

BEN-12 Displaying HR Master Data for Benefits (PA20)

Purpose

The purpose of this Business Process Procedure is to explain how to display various Benefit infotypes on a personnel number in the Integrated HR-Payroll System.

Trigger

There is a need to display various Benefit infotype records on a personnel number, such as Insurance Plans or Savings Plans.

Business Process Procedure Overview

In some instances, you may need to view the Benefit Infotypes only using the display function (PA20). In display mode you are unable to process or update data. Common Infotypes you may want to view for Benefit Processing purposes include:

- IT0021: Family Member/Dependents
- IT0167: Health Plans
- IT0168: Insurance Plans
- IT0169: Savings Plans
- IT0170: Flexible Spending Accounts
- IT0171: General Benefits Information
- IT0219: External Organizations (used for designating an outside entity as a beneficiary for a Life Insurance Plan)

- IT0377: Miscellaneous Plans

Access Transaction

Via Menu Path

SAP menu >> Human Resources >> Personnel Management >> Administration >> HR Master Data >> PA20 - Display

Via Transaction Code

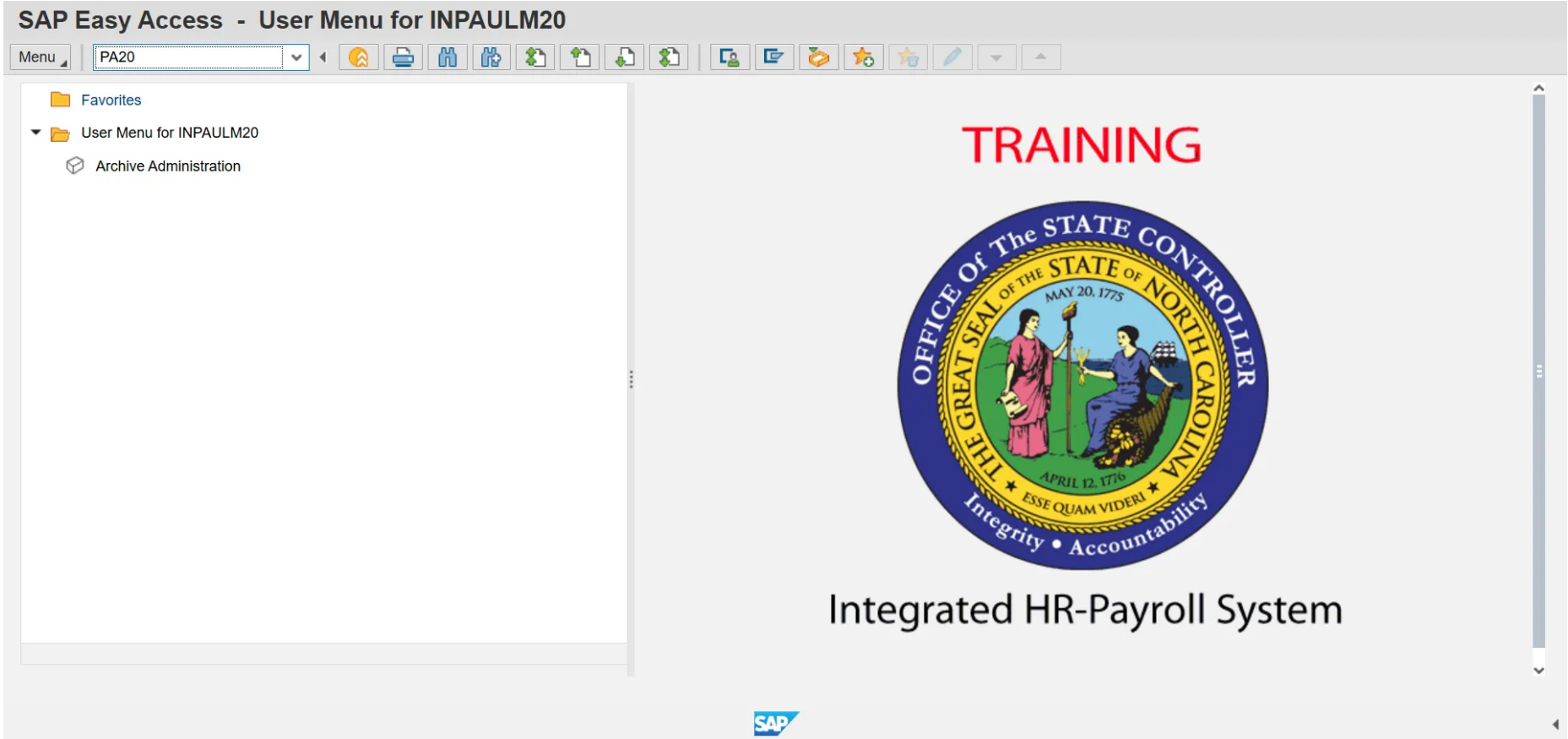
PA20

Procedure

There are 30 steps to complete this process.

Step 1. Update the following required and optional fields.

Field Name	Description	R/O/C	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	R	Enter value in Command Example: PA20
Image			



Step 2. Click the **Enter** button.

Step 3. Update the following **required** and **optional** fields.

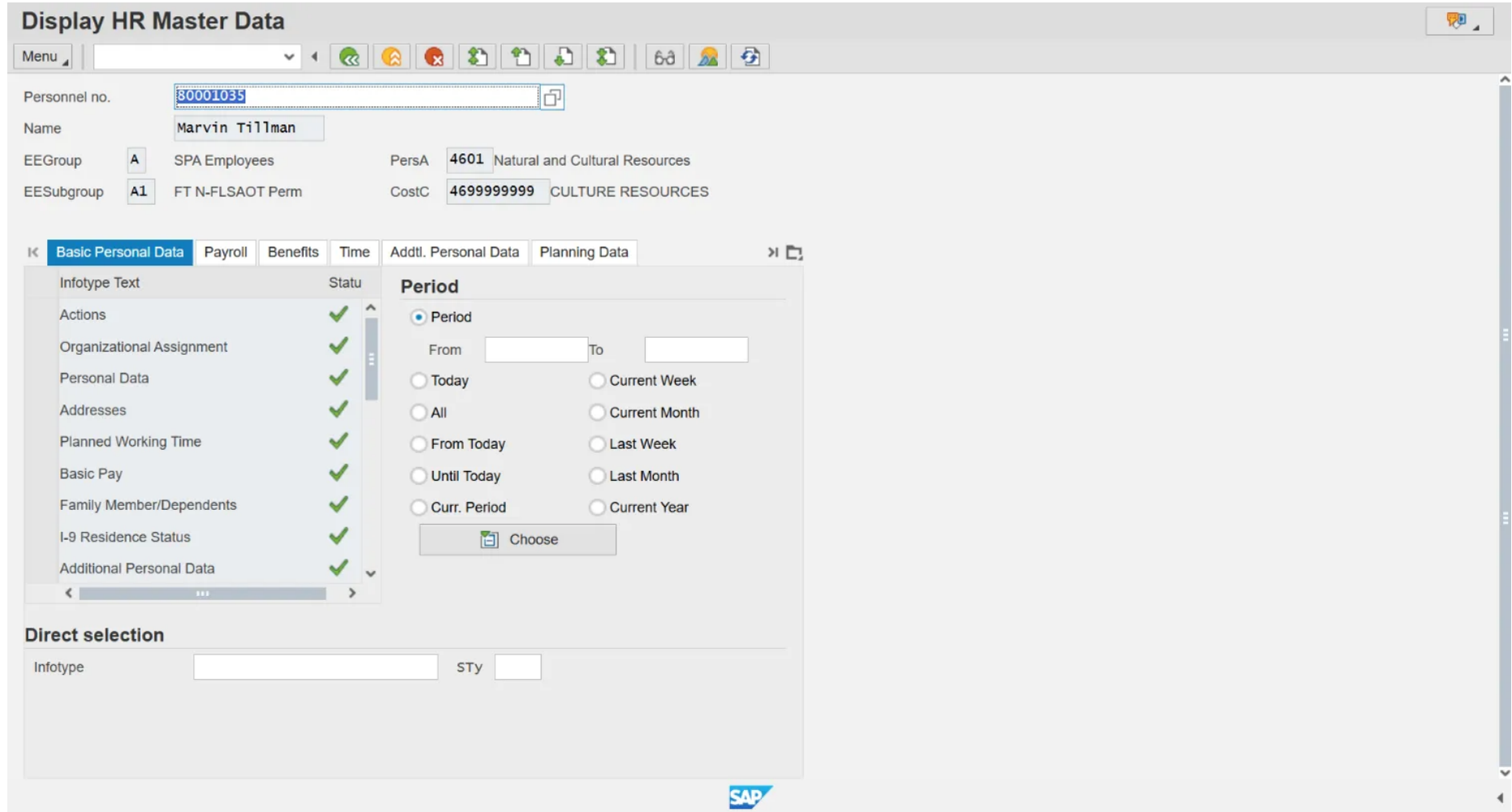
Field Name	Description	R/O/C	Values
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Personnel no. Unique employee identifier R			Enter value in Personnel no. Example: 80001035
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Step 4. Click the **Enter** button.

