Dental, Basic Life AD&D, Optional Life, Dependent Life, Healthcare FSA, and Dep Care FSA. A confirmation dialog box is overlaid on the screen, stating: 'Termination of Plan Participation' and 'For 7 of 7 plan types, plans have been delimited or deleted'. A blue arrow points to the green checkmark button in the bottom right corner of the dialog box.

Plan Type	Validity period	Action	Date
Medical	01/01/2025 - 12/31/9999	Terminate on	01/15/2025
Dental	01/01/2025 - 12/31/9999	Terminate on	01/31/2025
Basic Life AD&D			
Optional Life			
Dependent Life			
Healthcare FSA			
Dep Care FSA			

Note: You must complete both Transactions PA40 and HRBEN0014 to term an employee in KHRIS.

Step 4 continued: HRBEN0014 Termination of Participation

To verify that the health, dental, vision, and life plans, and flexible spending accounts have been terminated; type in the command box /npa20.

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

Click "Enter" on keyboard

The screenshot shows the SAP 'Display HR Master Data' interface. At the top, there's a title bar 'Display HR Master Data' and a menu bar with buttons: Menu, Back, Exit, Cancel, System, Display, Overview, and Refresh Data. Below the menu bar, there's a search bar with 'Personnel no.' and the value '3991'. A blue arrow points to this field. To the right of the search bar, there's a 'Name' field with 'Wallen, Morgan T' and a 'Status' field with 'Active'. Below these, there's a table with columns 'EE group', 'EE subgroup', 'Personnel area', 'Pers. subarea', and 'Benefits Only'. The table contains the following data:

EE group	EE subgroup	Personnel area	Pers. subarea	Benefits Only
L	External - BN	0004	2001	Board of Ed.

Below the table, there's a 'Find by' section with a dropdown menu showing 'Person' and a 'Collective search help' button. The main content area is divided into two sections: 'Basic personal data' and 'Period'. The 'Basic personal data' section has a table with columns 'Infotype Text' and 'Status'. The table contains the following data:

Infotype Text	Status
0000 Actions	✓
0001 Organizational assignment	✓
0002 Personal data	✓
0006 Addresses	✓
0007 Planned Working Time	✓
0008 Basic Pay	✓
0009 Bank Details	
0019 Monitoring of Tasks	
0031 Reference Personnel Numbers	

The 'Period' section has a 'Period' dropdown menu with options: Today, All, From Today, Until Today, Curr. Period, Current Week, Current Month, Last Week, Last Month, and Current Year. There's a 'Choose' button next to the 'Curr. Period' option. At the bottom, there's a 'Direct selection' section with an 'Infotype' field and an 'STy' field.

Step 4 continued: HRBEN0014 Termination of Participation

Select the “Benefits” tab

Click on “0167 Health Plans” then after checking the health, dental, and vision plan clicks 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 screenshot shows the SAP 'Display HR Master Data' interface for personnel number 3991, Morgan T. Wallen. The 'Benefits' tab is selected, indicated by a blue arrow. The left sidebar shows a search filter for 'Person'. The main area displays a list of benefit infotypes with their status. Three blue arrows point to the following infotypes:

Infotype Text	Status
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	✓

Below the list is a 'Direct selection' section with an 'Infotype' input field and an 'STy' dropdown. The 'Period' section on the right allows for selecting a time range, with options like 'Today', 'All', 'From Today', 'Until Today', 'Curr. Period', 'Current Week', 'Current Month', 'Last Week', 'Last Month', and 'Current Year'. A 'Choose' button is also present. The SAP logo is in the bottom right corner.

Step 4 continued: HRBEN0014 Termination of Participation

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

Display 0167 Health Plans

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

Personnel No: 3991 [Redacted] Name: Wallen, Morgan T
Payroll area: BN Org. unit: Ashland Independent
Tobacco: X
Start: 01/01/2025 to 01/15/2025 Chng: 10/10/2024 BN_STUDENT01
Plan: AB 33 Waiver HRA - with \$

Find by: Person Collective search help

Plan data | Administration | Costs | Dependents | Additional data

General plan data

Benefit area: 01 Comm of KY
Plan type: A001 Medical
Benefit plan: AB 33 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)

SAP

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 'Health Plan Costs' report selection interface. At the top, there is a title bar 'Health Plan Costs' and a menu bar with options: Menu, Save as Variant..., Back, Exit, Cancel, System, Execute, and Get Variant... Below the menu bar, there are three tabs: 'Further selections', 'Search helps' (which is highlighted with a blue arrow), and 'Org. structure'. The 'Search helps' tab contains the following sections:

- Key date:** Includes radio buttons for 'Today' (selected) and 'Other keydate'. Below 'Other keydate' is a 'Key Date' field with a calendar icon.
- Selection:** Includes a 'Personnel Number' field with a search icon.
- Additional selection:** Includes fields for 'Benefit area' (with value '01'), '1st Program Grouping', '2nd Program Grouping', and 'Benefit plan'. Each of these fields is followed by a 'to' field and a search icon.

The SAP logo is visible in the bottom right corner.

