

Retirement Contribution Percentages

PA30

Change History

Update the following table as necessary when this document is changed:

Date	Name	Change Description
4/4/2005	Dorie Schmeling	Document draft
4/5/2005	Joanne Gallaher	SME review
4/14/2005	Heather Hanson	Training review
4/15/2005		Agency review
5/24/05	Marie Holts	Testing review
2/10/06	Heather Hanson	Update
6/08/06	Lesa Terry	Update

Purpose

Use this procedure to correct the *Savings Plans* (0169) infotype when a retirement contribution percentage was not entered during the enrollment process.

Trigger

Perform this procedure when the employee contribution percentage was not entered for the selected retirement plan when performing a new hire, rehire or appointment change action.

Prerequisites

- Employee was enrolled into the selected retirement plan and the employee contribution rate was not entered.

Menu Path

Human Resources → Personnel Management → Administration → HR Master Data → Maintain

Transaction Code

PA30

Helpful Hints

The Department of Retirement Services (DRS) controls the correct percentage amount for each plan. The percentages are found on the DRS website in the [DRS Employer Handbook, Chapter 6](#) and in DRS bulletins.

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

Procedure

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

Maintain HR Master Data

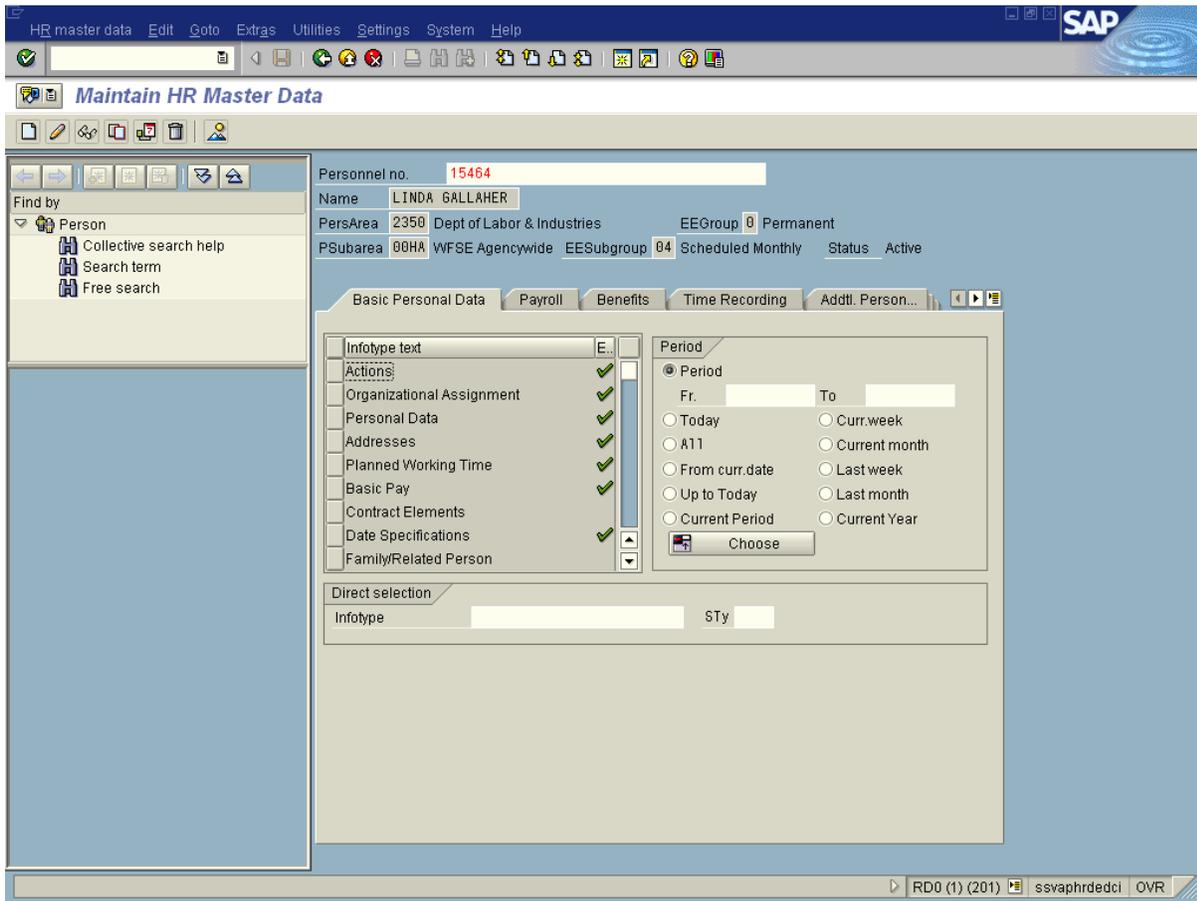
The screenshot shows the SAP 'Maintain HR Master Data' interface. At the top, the title bar reads 'HR master data' with standard menu options (Edit, Goto, Extras, Utilities, Settings, System, Help) and the SAP logo. Below the title bar is a toolbar with various icons. The main window title is 'Maintain HR Master Data'. On the left, there is a 'Find by' sidebar with options: Person, Collective search help, Search term, and Free search. The main area displays data for Personnel no. 15464, Name LINDA GALLAHER, PersArea 2350, Dept of Labor & Industries, EEGroup 0 Permanent, PSubarea 00HA, WFSE Agencywide, EESubgroup 04, Scheduled Monthly, and Status Active. Below this is a tabbed interface with 'Basic Personal Data' selected. A list of 'Infotype text' is shown with checkboxes and green checkmarks: Actions, Organizational Assignment, Personal Data, Addresses, Planned Working Time, Basic Pay, Contract Elements, Date Specifications, and Family/Related Person. To the right, a 'Period' selection window is open, showing radio buttons for 'Today', 'Curr.week', 'A11', 'Current month', 'From curr.date', 'Last week', 'Up to Today', 'Last month', 'Current Period', and 'Current Year', with a 'Choose' button. At the bottom, there is a 'Direct selection' section with an 'Infotype' field and an 'STy' field. The status bar at the very bottom shows 'RD0 (1) (201)' and user information 'ssvaphrdedci OVR'.

