

Medical Aid Additional Withholdings

- Purpose** Use this procedure to update an employee’s medical aid tax rate.
- Trigger** Perform this procedure when a new tax rate has been created and the employee falls into the new category.
- Prerequisites** You have received notification that the employee belongs in a different medical aid category.
- End User Roles** In order to perform this transaction you must be assigned the following role:
Payroll Processor

Change History	
Date	Change Description
11/22/06	Lesa Terry – Create
8/10/09	Patty Peterson Update into new template, new screen shots, correction of dates related to employee transfer from one medical aid group to another.

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

Transaction Code PA30

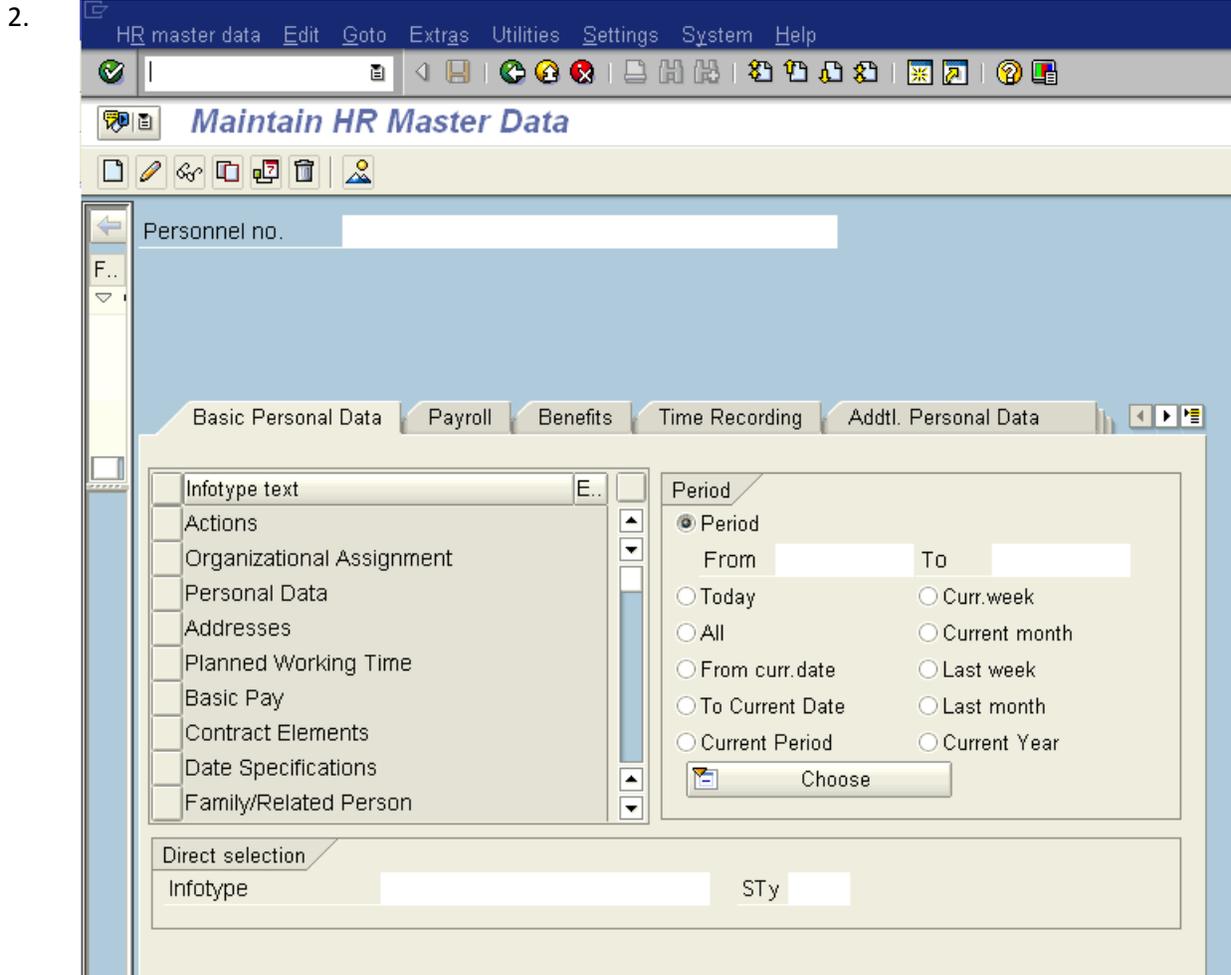
Helpful Hints	In the event of an employee transferring from one medical aid override group (IT 0234) to another with no break in service, the effective date of change must be the check date that the change will take effect. This is true regardless of if the employee is moving between agencies.
----------------------	--