Step 1 continued: HRBEN0073 Health Plan Costs

Select “K –Organizational Assignment”

Health Plan Costs

Menu Save as Variant... Back Exit Cancel Sys

Further selections Search helps

Key date

☒ Today
☐ Other keydate

Key Date

Selection

Personnel Number

Additional selection

Benefit area to

1st Program Grouping to

2nd Program Grouping to

Benefit plan to

Restrict Value Range (1)

HKy	Short text
A	Branches and construction sites (BR)
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

Click

Step 1 continued: HRBEN0073 Health Plan Costs

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

The screenshot shows the SAP 'Health Plan Costs' report configuration screen. The background interface includes a menu bar with options like 'Save as Variant...', 'Back', 'Exit', 'Cancel', 'System', 'Execute', and 'Get Variant...'. Below this are tabs for 'Further selections', 'Search helps', and 'Org. structure'. The main area is divided into sections: 'Key date' with radio buttons for 'Today' and 'Other keydate'; 'Selection' with a 'Personnel Number' field; and 'Additional selection' with fields for 'Benefit area' (containing '01'), '1st Program Grouping', '2nd Program Grouping', and 'Benefit plan'. A modal dialog box titled 'Restrict Value Range' is open in the foreground. It has a 'Restrictions' tab and a list of fields with corresponding input boxes and folder icons: 'Personnel area', 'Personnel subarea', 'Employee group', 'Employee subgroup', 'Payroll area', 'Company Code', 'Cost Center', 'Organizational unit' (containing '10006048' with a blue arrow pointing to it), 'Organizational key', 'Administrator group', 'Time administrator', 'Last name', and 'First name'. At the bottom of the dialog are four icons: a green checkmark, a red 'X', a trash can, and a refresh symbol. A large blue arrow points from the bottom of the dialog towards the SAP logo at the bottom right of the main screen.

Click ✓

Note: This will take you back to the Health Plan 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.

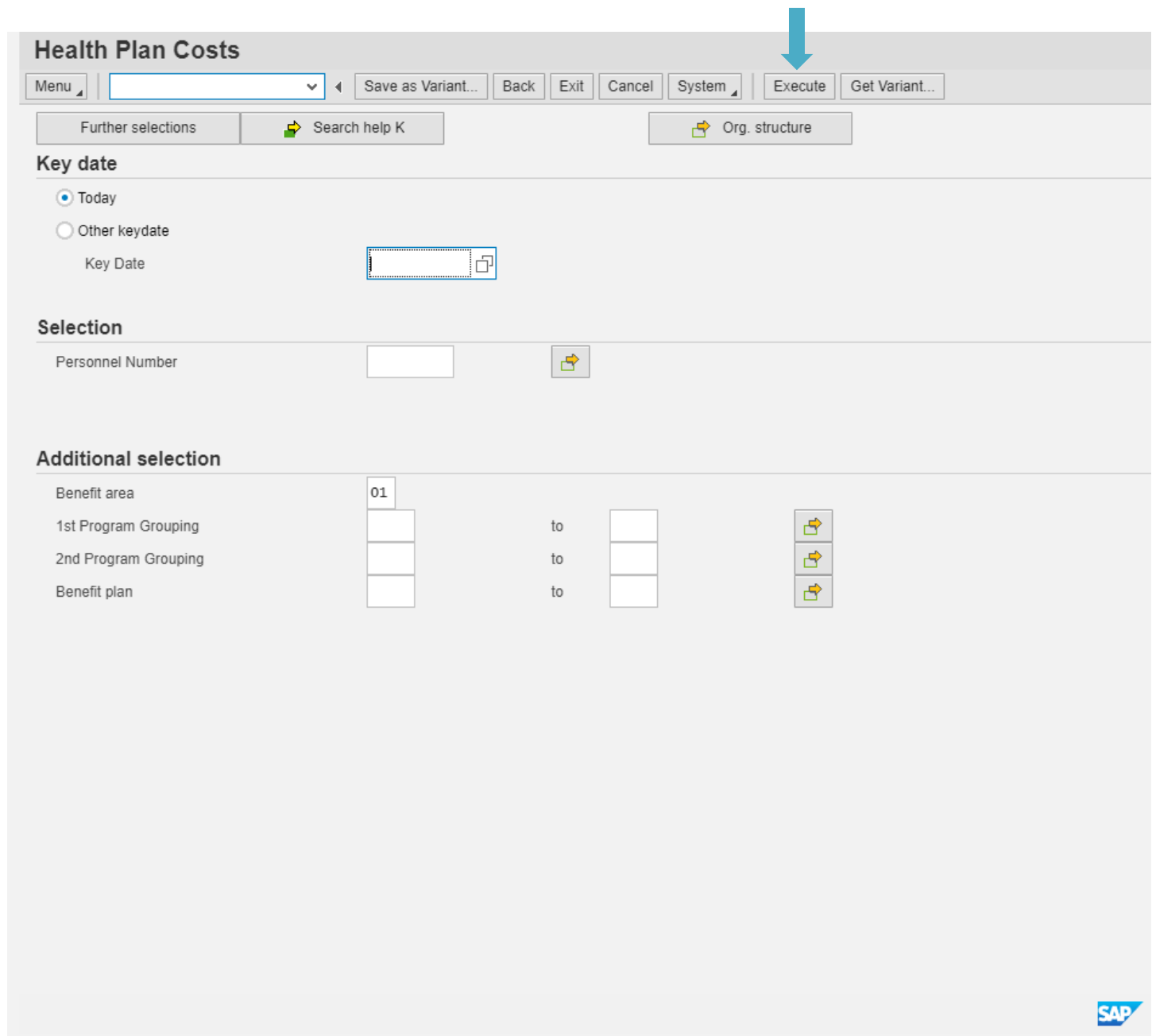
Step 1 continued: HRBEN0073 Health Plan Costs

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

Use other key date to select next plan year, example 01/01/2025.

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. 01/01/2025).

Click “Execute”



Health Plan Costs

Menu | [Dropdown] | Save as Variant... | Back | Exit | Cancel | System | **Execute** | Get Variant...

Further selections | Search help K | Org. structure

Key date

☒ Today
☐ Other keydate
Key Date [Text Field]

Selection

Personnel Number [Text Field]

Additional selection

Benefit area	01			
1st Program Grouping	[Text Field]	to	[Text Field]	[Icon]
2nd Program Grouping	[Text Field]	to	[Text Field]	[Icon]
Benefit plan	[Text Field]	to	[Text Field]	[Icon]

SAP

Step 1 continued: HRBEN0073 Health Plan Costs

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

Menu

Back

Exit

Cancel

System

Details

Sort in Ascending Order

Sort in descending order

Set filter

Total

Print preview

Local file...

