

Benefits Administration User Guide

For Insurance Coordinators

Health Insurance and Optional Insurance

Personnel Cabinet
Department of Employee Insurance



Updated March 31, 2023

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

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

Please use the following matrix for processing:

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"/> Health Benefit Enrollment Reporting	<input type="checkbox"/> Begin/End Leave Without Pay
<input type="checkbox"/> Plan Change History Report	<input type="checkbox"/> Dependent Demographic Data Changes
<input type="checkbox"/> Insurance Plan Cost Report	<input type="checkbox"/> All Reinstatement in Employment
<input type="checkbox"/> Life Conversion and Portability Letter(s)	<input type="checkbox"/> Statement of Health (SOH) – OIB only
<input type="checkbox"/> Smoker Status Report	<input type="checkbox"/> Leave Without Pay (LWOP) w/premium-OIB only
<input type="checkbox"/> Health Post Tax Participant's Report	<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) should be uploaded using the online upload tool and all Optional Insurance Branch (OIB) applications/documentation should be mailed.

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

Department of Employee Insurance
Enrollment Information Branch Manager
502-564-1085
501 High Street, 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.

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, webinar and in person training conducted by the Department of Employee Insurance (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. Please contact DEI at 888-581-8834 to enroll.
 - b. Open Enrollment Training – gives you up to date benefit related information for the upcoming plan year.
 - c. Yearly iStep Training that includes HIPAA – similar to the HIPAA training you took to gain access to KHRIS and is required yearly to maintain KHRIS access.
 - d. Various webinars from DEI and our vendors. Training information is located on the [“Resources for Insurance Coordinators, HRG’s and Billing Liaisons”](#) page.

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

LOGGING INTO KHRIS

Log into [KHRIS](#).

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

Welcome [Need Help?](#)

KHRIS
Connecting the Commonwealth

KHRIS User ID *
Password *

[Log On](#)

[Forgot KHRIS User ID?](#)
[Forgot/Reset Password or New User?](#)

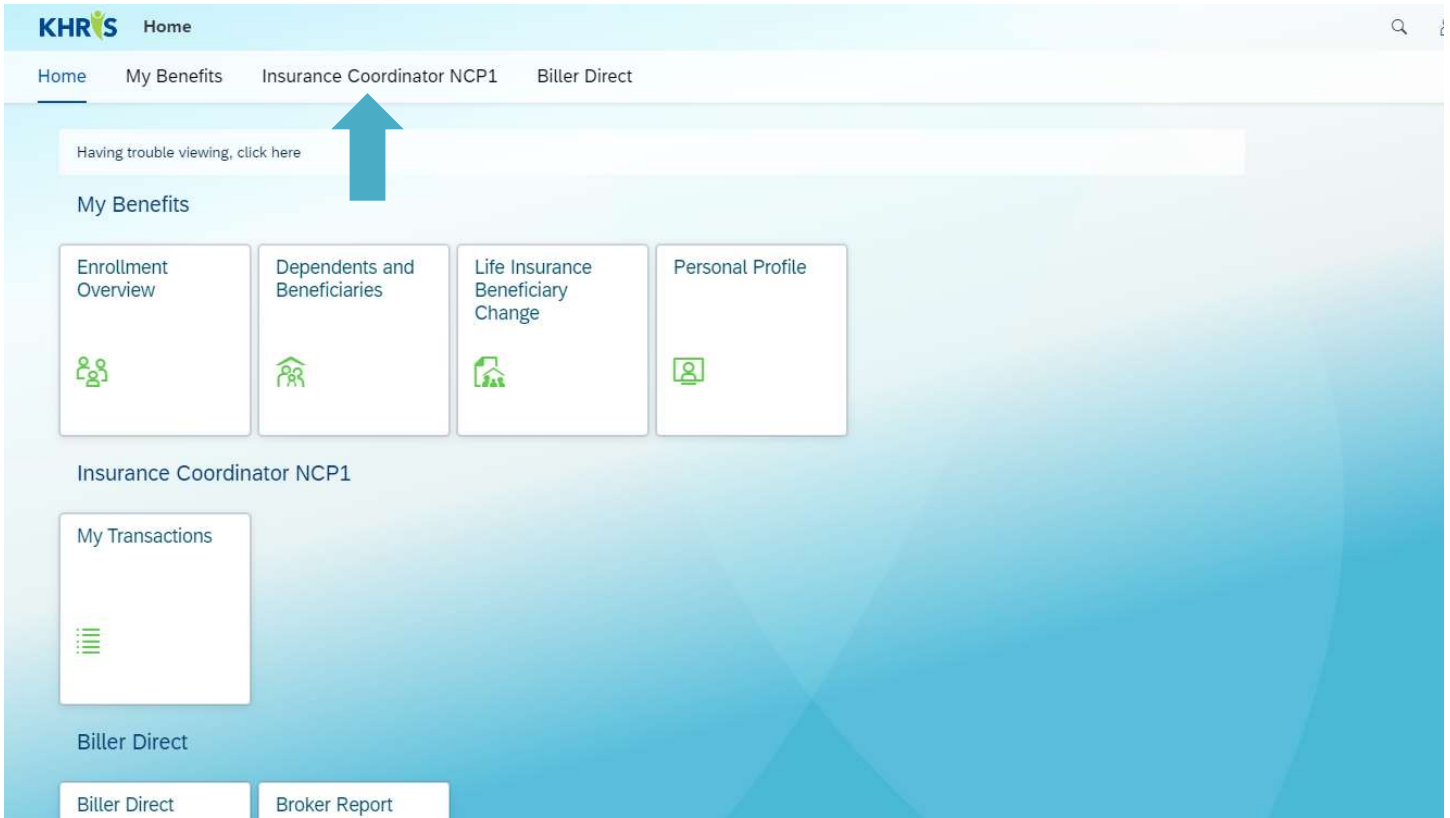
[Browser Requirements](#)

TEAM KENTUCKY
PERSONNEL CABINET

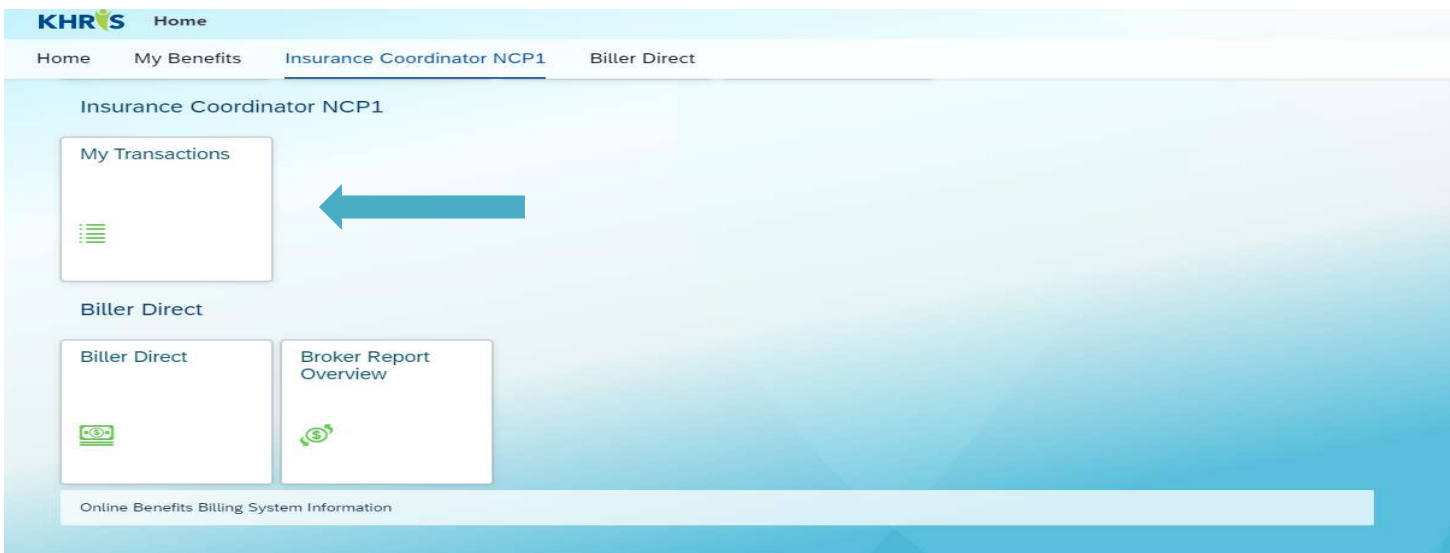
You are accessing a government computer system which is the property of the Commonwealth of Kentucky. It is for authorized use only regardless of time of day, location or method of access. Users (authorized or unauthorized) have no explicit or implicit expectation of privacy. Any or all uses of this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

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



Then select My Transactions.



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

KHRIS My Transactions ▾

Related Links

Search

- 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.

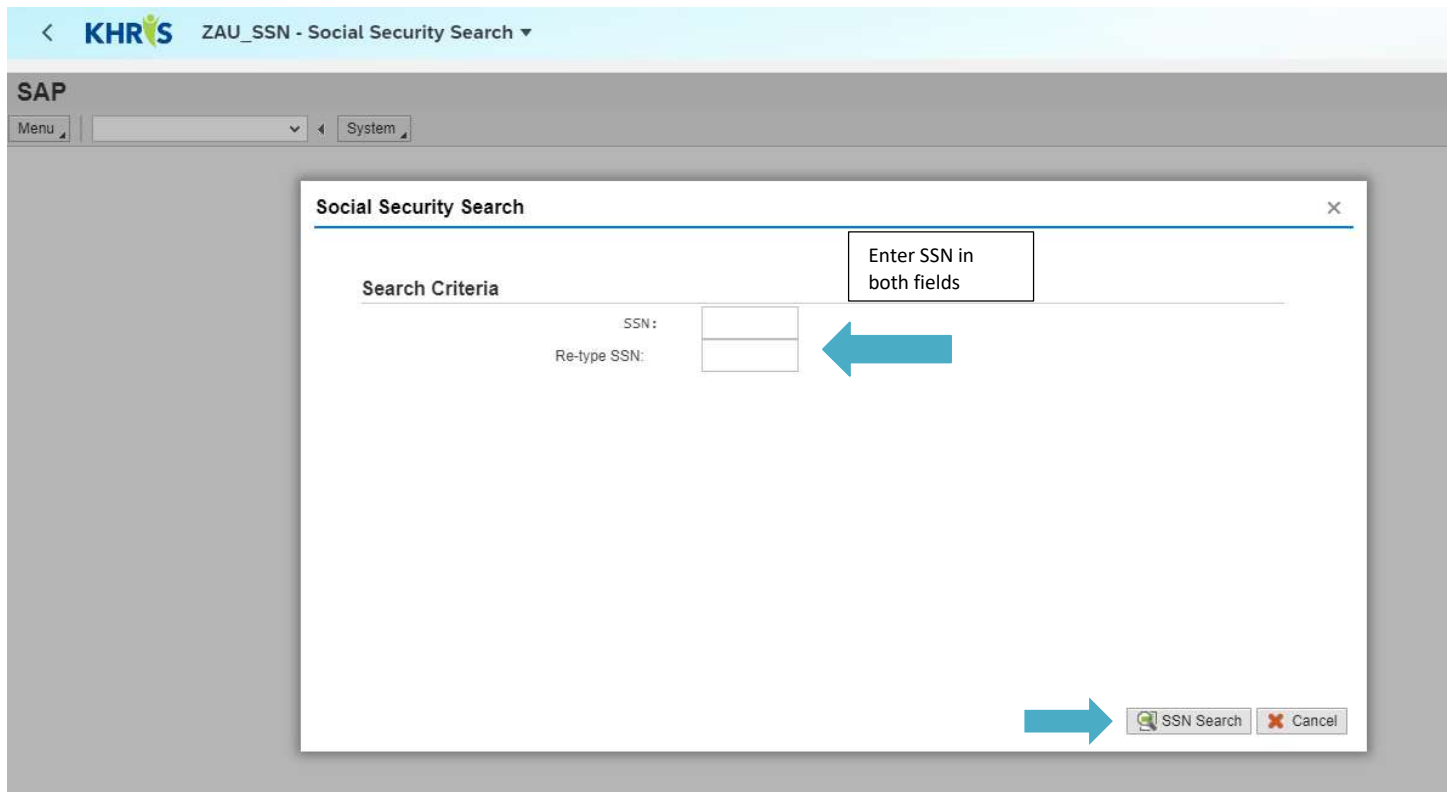
Health Insurance, FSA or HRA Billing concerns or questions: Contact the Financial Management Branch at (502) 564-9097.
Business Hours are 7:30 am to 4:30 pm EST, Monday through Friday.

ENROLLING A NEW HIRE

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

Step 1: Social Security Search

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

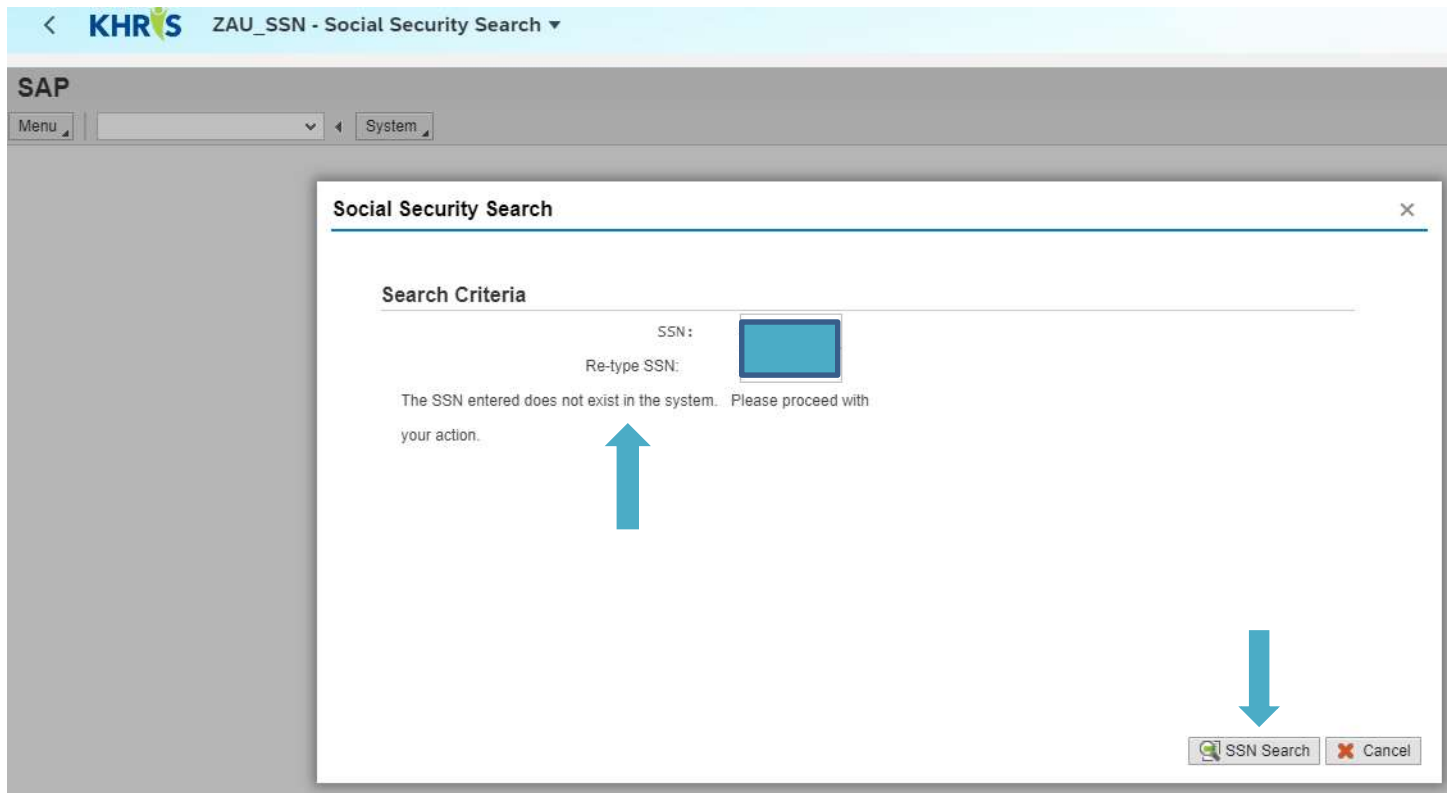


The screenshot shows the SAP interface for the 'Social Security Search' transaction. The dialog box is titled 'Social Security Search' and contains a 'Search Criteria' section. This section has two input fields: 'SSN:' and 'Re-type SSN:'. A blue arrow points to the 'Re-type SSN:' field, and a callout box above it says 'Enter SSN in both fields'. At the bottom right of the dialog, there are two buttons: 'SSN Search' and 'Cancel'. A blue arrow points to the 'SSN Search' button. The background shows the SAP menu bar with 'ZAU_SSN - Social Security Search' selected.