2. Complete the following field:

Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. Example: 15464

3. Click  (Enter) to validate the information.

Maintain HR Master Data



4. Click the **Benefits** tab.

Maintain HR Master Data

The screenshot shows the SAP HR Master Data maintenance interface. At the top, the menu bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The title bar reads 'Maintain HR Master Data'. The main area displays the following data:

- Personnel no. 15464
- Name LINDA GALLAHER
- PersArea 2350 Dept of Labor & Industries
- EEGroup 0 Permanent
- PSubarea 00HA WFSE Agencywide
- EESubgroup 04 Scheduled Monthly
- Status Active

Below this information are tabs for 'Basic Personal Data', 'Payroll', 'Benefits', 'Time Recording', and 'Addtl. Person...'. The 'Benefits' tab is active, showing a list of benefit types on the left and a 'Period' selection area on the right.

Infotype text	E.
Health Plans	✓
Savings Plans	✓
Miscellaneous Plans	✓
General Benefits Information	✓

The 'Period' section includes a 'Fr.' and 'To' field, and several radio button options: Today, Curr.week, A11, Current month, From curr.date, Last week, Up to Today, Last month, Current Period, and Current Year. A 'Choose' button is located below these options.

At the bottom of the screen, the status bar shows 'RD0 (1) (201)' and 'ssvaphrdedci | INS'.

5. Click the gray box to the left of **Savings Plans** to select.
6. Click  (Change) to change the record.

Change Savings Plans (0169)

The screenshot displays the SAP 'Change Savings Plans (0169)' transaction. The top bar includes the SAP logo and standard menu options (Infotype, Edit, Goto, Extras, System, Help). Below the title bar, there are navigation icons and a search area. The main data area shows the following information:

- Personnel No.:** 15464, **Name:** LINDA GALLAHER
- PersArea:** 2350, **Dept of Labor & Industries**, **EEGroup:** 0, **Permanent**
- PSubarea:** 00HA, **WFSE Agencywide**, **EESubgroup:** 04, **Scheduled Monthly**, **Status:** Active
- Start:** 07/16/2004 to 12/31/9999, **Chng:** 04/04/2005, **JOANNEG**
- Plan:** P2 PERS 2

Below the data, there are tabs for 'Plan data', 'Administration', 'Regular contrib.', 'Bonus contribution', and 'Benefic...'. The 'Regular contrib.' tab is active, showing two sections:

- Pre-tax contribution:** Amount 0.00 USD, Percentage (empty), Units 0, Pre-Tax Rollover
- Post-tax contribution:** Amount 0.00 USD, Percentage 0.00, Units 0, Start Post-Tax Contributions Immediately

Below these sections is a 'Reference period for contributions' section with 'Period' set to 'Semi-monthly'. At the bottom, there is an 'Additional fields' section with 'Plan Choice Code' set to (empty).

7. Click the **Regular contrib.** tab.

8. Complete the following field:

Field Name	R/O/C	Description
Percentage	R	<p>The benefit plan contribution percentage.</p> <p>Example: 1.18</p> <p> HRMS validates correct percentages for each benefit plan and will display an error message if you enter an incorrect percentage.</p> <p> If you do not know the correct plan contribution percentage, HRMS can prompt you. Click in the percentage field and enter any number (example: 2) and press the enter button on your keyboard. You will receive an  Error message in the status bar telling you what the correct contribution percentage is for the selected plan.</p>

9. Click  (Enter) to validate the information.

Change Savings Plans (0169)

The screenshot shows the SAP 'Change Savings Plans (0169)' transaction. The main data area displays the following information:

Personnel No.	15464	Name	LINDA GALLAHER			
PersArea	2350	Dept of Labor & Industries	EEGroup 0 Permanent			
PSubarea	00HA	WFSE Agencywide	EESubgroup 04 Scheduled Monthly Status Active			
Start	07/16/2005	to	12/31/9999	Chng	04/04/2005	JOANNEG
Plan	P2	PERS 2				

Navigation tabs include: Plan data, Administration, Regular contrib., Bonus contribution, and Benefic... The 'Regular contrib.' tab is active, showing:

Pre-tax contribution		Post-tax contribution	
Amount	0.00 USD	Amount	0.00 USD
Percentage	1.18	Percentage	0.00
Units	0	Units	0
<input type="checkbox"/> Pre-Tax Rollover		<input type="checkbox"/> Start Post-Tax Contributions Immediately	

Reference period for contributions: Period Semi-monthly

Additional fields: Plan Choice Code

At the bottom, there is a 'Save your entries' button.

10. Click  (Save) to save.

11. You have completed this transaction.

Result

You have entered the contribution percentage for the selected benefit plan.

Comments



Using the  (Change) button to add the contribution rate will trigger HRMS to do a retro calculation if the retirement deduction was not taken for a prior pay period. Department of Personnel (DOP) will run a centralized report on each of the payroll processing days to look for discrepancies. DOP will contact the agency if any discrepancies are found to ensure the correction is made during the current pay period. Agencies will work directly with the Department of Retirement Systems (DRS) to correct any reporting discrepancies.