Mail Recipient

ABC Analysis

Graphic

Change layout...

Select layout...

Save layout...

Information

Health Plan Costs

Key date03/20/2023

Benefit area01 Comm of KY

Pers No.	Name	ID number	Part date	Benefit plan text	Dep.	Dep. coverage text	Tobacco	LivingWell Non-Fulfilled Previous Year	EE Cost	ER Credit	Provider Cost
				LivingWell CDHP	0001	Single			26.73	379.78	4.00
				LivingWell CDHP	0001	Single			26.73	379.78	4.00
				Anthem Dental Bronze	0001	Single			14.08	0.00	0.00
				LivingWell Basic CDHP	0001	Single			14.17	377.79	4.00
				Anthem Dental Bronze	0001	Single			14.08	0.00	0.00
				Anthem Vision Bronze	0001	Single			5.52	0.00	0.00
				LW CDHP Cross-Ref Prime	0004	Family			43.45	425.00	4.00
				Anthem Dental Silver	0004	Family			68.26	0.00	0.00
				Anthem Vision Gold	0004	Family			39.82	0.00	0.00
				Waiver without HRA – no \$	0006	Waive Coverage			0.00	0.00	4.00
				LivingWell CDHP	0001	Single		X	46.73	359.78	4.00
				LivingWell PPO	0003	Parent Plus			127.05	461.60	4.00
				LW PPO Cross-Ref Sec	0005	Family-CrossRefSecdry			85.24	413.77	4.00
				LivingWell PPO	0001	Single		X	64.57	352.25	4.00
				LivingWell Basic CDHP	0003	Parent Plus			33.76	505.32	4.00
				Anthem Dental Bronze	0004	Family			49.28	0.00	0.00
				Anthem Vision Bronze	0002	Couple			10.94	0.00	0.00
				Waiver without HRA – no \$	0006	Waive Coverage			0.00	0.00	4.00
				LW CDHP Cross-Ref Prime	0004	Family			43.45	425.00	4.00
				LivingWell PPO	0003	Parent Plus			127.05	461.60	4.00

SAP

ECQ (400)

Step 1 continued: HRBEN0073 Health Plan Costs

Click Menu

Click List

Click Export

Click Spreadsheet

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

Enter a file name

Click Save

Health Plan Costs

Menu ▾ Back Exit Cancel System ▾ Details Sort in Ascending Order Sort in descending order Set filter Total Print preview Local file... Mail Recipient ABC Analysis Graphic Change layout... Select layout... Save layout... Information

List ▾ Edit ▾ Goto ▾ Views ▾ Settings ▾ System ▾ Help ▾

Print preview (Ctrl+Shift+F10)
Print (Ctrl+P)
Export ▾
Send to ▾
Exit (Shift+F3)

Word processing...
Spreadsheet...
Local file... (Ctrl+Shift+F9)

Dep.	Dep coverage text	Tobacco	LivingWell Non-Fulfilled Previous Year	EE Cost	ER Credit	Provider Cost
LivingWell CDHP	0001 Single			26.73	379.78	4.00
LivingWell CDHP	0001 Single			26.73	379.78	4.00
Anthem Dental Bronze	0001 Single			14.08	0.00	0.00
LivingWell Basic CDHP	0001 Single			14.17	377.79	4.00
Anthem Dental Bronze	0001 Single			14.08	0.00	0.00
Anthem Vision Bronze	0001 Single			5.52	0.00	0.00
LW CDHP Cross-Ref Prime	0004 Family			43.45	425.00	4.00
Anthem Dental Silver	0004 Family			68.26	0.00	0.00
Anthem Vision Gold	0004 Family			39.82	0.00	0.00
Waiver without HRA – no \$	0006 Waive Coverage			0.00	0.00	4.00
LivingWell CDHP	0001 Single	X		46.73	359.78	4.00
LivingWell PPO	0003 Parent Plus			127.05	461.60	4.00
LW PPO Cross-Ref Sec	0005 Family-CrossRefSodry			85.24	413.77	4.00
LivingWell PPO	0001 Single	X		64.57	352.25	4.00
LivingWell Basic CDHP	0003 Parent Plus			33.76	505.32	4.00
Anthem Dental Bronze	0004 Family			49.28	0.00	0.00
Anthem Vision Bronze	0002 Couple			10.94	0.00	0.00
Waiver without HRA – no \$	0006 Waive Coverage			0.00	0.00	4.00
LW CDHP Cross-Ref Prime	0004 Family			43.45	425.00	4.00
LivingWell PPO	0003 Parent Plus			127.05	461.60	4.00

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 several 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

Plan Change History Report

Menu | [] | Save as Variant... | Back | Exit | Cancel | System | Execute | Get Variant... | Dynamic Selections

Further selections | **Search help K** | Sort order

Period

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

Data Selection Period [] To []
Person selection period [] To []
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

Plan type	[]	to	[]	[]
Benefit plan	[]	to	[]	[]
Changed By	[]	to	[]	[]

SAP

Step 1 continued: ZBNR006 Plan Change History

Select “K – Organizational Assignment”

Click ✓

Plan Change History Report

Menu Save as Variant... Back Exit Cancel Sys









Further selections Search helps Sort order

Period

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

Data Selection Period To
Person selection period To
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

Plan type to
Benefit plan to
Changed By to

Restrict Value Range (1)

HKy	Short text
A	Branches and construction sites (BR)
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

Step 1 continued: ZBNR006 Plan Change History

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

The screenshot shows the SAP 'Plan Change History Report' interface. The 'Restrict Value Range' dialog box is open, displaying a list of fields with corresponding input boxes. A blue arrow points to the 'Organizational unit' field, which contains the value '10006048'. Another blue arrow points to the 'OK' button (a green checkmark icon) at the bottom right of the dialog box. The background screen shows various selection criteria like 'Period' (Today, Current month, etc.) and 'Selection' (Personnel Number, Employment status, etc.).