Step 1 continued: SSN Search

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

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



The screenshot shows the SAP interface for the 'Social Security Search' dialog box. The title bar reads 'Social Security Search' with a close button (X) on the right. Below the title bar, the 'Search Criteria' section contains two input fields: 'SSN:' and 'Re-type SSN:'. The 'Re-type 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 dialog box, there are two buttons: 'SSN Search' (with a magnifying glass icon) and 'Cancel' (with a red X icon). A blue arrow points downwards from the top of 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. In the “Dependent SSN” field, enter the new employee’s SSN, then select “Execute”.

Dependent search by SSN

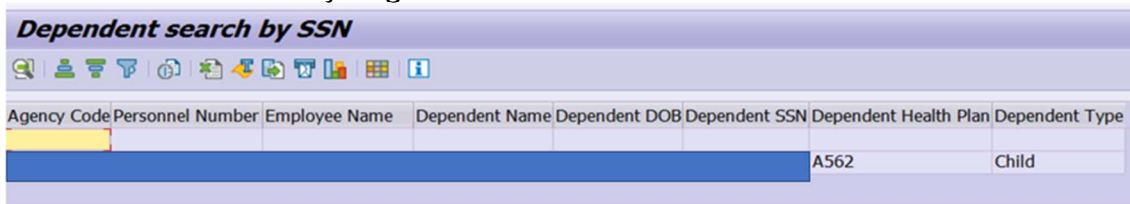
Menu | [Dropdown] | Save as Variant... | Back | Exit | Cancel | System | Execute

Additional Selection

Reporting Period	03/16/2023	to	03/16/2023	[Icon]
Dependent SSN	[Input]			[Icon]
First name	[Input]			[Icon]
Last name	[Input]			[Icon]
Date of birth	[Input]			[Icon]

Step 2 continued: Dependent SSN Search

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



The screenshot shows a web application window titled "Dependent search by SSN". Below the title bar is a toolbar with various icons. A table with the following columns is displayed: Agency Code, Personnel Number, Employee Name, Dependent Name, Dependent DOB, Dependent SSN, Dependent Health Plan, and Dependent Type. The table contains one row with the following data: Agency Code (blank), Personnel Number (blank), Employee Name (blank), Dependent Name (blank), Dependent DOB (blank), Dependent SSN (A562), Dependent Health Plan (blank), and Dependent Type (Child).

Agency Code	Personnel Number	Employee Name	Dependent Name	Dependent DOB	Dependent SSN	Dependent Health Plan	Dependent Type
					A562		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.

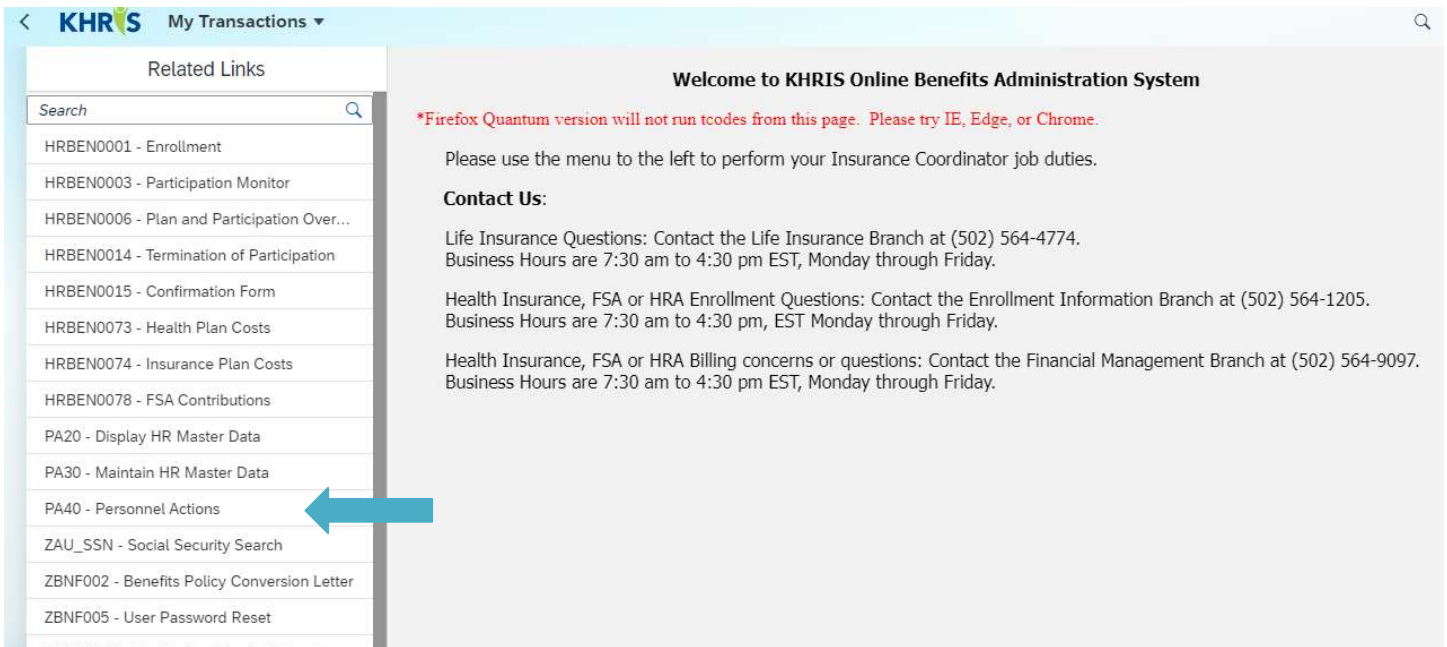


The screenshot shows a web application window titled "ZBNR013 - Dependent Search By SSN". Below the title bar is a toolbar with a "Menu" dropdown, a search input field, and buttons for "Back", "Exit", "Cancel", and "System". The main content area displays the message "No Records found for selection criteria". A large blue arrow points upwards from the bottom of the page towards the message.

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

Step 3: Personnel Actions

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



Step 3 continued: Personnel Actions

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

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

Click "Execute".

Personnel Actions

Menu [dropdown] [Back] [Exit] [Cancel] [System] [Execute] [SSN Search]

Find by

- Person
- Collective search help

Personnel no. [input field] [search icon]

From 01/31/2023

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 continued: Personnel Actions

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

In the "Position" field enter 99999999 (always)

In the "Personnel area" field enter 0004 -Benefits Only

In the "Employee group" field enter L -External BN

In the "Employee subgroup" enter 41 -24 Non-paid

Click "Save"

The screenshot shows the SAP 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 0000 Actions' with a blue arrow pointing to the 'Save' button. The 'Save' button is highlighted with a blue arrow. Below the title bar, there are several buttons: 'Menu', 'Save', 'Back', 'Exit', 'Cancel', 'System', 'Previous record', 'Next record', 'Overview', and 'Change info group'. The 'Pers.No.' field contains '3999'. The 'Start' field shows a date range from '01/31/2023' to '12/31/9999'. The 'Personnel action' section includes 'Action Type' set to 'BN - Begin Participation', 'Reason for Action' set to '01 New Employee' (with a blue arrow pointing to it), and 'Reference Pers. Nos.' empty. The 'Status' section includes 'Customer-specific', 'Employment' set to 'Active', and 'Special payment'. The 'Organizational assignment' section includes 'Position' set to '99999999' (with a blue arrow pointing to it), 'Personnel area' set to '0004 Benefits Only' (with a blue arrow pointing to it), 'Employee group' set to 'L External - BN' (with a blue arrow pointing to it), and 'Employee subgroup' set to '41 24 Non-Paid' (with a blue arrow pointing to it). At the bottom, there is a 'Save your entries' button with a green checkmark and the SAP logo.

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.

The screenshot shows the KHRIS PA40 - Personnel Actions form. The title is "Create 0001 Organizational assignment". The form includes a navigation bar with "Menu", "Save", "Back", "Exit", "Cancel", "System", "Previous record", "Next record", "Overview", and "Org Structure". The "Personnel No" field is set to "3999" and the "Status" is "Active". The "Start" date is "01/31/2023" and the "End" date is "12/31/9999". The "Enterprise structure" section includes "CoCode" (COMK - Commonwealth of Kentucky), "Pers.area" (0004 - Benefits Only), "Subarea" (2001), "Cost Ctr" (9200100147), and "Bus. Area". The "Personnel structure" section includes "EE group" (L - External - BN), "Payr.area" (BN - Non-COMK Paid), "EE subgroup" (41 - 24 Non-Paid), and "Contract". The "Organizational plan" section includes "Position" (99999999) and "Org. Unit" (10006048). Blue arrows point to the "Save" button, "Subarea" field, "Cost Ctr" field, "Position" field, and "Org. Unit" field.

Step 3 continued: Personnel Action

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

Click "Save"

Create 0002 Personal data

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

Personnel No: 3999
Position: 99999999 Integration: default position
Status: Active
Start: 01/31/2023 To: 12/31/9999

Name

Last name: Mouse
First name: Minnie
Middle name: L
Suffix: [Dropdown]
Name: [Text Field]
Pref 1s Nm: [Text Field]

HR data

SSN: [Text Field]
Date of Birth: 04211989
Language: English
Marital Status: Marr.

Gender

Female Male Undeclared

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”

The screenshot shows the SAP PA40 - Personnel Actions form for creating 0006 addresses. The form is titled "Create 0006 Addresses" and includes a navigation bar with buttons for "Save", "Back", "Exit", "Cancel", "System", "Previous record", "Next record", "Overview", and "Foreign address". The "Start" date is set to 01/31/2023 and the "to" date is 12/31/9999. The "Address" section contains the following fields: Address type (Permanent residence), Care Of, Address line 1 (105 Holly Lane), Address line 2, City (Frankfort), State/zip code (KY Kentucky 40601), Country Key (USA), and Telephone Number (502 330-8989). The "Communications" section has a table with columns for Type, Number, and Exte. The "Additional fields" section includes County Code (037 Franklin). A "Save your entries" button is at the bottom left, and the SAP logo is at the bottom right. Blue arrows point to the "Save" button, the "Address line 1" field, the "City" field, the "zip code" field, the "Telephone Number" field, and the "County Code" field.

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

Step 3 continued: Personnel Actions

In the "System ID" field, enter Employee's email address.

Click "Save"

The screenshot shows the SAP PA40 - Personnel Actions interface. The main heading is "Create 0105 Communication". Below this, there are several input fields and buttons. The "Personnel No" field contains "3999". The "Name" field contains "Mouse, Minnie L". The "Position" field contains "99999999". The "Status" field is set to "Active". The "Start" field contains "01/31/2023". The "System ID" field contains "MINNIE.MOUSE89@YAHOO.COM". There are buttons for "Save", "Back", "Exit", "Cancel", "System", "Previous record", "Next record", and "Overview". Blue arrows point to the "Name" field, the "Next record" button, and the "System ID" field.

Personnel No	3999	Name	Mouse, Minnie L
Position	99999999	Integration: default position	
Status	Active		
Start	01/31/2023	12/31/9999	

0105 Communication	
Type	0010 E-mail
System ID	MINNIE.MOUSE89@YAHOO.COM

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"

KHRIS PA40 - Personnel Actions

Copy 0008 Basic Pay

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

Personnel No: 3999 Name: Mouse, Minnie L
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: 01/31/2023 12/31/9999

Subtype: 0 Basic contract

Pay scale

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

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

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: 3999 Name: Mouse, Minnie L

Position: 99999999 Integration: default position

Status: Active

Start: 01/31/2023 to 12/31/9999

Date type	Date	Date type	Date
Z1 Original Hire Date	01312023	Z2 Current Hire Date	01312023
Z3 Increment Date		Z5 Benefits Elig. Date	

At least one infotype was skipped (authorization)

SAP

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

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

Step 3 continued: Personnel Actions

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

Click "Save"

The screenshot shows the SAP PA40 - Personnel Actions interface. At the top, there is a navigation bar with a back arrow, the KHR logo, and the text 'PA40 - Personnel Actions'. Below this is a header section titled 'Create 0171 General Benefits Information'. A blue arrow points to the 'Save' button in the top navigation bar. The main form contains the following data:

Personnel No	3999 401-22-9911	Name	Mouse , Minnie L
Payroll area	BN	Org.unit	Dayton Independent
Start	01/31/2023		12/31/9999

Below the main form is a section titled '0171 General Benefits Information' with the following data:

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

At the bottom left, there is a section titled 'Additional fields' with a green checkmark and the text 'Record created'. The SAP logo is visible in the bottom right corner.

Step 3 continued: Personnel Actions

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

Click “Save”

PA40 - Personnel Actions

Create 0378 Adjustment Reasons

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

Personnel No: 3999 401-22-9911 | Name: Mouse, Minnie L

Payroll area: BN | Org.unit: Dayton Independent

Start: 01/31/2023 to 03/07/2023

Adjustment Reason Data

Benefit area: Comm of KY

Adjustment reason: New Participant

Record created

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

Personnel Actions

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

Find by: Person | Collective search help

Personnel no. 3999
 Name Mouse, Minnie L. Status Active
 EE group L External - BN Personnel area 0004 Benefits Only
 EE subgroup 41 24 Non-Paid Pers. subarea 2001 Board of Ed.
 From 01/31/2023

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			

Record created

SAP

Step 4: Creating Dependent and Beneficiary records

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

Don't hit the < or the home button. Once you complete the PA40 action, you must NOT click on the < and not the Home button. If you click on either it locks the PERNR up. Instead, you must type in the 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 displays the SAP PA40 - Personnel Actions interface. The main window is titled 'Maintain HR Master Data' and shows the 'Benefits' tab selected. The 'Personnel no.' field contains '3999'. The 'Name' field contains 'Mouse, Minnie L'. The 'Status' is 'Active'. The 'EE group' is 'L External - BN' and the 'EE subgroup' is '41 24 Non-Paid'. The 'Personnel area' is '0004' and the 'Pers. subarea' is '2001'. The 'Benefits' tab is active, and the '0021 Family Member/Dependents' infotype is selected in the list. The 'Period' section shows options for 'Period', 'Today', 'All', 'From curr. date', 'To Current Date', 'Current Period', 'Curr. week', 'Current month', 'Last week', and 'Current Year'. The 'Direct selection' section has an 'Infotype' field and a 'STy' field. The SAP logo is visible at the bottom right.