Note: Click Enter and ensure the correct personnel number was entered.

Image



The screenshot shows the SAP 'Display HR Master Data' interface. At the top, the title bar reads 'Display HR Master Data'. Below it is a menu bar with a dropdown and several icons. The main area contains the following fields:

- Personnel no.: 80001035
- Name: Marvin Tillman
- EEGroup: A SPA Employees
- PersA: 4601 Natural and Cultural Resources
- EESubgroup: A1 FT N-FLSAOT Perm
- CostC: 4699999999 CULTURE RESOURCES

Below these fields are tabs for 'Basic Personal Data', 'Payroll', 'Benefits', 'Time', 'Addtl. Personal Data', and 'Planning Data'. The 'Basic Personal Data' tab is active. It contains a table with the following columns: 'Infotype Text' and 'Status'.

Infotype Text	Status
Actions	✓
Organizational Assignment	✓
Personal Data	✓
Addresses	✓
Planned Working Time	✓
Basic Pay	✓
Family Member/Dependents	✓
I-9 Residence Status	✓
Additional Personal Data	✓

To the right of the table is a 'Period' section with a radio button for 'Period' and a 'From' to 'To' date range. Below this are several radio buttons for different time periods: 'Today', 'Current Week', 'All', 'Current Month', 'From Today', 'Last Week', 'Until Today', 'Last Month', 'Curr. Period', and 'Current Year'. A 'Choose' button is also present.

At the bottom, there is a 'Direct selection' section with an 'Infotype' dropdown and an 'STy' dropdown.

Step 5. Click the **Benefits** tab button.

Note: Review the infotype master data as appropriate. Depending on the type of infotype data, there may be additional screens to scroll through to locate all the data.

Note: To review history, you can select an overview of the Infotype and select multiple rows. When displayed you will be able to move from record to record with the Next button.

Note: Many infotypes related to Benefits information can be displayed via [PA20]. In this example Personal Data is displayed. To display master data contained within an infotype, highlight the line item for the infotype and click Display, or enter the infotype number in the Infotype field at the bottom of the screen and click Display.

Step 6. Click **General Benefits Information** button.

Note: The Benefits tab contains various infotypes typically used by the Benefits functionality, although users may need to view other data such as personal information or address information, located on other tabs.

Image

Display HR Master Data

Menu



EESubgroup

A1

FT N-FLSAOT Perm

CostC

4699999999

CULTURE RESOURCES



Basic Personal Data

Payroll

Benefits

Time

Addtl. Personal Data

Planning Data



Infotype Text

Statu

General Benefits Information



Adjustment Reasons



Family Member/Dependents



Health Plans



Insurance Plans



Savings Plans



Flexible Spending Accounts



Miscellaneous Plans



Monitoring of Tasks



Period

☒ Period

From

To

☐ Today

☐ Current Week

☐ All

☐ Current Month

☐ From Today

☐ Last Week

☐ Until Today

☐ Last Month

☐ Curr. Period

☐ Current Year



Choose

Direct selection

Infotype

STy

Step 7. Click **Display (F7)** button.