Restrictions	
Personnel area	
Personnel subarea	
Employee group	
Employee subgroup	
Payroll area	
Company Code	
Cost Center	
Organizational unit	10006048
Organizational key	
Administrator group	
Time administrator	
Last name	
First name	

Click ✓

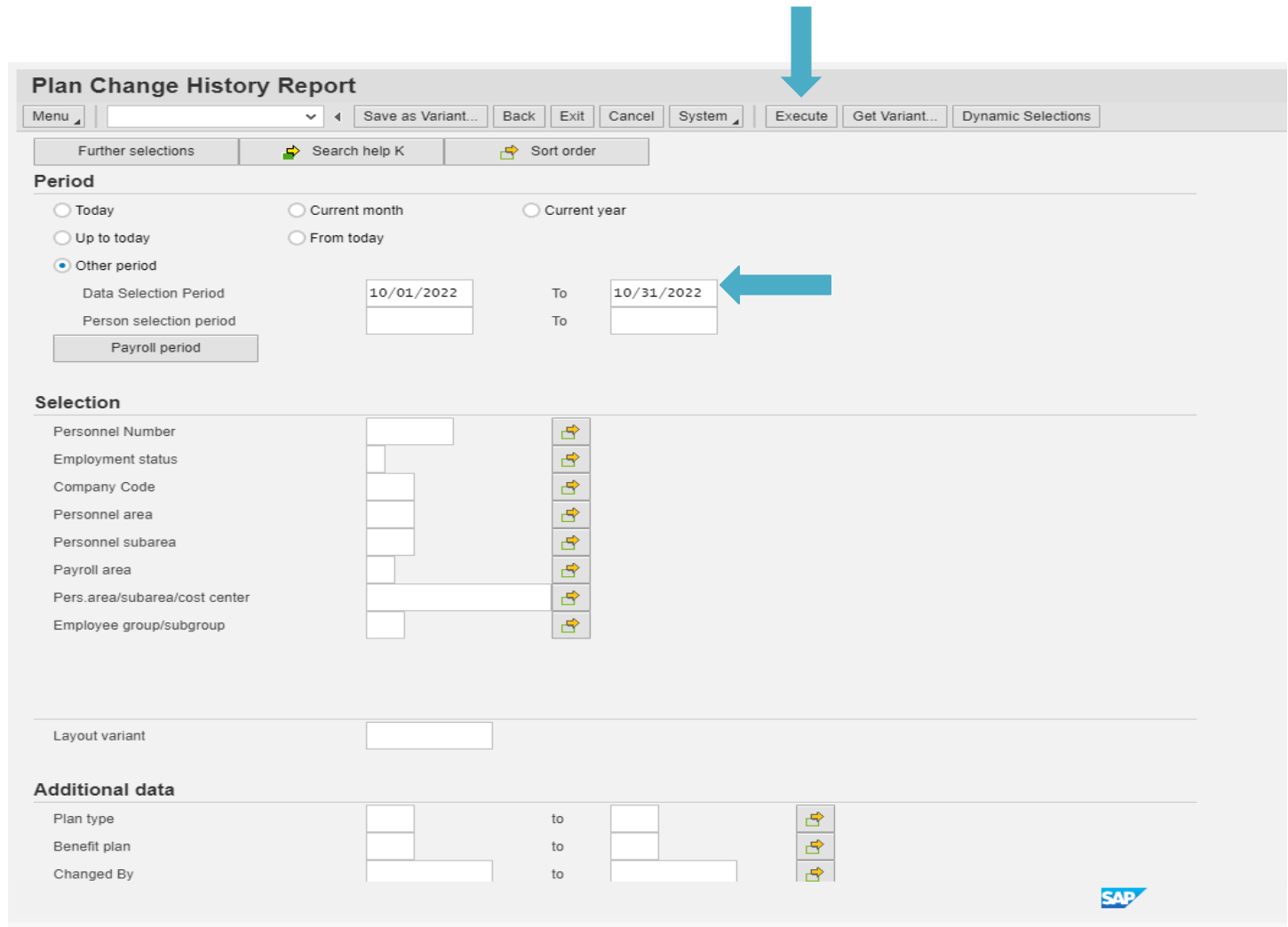
Note: This will take you back to the Plan Change History Report screen. After the Agency's Organizational number has been entered, the "Search helps" field will change to "Search helps K". This indicates that the report generated will only pertain to your Agency.

Step 1 continued: ZBNR006 Plan Change History

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.



Plan Change History Report

Menu | [Dropdown] | Save as Variant... | Back | Exit | Cancel | System | **Execute** | Get Variant... | Dynamic Selections

Further selections | Search help K | Sort order

Period

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

Data Selection Period: 10/01/2022 To: 10/31/2022
Person selection period: [Field] To: [Field]
Payroll period: [Field]

Selection

Personnel Number	[Field]	[Icon]
Employment status	[Field]	[Icon]
Company Code	[Field]	[Icon]
Personnel area	[Field]	[Icon]
Personnel subarea	[Field]	[Icon]
Payroll area	[Field]	[Icon]
Pers.area/subarea/cost center	[Field]	[Icon]
Employee group/subgroup	[Field]	[Icon]

Layout variant: [Field]

Additional data

Plan type	[Field]	to	[Field]	[Icon]
Benefit plan	[Field]	to	[Field]	[Icon]
Changed By	[Field]	to	[Field]	[Icon]

SAP

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”

Step 1 continued: ZBNR006 Plan Change History

“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”)

