

## Retirement – Change Employee to Ineligible

**Purpose** Use this procedure to change the **1<sup>st</sup> Program Grouping** field from the default ‘ELIG’ (Eligible for Retirement) to ‘INEL’ (Ineligible for Retirement) on *General Benefits Information* (0171).

**Trigger** Perform this procedure when changing the employee’s retirement eligibility.

**Prerequisites**

- Employee is hired and is ineligible for a retirement deduction, or
- Employee is transferring to an retirement ineligible position, or
- Employee is changing from eligible to ineligible status in an eligible position.

**End User Roles** In order to perform this transaction you must be assigned the following role:  
Benefits Processor

| Change History |   |
|----------------|---|
| Date           | Change Description  |
| 7/27/2009      | Update Trigger and Prerequisites section. Placed procedure in new template and updated screenshots. |

**Menu Path** Human Resources → Personnel Management → Administration → HR Master Data → Maintain

**Transaction Code** PA30

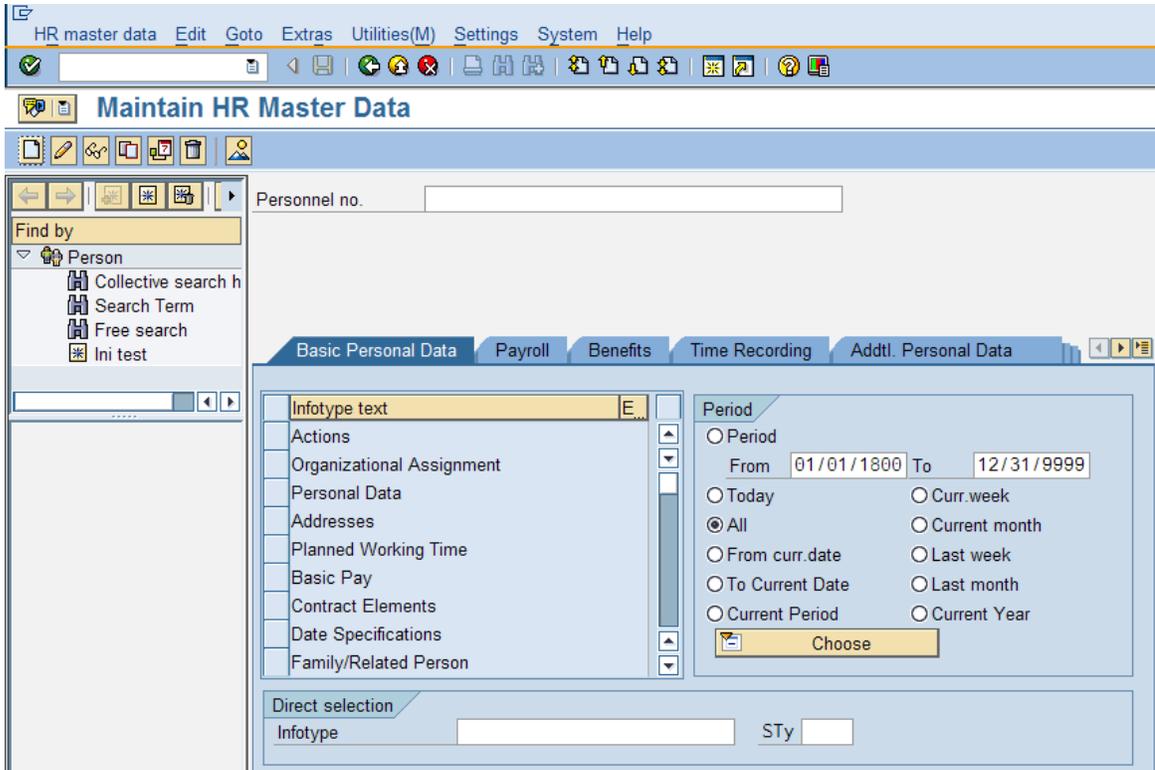
|                      |  |
|----------------------|--|
| <b>Helpful Hints</b> | <ul style="list-style-type: none"> <li>• The system always defaults the 1<sup>st</sup> Program Groupings field on <i>General Benefits</i> infotype (0171) to <b>Eligible for Retirement</b> status. This value must be changed when an employee is newly hired or is transferring in to an ineligible position, or an employee is changing from eligible to ineligible status in an eligible position.</li> <li>• Contact your agency’s Organizational Management Processor to verify the retirement eligibility for a position.</li> <li>• Please refer to Chapter 2 of the Department of Retirement Services (DRS) <a href="#">Employer Handbook</a>.</li> </ul> |
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The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

| Message Type  | Description  |
|---|--|
| <b>Error</b><br>   | <b>Example:</b>  Make an entry in all required fields.<br><b>Action:</b> Fix the problem(s) and then click  (Enter) to validate and proceed.   |
| <b>Warning</b><br>   | <b>Example:</b>  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end.<br><b>Action:</b> If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed. |
| <b>Confirmation</b><br> or  | <b>Example:</b>  Save your entries.<br><b>Action:</b> Perform the required action to proceed.   |

