

Retirement Plan Choice Code during 90-Day Period (New Hire)

PA30

Change History

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

Date	Name	Change Description
4/5/05	Dorie Schmeling	Draft
4/12/05	Beth Dockins	SME review
4/19/05	Heather Hanson	Training review
5/10/05		Agency review
5/24/05	Marie Holts	Testing
2/10/06	Heather Hanson	Update
6/22/06	Lesa Terry	Update

Purpose

Use this procedure to place a Public Employees Retirement System (PERS) employee in the 90-Day Choice period during the retirement enrollment process immediately following the New Hire action (PA40). This will place the employee on the 70-Day Report/90-Day Default Report.

Trigger

The **Plan Choice Code** must be manually entered after enrolling a new PERS employee who is in the 90-day window to select Plan 2 or Plan 3.

Prerequisites

- Employee is new to the State of Washington and has *never* been enrolled in a retirement plan.



Example of when not to do this for a New Hire: Employee was previously employed by another public sector entity with retirement plans administered by the Department of Retirement Systems (DRS).

Menu Path

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

Transaction Code

PA30

Helpful Hints

The Plan Choice Codes are defined in the following table:

Plan Choice Code	System/ Plan	Employee Status	Plan Choice Description
2N	P2	New PERS member.	<ul style="list-style-type: none"> Employee is a new Plan 2 enrollee. Employee is deciding between Plan 2 and Plan 3.  HRMS uses the 2N code to report employees on 70 and 90-day default warning reports.

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:

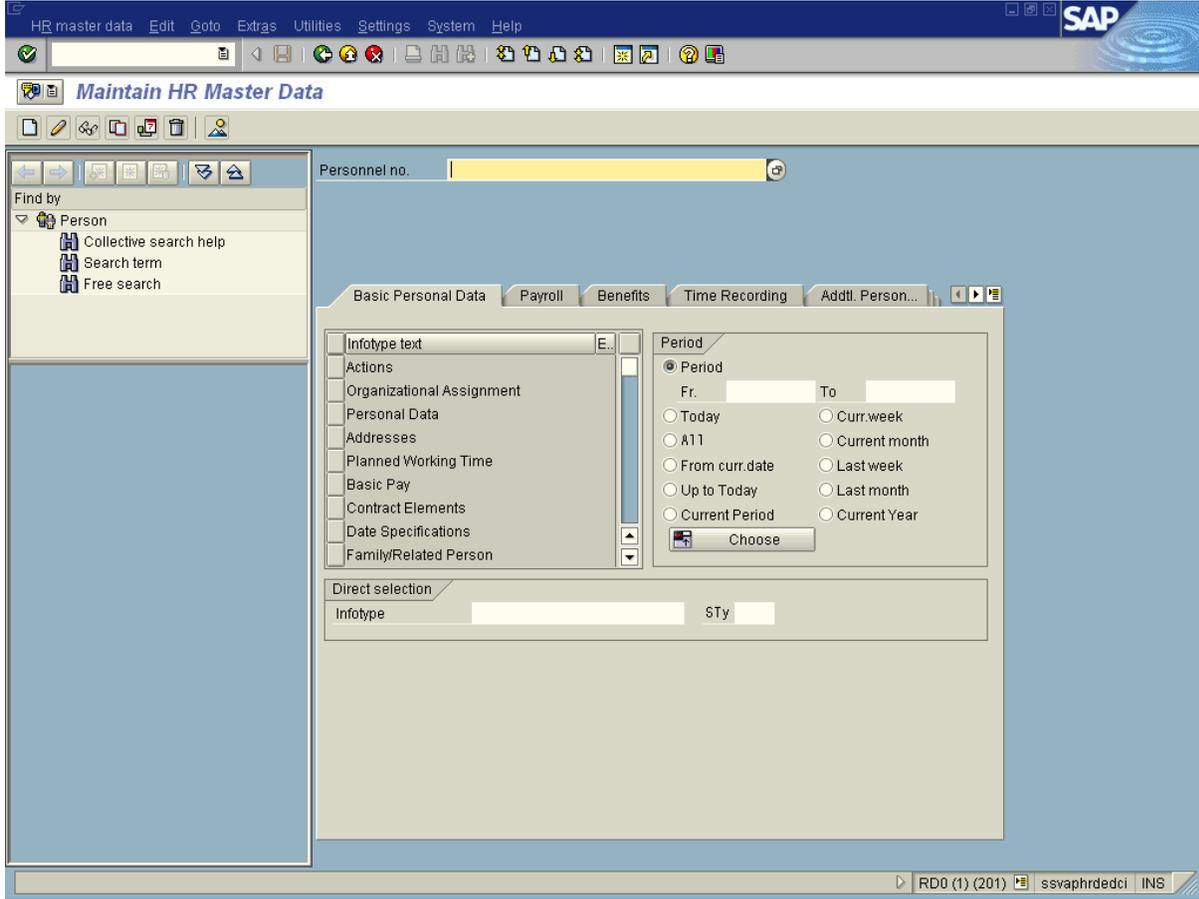
Message Type	Description
Error 	Example:  Make an entry in all required fields. Action: Fix the problem(s) and then click  (Enter) to proceed.
Warning 	Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter)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