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 ✓

Maintain HR Master Data

PA40 - Personnel Actions

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

Restrictions

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

Navigation icons: Home, Checkmark, Print, Close

Step 4 continued: Creating Dependent and Beneficiary records

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

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

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

Click “Save”

The screenshot shows the SAP PA40 - Personnel Actions screen for creating a dependent record. The main header is "Create 0021 Family Member/Dependents". The "Save" button is highlighted with a blue arrow. The "Personal data" section includes the following fields:

Last name	Mouse	Initials	
First name	Mickey		
Title			
Gender	<input checked="" type="radio"/> Male		
Birth date	09/30/1987	Ref.Pers.No.	
SSN		Telephone number	
Street			
Addr Line 2			
City/State			
Zip/country			

At the bottom left, there is a "Save your entries" button with a green checkmark. At the bottom right, there is a "Smoker" checkbox and the SAP logo.

Repeat the steps above to create additional dependent records.

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

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

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

Step 4 continued: Creating an External Organization as Beneficiary record

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

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

Bring up Transaction PA 30 from the menu on the left

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

Hit enter on your keyboard

Click on the "Benefits" tab

Select Infotype "0219 External Organizations"

Click "Create"

The screenshot displays the SAP PA40 - Personnel Actions interface. The main window is titled "Maintain HR Master Data". At the top, there is a navigation bar with buttons: Menu, Back, Exit, Cancel, System, Create, Change, Display, Copy, Delimit, Delete, and Overview. The "Create" button is highlighted with a blue arrow. Below the navigation bar, the employee's details are shown: Personnel no. 3999, Name Mouse, Minnie L, Status Active, EE group L External - BN, Personnel area 0004 Benefits Only, EE subgroup 41 24 Non-Paid, Pers. subarea 2001 Board of Ed. The "Benefits" tab is selected, and the "Infotype Text" list is visible. The "0219 External Organizations" infotype is highlighted with a blue arrow. The "Direct selection" section shows the "Infotype" field set to "0021 Family Member/Dependents" and the "STY" field empty. A "Record created" message is visible at the bottom left, and the SAP logo is at the bottom right.

Step 4 continued: Creating an External Organization as Beneficiary record

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

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

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

Click “Save”

The screenshot shows the SAP PA40 - Personnel Actions interface for creating an external organization. The form is titled "Create 0219 External Organizations". The top navigation bar includes "KHRIS" and "PA40 - Personnel Actions". The form is divided into several sections:

- Personnel Information:** Personnel No. 3999, Name Mouse, Minnie L, EE group L External - BN, Personnel area 0004 Benefits Only, EE subgroup 41 24 Non-Paid, Pers. subarea 2001 Board of Ed., Start 01/31/2023 to 12/31/9999.
- External organization:** Organization type Charity organization, Organization Name Saint Jude, Tax number 119783443, Charitable org. checkbox.
- Organization's address:** Street and House No. 326 Brave Street, 2nd Address Line, City Frankfort, Region KY Kentucky, Postal Code 40601, Country Key USA, Telephone Number 502 319-0876, Fax number.

Blue arrows point to the following fields: Organization type, Organization Name, Tax number, Street and House No., City, Postal Code, and Country Key.

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

Step 5: Adding Tobacco Use Status

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

Click “Benefits tab”

Select Infotype “0376 Benefits Medical information”

Click “Create”

The screenshot shows the SAP HR Master Data maintenance interface. At the top, the breadcrumb is "KHR S PA40 - Personnel Actions". The main title is "Maintain HR Master Data". A toolbar contains buttons: Menu, Back, Exit, Cancel, System, **Create**, Change, Display, Copy, Delimit, Delete, and Overview. A blue arrow points to the "Create" button.

Personnel no. 3999
Name: Mouse, Minnie L, Status: Active
EE group: L External - BN, Personnel area: 0004, Benefits Only
EE subgroup: 41 24 Non-Paid, Pers. subarea: 2001, Board of Ed.

Navigation tabs: Basic personal data, Payroll, **Benefits**, Time, Taxes, Planning Data

Infotype Text	Statu
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	✓

A blue arrow points to the "0376 Benefits Medical Information" row.

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

Direct selection
Infotype: 0219 External Organizations STy: []

Record created (with green checkmark icon) and SAP logo are visible at the bottom.

Step 5 continued: Adding Tobacco Use Status

Change “Start Date” to hire date

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

Click “Save”

The screenshot shows the SAP KHRIS PA40 - Personnel Actions screen for creating medical information. The screen displays the following fields and values:

Personnel No	3999	401-22-9911	Name	Mouse, Minnie L
Payroll area	BN	Org. unit	Dayton Independent	
Start	01/31/2023		12/31/9999	

The "Tobacco use" checkbox is checked. Below this, there are two sections of text:

- Prior to 2014: Smoker status for EE only, for past 2 mn
- 2014: Tobacco use for EE and/or covered Spouse/Deps, for past 6 mn

At the bottom, there is a checkbox for "LivingWell Non-Fulfilled Previous Year" which is unchecked. The SAP logo is visible in the bottom right corner.

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

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

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

Step 6: HRBEN0001-Enrollment

Bring up Transaction HRBEN0001 – Enrollment

Don't hit the < or the home button. Once you complete the PA40 action, you must NOT click on the < and not the Home button. If you click on either it locks the PERNR up. Instead, you must type in the 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 PA 40 step). If you did not write it down, you can enter the employee's SSN in the "ID Number" field.

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

Click Green Check Mark

Click "Select"

Highlight New Participant (may already be highlighted)

Click "Get Offer"

The screenshot shows the SAP HRBEN0001 Enrollment screen. The top navigation bar includes the KHR logo and the text "PA40 - Personnel Actions". The main header is "Enrollment". Below this, there are several sections:

- Direct selection**: Contains a "Personnel no." field with a search icon and a "Select" button. A blue arrow points to the search icon.
- ID number**: A text input field with a blue arrow pointing to it.
- Enroll**: Contains a "Name" field with the value "Mouse , Minnie L", a date field with "02/14/2023", and an "Overview" button. A blue arrow points to the calendar icon next to the date field.
- Offer selection**: Contains buttons for "Get offer", "Print form", "General Notice", and "Error list". Below these is a table of possible offers:

Possible offers	Enrollment period
New Participant	01/31/2023 - 03/07/2023
Life Beneficiary Chg	01/01/1800 - 12/31/9999

Below the table, there is an "Offer" section. At the bottom left, there is a list of personnel numbers and names, with "3999 Mouse , Minnie L" highlighted. A blue arrow points to this entry. The SAP logo is visible in the bottom right corner.

Note: HRBEN0001 uses the signature date entered to validate that the employee signed his/her application within the allotted 35-day period. If the signature date is outside of the 35-day period, the HRBEN0001 transaction will not allow you to enroll the employee for benefits. If application is signed outside of the 35 days of hire, please submit an exception form along with an enrollment/change form to the Member Services 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. Please call EIB for assistance at 888-581-8834, option 4.

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

The screenshot displays the SAP HRBEN0001 Enrollment interface. The main window is titled "Enrollment" and includes a navigation bar with "Menu", "Back", "Exit", "Cancel", and "System". The left sidebar shows "Direct selection" and "Selection set" tabs, with input fields for "Personnel no." and "ID number", and a "Select" button. Below this is a list of personnel with "3999 Mouse, Minnie L." selected. The main content area is divided into three sections: "Enroll", "Offer selection", and "New Participant".

Enroll Section: Shows "Name: Mouse, Minnie L.", "on: 02/14/2023", and an "Overview" button.

Offer selection Section: Includes buttons for "Get offer", "Print form", "General Notice", and "Error list". A table lists possible offers:

Possible offers	Enrollment period
New Participant	01/31/2023 - 03/07/2023
Life Beneficiary Chg	01/01/1800 - 12/31/9999

New Participant Section: Includes buttons for "Enroll", "Costs", "Undo selection", and "Error List". A table lists available plans:

Plan	Sta...	Validity period	Acti...
Medical			
LivingWell CDHP		03/01/2023 - 12/31/9999	
LivingWell PPO		03/01/2023 - 12/31/9999	
LivingWell Basic CDHP		03/01/2023 - 12/31/9999	
Default LW Basic CDHP No HRA	●	03/01/2023 - 12/31/9999	
Waiver HRA - with \$		03/01/2023 - 12/31/9999	
Waiver Limited Purpose HRA		03/01/2023 - 12/31/9999	
Default Waiver – no VISA/\$\$		03/01/2023 - 12/31/9999	
Dental			
Anthem Dental Bronze		03/01/2023 - 12/31/9999	
Anthem Dental Silver		03/01/2023 - 12/31/9999	
Anthem Dental Gold		03/01/2023 - 12/31/9999	
Vision			
Anthem Vision Bronze		03/01/2023 - 12/31/9999	

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

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 shows the SAP Enrollment interface. The main window is titled "Enrollment" and displays the "New Participant" section for Minnie L. Mouse. A "Maintain Health Plan" dialog box is open, showing the following details:

- Pers.No.: 3999 Mouse, Minnie L
- Plan: LivingWell CDHP
- Start: 03/01/2023 - 12/31/9999
- Option: Option (selected), Dependents
- Plan options: Health Plan Opt: KEHP, Dependent Cover: Couple
- Costs USD Semi-monthly: Employee: 209.67, Employer: 594.45, Deductions Pre- (checked)

The "Accept" button at the bottom right of the dialog box is highlighted with a blue arrow.

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 by health insurance

Click “Accept” when done

The screenshot shows the SAP Enrollment interface. A 'Maintain Health Plan' dialog box is open, displaying the following information:

- Pers.No.: 3999 Mouse , Minnie L
- Plan: LivingWell CDHP
- Start: 03/01/2023 - 12/31/9999
- Option: Dependents

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

At the bottom right of the dialog, there is an 'Accept' button with a blue arrow pointing to it, and a close button (X).

Step 6 continued: HRBEN0001-Enrollment

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

Click on Waiver HRA – with \$.

The screenshot displays the SAP Enrollment interface. On the left, the 'Direct selection' tab is active, showing fields for 'Personnel no.' and 'ID number', and a 'Select' button. Below these is a list of personnel with '3999 Mouse, Minnie L' selected. The main area is titled 'Enroll' and shows the member's name 'Mouse, Minnie L' and the date '02/14/2023'. The 'Offer selection' section includes buttons for 'Get offer', 'Print form', 'General Notice', and 'Error list', and a table of possible offers:

Possible offers	Enrollment period
New Participant	01/31/2023 - 03/07/2023
Life Beneficiary Chg	01/01/1800 - 12/31/9999

The 'New Participant' section is expanded, showing a list of plans under 'Medical', 'Dental', and 'Vision' categories. A blue arrow points to the 'Waiver HRA - with \$' option in the Medical list:

Plan	Sta...	Validity period	Acti...
LivingWell CDHP		03/01/2023 - 12/31/9999	
LivingWell PPO		03/01/2023 - 12/31/9999	
LivingWell Basic CDHP		03/01/2023 - 12/31/9999	
Default LW Basic CDHP No HRA		03/01/2023 - 12/31/9999	
Waiver HRA - with \$	<input checked="" type="checkbox"/>	03/01/2023 - 12/31/9999	
Waiver Limited Purpose HRA		03/01/2023 - 12/31/9999	
Default Waiver - no VISA/\$\$		03/01/2023 - 12/31/9999	
Dental			
Anthem Dental Bronze		03/01/2023 - 12/31/9999	
Anthem Dental Silver		03/01/2023 - 12/31/9999	
Anthem Dental Gold		03/01/2023 - 12/31/9999	
Vision			
Anthem Vision Bronze		03/01/2023 - 12/31/9999	

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

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

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

Enrollment

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

Direct selection

Personnel no. []

ID number []

[Select]

[Person] [Print] [Refresh] [Home] [Close]

* Pers.No. Name

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

Enroll

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

Offer selection

[Get offer] [Print form]

Possible offers

- New Participant
- Life Beneficiary Chg

New Participant

[Enroll] [Costs]

Plan

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

Maintain Health Plan

Pers.No. 510634 Mouse, Mickey

Plan Waiver HRA - with \$

Start 05/01/2020 - 12/31/9999

Stop participation in period

Option Dependents

Plan options

Health Plan Opt Employer Funded \$175 Monthly

Dependent Cover General Purpose HRA

Or Other Cover Covered with my spouse's employer (does not include TRICARE)

Costs USD Semi-monthly

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

[Accept] [X]



Step 6 continued: HRBEN0001-Enrollment

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

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

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

Click “Accept” when done

The screenshot shows the SAP Enrollment interface. On the left, the 'Enroll' section for 'Mouse, Minnie L' is visible. The 'Offer selection' section shows 'New Participant' as the selected offer. The 'New Participant' section shows the 'Medical' plan category with 'Waiver HRA - with \$' selected. A blue arrow points from this selection to the 'Maintain Health Plan' dialog box.

The 'Maintain Health Plan' dialog box displays the following information:

- Pers.No.: 3999 Mouse, Minnie L
- Plan: Waiver HRA - with \$
- Start: 03/01/2023 - 12/31/9999
- Stop participation period
- Option: Dependents

The dialog box contains a table of dependents:

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

A blue arrow points from the 'Accept' button in the dialog box to the 'Accept' button in the bottom right corner of the dialog box.

Step 6 continued: HRBEN0001-Enrollment

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

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

NOTE: If you do not see any dental or vision plans, an error has occurred somewhere in one of the steps. Please call OIB for assistance at 888-581-8834, option 5.

The screenshot shows the SAP Enrollment system interface. The main header is "Enrollment" with a menu and navigation buttons (Back, Exit, Cancel, System). Below the header, there are two tabs: "Direct selection" and "Selection set".

Enroll Section: Shows the member's name "Mouse, Minnie L" and the enrollment date "02/14/2023". There is an "Overview" button.