Image

Display General Benefits Information (0171)

Menu ▾

◀

⏮

⏭

✖

📄

📄

📄

Personnel No	80001035	Name	Marvin Tillman
EEGroup	A SPA Employees	PersA	4601 Natural and Cultural Resources
EESubgroup	A1 FT N-FLSAOT Perm	Statu	Active
Start	01/01/2008	to	12/31/9999
		Chng	06/17/2008 ECATT

General Benefits Information

Benefit area	NC	State of NC
1st Program Grouping	FULL	Full Benefits Elg
2nd Program Grouping	B014	Reg State Employees

Step 8. Review the General Benefit Infotype data as appropriate.

Step 9. Click **Back (F3)** button.

Step 10. Click **Family Member/Dependents** button.

Image

Display HR Master Data

Menu



Personnel no.

80001035

Name

Marvin Tillman

EEGroup

A

SPA Employees

PersA

4601

Natural and Cultural Resources

EESubgroup

A1

FT N-FLSAOT Perm

CostC

4699999999

CULTURE RESOURCES



Basic Personal Data

Payroll

Benefits

Time

Addtl. Personal Data

Planning Data



Infotype Text

Statu

General Benefits Information



Adjustment Reasons



Family Member/Dependents



Health Plans



Insurance Plans



Savings Plans



Flexible Spending Accounts



Miscellaneous Plans



Monitoring of Tasks



Period

☒ Period

From

To

☐ Today

☐ Current Week

☐ All

☐ Current Month

☐ From Today

☐ Last Week

☐ Until Today

☐ Last Month

☐ Curr. Period

☐ Current Year



Choose

Step 11. Click **Display (F7)** button.

Image

Display Family Member/Dependents (0021)

Menu



Personnel No

80001035

Name

Marvin Tillman

EEGroup

A

SPA Employees

PersA

4601

Natural and Cultural Resources

EESubgroup

A1

FT N-FLSAOT Perm

Statu

Active

Start

05/01/2008

To

12/31/9999

Chng

06/19/2008

90000044

Member

1 Spouse

Number

Personal data

Last name

Tillman

Birth name

First name

Cynthia

Initials

Title



Nationality

Gender

2 Female



Ref.Pers.No.

Birth date

11/02/1966

SSN

554-69-8751

Telephone number

0

BIN

Separation Date

Street

Marital status

Addr Line 2

City/State

Zip/country

Challenge

☐ Disability

Status

☐ Student Indicator

Step 12. Click **Next record (Shift+F7)** button.

Review the Family Member/Dependents infotype data as appropriate. In some cases, there is more than one record. To view the next record, click the Next record button.

Image

Display Family Member/Dependents (0021)

Menu



Personnel No

80001035

Name

Marvin Tillman

EEGroup

A

SPA Employees

PersA

4601

Natural and Cultural Resources

EESubgroup

A1

FT N-FLSAOT Perm

Statu

Active

Start

02/01/2008

To

12/31/9999

Chng

11/16/2012

01346009

Member

2 Child

Child no

01

Personal data

Last name

Tillman

Birth name

First name

Marvin Jr

Initials

Title



Nationality

Gender

1 Male



Ref.Pers.No.

Birth date

01/25/1986

SSN

556-49-7785

Telephone number

0

BIN

Separation Date

Street

Marital status

Addr Line 2

City/State

Zip/country

Challenge

Status

Step 13. Click **Back (F3)** button.

Step 14. Click **Health Plans** button.

Click **Display (F7)** button.

Image

Display Health Plans (0167)

Menu ▾



Personnel No

80001035

Name

Marvin Tillman

EEGroup

A

SPA Employees

PersA

4601

Natural and Cultural Resources

EESubgroup

A1

FT N-FLSAOT Perm

Statu

Active

Start

01/01/2023

to

12/31/9999

Chng

01/05/2023

ZWFINOMPA191

Plan

CANC

NC Flex Cancer Insurance

Plan data

Administration

Costs

Dependents

Additional data

General plan data

Benefit area

NC

State of NC

Plan type

CANC

Cancer Plan

Benefit plan

CANC

NC Flex Cancer Insurance

Health Plan Option

CHIG

Cancer High Option

Dependent Coverage

EE

Employee Only

Planning Parameters

Cost Rule Variant

CHEE

Cancer High Opt EE Only Cost

Step 15. Click **Next record (Shift+F7)** button.