The screenshot displays the SAP 'Plan Change History Report' interface. On the left, there are two main sections: 'Selection' and 'Additional data'. The 'Selection' section includes fields for Personnel Number, Employment status, Company Code, Personnel area, Personnel subarea, Payroll area, Pers.area/subarea/cost center, and Employee group/subgroup. The 'Additional data' section includes Plan type, Benefit plan, Changed By, and Changed on. A toolbar at the top contains buttons for Menu, Save as Variant..., Back, Exit, Cancel, System, Execute, Get Variant..., and Dynamic Selections. A modal dialog box titled 'Multiple Selection for Personnel Number' is open in the center. It has four tabs: 'Select Single Values' (which is active), 'Select Ranges', 'Exclude Single Values', and 'Exclude Ranges'. The 'Select Single Values' tab shows a list of input fields, with the first one highlighted in blue. The dialog box also features a toolbar at the bottom with various icons and a 'Multiple selection...' button. The SAP logo is visible in the bottom right corner of the main interface.

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

Step 1 continued: ZBNR006 Plan Change History

Use “Changed on” dates to capture changes processed within a particular date range. For example, if you want to see changes processed in KHRIS in from January 1, 2023, through March 2023, use, 01/01/2023 in the first data box and 04/01/2023 in the second data box. You can also use the “Multiple Selection” choice to choose specific dates or multiple ranges.

The screenshot shows the SAP 'Plan Change History Report' interface. On the left, there are two main sections: 'Selection' and 'Additional data'. The 'Selection' section includes fields for Personnel Number, Employment status, Company Code, Personnel area, Personnel subarea, Payroll area, Pers.area/subarea/cost center, and Employee group/subgroup. The 'Additional data' section includes Plan type, Benefit plan, Changed By, and Changed on. At the top, there are buttons for Menu, Save as Variant..., Back, Exit, Cancel, System, Execute, Get Variant..., and Dynamic Selections. A modal dialog titled 'Multiple Selection for Personnel Number' is open in the center. It has four tabs: 'Select Single Values', 'Select Ranges' (which is active), 'Exclude Single Values', and 'Exclude Ranges'. The 'Select Ranges' tab contains a table with columns 'O...', 'Lower limit', and 'Upper limit'. The first row has '01012023' in the 'Lower limit' column and '04012023' in the 'Upper limit' column. Below the table is a large empty area for additional selections. At the bottom of the dialog, there are several icons and a button labeled 'Multiple selection...'. The SAP logo is visible at the bottom right of the main interface.

O...	Lower limit	Upper limit
	01012023	04012023

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.









Step 1 continued: ZBNR006 Plan Change History

As an example, this report is asking for changes made by a particular user between 10/01/2022 and 10/16/2022.

Plan Change History Report





Menu ▾ | ▾ | Save as Variant... | Back | Exit | Cancel | System ▾ | Execute | Get Variant... | Dynamic Selections


Selection

Personnel Number	<input type="text"/>	
Employment status	<input type="text"/>	
Company Code	<input type="text"/>	
Personnel area	<input type="text"/>	
Personnel subarea	<input type="text"/>	
Payroll area	<input type="text"/>	
Pers.area/subarea/cost center	<input type="text"/>	
Employee group/subgroup	<input type="text"/>	

Layout variant

Additional data

Plan type	<input type="text"/>	to	<input type="text"/>	
Benefit plan	<input type="text"/>	to	<input type="text"/>	
Changed By	<input type="text"/>	to	<input type="text"/>	
Changed on	<input type="text" value="10/01/2022"/>	to	<input type="text" value="10/16/2022"/>	



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

Step 1 continued: ZBNR006 Plan Change History

The report generated will look like this:

KHRS

SAP GUI for HTML

Plan Change History Report

MenuBackExitCancelSystemDetailsSort in Ascending OrderSort in Descending OrderSet FilterTotalSubtotals...Print PreviewLocal File...>>

Changes in Benefit Elections

Evaluation Period
Program: ZBNR006_PLAN_CHANGE_HISTORY
System: ECQ
Date: 07/22/2020

Client: 400
Time: 12:30:05

Plan	Text	Text	Org. Unit	Object name	Pemr 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) | khriecqci

You can download this to an excel spreadsheet

Step 1 continued: ZBNR006 Plan Change History

To export to a spreadsheet click “Menu” tab then click, “List, Export, Spreadsheet”

The screenshot displays the SAP GUI for HTML interface for the 'Plan Change History Report'. The 'Menu' tab is active, and the 'Export' option is selected from the dropdown menu. The 'Spreadsheet...' option is highlighted in the sub-menu. A large blue rectangle obscures the table data.