Offer selection Section: Contains buttons for "Get offer", "Print form", "General Notice", and "Error list". Below these are two tables:

Possible offers	Enrollment period
New Participant	01/31/2023 - 03/07/2023
Life Beneficiary Chg	01/01/1800 - 12/31/9999

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

Plan	Sta...	Validity period	Acti...
Default Waiver – no VISA/\$\$		03/01/2023 - 12/31/9999	
Dental			
Anthem Dental Bronze		03/01/2023 - 12/31/9999	
Anthem Dental Silver		03/01/2023 - 12/31/9999	
Anthem Dental Gold		03/01/2023 - 12/31/9999	
Vision			
Anthem Vision Bronze		03/01/2023 - 12/31/9999	
Anthem Vision Silver		03/01/2023 - 12/31/9999	
Anthem Vision Gold		03/01/2023 - 12/31/9999	
Basic Life AD&D			
Basic Life and AD&D	■	03/01/2023 - 12/31/9999	
Optional Life			
Option 1, \$10K, age 30-39		03/01/2023 - 12/31/9999	
Option 2, \$25K, age 30-39		03/01/2023 - 12/31/9999	

Two blue arrows point to the "Anthem Dental Silver" and "Anthem Vision Silver" rows in the table.

The left sidebar shows the member's personnel number "3999" and name "Mouse, Minnie L".

The SAP logo is visible in the bottom right corner.

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 shows the SAP Enrollment interface. A modal window titled "Maintain Health Plan" is open, displaying the following information:

- Pers.No.:** 3999 Mouse, Minnie L
- Plan:** Anthem Dental Silver
- Start:** 03/01/2023 - 12/31/9999
- Stop participation in period
- Option** | Dependents
- Plan options:**
 - Health Plan Opt: KEHP
 - Dependent Cover: Couple
- Costs USD Monthly:**

Employee	40.62	<input checked="" type="checkbox"/> Deductions Pre-
Employer	0.00	
- Accept** | **X**

The background interface shows the "Enroll" section for Minnie L. Mouse, with the "New Participant" tab selected. Under "New Participant", the "Plan" section is expanded, and "Anthem Dental Silver" is selected. The "Costs" section shows two options: "Option 1, \$10K, age 30-39" and "Option 2, \$25K, age 30-39".

Step 6 continued: HRBEN0001-Enrollment

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

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

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

Click “Accept” when done

The screenshot displays the SAP Enrollment interface. The main window is titled "Enrollment" and shows the "Enroll" process for Minnie L. Mouse. A modal dialog box titled "Maintain Health Plan" is open, showing the "Dependents" tab. The dialog contains the following information:

- Pers.No.: 3999 Mouse , Minnie L
- Plan: Anthem Dental Silver
- Start: 03/01/2023 - 12/31/9999
- Option: Dependents

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

At the bottom right of the dialog, there is an "Accept" button with a green checkmark icon and a red "X" icon.

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)

The screenshot displays the SAP Enrollment interface for Minnie L. Mouse. The 'Enroll' section shows the member's name and enrollment date (02/14/2023). The 'Offer selection' table lists 'New Participant' and 'Life Beneficiary Chg' with their respective enrollment periods. The 'New Participant' section shows a list of life insurance plans, with three blue arrows pointing to the 'Basic Life AD&D', 'Optional Life', and 'Dependent Life' categories.

Possible offers	Enrollment period
New Participant	01/31/2023 - 03/07/2023
Life Beneficiary Chg	01/01/1800 - 12/31/9999

Plan	Sta...	Validity period	Acti...
Basic Life AD&D			
Basic Life and AD&D	■	03/01/2023 - 12/31/9999	
Optional Life			
Option 1, \$10K, age 30-39		03/01/2023 - 12/31/9999	
Option 2, \$25K, age 30-39		03/01/2023 - 12/31/9999	
Option 3, \$50K, age 30-39		03/01/2023 - 12/31/9999	
Option 4, \$100K, age 30-39		03/01/2023 - 12/31/9999	
Option 5, \$150K, age 30-39		03/01/2023 - 12/31/9999	
Dependent Life			
Dep Option 1, 10k/2.5k/5k		03/01/2023 - 12/31/9999	
Dep Option 2, 20k/2.5k/10k		03/01/2023 - 12/31/9999	
Dep Option 3, 50k/2.5k/10k		03/01/2023 - 12/31/9999	
Dep Option 4, 10k/0/0		03/01/2023 - 12/31/9999	
Dep Option 5, 20k/0/0		03/01/2023 - 12/31/9999	

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

Step 6 continued: HRBEN0001-Enrollment

Click the “Beneficiaries” tab

Assign percentages for the Primary beneficiaries

Place ✓ next to Contingent beneficiaries

Select “Accept”

The screenshot displays the SAP HRBEN0001-Enrollment interface. The main window shows the enrollment details for Minnie L. Mouse (Personnel No. 3999). The 'New Participant' section is active, showing the 'Basic Life and AD&D' plan selected. A 'Maintain Insurance Plan' dialog box is open, showing the 'Beneficiaries' tab. The dialog box contains a table of beneficiaries with the following data:

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

Blue arrows indicate the following actions: one arrow points to the 'Beneficiaries' tab in the dialog box, another points to the 'Con.' checkbox for Saint Jude, and a third points to the 'Accept' button at the bottom right of the dialog box.

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

Step 6 continued: HRBEN0001-Enrollment

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

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

Click “Accept”

The screenshot shows the SAP Enrollment system interface. The main window is titled "Enrollment" and displays the enrollment details for a new participant, Minnie L. Mouse, with personnel number 3999. The enrollment period is from 01/31/2023 to 03/07/2023. The "Offer selection" section shows the "New Participant" offer. The "New Participant" section lists various options, including "Healthcare FSA" and "Dep Care FSA". A dialog box titled "Maintain Flexible Spending Account" is open, showing the member's details and the selected plan. The "Target contribution period" is 01/01/2023-12/31/2023, and the "Contribution" amount is 700.00 USD. The "Accept" button is highlighted with a blue arrow.

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

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

Step 6 continued: HRBEN0001-Enrollment

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

The screenshot displays the SAP Enrollment interface for Minnie L. Mouse. The main screen is titled "Enrollment" and shows the participant's details, including Name, Date of Birth (02/14/2023), and an Overview button. The "Offer selection" section includes buttons for "Get offer", "Print form", "General Notice", and "Error list". A table lists possible offers with their enrollment periods:

Possible offers	Enrollment period
New Participant	01/31/2023 - 03/07/2023
Life Beneficiary Chg	01/01/1800 - 12/31/9999

The "New Participant" section shows a list of available plans. A blue arrow points to the "Child & Adult Daycare FSA" option under the "Dep Care FSA" category. The "Maintain Flexible Spending Account" dialog box is open, showing the following details:

- Pers.No.: 3999 Mouse, Minnie L.
- Plan: Child & Adult Daycare FSA
- Start: 03/01/2023 - 12/31/9999
- Target contribution period: 01/01/2023-12/31/2023
- Contribution: 1000 USD

A blue arrow points to the "1000 USD" input field, and another blue arrow points to the "Accept" button. The SAP logo is visible in the bottom right corner.

Step 6 continued: HRBEN0001-Enrollment

Select "Enroll"

Enrollment
Menu

Direct selection
Selection set

Personnel no.

ID number

▲ Pers.No. Name

Pers.No.	Name
3999	Mouse , Minnie L

Enroll

Name
on
 Overview

Offer selection

Get offer
 Print form
 General Notice
 Error list

Possible offers	Enrollment period
New Participant	01/31/2023 - 03/07/2023
Life Beneficiary Chg	01/01/1800 - 12/31/9999

New Participant

Enroll
 Costs
 Undo selection

 Error List

Plan	Sta...	Validity period	Acti...
Option 5, \$150K, age 30-39		03/01/2023 - 12/31/9999	
▼ Dependent Life			
Dep Option 1, 10k/2.5k/5k		03/01/2023 - 12/31/9999	
Dep Option 2, 20k/2.5k/10k		03/01/2023 - 12/31/9999	
Dep Option 3, 50k/2.5k/10k		03/01/2023 - 12/31/9999	
Dep Option 4, 10k/0/0		03/01/2023 - 12/31/9999	
Dep Option 5, 20k/0/0		03/01/2023 - 12/31/9999	
Dep Option 6, 50k/0/0		03/01/2023 - 12/31/9999	
Dep Option 7, 0/2.5k/5k		03/01/2023 - 12/31/9999	
Dep Option 8, 0/2.5k/10k		03/01/2023 - 12/31/9999	
▼ Healthcare FSA			
Healthcare FSA		03/01/2023 - 12/31/9999	✓
▼ Dep Care FSA			
Child & Adult Daycare FSA		03/01/2023 - 12/31/9999	✓

Step 6 continued: HRBEN0001-Enrollment

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

The screenshot displays the SAP Enrollment interface for Minnie L. Mouse. A modal window titled "Confirmation of Selected Actions" is open, showing a list of planned activities. A blue arrow points to the "Enroll" button at the bottom right of this window.

Confirmation of Selected Actions

Activity	Plan	From	To
Change	Waiver HRA - with \$	03/01/2023	12/31/9999
Create	Anthem Dental Silver	03/01/2023	12/31/9999
Change	Basic Life and AD&D	03/01/2023	12/31/9999
Create	Healthcare FSA	03/01/2023	12/31/9999
Create	Child & Adult Daycare FSA	03/01/2023	12/31/9999

Enroll **Cancel**

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

Step 6 continued: HRBEN0001-Enrollment

You will receive acknowledgement “Enrollment completed successfully”

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

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

The screenshot displays the SAP HRBEN0001 Enrollment interface. The main window is titled "Enrollment" and shows details for a participant named "Mouse, Minnie L." on 02/14/2023. The "Offer selection" section lists "New Participant" and "Life Beneficiary Chg". The "New Participant" section shows a list of plan options, including "Option 5, \$150K, age 30-39", "Dependent Life" (with options 1-8), "Healthcare FSA", and "Dep Care FSA" (with "Child & Adult Daycare FSA" selected). A modal window titled "Enrollment" is overlaid on the screen, displaying the message "Enrollment completed successfully" and two buttons: "Continue" and "Confirmation". A blue arrow points down to the "Confirmation" button.

Step 6 continued: HRBEN0001-Enrollment

Change “Output Device” to ZPDF

Click “Print Preview”

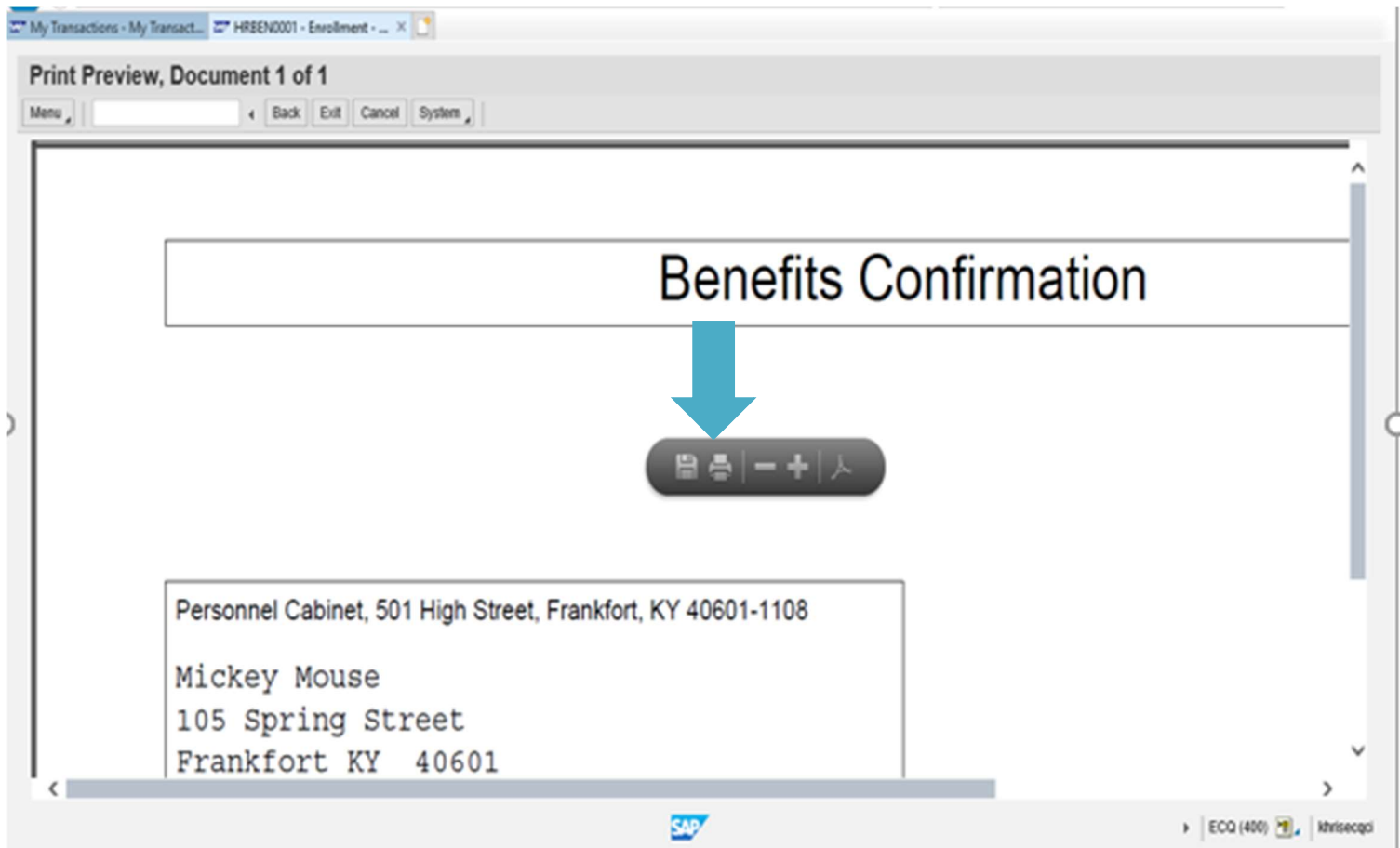
The screenshot shows the SAP Enrollment interface for Minnie L. Mouse. A 'Print:' dialog box is open, allowing configuration of print settings. The 'Output Device' is set to 'ZPDF'. The 'Spool Request' section includes fields for Name (PBF0RM LOCL BN_STUDENT04), Cover Page Text, and Authorization. The 'Spool Control' section has checkboxes for 'Print Immediately' and 'Delete After Output', and a 'Storage Mode' dropdown set to 'Print only'. The 'Number of Copies' is set to 1. The 'Cover Page Settings' section has 'SAP Cover Page' set to 'Do Not Print'. At the bottom of the dialog, there are buttons for 'Print', 'Print Preview', and 'Additional Options'. A blue arrow points to the 'Print Preview' button.

Plan	Healthcare FSA	Dep Care FSA
Option 5, \$150K, age 30-39	Healthcare FSA	Child & Adult Daycare FSA
Dependent Life		
Dep Option 1, 10k/2.5k/5k		
Dep Option 2, 20k/2.5k/10k		
Dep Option 3, 50k/2.5k/10k		
Dep Option 4, 10k/0/0		
Dep Option 5, 20k/0/0		
Dep Option 6, 50k/0/0		
Dep Option 7, 0/2.5k/5k		
Dep Option 8, 0/2.5k/10k		

NOTE: You must click “Print Preview”, and view the confirmation sheet, first. **You cannot print from this screen.**

Step 6 continued: HRBEN0001-Enrollment

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



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

Employee Demographic Updates/Corrections

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

Step 1: PA 30 Maintain HR Master Data

This step is to be completed

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

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

Select "Basic personal data" tab

Maintain HR Master Data

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

Personnel no. [Search]

Name Status

EE group Personnel area Benefits Only

EE subgroup Pers. subarea Board of Ed.