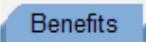
**Procedure**

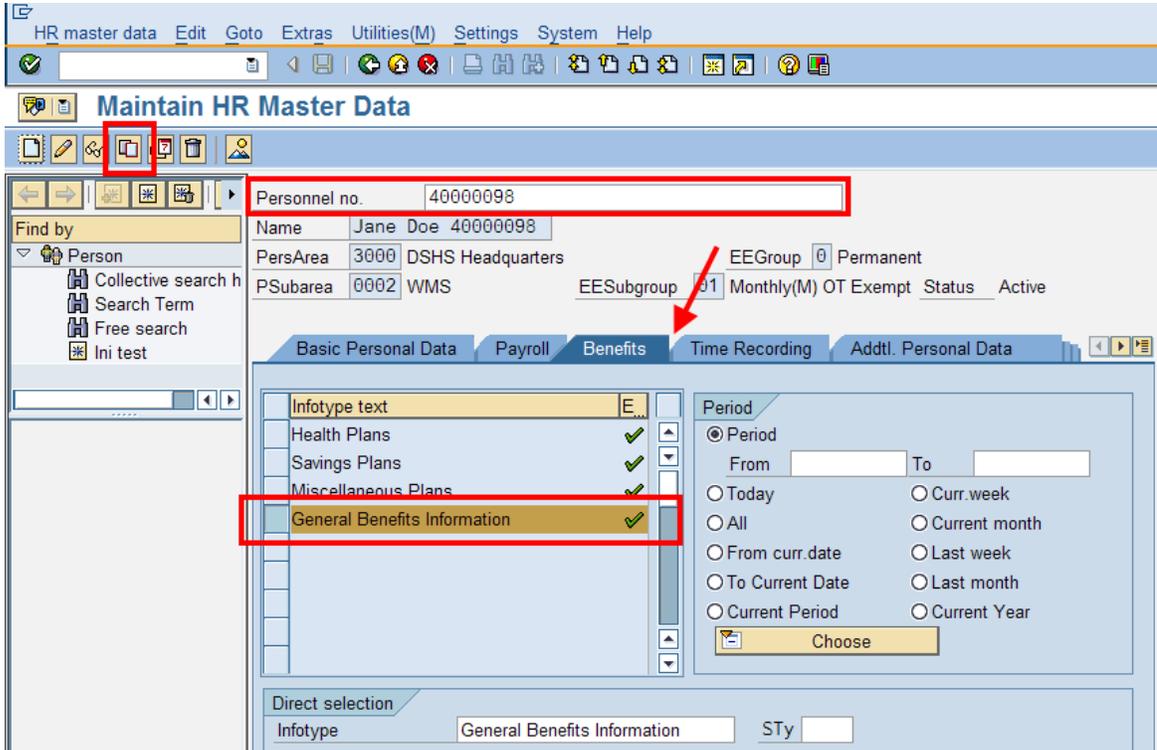
1. Start the transaction using the above menu path or transaction code **PA30**.