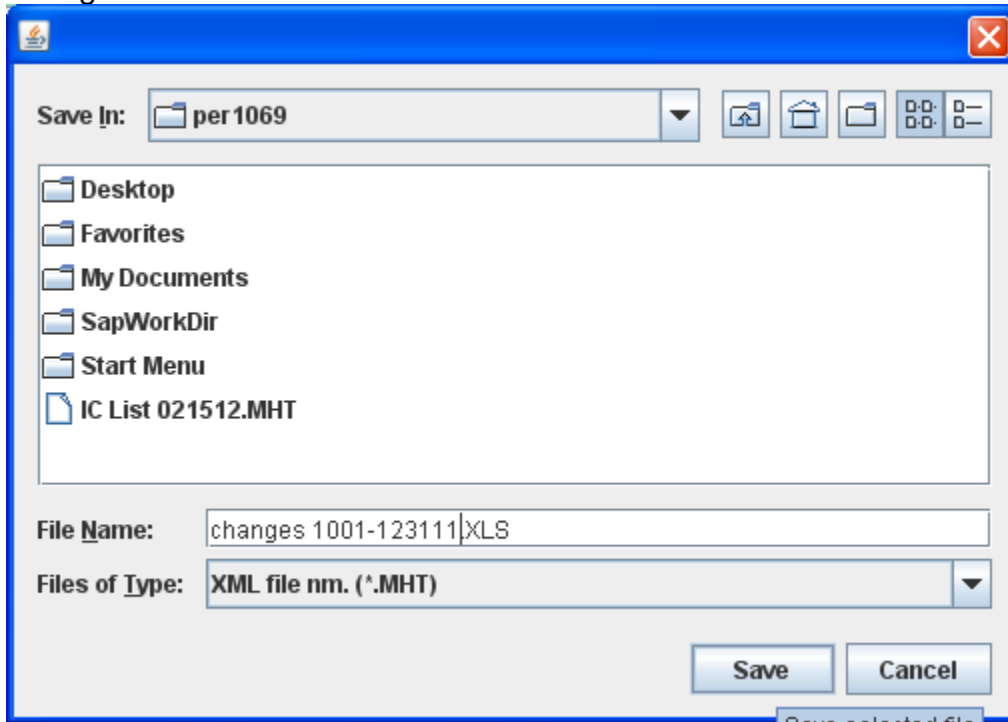
Plan Name	From	To	Infotype	Changed On	Changed By
Basic Life and AD&D	08/01/2020	07/31/2020	0198	07/22/2020	Freda Holdeman
Dependent Life Plan D	08/01/2020	07/31/2020	0198	07/22/2020	Freda Holdeman
Optional Life \$50,000 + 40	08/01/2020	07/31/2020	0198	07/22/2020	Freda Holdeman
Optional Life \$50,000 + 40	08/01/2020	07/31/2020	0198	07/22/2020	Freda Holdeman
FD12 Anthem Dental Silver	08/01/2020	07/31/2020	0187	07/22/2020	Freda Holdeman
Anthem Dental Silver	08/01/2020	07/31/2020	0187	07/22/2020	Freda Holdeman
Anthem Vision Silver	08/01/2020	07/31/2020	0187	07/22/2020	Freda Holdeman
Anthem Vision Silver	08/01/2020	07/31/2020	0187	07/22/2020	Freda Holdeman

Click ✓

Step 1 continued: ZBNR006 Plan Change History

The report will automatically generate to an Excel Spreadsheet and should be in the bottom left corner of the screen. You can open it and then save the file in a folder.

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



Insurance Plan Cost Report

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.

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

Click “Search helps” tab

Insurance Plan Costs

Menu | [Dropdown] | Save as Variant... | Back | Exit | Cancel | System | Execute

Further selections | **Search helps** | Org. structure

Key date

☒ Today
☐ Other keydate

Key Date [Input Field]

Selection

Personnel Number [Input Field]

Additional selection

Benefit area	01			
1st Program Grouping	[Input]	to	[Input]	[Icon]
2nd Program Grouping	[Input]	to	[Input]	[Icon]
Benefit plan	[Input]	to	[Input]	[Icon]

SAP

Select “K –Organizational Assignment”

Click

Step 1 continued: HRBEN0074 Insurance Plan Costs

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

The screenshot shows the SAP 'Insurance Plan Costs' screen in the background. The 'Key date' section has 'Today' selected. The 'Selection' section has 'Personnel Number' entered. The 'Additional selection' section has 'Benefit area' set to '01'. Overlaid on this is the 'Restrict Value Range' dialog box. The 'Restrictions' tab is active, showing a list of fields: Personnel area, Personnel subarea, Employee group, Employee subgroup, Payroll area, Company Code, Cost Center, Organizational unit, Organizational key, Administrator group, Time administrator, Last name, and First name. The 'Organizational unit' field contains the value '10006048', with a blue arrow pointing to it from a text box. The text box says: 'Enter Agency's organizational unit number (you can use drop down box to select your organization) and click check mark'. At the bottom right of the dialog box, there are four icons: a green checkmark, a magnifying glass, a trash can, and a red X. A blue arrow points to the green checkmark icon.

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.