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

Infotype Text	Statu
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 Curr.week

All Current month

From curr.date Last week

To Current Date Last month

Current Period Current Year

Direct selection

Infotype STy

Step 1 continued: PA 30 Maintain HR Master Data

Select Infotype “0002 Personal Data” (highlight)

Click “Change” -if you are correcting an error

Click “Copy” -if you are updating information

Maintain HR Master Data

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

Personnel no. 3999
Name Mouse , Minnie L Status Active
EE group L External - BN Personnel area 0004 Benefits Only
EE subgroup 41 24 Non-Paid Pers. subarea 2001 Board of Ed.

Find by
Person
Collective search help

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

Infotype Text	Statu
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 Curr.week
 All Current month
 From curr.date Last week
 To Current Date Last month
 Current Period Current Year
Choose

Direct selection
Infotype [] STy []

SAP

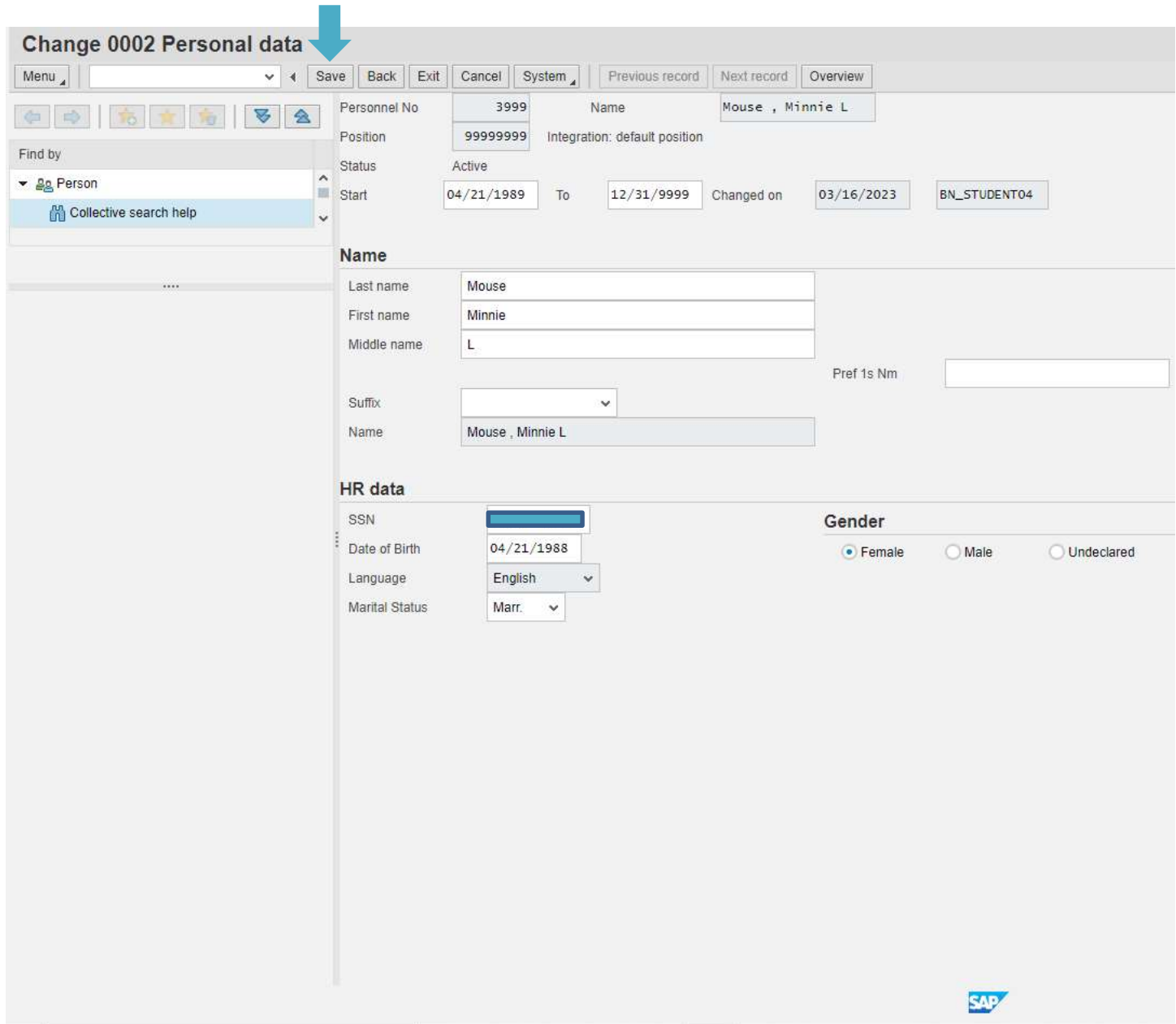
NOTE: Only chose “Change” if you are correcting data that has been wrong since the employee’s initial entry into KHRIS. If you are updating a name due to a name change, make sure the employee has a new social security card, marriage certificate or court order reflecting the name change. If you are correcting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

Step 1 continued: PA 30 Maintain HR Master Data

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

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

Click “Save”



Change 0002 Personal data

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

Personnel No: 3999 | Name: Mouse, Minnie L
Position: 99999999 | Integration: default position
Status: Active
Start: 04/21/1989 | To: 12/31/9999 | Changed on: 03/16/2023 | BN_STUDENT04

Name

Last name: Mouse
First name: Minnie
Middle name: L
Suffix:
Name: Mouse, Minnie L
Pref 1s Nm:
Gender: Female Male Undeclared

HR data

SSN:
Date of Birth: 04/21/1988
Language: English
Marital Status: Marr.

SAP

Step 1 continued: PA 30 Maintain HR Master Data

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

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

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

In this example we will use copy.

Highlight Addresses and then select copy.

The screenshot displays the SAP 'Maintain HR Master Data' interface. At the top, a menu bar includes buttons for 'Back', 'Exit', 'Cancel', 'System', 'Create', 'Change', 'Display', 'Copy', 'Delimit', 'Delete', and 'Overview'. Below this, the main data area shows details for Personnel no. 3999, Name 'Mouse, Minnie L', and Status 'Active'. The 'EE group' is 'L External - BN' and 'EE subgroup' is '41 24 Non-Paid'. The 'Personnel area' is '0004 Benefits Only' and 'Pers. subarea' is '2001 Board of Ed.'. A left sidebar contains a 'Find by' section with 'Person' selected and a 'Collective search help' button. The main content area has tabs for 'Basic personal data', 'Payroll', 'Benefits', 'Time', 'Taxes', and 'Planning Data'. The 'Basic personal data' tab is active, showing a list of Infotypes with their status. The '0006 Addresses' infotype is highlighted with a blue arrow. To the right of the list is a 'Period' selection area with radio buttons for 'Period', 'Today', 'All', 'From curr. date', 'Current Period', 'Curr. week', 'Current month', 'Last week', and 'Current Year'. Below this is a 'Direct selection' section with an 'Infotype' field containing '0002 Personal data' and an 'STy' field. At the bottom left, a green checkmark indicates 'Record changed', and the SAP logo is at the bottom right.

Infotype Text	Statu
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: PA 30 Maintain HR Master Data

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

Either click twice, or click once then click ✓

The screenshot shows the SAP 'Maintain HR Master Data' interface. The main window displays data for Personnel no. 3999, Name Mouse, Minnie L, and EE group L External - BN. The '0006 Addresses' infotype is selected in the left-hand menu. A dialog box titled 'Subtypes for infotype "0006 Addresses" (1)' is open, showing a table of restrictions. The first row, '1 Permanent residence', is highlighted. A blue arrow points to this row. At the bottom right of the dialog, a blue arrow points to the checkmark icon, indicating the selection process.

STyp	Name
1	Permanent residence
4	ESS Required
5	ESS Required
6	ESS Required
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)
SK01	Address for payment form SK01
SKMV	Work location
Z001	Work Address

Step 1 continued: PA 30 Maintain HR Master Data

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

Update all pertinent address information

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

Click “Save”

Copy 0006 Addresses

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

Personnel No: 3999 | Name: Mouse, Minnie L
Position: 99999999 | Integration: default position
Status: Active
Start: 03/10/2022 to 12/31/9999

Address

Address type: Permanent residence
Care Of:
Address line 1: 259 Preston Way
Address line 2:
City: Shelbyville
State/zip code: KY | Kentucky | 40065
Country Key: USA
Telephone Number: 502 | 330-8989

Communications

Type	Number	Exte
WORK	502 564-2895	

Additional fields

County Code: 106 | Shelby

Save your entries | SAP

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

PROCESS COMPLETE

Terminating Benefit Participation

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 for Personnel No. 3999. The employee's name is Minnie L. Mouse. The status is 'Active'. The EE group is 'L External - BN' and the EE subgroup is '41 24 Non-Paid'. The Personnel area is '0004' and the Pers. subarea is '2001'. The Benefits Only and Board of Ed. options are also visible.

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 includes options for 'Today', 'All', 'From curr. date', 'Current Period', 'Curr. week', 'Current month', 'Last week', 'Last month', and 'Current Year'. A 'Choose' button is present below these options.

The 'Direct selection' section has fields for 'Infotype' and 'STY'.

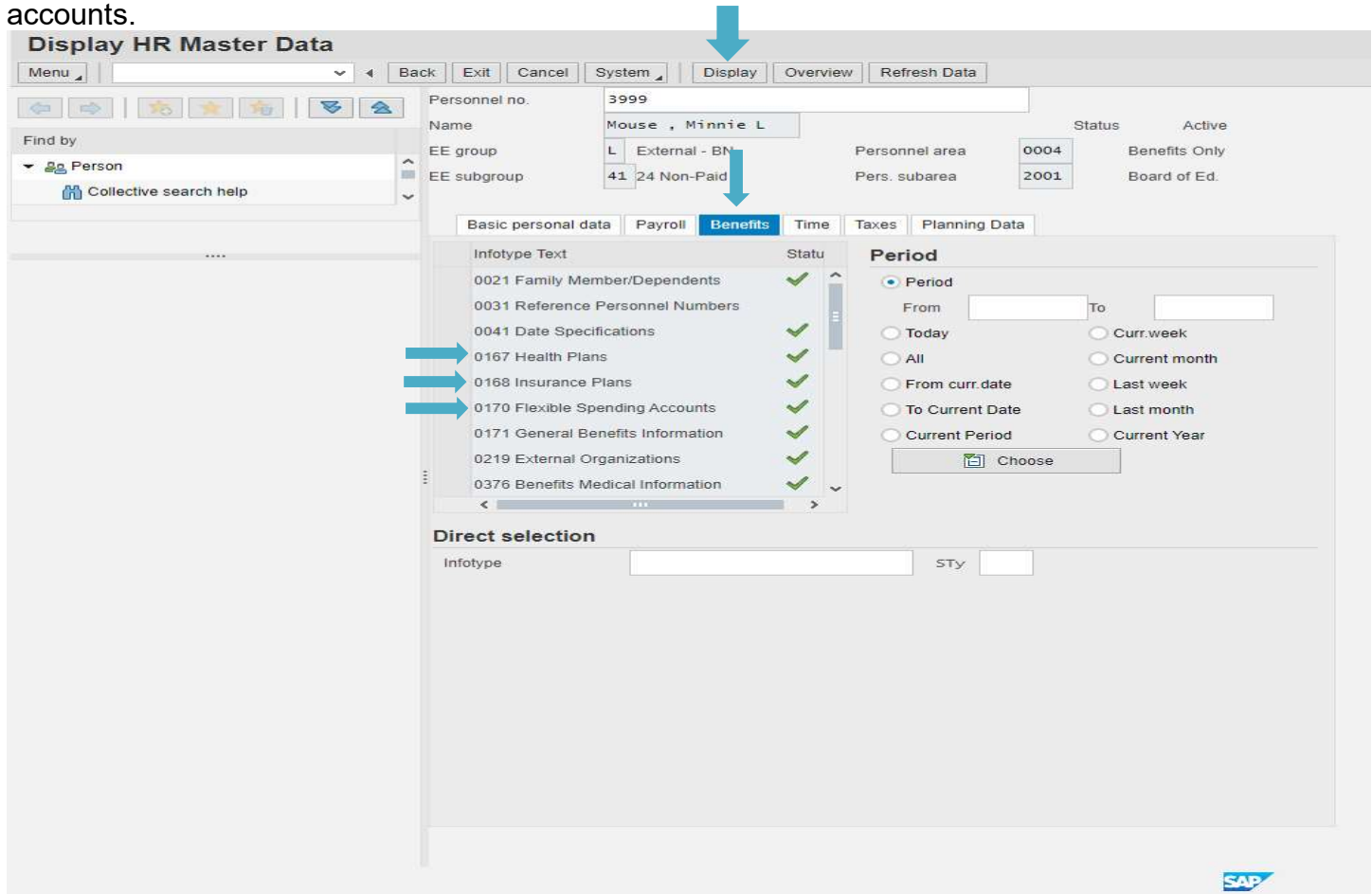
Step 1 continued: Verify Plan Information

Select the “Benefits” Tab

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

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

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



The screenshot shows the SAP 'Display HR Master Data' interface. At the top, there are navigation buttons: Menu, Back, Exit, Cancel, System, Display, Overview, and Refresh Data. The 'Display' button is highlighted with a blue arrow. Below the navigation bar, the personnel information is displayed: Personnel no. 3999, Name Mouse, Minnie L, Status Active, EE group L External - BN, Personnel area 0004 Benefits Only, EE subgroup 41 24 Non-Paid, Pers. subarea 2001 Board of Ed. The 'Benefits' tab is selected, showing a list of infotypes with their status. The list includes: 0021 Family Member/Dependents (Status: ✓), 0031 Reference Personnel Numbers (Status: ✓), 0041 Date Specifications (Status: ✓), 0167 Health Plans (Status: ✓), 0168 Insurance Plans (Status: ✓), 0170 Flexible Spending Accounts (Status: ✓), 0171 General Benefits Information (Status: ✓), 0219 External Organizations (Status: ✓), and 0376 Benefits Medical Information (Status: ✓). Three blue arrows point to the rows for 0167 Health Plans, 0168 Insurance Plans, and 0170 Flexible Spending Accounts. To the right of the list is a 'Period' section with radio buttons for 'Period', 'Today', 'All', 'From curr. date', 'To Current Date', 'Current Period', 'Curr. week', 'Current month', 'Last week', 'Last month', and 'Current Year'. A 'Choose' button is also present. Below the list is a 'Direct selection' section with an 'Infotype' field and an 'STy' field. The SAP logo is visible in the bottom right corner.