Related Procedure:

Procedure

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

Maintain HR Master Data



2. Complete the following field:

Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. Example: 20000384

Maintain HR Master Data

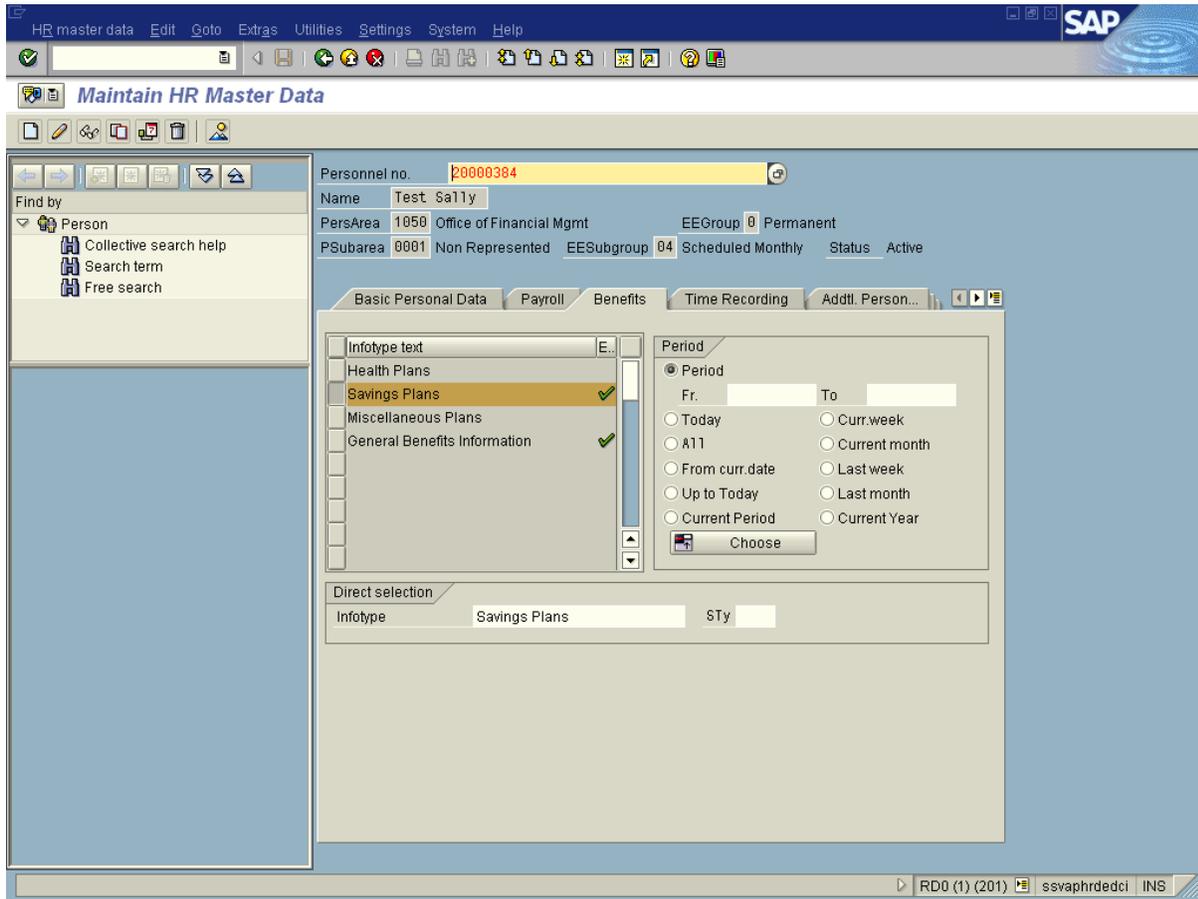
The screenshot shows the SAP 'Maintain HR Master Data' interface. At the top, the title bar reads 'Maintain HR Master Data' with the SAP logo on the right. Below the title bar is a toolbar with various icons. The main area is titled 'Maintain HR Master Data' and contains a search sidebar on the left with options like 'Person', 'Collective search help', 'Search term', and 'Free search'. The main data area displays the following information:

- Personnel no. 20000384
- Name Test Sally
- PersArea 1050 Office of Financial Mgmt
- EEGroup 0 Permanent
- PSubarea 0001 Non Represented
- EESubgroup 04 Scheduled Monthly
- Status Active

Below this information are several tabs: 'Basic Personal Data', 'Payroll', 'Benefits', 'Time Recording', and 'Addtl. Person...'. The 'Benefits' tab is currently selected. Within the 'Benefits' tab, there is a 'Period' section with a 'Fr.' (From) and 'To' (To) date range, 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 window, the status bar shows 'RD0 (1) (201)', 'ssvaphrdedci', and 'OVR'.

3. Click the **Benefits** tab.

Maintain HR Master Data



4. Click the gray box to the left of the Savings Plans selection.
5. Click  (Change) to change the record.

Change Savings Plans (0169)

The screenshot shows the SAP HRMS interface for the transaction 'Copy Savings Plans (0169)'. The top bar includes the SAP logo and menu options like 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The main area is divided into several sections:

- Personnel Data:** Personnel No. 20000384, Name Test Sally, PersArea 1050, Office of Financial Mgmt, EEGroup 0 Permanent, PSubarea 0001, Non Represented, EESubgroup 04, Scheduled Monthly, Status Active, Start 01/01/2005 to 12/31/9999.
- Plan Data:** Plan P2 PERS 2.
- General plan data:** Benefit area US USA, Plan type 401A 401(a), Benefit plan P2 PERS 2.
- Planning Parameters:** EE Contr. Variant PRS2 PERS 2, ER Contr. Variant PRS2 PERS 2, Vesting rule, Investment Group.
- Additional fields:** Plan Choice Code field with a matchcode icon.

6. In the **Additional fields** group, in the **Plan Choice Code** field, click  (Matchcode) to open the selection list.

Plan Choice Code (1) 115 Entries Found

Plan	PlnChoiceC	Plan Choice Code txt
E3FW		
E3FW	3X	TRANSFER FROM PLAN 2
P2		
P2	2C	CHOSE PLAN 2
P2	2N	NEW PLAN 2 ENROLLEE
P30		
P30	3C	CHOSE PLAN 3
P30	3D	DEFAULT FROM PLAN 2
P30	3X	TRANSFER FROM PLAN 2
P3AS		
P3AS	3C	CHOSE PLAN 3
P3AS	3D	DEFAULT FROM PLAN 2
P3AS	3X	TRANSFER FROM PLAN 2
P3AW		
P3AW	3C	CHOSE PLAN 3
P3AW	3D	DEFAULT FROM PLAN 2
P3AW	3X	TRANSFER FROM PLAN 2
P3BS		
P3BS	3C	CHOSE PLAN 3
P3BS	3D	DEFAULT FROM PLAN 2
P3BS	3X	TRANSFER FROM PLAN 2

7. Select Plan Choice Code 2N. Click to highlight the correct plan.
8. Click  (Copy) to accept.

Change Savings Plans (0169)

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

- Personnel No.: 20001030, Name: CHEZEY CHUCKIE
- PersArea: 4900, Dept: Natural Resources, EEGroup: 0, Permanent
- PSubarea: 0001, Non Represented, EESubgroup: 01, Monthly(M) OT Exem..., Status: Active
- Start: 04/16/2006, to: 12/31/9999, Chng: 04/05/2006, TERESAD
- Plan: P2, PERS 2

The 'General plan data' section shows:

- Benefit area: US, USA
- Plan type: 401A, 401 (a)
- Benefit plan: P2, PERS 2

The 'Planning Parameters' section shows:

- EE Contr. Variant: PRS2, PERS 2
- ER Contr. Variant: PRS2, PERS 2
- Vesting rule: [dropdown]
- Investment Group: [dropdown]

The 'Additional fields' section shows:

- Plan Choice Code: 2N

The bottom right corner of the window shows 'RT0 (1) (501)' and 'ssvaphtr3e OVR'.

9. Click  (Enter) to validate the information.
10. Click  (Save) to save.
11. You have completed this transaction.

Result

You have entered the Plan Choice Code which will place the employee on the 70-Day Report/90-Day Default Report for monitoring purposes. If the employee has not made a selection at the end of the 90-day period, they will automatically default to PERS Plan 3 – Rate Option A, WSIB Investment Manager.

Comments