Step 1 continued: HRBEN0074 Insurance Plan Costs

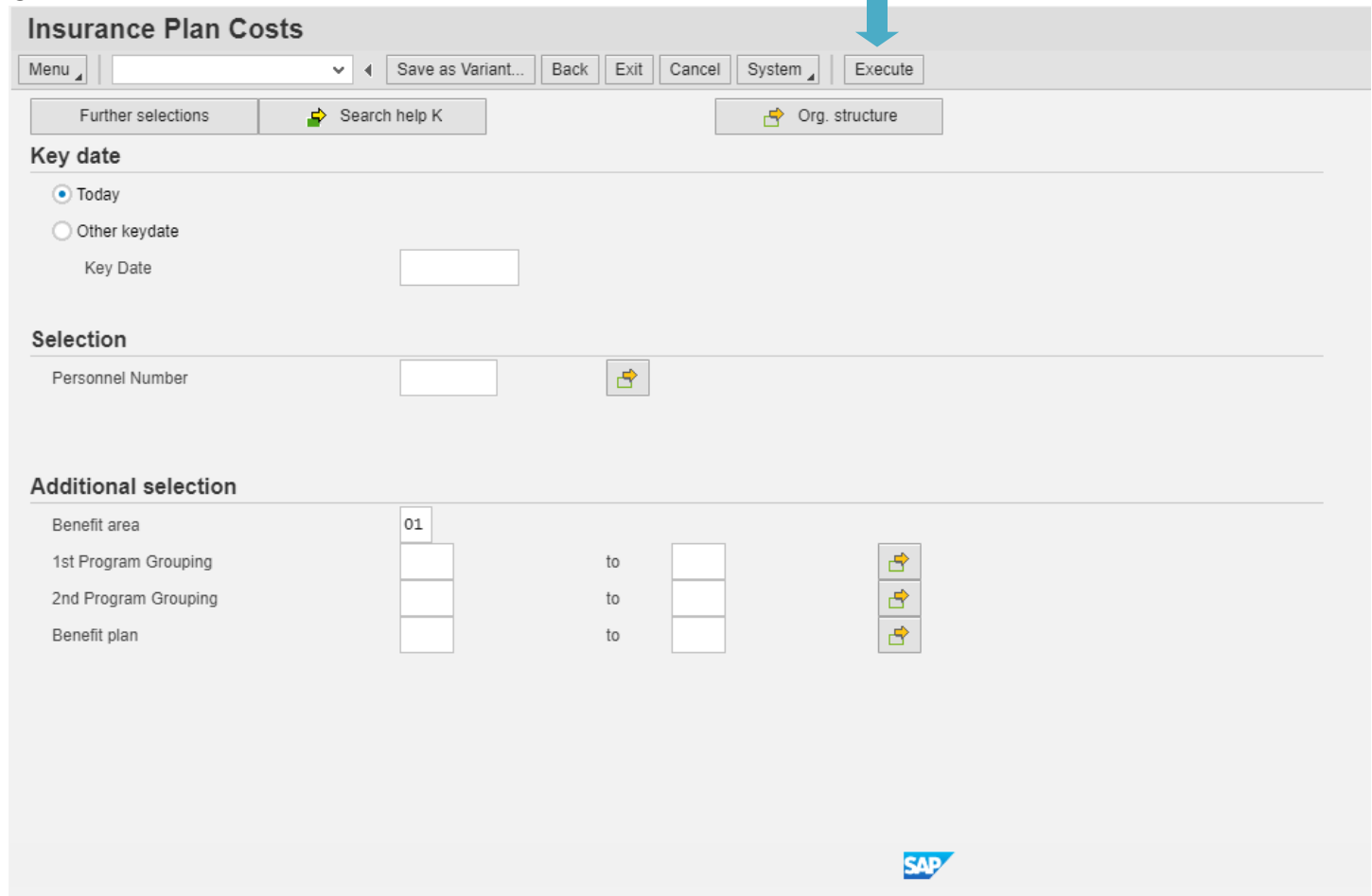
To run a report on **current elections**, under the Key date box, select “Today”

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”



Insurance Plan Costs

Menu | [Dropdown] | Save as Variant... | Back | Exit | Cancel | System | **Execute**

Further selections | Search help K | Org. structure

Key date

☒ Today
☐ Other keydate
Key Date [Text Box]

Selection

Personnel Number [Text Box] [Icon]

Additional selection

Benefit area	01			
1st Program Grouping	[Text Box]	to	[Text Box]	[Icon]
2nd Program Grouping	[Text Box]	to	[Text Box]	[Icon]
Benefit plan	[Text Box]	to	[Text Box]	[Icon]

SAP

Step 1 continued: HRBEN0074 Insurance Plan Costs

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. Premiums are monthly not semi-monthly.

Insurance Plan Costs

Menu

Back

Exit

Cancel

System

Details

Sort in Ascending Order

Sort in descending order

Set filter

Total

Print preview

Local file...

Mail Recipient

ABC Analysis

Insurance Plan Costs

Key date03/20/2023

Benefit area01 Comm of KY

Per	Period text	Plan	Benefit plan text	Pers.No.	Name	ID number	Rg	G	Entry	Part date	Option	Insurance option text	EE Cost	ER Credit
2	<div><div></div>mi-monthly</div>	B501	Basic Life and AD&D							0001	\$20,000	0.00	1.00	
2		B501								0001	\$20,000	0.00	1.00	
2		B501								0001	\$20,000	0.00	1.00	
2		B501								0001	\$20,000	0.00	1.00	
2		B501								0001	\$20,000	0.00	1.00	
2		B501								0001	\$20,000	0.00	1.00	
2		B501								0001	\$20,000	0.00	1.00	
2		B501								0001	\$20,000	0.00	1.00	
2		B503								0001	\$20,000	0.00	1.00	
2		B704	Dependent Life Plan D							0001	\$10,000 Spouse	8.42	0.00	
2		B609	Optional Life \$5,000 >= 60	0001	\$5,000	4.52	0.00							
2		B609		0001	\$5,000	4.52	0.00							

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.

Step 1 continued: HRBEN0074 Insurance Plan Costs

To Export to Excel
Click Menu
List
Export
Spreadsheet

The screenshot shows the SAP Insurance Plan Costs transaction. The 'Menu' dropdown is open, showing the path: Menu > List > Export > Spreadsheet... The 'Export' menu item is highlighted, and the 'Spreadsheet...' option is selected. The background table displays insurance plan costs for various entries, including Basic Life and AD&D, and Dependent Life Plan D.

Entry	Part.date	Option	Insurance option text	EE Cost	ER Credit
10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
01/31/2023	03/01/2023	0001	\$20,000	0.00	1.00
10/01/2012	12/01/2012	0001	\$10,000 Spouse	8.42	0.00
10/01/2012	12/01/2012	0001	\$5,000	4.52	0.00
10/01/2012	12/01/2012	0001	\$5,000	4.52	0.00

The 'Select Spreadsheet' dialog box is shown. It has a 'Formats:' section with three radio buttons: 'Excel (in MHTML Format)' (selected), 'OpenOffice (in OpenDocument Format 2.0)', and 'Select from All Available Formats'. Below the radio buttons is a dropdown menu showing 'Excel - Office Open XML Format (XLSX)'. There is also an 'Always Use Selected Format' checkbox which is unchecked. At the bottom right, there are green checkmark and red X buttons.