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

Step 1 continued: Verify Plan Information

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

The screenshot displays the SAP 'Display 0167 Health Plans' interface. At the top, there is a navigation bar with buttons for 'Menu', 'Back', 'Exit', 'Cancel', 'System', 'Previous record', 'Next record', and 'Overview'. Below this, a search bar is visible with 'Person' selected under 'Find by'. The main data area shows the following details:

Personnel No	3999	Name	Mouse , Minnie L
Payroll area	BN	Org. unit	Dayton Independent
Tobacco	X		
Start	03/01/2023	to	12/31/9999
Chng	03/20/2023		BN_STUDENT04
Plan	AB05	Waiver HRA - with \$	

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

General plan data

Benefit area	01	Comm of KY
Plan type	A001	Medical
Benefit plan	AB05	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: PA 40 End Participation/Benefit Eligibility

Once you check plans in PA20, you must NOT click on the < and not 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

The screenshot shows the SAP Personnel Actions interface. At the top, there is a menu bar with options like Back, Exit, Cancel, System, Execute, and SSN Search. Below this is a search area with a "Find by" dropdown set to "Person" and a "Collective search help" link. The main data area displays the following information:

Personnel no.	3999			
Name	Mouse , Minnie L			Status Active
EE group	L External - BN	Personnel area	0004	Benefits Only
EE subgroup	41 24 Non-Paid	Pers. subarea	2001	Board of Ed.
From				

Below the data area is a table titled "Personnel Actions" with the following columns: Action Type, Personne..., EE group, and EE subgr... The table lists several action types:

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			

The SAP logo is visible in the bottom right corner.

Step 2 continued: PA 40 Ending Participation/Benefit Eligibility

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

Select "End Participation"

Click "Execute"

The screenshot shows the SAP Personnel Actions interface. At the top, there is a menu bar with options like 'Menu', 'Back', 'Exit', 'Cancel', 'System', 'Execute', and 'SSN Search'. Below this, a search area on the left allows finding by 'Person' or 'Collective search help'. The main data area displays the following information:

Personnel no.	3999	Status	Active
Name	Mouse , Minnie L	Personnel area	0004
EE group	L External - BN	Pers. subarea	2001
EE subgroup	41 24 Non-Paid	Board of Ed.	
From	03/18/2023		

Below the data is a table titled 'Personnel Actions' with columns for Action Type, Personnel..., EE group, and EE subgr... The table contains the following rows:

Action Type	Personnel...	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			

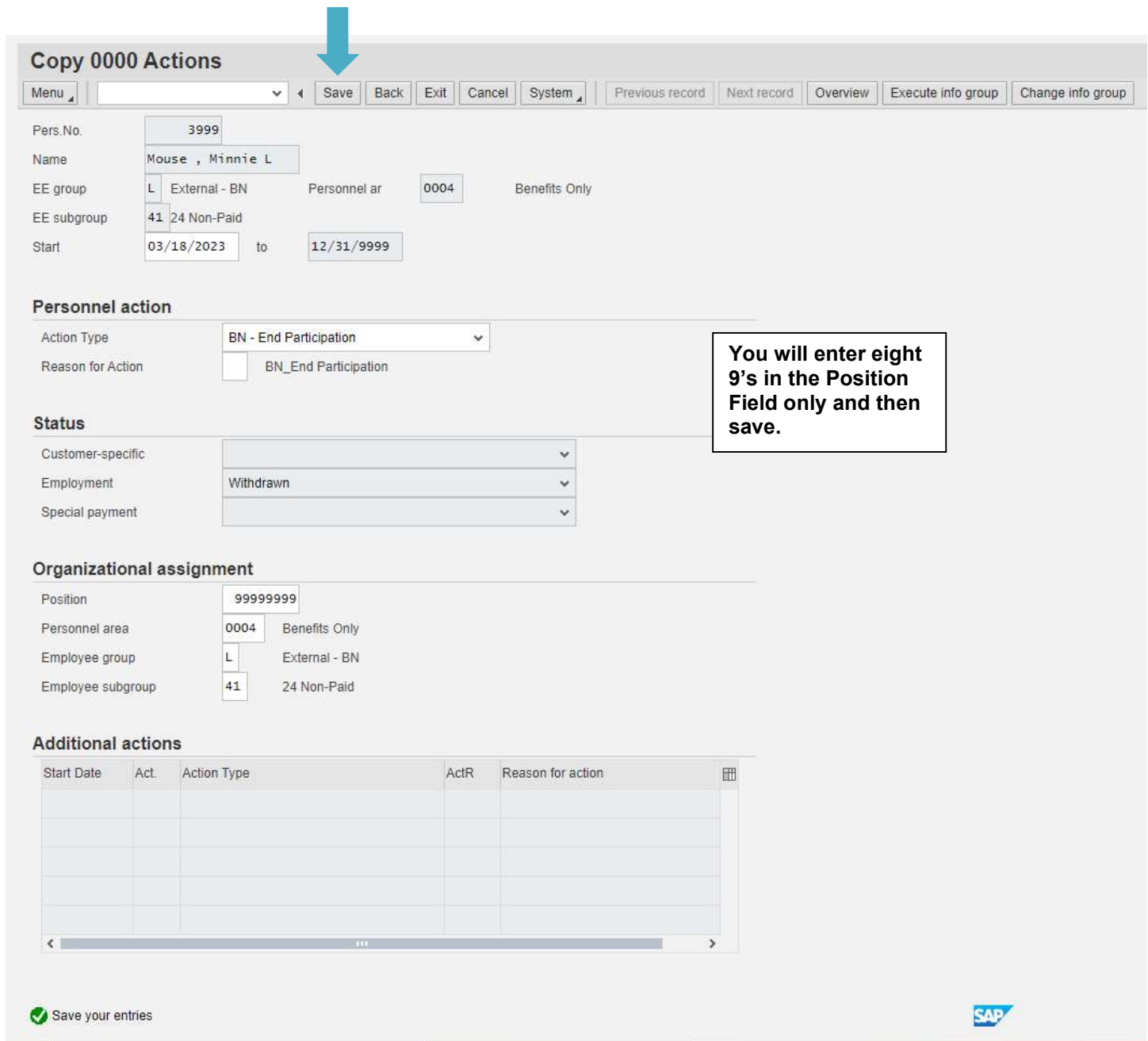
Blue arrows in the image point to the 'Execute' button, the 'From' date field, and the selected 'BN - End Participation' row.

Step 3: PA 40 Personnel Actions

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

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

Click “Save”



Copy 0000 Actions

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

Pers.No. 3999
Name Mouse , Minnie L
EE group L External - BN Personnel ar 0004 Benefits Only
EE subgroup 41 24 Non-Paid
Start 03/18/2023 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

Save your entries

SAP

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

Terminating Benefit Participation

Step 3 continued: PA 40 Personnel Actions

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

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

Click "Save"

Copy 0001 Organizational assignment

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

Personnel No: 3999 | Name: Mouse, Minnie L
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: 03/18/2023 to 12/31/9999

Enterprise structure

CoCode: COMK Commonwealth of Kentucky
Pers. area: 0004 Benefits Only | Subarea: 2001 Board of Ed.
Cost Ctr: 9200100147 Dayton 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: 10006048 00147 Dayton Independent

Record created

Terminating Benefit Participation

Step 3 continued: PA 40 Personnel Actions

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

The screenshot shows the SAP Personnel Actions interface. At the top, there is a header bar with the title "Personnel Actions" and a menu. Below the header, there are navigation buttons: "Menu", "Back", "Exit", "Cancel", "System", "Execute", and "SSN Search".

On the left side, there is a "Find by" section with a search filter set to "Person" and a "Collective search help" link.

The main search area contains the following fields:

- Personnel no.: 3999
- Name: Mouse, Minnie L
- EE group: L External - BN
- EE subgroup: 41 24 Non-Paid
- From: 03/18/2023
- Personnel area: 0004
- Pers. subarea: 2001
- Status: Benefits Only
- Withdrawn: Board of Ed.

Below the search fields, there is a table titled "Personnel Actions". The table has the following columns: Action Type, Personne..., EE group, and EE subgr... The table contains the following rows:

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			

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

Step 4: HRBEN0014 Termination of Participation

Don't hit the < or the home button. Once you complete the PA40 action, you must NOT click on the < and not the Home button. If you click on either it locks the PERNR up. Instead, you must type in the 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 03/15/2023)

Click "Select"

The screenshot displays the SAP 'Termination of Plan Participation' interface. On the left, the 'Direct selection' panel includes a 'Personnel no.' field with the value '3999' and a 'Select' button. The main area, titled 'Termination for', shows a date field set to '03/15/2023' with a calendar icon. Below this is a table with columns for 'Validity period', 'Action', and 'Date'. A blue arrow points to the calendar icon, and another blue arrow points to the 'Select' button.

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

Termination of Plan Participation

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

Direct selection Selection set

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

[Icons]

▲ Pers.No. Name

3999	Mouse , Minnie L
------	------------------

Termination for

Name: Mouse , Minnie L on 03/15/2023 [Calendar] [Overview]

[Stop participation] [Display Plan] [Icons] [Error List]

	Validity period	Action	Date
<input type="checkbox"/> Medical Waiver HRA - with \$	03/01/2023 - 12/31/9999	Terminate on	03/15/2023
<input type="checkbox"/> Dental Anthem Dental Silver	03/01/2023 - 12/31/9999	Terminate on	03/31/2023
<input type="checkbox"/> Basic Life AD&D Basic Life and AD&D	03/01/2023 - 12/31/9999	Terminate on	03/31/2023
<input type="checkbox"/> Healthcare FSA Healthcare FSA	03/01/2023 - 12/31/9999	Terminate on	03/15/2023
<input type="checkbox"/> Dep Care FSA Child & Adult Daycare FSA	03/01/2023 - 12/31/9999	Terminate on	03/15/2023

SAP

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

Click "Stop Participation"

Termination of Plan Participation

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

Direct selection | Selection set

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

[Icons: Print, Copy, Paste, Info, Delete, Refresh]


Pers.No.	Name
3999	Mouse, Minnie L

Termination for

Name: Mouse, Minnie L on 03/15/2023 [Overview]

[Stop participation] [Display Plan] [Action] [Error List]

	Validity period	Action	Date
<input checked="" type="checkbox"/> Medical Waiver HRA - with \$	03/01/2023 - 12/31/9999	Terminate on	03/15/2023
<input checked="" type="checkbox"/> Dental Anthem Dental Silver	03/01/2023 - 12/31/9999	Terminate on	03/31/2023
<input checked="" type="checkbox"/> Basic Life AD&D Basic Life and AD&D	03/01/2023 - 12/31/9999	Terminate on	03/31/2023
<input checked="" type="checkbox"/> Healthcare FSA Healthcare FSA	03/01/2023 - 12/31/9999	Terminate on	03/15/2023
<input checked="" type="checkbox"/> Dep Care FSA Child & Adult Daycare FSA	03/01/2023 - 12/31/9999	Terminate on	03/15/2023



Select "Stop participation"

The screenshot shows the SAP 'Termination of Plan Participation' interface. The main window title is 'Termination of Plan Participation'. At the top, there are navigation buttons: 'Menu', 'Back', 'Exit', 'Cancel', and 'System'. Below this, there are tabs for 'Direct selection' and 'Selection set'. The 'Direct selection' tab is active, showing input fields for 'Personnel no.' and 'ID number', and a 'Select' button. Below these are icons for various actions and a list of personnel with '3999 Mouse, Minnie L' selected. The main area is titled 'Termination for' and shows details for 'Name: Mouse, Minnie L' on '03/15/2023'. There are buttons for 'Stop participation', 'Display Plan', and 'Error List'. A table lists various plan types with their validity periods and actions. A modal dialog titled 'Termination of Plan Participation' is open, showing a list of plan types: Medical, Dental, Basic Life AD&D, Healthcare FSA, and Dep Care FSA. At the bottom of the dialog, there is a 'Stop participation' button with a green arrow icon, which is highlighted by a blue arrow pointing upwards from the bottom of the page.

Plan type	Validity period	Action	Date
Medical	03/01/2023 - 12/31/9999	Terminate	
Waiver HRA - with \$	03/01/2023 - 12/31/9999	Terminate	
Dental	03/01/2023 - 12/31/9999	Terminate	
Anthem Dental Silver	03/01/2023 - 12/31/9999	Terminate	
Basic Life AD&D	03/01/2023 - 12/31/9999	Terminate	
Basic Life and AD&D	03/01/2023 - 12/31/9999	Terminate	
Healthcare FSA	03/01/2023 - 12/31/9999	Terminate	
Healthcare FSA	03/01/2023 - 12/31/9999	Terminate	
Dep Care FSA	03/01/2023 - 12/31/9999	Terminate	
Child & Adult Daycare FSA	03/01/2023 - 12/31/9999	Terminate	

To verify that health plan, dental plan, vision plan, 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 are navigation buttons: Menu, Back, Exit, Cancel, System, Display, Overview, and Refresh Data. The main data area shows the following information:

Personnel no.	3999	Status	Withdrawn
Name	Mouse, Minnie L	EE group	L External - BN
EE group	L External - BN	Personnel area	0004
EE subgroup	41 24 Non-Paid	Pers. subarea	2001
		Benefits Only	Board of Ed.

Below this, there are tabs for 'Basic personal data', 'Payroll', 'Benefits', 'Time', 'Taxes', and 'Planning Data'. The 'Basic personal data' tab is active, showing a list of infotypes with their status:

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	

To the right of the infotype list is a 'Period' section with radio buttons for 'Period', 'Today', 'All', 'From curr. date', 'To Current Date', 'Current Period', 'Curr. week', 'Current month', 'Last week', 'Last month', and 'Current Year'. A 'Choose' button is located below these options.