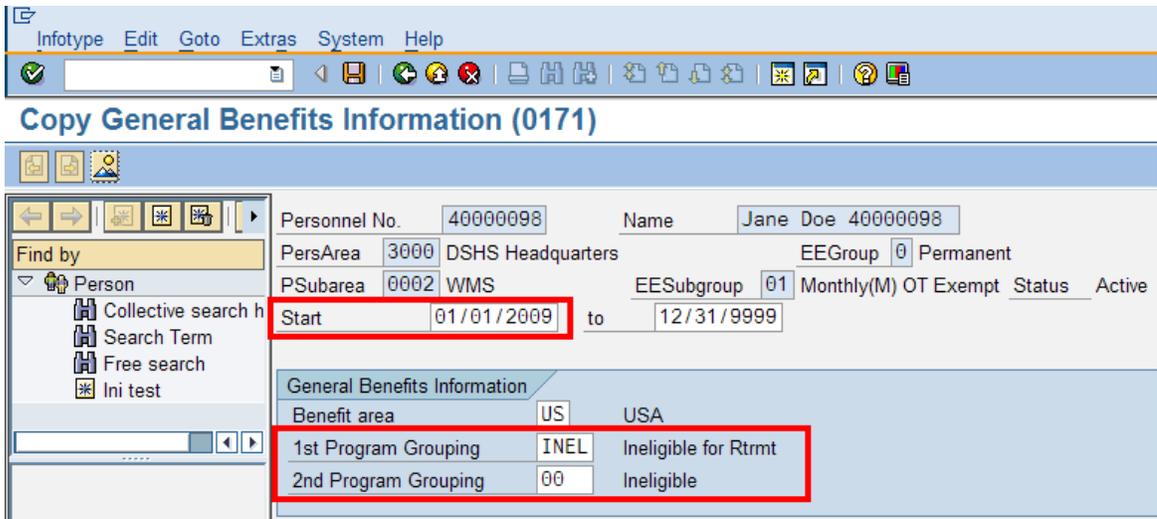
2. Complete the following fields:

| R=Required Entry O=Optional Entry C=Conditional Entry |       |  |
|---|-------|--|
| Field Name  | R/O/C | Description  |
| Personnel no.   | R     | The employee's unique identifying number.<br><b>Example:</b> 4000098 |

3. Click  (Enter) to validate the information.
4. Click  to select.
5. Click to box to the left of  to select.



6. Click  (Copy) to copy and continue.



7. Complete the following fields:

| R=Required Entry O=Optional Entry C=Conditional Entry |       |   |
|---|-------|---|
| Field Name  | R/O/C | Description   |
| Start date  | R     | This is the date on which a record begins.<br><b>Example:</b> 01/01/2009  |
| 1 <sup>st</sup> Program Grouping                      | R     | This is used to determine an employee's retirement plan eligibility.<br> The <b>1<sup>st</sup> Program Grouping</b> defaults in as eligible. To verify that the position is eligible use transaction code <b>PO13D</b> , click the gray box to the left of <i>Acct Assignment Features</i> infotype. If there is an X in the box next to Retirement Eligible field, then the position is retirement eligible. If the box is blank, the position is not retirement eligible. Click the  (Matchcode) to open the selection list.<br><b>Example:</b> INEL – Ineligible for Rtmnt   |
| 2 <sup>nd</sup> Program Grouping                      | R     | This defines the employee's job type and employer.<br> The value in the <b>2<sup>nd</sup> Program Grouping</b> field defaults from the personnel area.<br>You will have to change the <b>2<sup>nd</sup> Program Grouping</b> field if:<br>An employee chooses a different plan.<br>The Employee Type defaults to a code not consistent with the System/Plan set up at hiring time.<br>An employee changes positions and wants to continue contributing to the System/Plan from his previous position rather than the one that defaults with the new position.<br>For a list of valid type codes for each retirement system, see <a href="#">The Employer Handbook - Type Codes</a><br>Click the  (Matchcode) to open the selection list.<br><b>Example:</b> 00 - Ineligible |

8. Click  (Enter) to validate the information.

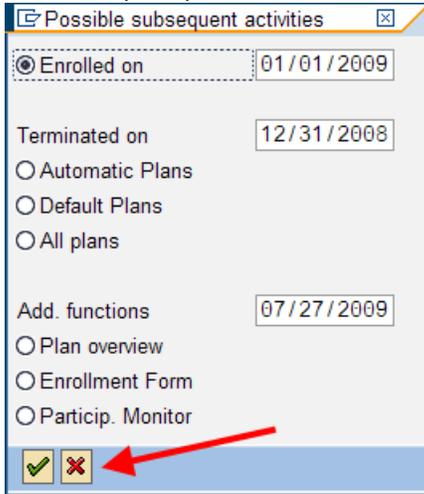
9. You will receive the following messages:

 First program grouping INEL differs from the default ELIG

 Second program grouping 00 differs from the default 01

Continue to click  (Enter) to validate the information until prompted to Save.

10. Click  (Save) to save.



11. Click  (Cancel) to cancel.

12. You have completed this transaction.

|  |
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| <b>Results</b>   |
| You have changed the employee's retirement benefit status from <b>ELIG</b> to <b>INEL</b> .  |
| <b>Comments</b>  |
|  Be sure to end date any corresponding DRS Retirement Benefit Plan on <i>Savings Plan</i> (0169). |