Excel (InMHTML Formats)

Click ✓

Transaction Complete

Life Insurance Conversion and Portability Letter

Step 1: Go to our webpage [Pages – Life Insurance \(ky.gov\)](#)

Resources

 [Life Beneficiary Change KHRIS ESS Instruction Sheet](#)

 [2025 Life Insurance and ADD Certificate of Coverage](#)

 [MetLife Privacy Notice](#)

 [MetLife Portability v. Conversion Brochure](#)

 [MetLife Conversion Application](#)

 [Estate Planning Tip Sheet](#)

 [SAMPLE - LWOP Template](#)

 [MetLife Portability Application](#)

 [MetLife Conversion and Portability Letter](#) 

 [Life Insurance FAQs](#)

Step 2: Click on MetLife Conversion and Portability Letter and complete with employee's information

(Date of Notice)

(Employee)

(Address)

(City, State, Zip Code)

Re: Group Life Insurance Conversion and Portability Options

Termination Date of Employment:

Life Insurance Plan End Date:

Dear (Name of Employee):

You are receiving this letter to inform you of your Conversion and Portability options for the State Paid Life Insurance coverage you were provided as an employee of the Commonwealth of Kentucky.

The life insurance policy you had can be continued after your employment has terminated provided required premiums are current. You can convert your Group Life insurance benefits to an individual whole life policy. The conversion applies to the free basic coverage and/or any optional Life Insurance policies you may have had with the Commonwealth. No evidence of insurability will be required to convert your life insurance coverage to an individual whole life policy. Portability or porting allows employees and dependents to continue their Group Life insurance under a separate group policy. Medical questions (Statement of Health) must be completed to apply for Preferred Life Rates (lower) or increase the amount of life insurance you previously had under your former employer's plan.

You must request to convert or port your coverage within 31 days from the termination of your insurance. The policy with the Commonwealth provided you with a term life insurance policy at group rates. The conversion and portability policy rates are often higher than group rates because these rates are based on your age at the time employment ends.

To speak with a MetLife representative who can provide general information about portability, call 888-252-3607. To reach the Transition Solutions Call Center who can assign you to a Barnum Advisor and provide more detailed Conversion or Portability information, call 877-275-6387. Reference group number 235782. Both options require the employer portion of the application to be completed upon separation from employment. Applications can be found online at personnel.ky.gov/Pages/LifeInsurance.aspx.

Sincerely,

(Your Name)

(Title)

Step 3: Next print a copy of the MetLife Portability v. Conversion Brochure

Resources

 Life Beneficiary Change KHRIS ESS Instruction Sheet

 2025 Life Insurance and ADD Certificate of Coverage

 MetLife Privacy Notice

 MetLife Portability v. Conversion Brochure

 MetLife Conversion Application

 Estate Planning Tip Sheet

 SAMPLE - LWOP Template

 MetLife Portability Application

 MetLife Conversion and Portability Letter

 Life Insurance FAQs

You know that life insurance is a **critical part of your overall benefits plan** — that's why you chose to enroll in the Group Life insurance program offered by your employer. As you leave your employment, you have **options** to continue your current Group Life coverage and **maintain this important protection** for you and your family.

Now you have **important decisions to make** about continuing your Group Life insurance benefits. There are **two options** under which you can continue your coverage — **Portability and Conversion**. This brochure is designed to answer the most common questions about each option and give you a side-by-side comparison, so you can choose the option that best meets your needs.

Is there anything else I need to know?

To continue your life coverage benefits, you will receive a notice after your group life benefits end which includes coverage amounts and eligibility dates.

If you wish to increase your coverage amount or add spouse or child coverage, the non-underwritten policy available through the Conversion process may not meet your needs. An individually underwritten policy may be more cost-effective and provide additional benefits, such as the ability to elect waiver of premium, accidental death benefit and/or a children's term rider, that are not available with a Conversion policy. You may apply for a medically underwritten life insurance policy simultaneously with your application for the Conversion policy. Underwritten policies are subject to underwriting requirements, so you may have to provide medical information. If you apply for both the Conversion policy and an underwritten policy and are approved for the underwritten policy, then you can choose the underwritten policy. If you are not approved for the underwritten policy, then the Conversion policy will be issued and become effective on the 32nd day after your group coverage ends.

Portability or porting is an optional feature chosen by your former employer. It allows you and your dependents to continue their Group Term Life and Accidental Death and Dismemberment (AD&D) insurance under a separate policy. Once enrolled, MetLife will mail you a portable certificate and your initial bill. Instructions on how to set up the monthly Electronic Funds Transfer (EFT) can be found on the back of your bill. If you apply for Portability, preferred portable rates are available for you and your spouse or domestic partner with Evidence of Insurability (EOI). Portable coverage is effective on the 32nd day after group coverage ends.

What if I still have questions?

Helping you make the best decision for you and your family's needs is important to us.

To speak with a MetLife representative who can answer your questions about Portability, call: **1-888-252-3607**.

We want to help you understand conversion and other options available to you. We have arranged for specially-trained third party financial professionals to help explain your options. If you choose, since MetLife cannot provide you with individual guidance, if you have any questions, you can arrange a meeting with a specially-trained third party financial professional by calling **1-877-275-6387** Monday-Friday 9:00 a.m. to 6:00 p.m. (ET).

Metropolitan Life Insurance Company, 100 Park Avenue | New York, NY 10066
ConversionApplicationForm (Rev. 04/14) (A) © 2015 MetLife Insurance and Services, LLC



Understanding your options

Portability and Conversion



Navigating life together

Step 4: Mail completed letter and copy of the brochure to employee

***If the employee is interested in either option, complete the employer portions of the conversion and portability application before providing to the employee.**

***Employees may call Transition Solutions (877) 275-6387, to discuss both options after the portability application has been completed and submitted to MetLife and the employer has completed the conversion application and the employee has the application in hand before calling MetLife.**

*** The employee has 31 days after the termination of benefits to covert/port their life insurance.**

Transaction Complete