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 validate and 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 validate and proceed.
Confirmation  or 	Example:  Save your entries. Action: Perform the required action to proceed.

Procedure

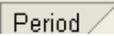
1. Start the transaction using the above menu path or transaction code PA30.

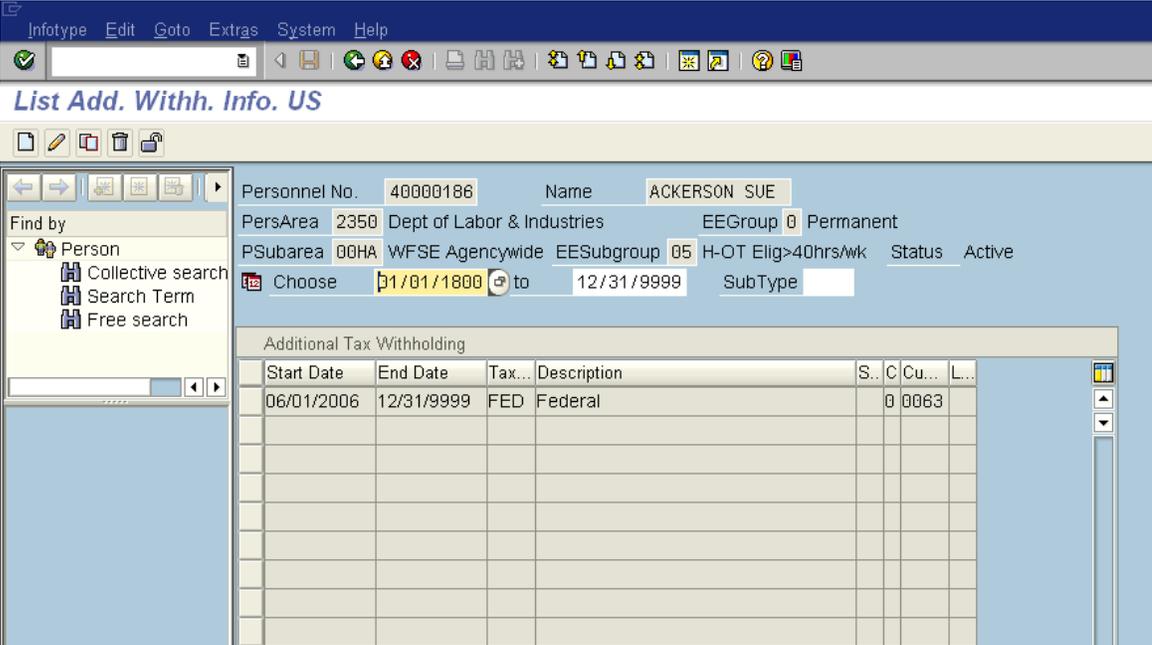


3. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. Example: 40000186

4. Click  (Enter) to validate the information.

5. On the Payroll tab , click the gray box to the left of  to select.
6. In the period  field, click the radio button for All.
7. Click  (Overview) for an overview of all actions associated with the Add. Withh. Info. US infotype (0234).

8. 