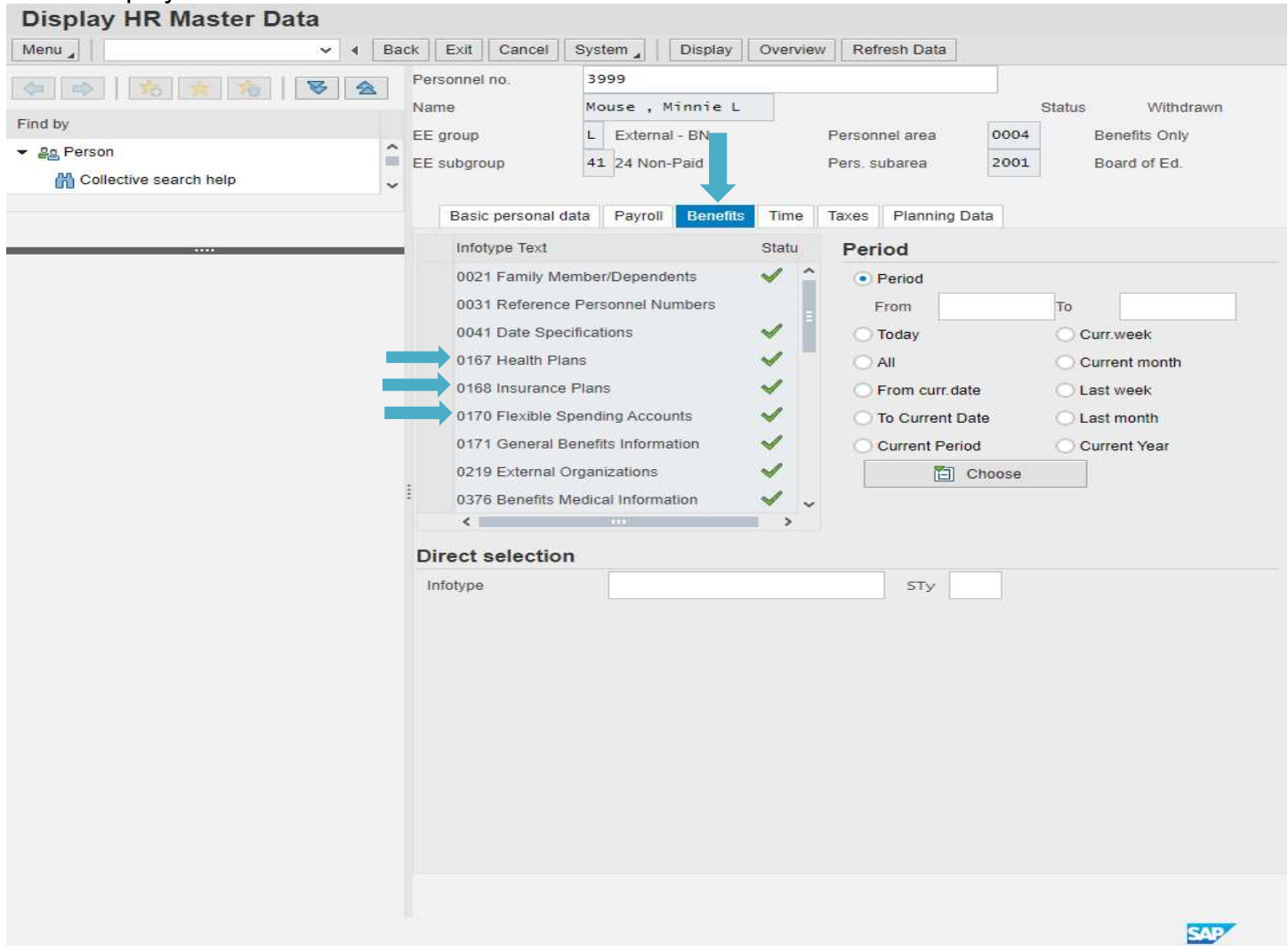
At the bottom, there is a 'Direct selection' section with an 'Infotype' field and an 'STy' field.

The SAP logo is visible in the bottom right corner.

Select the "Benefits" tab

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

Click "Display"



The screenshot shows the SAP 'Display HR Master Data' interface for employee Minnie L. Mouse (Personnel no. 3999). The 'Benefits' tab is selected, showing a list of benefit infotypes with their status. Three blue arrows point to the '0167 Health Plans', '0168 Insurance Plans', and '0170 Flexible Spending Accounts' rows. The 'Period' section on the right allows for selecting a specific time range for the data.

Infotype Text	Statu
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

Period
From: [] To: []

Today Curr. week
 All Current month
 From curr. date Last week
 To Current Date Last month
 Current Period Current Year

Direct selection

Infotype: [] STy: []

Terminating Benefit 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: 3999 | Name: Mouse, Minnie L

Payroll area: BN | Org. unit: Dayton Independent

Tobacco: X

Start: 03/01/2023 to 03/15/2023 | Chng: 03/20/2023 | BN_STUDENT04

Plan: AB05 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	AB05	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
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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 with the text 'Health Plan Costs' and a menu dropdown. Below the title bar is a navigation bar with buttons for 'Save as Variant...', 'Back', 'Exit', 'Cancel', 'System', 'Execute', and 'Get Variant...'. The main area is divided into several sections:

- Further selections:** Includes a 'Search helps' button (highlighted with a blue arrow) and an 'Org. structure' button.
- Key date:** Features radio buttons for 'Today' (selected) and 'Other keydate'. Below is a 'Key Date' input field with a calendar icon.
- Selection:** Includes a 'Personnel Number' input 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' label and another input field. To the right of these fields are three search icons.

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

Select "K –Organizational Assignment"

The screenshot shows the 'Health Plan Costs' configuration screen with a 'Restrict Value Range (1)' dialog box overlaid. The dialog box contains a table with the following data:

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

At the bottom of the dialog box, it states '37 Entries found'. A blue arrow points to the 'OK' button (green checkmark icon) in the bottom right corner of the dialog box.

Click ✓

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

The screenshot shows the SAP 'Health Plan Costs' interface. A 'Restrict Value Range' dialog box is open, displaying a list of restrictions. The 'Organizational unit' field is highlighted with a blue arrow and contains the value '10006048'. At the bottom right of the dialog box, a blue arrow points to a green checkmark button, indicating the confirmation step.

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.

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

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

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

Click “Execute”

The screenshot shows the SAP 'Health Plan Costs' report selection interface. At the top, there is a menu bar with buttons for 'Save as Variant...', 'Back', 'Exit', 'Cancel', 'System', 'Execute', and 'Get Variant...'. A blue arrow points to the 'Execute' button. Below the menu bar are three buttons: 'Further selections', 'Search help K', and 'Org. structure'. The main area is divided into three sections: 'Key date', 'Selection', and 'Additional selection'. In the 'Key date' section, the 'Today' radio button is selected, and there is a 'Key Date' input field with a calendar icon. In the 'Selection' section, there is a 'Personnel Number' input field with a search icon. In the 'Additional selection' section, there are four rows of input fields: 'Benefit area' (with '01' entered), '1st Program Grouping', '2nd Program Grouping', and 'Benefit plan'. Each row has a 'to' label and a corresponding input field, with search icons to the right of the 'to' fields. The SAP logo is visible in the bottom right corner.

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 | [Dropdown] | 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 date 03/20/2023
Benefit area 01 Comm of KY

Part date	Benefit plan text	Dep.	Dep. coverage text	Tobacco	LivingWell Non-Fulfilled Previous Year	EE Cost	ER Credit	Provider Cost
01/01/2023	LivingWell CDHP	0001	Single			26.73	379.78	4.00
01/01/2023	LivingWell CDHP	0001	Single			26.73	379.78	4.00
01/01/2023	Anthem Dental Bronze	0001	Single			14.08	0.00	0.00
01/01/2023	LivingWell Basic CDHP	0001	Single			14.17	377.79	4.00
01/01/2023	Anthem Dental Bronze	0001	Single			14.08	0.00	0.00
01/01/2023	Anthem Vision Bronze	0001	Single			5.52	0.00	0.00
01/01/2023	LW CDHP Cross-Ref Prime	0004	Family			43.45	425.00	4.00
01/01/2023	Anthem Dental Silver	0004	Family			68.26	0.00	0.00
01/01/2023	Anthem Vision Gold	0004	Family			39.82	0.00	0.00
01/01/2023	Waiver without HRA – no \$	0006	Waive Coverage			0.00	0.00	4.00
01/01/2023	LivingWell CDHP	0001	Single		X	46.73	359.78	4.00
01/01/2023	LivingWell PPO	0003	Parent Plus			127.05	461.60	4.00
01/01/2023	LW PPO Cross-Ref Sec	0005	Family-CrossRefScdry			85.24	413.77	4.00
01/01/2023	LivingWell PPO	0001	Single		X	64.57	352.25	4.00
01/01/2023	LivingWell Basic CDHP	0003	Parent Plus			33.76	505.32	4.00
01/01/2023	Anthem Dental Bronze	0004	Family			49.28	0.00	0.00
01/01/2023	Anthem Vision Bronze	0002	Couple			10.94	0.00	0.00
01/01/2023	Waiver without HRA – no \$	0006	Waive Coverage			0.00	0.00	4.00
01/01/2023	LW CDHP Cross-Ref Prime	0004	Family			43.45	425.00	4.00
01/01/2023	LivingWell PPO	0003	Parent Plus			127.05	461.60	4.00

SAP | ECO (400) | 1

Click Menu

Click List

Click Export

Click Spreadsheet

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

Enter a file name

Click Save

The screenshot shows the SAP Health Plan Costs report interface. The 'Menu' dropdown is open, showing options like 'List', 'Edit', 'Goto', 'Views', 'Settings', 'System', and 'Help'. The 'Export' option is selected, opening a sub-menu with 'Word processing...', 'Spreadsheet...', and 'Local file...'. The 'Local file...' option is selected, opening a file save dialog. The background shows a table with columns for 'Dep.', 'Dep coverage text', 'Tobacco', 'LivingWell Non-Fulfilled Previous Year', 'EE Cost', 'ER Credit', and 'Provider Cost'. The table contains 20 rows of data for various health plans and coverage types.

Dep.	Dep coverage text	Tobacco	LivingWell Non-Fulfilled Previous Year	EE Cost	ER Credit	Provider Cost
0001	Single			26.73	379.78	4.00
0001	Single			26.73	379.78	4.00
0001	Single			14.08	0.00	0.00
0001	Single			14.17	377.79	4.00
0001	Single			14.08	0.00	0.00
0001	Single			5.52	0.00	0.00
0004	Family			43.45	425.00	4.00
0004	Family			68.26	0.00	0.00
0004	Family			39.82	0.00	0.00
0006	Waive Coverage			0.00	0.00	4.00
0001	Single	X		46.73	359.78	4.00
0003	Parent Plus			127.05	461.60	4.00
0005	Family-CrossRefScdry			85.24	413.77	4.00
0001	Single	X		64.57	352.25	4.00
0003	Parent Plus			33.76	505.32	4.00
0004	Family			49.28	0.00	0.00
0002	Couple			10.94	0.00	0.00
0006	Waive Coverage			0.00	0.00	4.00
0004	Family			43.45	425.00	4.00
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

The screenshot shows the SAP 'Plan Change History Report' selection interface. At the top, there is a title bar with a 'Menu' dropdown and a search bar. Below this is a navigation bar with buttons: 'Save as Variant...', 'Back', 'Exit', 'Cancel', 'System', 'Execute', 'Get Variant...', and 'Dynamic Selections'. A blue arrow points to the 'Search help K' button in the 'Further selections' section.

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 logo in the bottom right corner.

Select “K – Organizational Assignment”

Click ✓

The screenshot shows the SAP Plan Change History Report interface. A dialog box titled "Restrict Value Range (1)" is open, displaying a list of values. The value "K Organizational assignment" is selected and highlighted in blue. A blue arrow points to this selection. At the bottom right of the dialog box, a green checkmark icon is highlighted with another blue arrow, indicating the confirmation step.

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

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

The screenshot shows the SAP 'Plan Change History Report' interface. A 'Restrict Value Range' dialog box is open, allowing users to filter the report by various organizational parameters. The 'Organizational unit' field is highlighted with a blue arrow and contains the value '10006048'. Another blue arrow points to the green checkmark icon at the bottom right of the dialog box, indicating the confirmation step.

Restrictions	Value
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.

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 | 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 To
Payroll period

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

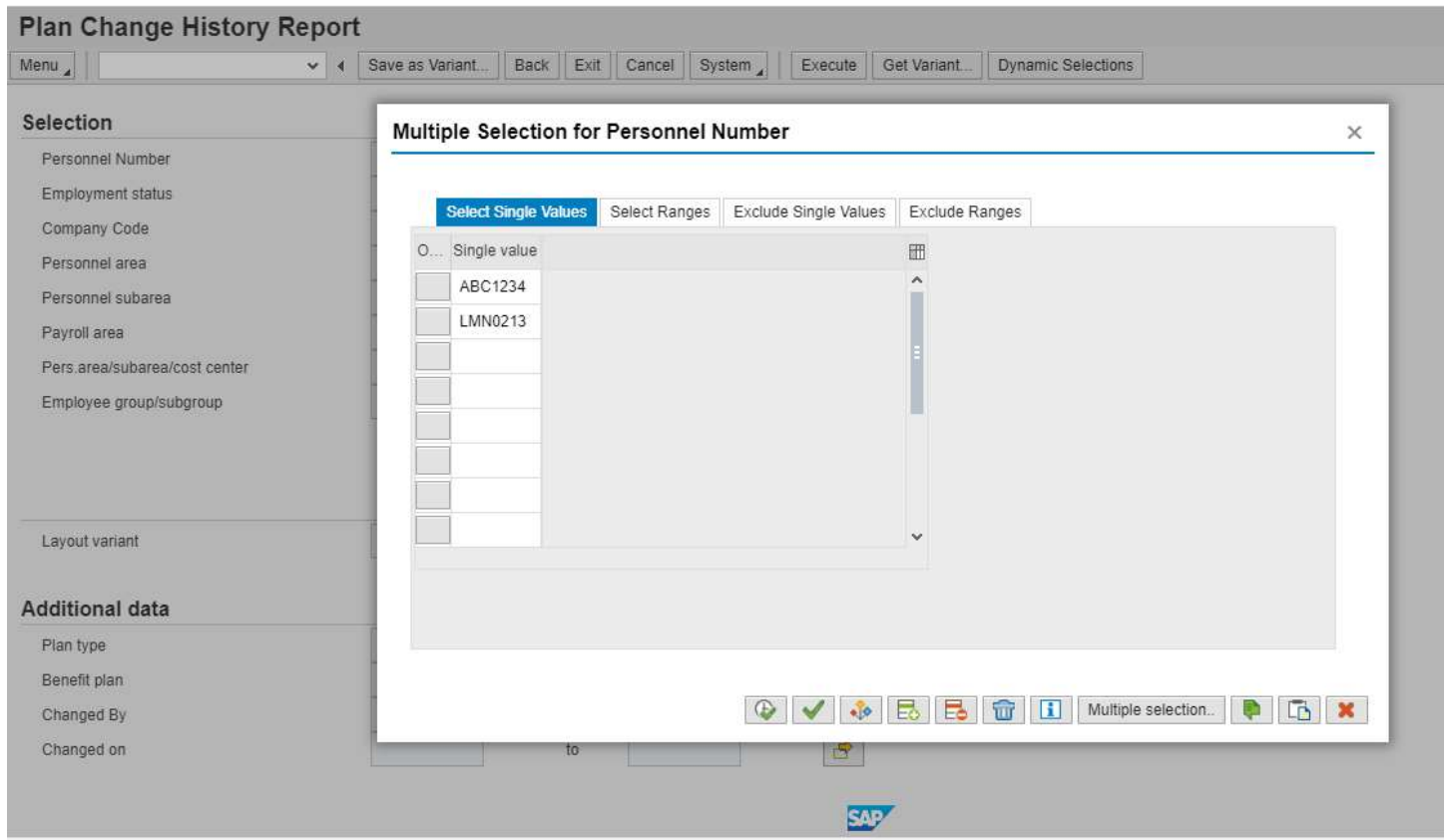
Plan type	<input type="text"/>	to	<input type="text"/>	
Benefit plan	<input type="text"/>	to	<input type="text"/>	
Changed By	<input type="text"/>	to	<input type="text"/>	

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”

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



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

Use “Changed on” dates 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 sections for '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 dialog box 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 toolbar with various icons and a 'Multiple selection...' button. The SAP logo is visible at the bottom center of the interface.

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

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

Plan Change History Report

Menu | [dropdown] | 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”.

