

BEN-02 Benefits Participation Report

Purpose

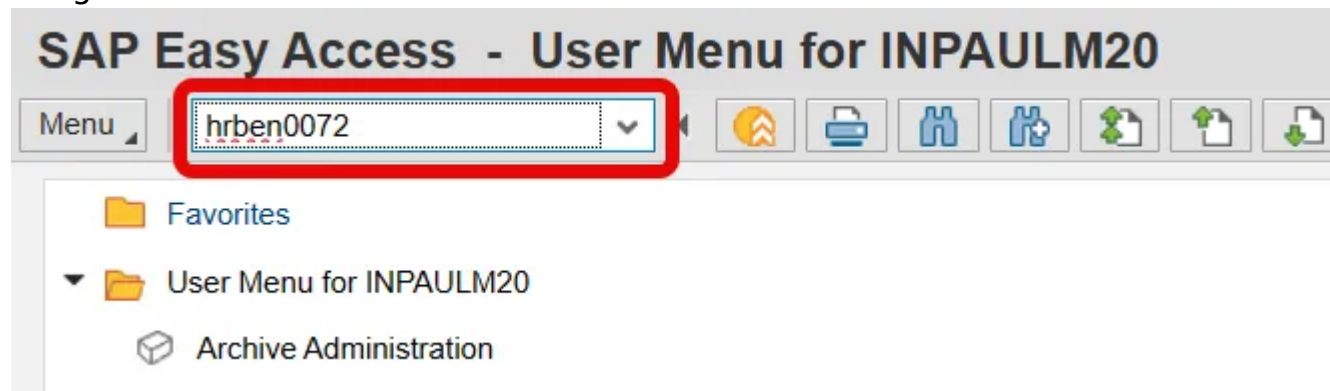
This job aid provides a guide to running a Benefits Participation Report in the Integrated HR/Payroll System. This is not a BI report. The Benefits Participation Report can tell you in real time who in your organization (for whom you have security access) is enrolled in a specific plan(s).

Benefits Participation Report

There are 10 steps to complete this process.

Step 1. Enter the transaction **HRBEN0072**.

Image



Step 2. Press **Enter**.

Step 3. Select **Other period**. Enter the Participation date you want to view. For example, enter **01/01/2010** for Annual Enrollment participation.

Image

The screenshot shows a web interface for 'Participation'. At the top, there is a 'Menu' dropdown and a search bar. Below this, there are three buttons: 'Further selections', 'Search helps', and 'Org. structure'. The 'Period' section contains several radio button options: 'Today', 'Up to today', 'Other period' (which is selected), 'Current month', 'From today', and 'Current year'. Below the 'Other period' option, there is a date input field containing '01/01/2010', which is highlighted with a red rectangular box. To the right of the date field is a 'To' label followed by another empty date input field.

Step 4. Select **Further selections**.

Image

Participation

Menu      

Further selections  Search helps  Org. structure

Period

☐ Today ☐ Current month ☐ Current year

☐ Up to today ☐ From today

☒ Other period

Period  To

Step 5. Select **Personnel Area** under the Selection options.

Image

Choose Selection Fields



Selection options

Selection options
Employment status
Company Code
Personnel area
Personnel subarea
Employee group
Employee subgroup
Payroll area
Administrator group
Payroll administrator
Personnel administrator
Time recording administrator
Pers.area/subarea/cost center



Selection fields

Selection fields	R.
Personnel Number	

Selection: 1



Step 6. Click the right arrow to move the **Personnel area** to the Selection fields section.

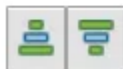
Image

Choose Selection Fields



Selection options

Selection options
Employment status
Company Code
Personnel subarea
Employee group
Employee subgroup
Payroll area
Administrator group
Payroll administrator
Personnel administrator
Time recording administrator
Pers.area/subarea/cost center
Employee group/subgroup



Selection fields

Selection fields	R.
Personnel Number	
Personnel area	

Selection: 2



Step 7. Press **Enter** or Click the **green check**.

Image

Participation

Menu



Further selections



Search helps



Org. structure

Period

☐ Today

☐ Current month

☐ Current year

☐ Up to today

☐ From today

☒ Other period

Period

01/01/2010

To

Selection

Personnel Number

Personnel area

1401



Additional selection

Benefit area

NC

1st Program Grouping

to

2nd Program Grouping

to

Benefit plan

to



Step 8. Select your **Personnel area**.

NOTE: The report does not run unless your personnel area is selected.

Step 9. Select the benefit plan or plans for which you want to view employees' participation.

NOTE: In this example, you will get a list of employees enrolled in the Core AD&D plan effective January 1, 2010.

Image

Participation

Menu ▾



Further selections



Search helps



Org. structure

Period

☐ Today

☐ Current month

☐ Current year

☐ Up to today

☐ From today

☒ Other period

Period

01/01/2010

To

Selection

Personnel Number



Personnel area

1401



Additional selection

Benefit area

NC

1st Program Grouping

to



2nd Program Grouping

to



Benefit plan

ADDC

to



Step 10. Execute the report.

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