Review the Health Plans infotype data as appropriate. In some cases, there is more than one record. To view the next record, click the Next record button.

Step 16. Click **Back (F3)** button.

Step 17. Click **Insurance Plans** button.

Step 18. Click **Display (F7)** button.

Image

Display Insurance Plans (0168)

Menu ▾



Personnel No

80001035

Name

Marvin Tillman

EEGroup

A

SPA Employees

PersA

4601

Natural and Cultural Resources

EESubgroup

A1

FT N-FLSAOT Perm

Statu

Active

Start

01/01/2023

to

12/31/9999

chnng

01/05/2023

ZWFINOMPA191

Plan

ADDC

NC Flex Core AD&D Insurance

Plan data

Administration

Insurance cov.

Costs

Beneficiaries

General plan data

Benefit area

NC

State of NC

Plan type

AADD

Core AD&D

Benefit plan

ADDC

NC Flex Core AD&D Insurance

Insurance Option

I010

\$10,000 EE Only

Planning Parameters

Coverage Variant

I010

\$10,000 EE Only

Cost Rule Variant

I010

\$10,000 EE Only

Step 19. Click **Next record (Shift+F7)** button.

Review the Insurance Plans infotype data as appropriate. In some cases, there is more than one record. To view the next record, click the Next record button.

Step 20. Click **Back (F3)** button.

Step 21. Click Flexible Spending Accounts button.

Step 22. Click **Display (F7)** button.

Image

Display Flexible Spending Accounts (0170)

Menu ▾



Personnel No

80001035

Name

Marvin Tillman

EEGroup

A

SPA Employees

PersA

4601

Natural and Cultural Resources

EESubgroup

A1

FT N-FLSAOT Perm

Statu

Active

Start

01/01/2023

to

12/31/9999

Chng

01/05/2023

ZWFINOMPA191

Plan

DCSA

NC Flex Dependent Care FSA

Plan data

Administration

Employee contribution

General plan data

Benefit area

NC

State of NC

Plan type

DCAR

Dependent Care

Benefit plan

DCSA

NC Flex Dependent Care FSA

Planning Parameters

Employer FSA Contr.

Step 23. Click **Next record (Shift+F7)** button.

Review the Flexible Spending Accounts infotype data as appropriate. In some cases, there is more than one record. To view the next record, click the Next record button.

Step 24. Click **Back (F3)** button.

Step 25. Click **Savings Plans** button.

Step 26. Click **Display (F7)** button.

Review the Savings Plans infotype data as appropriate. There may be multiple records for infotype 0169 (savings plans) available by clicking on the next screen or previous screen buttons. If there are multiple tabs on the screen, additional data is available on other tabs.

Image

Display Savings Plans (0169)

Menu ▾



Personnel No

80001035

Name

Marvin Tillman

EEGroup

A

SPA Employees

PersA

4601

Natural and Cultural Resources

EESubgroup

A1

FT N-FLSAOT Perm

Statu

Active

Start

12/01/2015

to

12/31/9999

chnng

02/04/2016

01974238

Plan

401K

401(K) Savings Plan



Plan data

Administration

Regular contrib.

Bonus contribution

Beneficiaries

Investments



General plan data

Benefit area

NC

State of NC

Plan type

401K

401(k) Savings

Benefit plan

401K

401(K) Savings Plan

Planning Parameters

EE Contr. Variant

401K

401K EE Contr

ER Contr. Variant

Vesting rule

Investment Group

Step 27. Click **Back (F3)** button.

Step 28. Click **Back (F3)** button.

Step 29. Review additional infotypes as appropriate. If there is a green check mark next to an infotype title, then master data has been entered for that infotype on this employee's record.

Step 30. The system task is complete.

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