The report generated will look like this:

Plan Change History Report

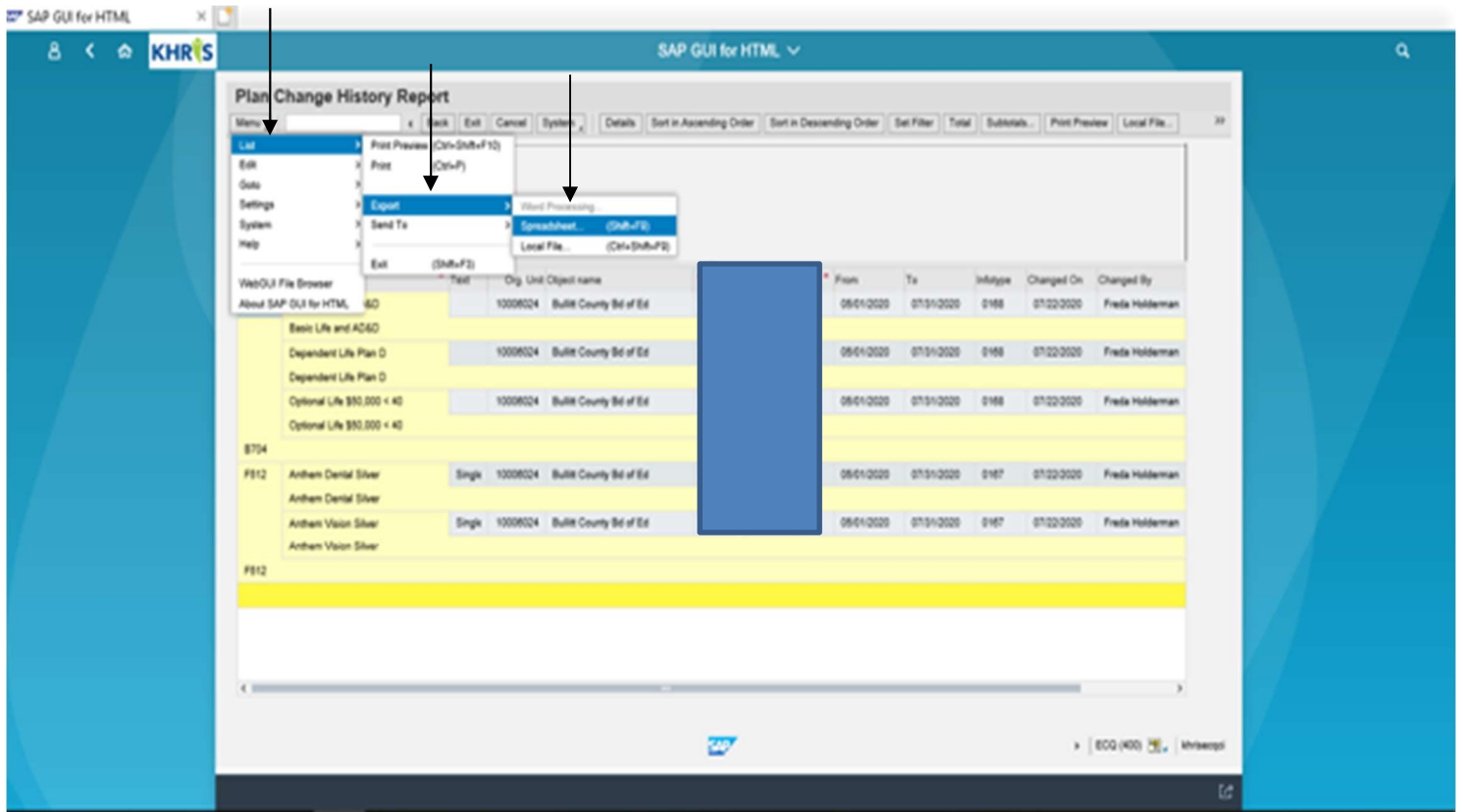
Changes in Benefit Elections

Evaluation Period
 Program: ZBNR006_PLAN_CHANGE_HISTORY
 System: ECQ Client: 400
 Date: 07/22/2020 Time: 12:30:05

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

You can download this to an excel spreadsheet

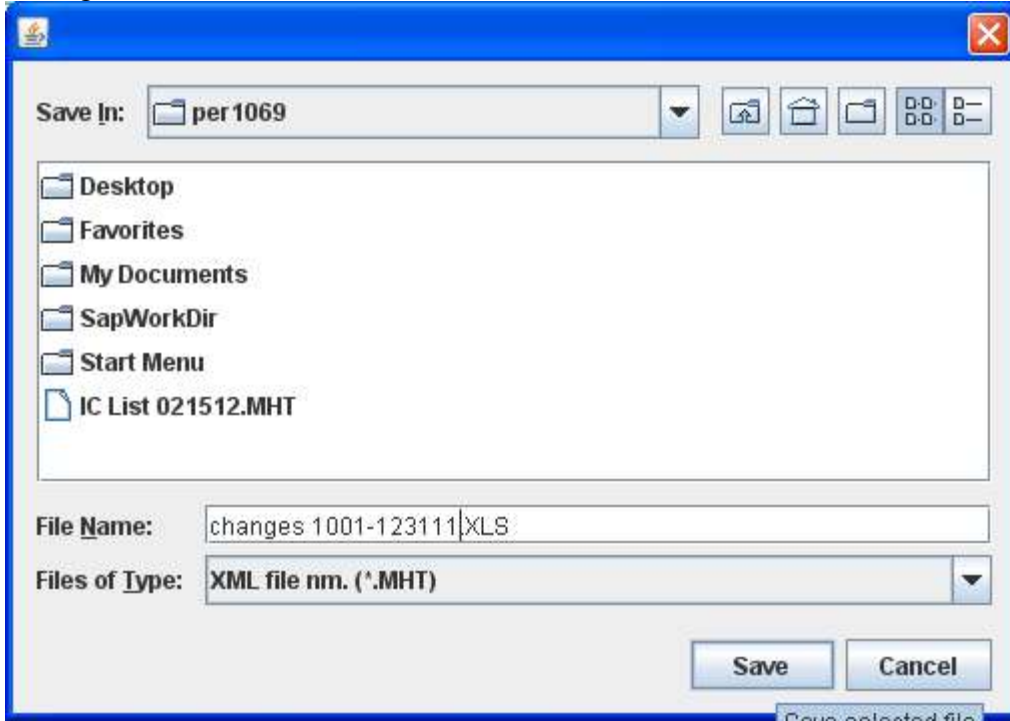
To export to a spreadsheet click “Menu” tab then click, “List, Export, Spreadsheet”



Click ✓

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.



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

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

Click "Search helps" tab

The screenshot shows the SAP 'Insurance Plan Costs' report selection interface. At the top, there is a title bar 'Insurance Plan Costs' and a menu bar with buttons: 'Menu', 'Save as Variant...', 'Back', 'Exit', 'Cancel', 'System', and 'Execute'. Below the menu bar are three tabs: 'Further selections', 'Search helps' (which is highlighted with a blue arrow), and 'Org. structure'. The main area is divided into three sections:

- Key date:** Contains radio buttons for 'Today' (selected) and 'Other keydate'. Below is a 'Key Date' input field with a calendar icon.
- Selection:** Contains a 'Personnel Number' input field with a search icon.
- Additional selection:** Contains a table for selecting benefit areas and program groupings. The first row has 'Benefit area' with the value '01'. The subsequent rows are '1st Program Grouping', '2nd Program Grouping', and 'Benefit plan', each with a 'to' field and a search icon.

The SAP logo is visible in the bottom right corner.

Select "K –Organizational Assignment"

Restrict Value Range (1)

HKy	Short text
A	Ownership matchcode (non applicable)
B	PDC error indicator
C	Personnel ID Number
D	Part-time employees (D)
E	Buyer
F	Construction industry - organizational assignment
G	Date of birth
H	Sickness cert.data (A)
I	IC number
J	Last name - 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

Click

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

Insurance Plan Costs

Menu Save as Variant...

Further selections Search helps

Key date

Today
 Other keydate

Key Date

Selection

Personnel Number

Additional selection

Benefit area 01
1st Program Grouping
2nd Program Grouping
Benefit plan

Restrict Value Range

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

Enter Agency's organizational unit number (you can use drop down box to select your organization) and click check mark

Click

Click ✓

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

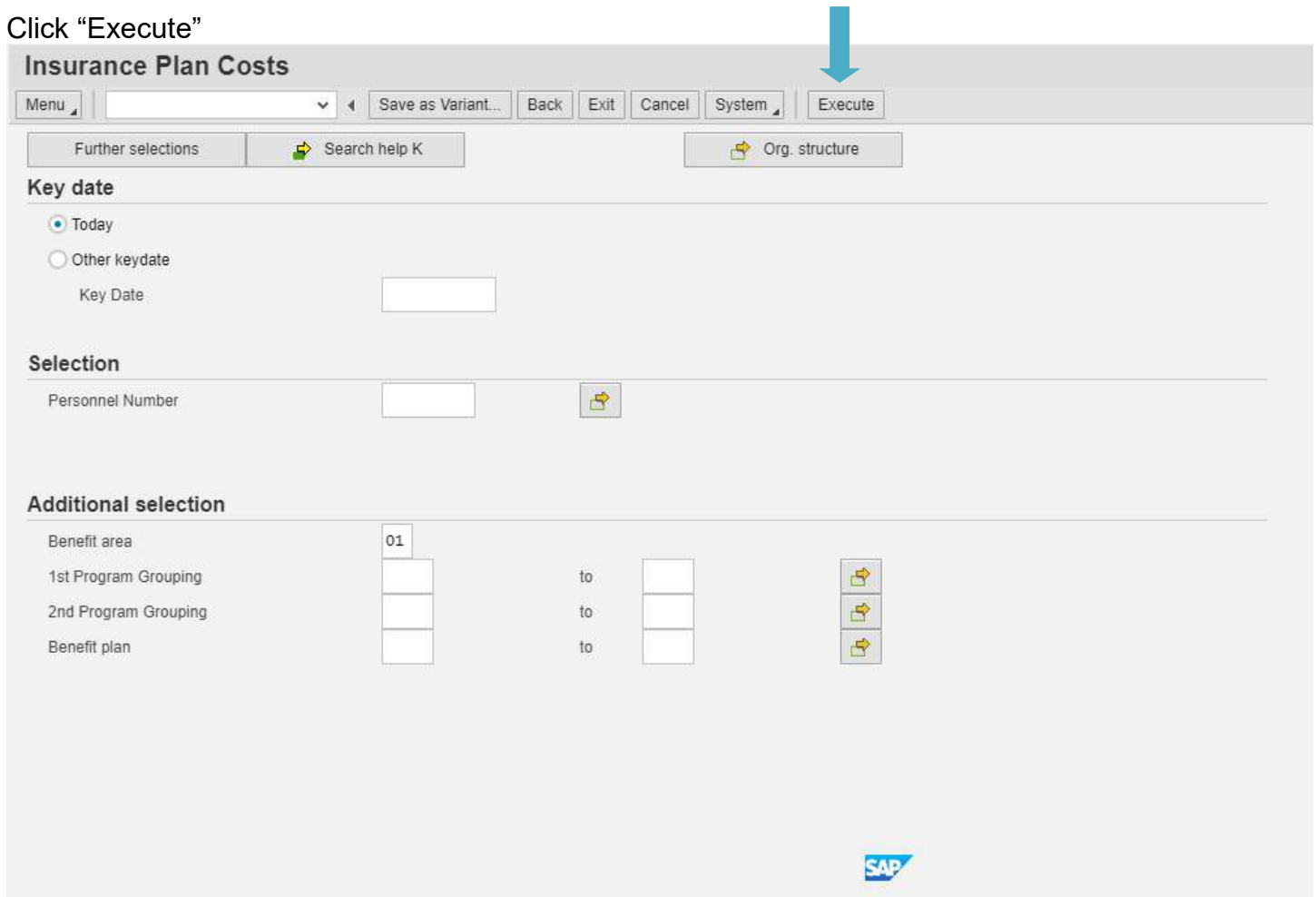
To run a report on **current elections**, under the Key date box, select “Today”

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

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

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

Click “Execute”



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

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

Insurance Plan Costs														
Menu <input type="text"/> <input type="button" value="Back"/> <input type="button" value="Exit"/> <input type="button" value="Cancel"/> <input type="button" value="System"/> <input type="button" value="Details"/> <input type="button" value="Sort in Ascending Order"/> <input type="button" value="Sort in descending order"/> <input type="button" value="Set filter"/> <input type="button" value="Total"/> <input type="button" value="Print preview"/> <input type="button" value="Local file..."/> <input type="button" value="Mail Recipient"/> <input type="button" value="ABC Analysis"/>														
Insurance Plan Costs														
Key date 03/20/2023 Benefit area 01 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	mi-monthly	B501	Basic Life and AD&D						10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	\$20,000	0.00	1.00
2		B503							01/31/2023	03/01/2023	0001	\$20,000	0.00	1.00
2		B704	Dependent Life Plan D						10/01/2012	12/01/2012	0001	\$10,000 Spouse	8.42	0.00
2		B609	Optional Life \$5,000 >= 60						10/01/2012	12/01/2012	0001	\$5,000	4.52	0.00
2		B609							10/01/2012	12/01/2012	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.

To Export to Excel
 Click Menu
 List
 Export
 Spreadsheet

The screenshot shows the SAP GUI for the 'Insurance Plan Costs' report. The 'Menu' is open, and the path 'List' > 'Export' > 'Spreadsheet...' is highlighted. A blue box obscures the 'Local file...' option. The report table below shows columns for Entry, Part.date, Option, Insurance option text, EE Cost, and ER Credit.

Entry	Part.date	Option	Insurance option text	EE Cost	ER Credit
3888	10/01/2012	0001	\$20,000	0.00	1.00
3881	10/01/2012	0001	\$20,000	0.00	1.00
3870	10/01/2012	0001	\$20,000	0.00	1.00
3885	10/01/2012	0001	\$20,000	0.00	1.00
3883	10/01/2012	0001	\$20,000	0.00	1.00
3890	10/01/2012	0001	\$20,000	0.00	1.00
3876	10/01/2012	0001	\$20,000	0.00	1.00
3872	10/01/2012	0001	\$20,000	0.00	1.00
3999	01/31/2023	0001	\$20,000	0.00	1.00
3870	10/01/2012	0001	\$10,000 Spouse	8.42	0.00
3870	10/01/2012	0001	\$5,000	4.52	0.00
3872	10/01/2012	0001	\$5,000	4.52	0.00

The 'Select Spreadsheet' dialog box shows the following options:

- Excel (in MHTML Format)
- OpenOffice (in OpenDocument Format 2.0)
- Select from All Available Formats

The dropdown menu is set to 'Excel - Office Open XML Format (XLSX)'. There is an unchecked checkbox for 'Always Use Selected Format' and 'OK' and 'Cancel' buttons at the bottom.

Excel (InMHTML Formats)
 Click ✓







Transaction Complete

Life Insurance Conversion and Portability Letter

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

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

Resources

-  [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](#) 

(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 and Accidental Death and Dismemberment (AD&D) 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

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

Resources

-  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

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 **1-877-276-6387** Monday-Friday 9:00 a.m. to 6:00 p.m. (ET).

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Understanding your options

Portability and Conversion



Navigating life together

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

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

***Employees may call Transition Solutions (877) 275-6387, to discuss both options after applications have been completed and submitted to MetLife.**

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

Transaction Complete