The screenshot shows the SAP 'List Add. Withh. Info. US' window. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The window title is 'List Add. Withh. Info. US'. Below the title bar, there are several icons for navigation and actions. The main area displays the following information:

Personnel No. 40000186 Name ACKERSON SUE
 PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent
 PSubarea 00HA WFSE Agencywide EESubgroup 05 H-OT Elig>40hrs/wk Status Active
 Choose 31/01/1800 to 12/31/9999 SubType

Below this information is a table titled 'Additional Tax Withholding' with the following columns: Start Date, End Date, Tax..., Description, S., C, Cu..., L... The table contains one row of data:

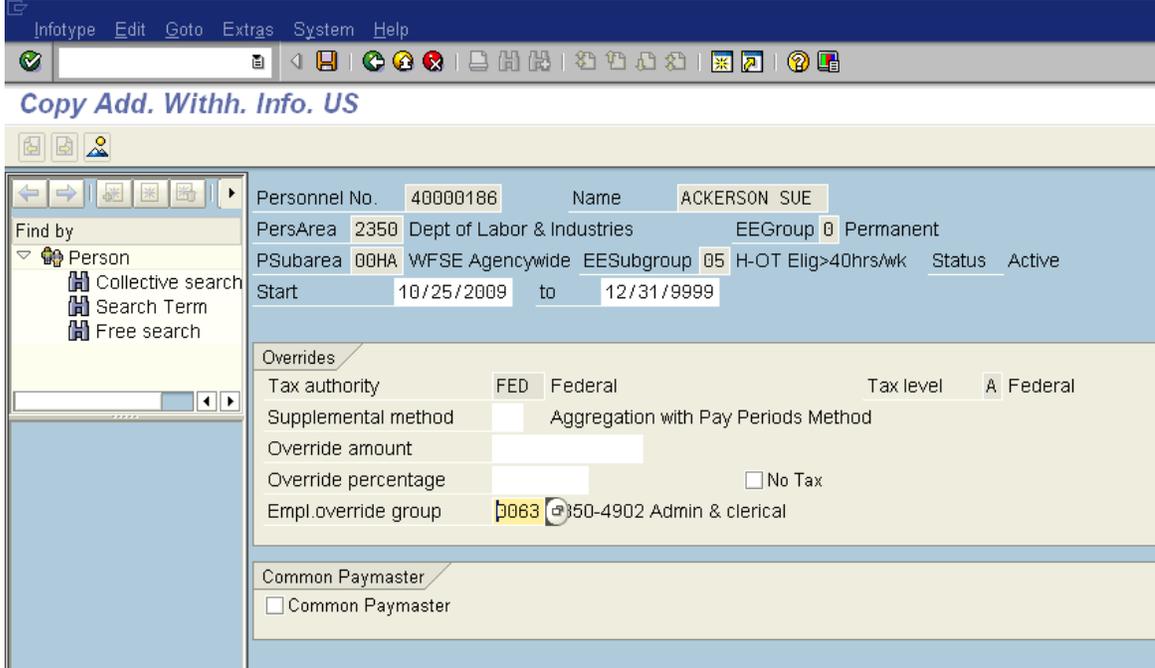
Start Date	End Date	Tax...	Description	S.	C	Cu...	L...
06/01/2006	12/31/9999	FED	Federal			00063	

9. Click the gray box to the left of the current record to select.
10. Click  (Copy) to copy the record. The old record will be delimited the day before the new record takes effect.

11.

12. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Start	R	<p>The effective date of the change must be the check date that the change will take effect. (This is true regardless of if the employee is moving between agencies.)</p> <p>Example: 10/25/2009</p> <p> The date entered should be the actual check date in which the deduction should be taken.</p> <p> Most frequently the actual check dates (pay dates) are the 10th and 25th of the month. If the actual check date (pay date) falls on another date, you will need to use that date.</p>
Empl. override group	R	<p>The Medical Aid Category for the position.</p> <p>Example: 0132</p>

13. 

14. Click  (Enter) to validate the information.

15.  You will receive a warning message in the status bar telling you that the previous record will be delimited.

16. Click  (Save) to save the record.

17.

Personnel No. 40000186 Name ACKERSON SUE

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00HA WFSE Agencywide EESubgroup 05 H-OT Elig>40hrs/wk Status Active

Choose 01/01/1800 to 12/31/9999 SubType

Start Date	End Date	Tax...	Description	S.	C	Cu...	L...
10/25/2009	12/31/9999	FED	Federal	0	0	0064	
06/01/2006	10/24/2009	FED	Federal	0	0	0063	

Page 1 of 2

18.



The above images display the new Medical Aid record that you have just updated with the new Start Date.

19.

You have completed this transaction.

Results
You have updated the employee's medical aid category and rate.
Comments
None.