

BEN-13 Participation Overview (HRBEN0006)

Purpose

The purpose of this Business Process Procedure is to explain how to display benefits enrollment information for employees in the Integrated HR-Payroll System.

Trigger

Benefit information for an individual is required.

Business Process Procedure Overview

This function allows you to display information about the benefit enrollments for individual employees. It can be used to provide a general overview when a Benefit Administrator receives inquiries from employees regarding their current enrollment information.

This function can be accessed separately via HRBEN0006 or through other HR processing functions (enrollment, termination, participation, and insurability) by selecting the Overview tab.

The overview of employee benefits shows the following information:

- Plan data - The selected options, dependents/beneficiaries, costs, employee, and employer contributions costs.

- Cost data - The costs for the employer (if applicable) and employee are shown.
- Employee master data - A summary of relevant employee data is shown from the infotypes Personal Data (0002), General Benefits Information (0171), Organizational Assignment (0001), Family/Related Person (0021).
- Participation overview - A diagram shows participation in plans over a specific block of time.

Access Transaction

Via Menu Path: SAP menu >> Human Resources >> Personnel Management >> Benefits >> HRBEN0006 - Participation Overview

Note: Your menu path may contain this custom transaction code depending on your security roles.

Via Transaction Code: HRBEN0006

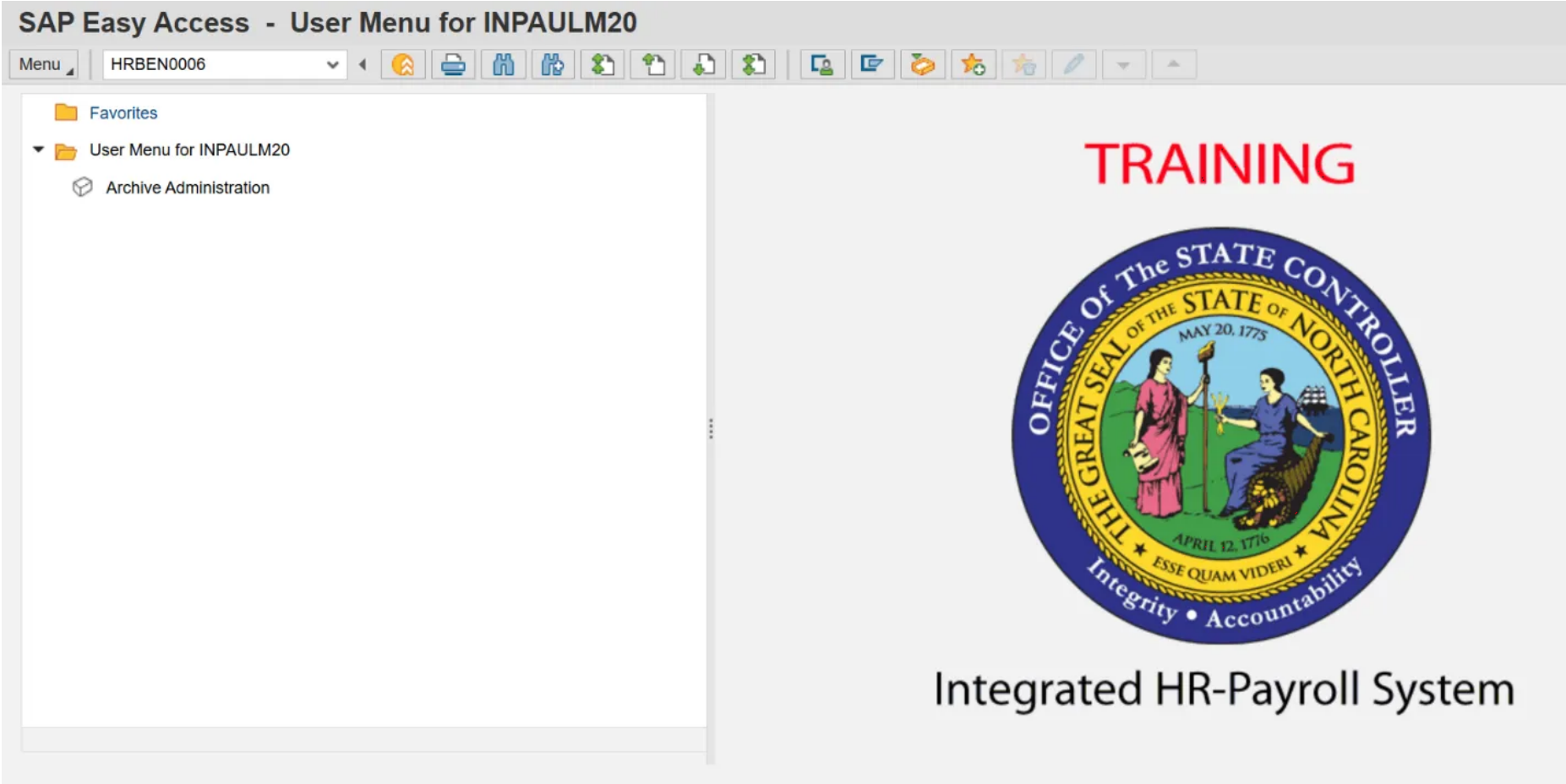
Procedure

There are 15 steps to complete this process.

Step 1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. Example: HRBEN0006

Image



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

Step 3. Update the following fields:

Field Name	Description	Values
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Enter value in Personnel no.

Personnel no. Unique employee identifier

Example: 80001036

Image

General Overview of Benefit Plan Data

Menu

Direct selection Selection set

Personnel no. **80001036**

ID number

Select

Pers.No. Name

Display

Name on 09/10/2025

Plans Costs Master Data Overview

Display Change Confirmation Form Error List

Plan Attributes	Plan Details	Further Details

SAP

Step 4. Click **Enter**.

Ensure the correct personnel number was entered after clicking Enter.

Note: To generate an overview for a different date, click on the Change date button (to the right of the screen) or the calendar next to the date field and change the system date.

Image

General Overview of Benefit Plan Data

Menu [Dropdown] [Icons]

Display

Name: **Jean Leach** on **09/10/2025** [Calendar Icon]

Plans | Costs | Master Data | Overview

[Display] [Change] [Confirmation Form] [Error List]

Plan Attributes	Plan Details	Further Details
▶ NC Flex Accident Plan	01/01/2023 - 12/31/9999	
▶ NC Flex Cancer Insurance	01/01/2023 - 12/31/9999	
▶ NC Flex Critical Illness Plan	01/01/2023 - 12/31/9999	
▶ NC Flex Dental Plan	01/01/2023 - 12/31/9999	
▶ Enhanced 80/20 Plan	01/01/2023 - 12/31/9999	
▶ NC Flex Vision Plan	01/01/2023 - 12/31/9999	
▶ NC Flex Core AD&D Insurance	01/01/2023 - 12/31/9999	
▶ NC Flex AD&D Insurance	01/01/2023 - 12/31/9999	
▶ NC Flex Life Insurance	01/01/2023 - 12/31/9999	

Bar chart cannot be displayed due to GUI incompatibility

SAP

Step 5. Click the **Select** button.

Step 6. Click the **Expand All** button.

The gray triangles may be used to expand or collapse an individual folder or all folders at once.

Image

General Overview of Benefit Plan Data

Menu [Dropdown] [Icons]

Direct selection Selection set

Personnel no. [Input] [Icon]

ID number [Input]

Select [Icon]

[Icons]

Pers.No. Name

80001036	Jean Leach
----------	------------

Display

Name **Jean Leach** on 09/10/2025 [Icon]

Plans Costs Master Data Overview

Display Change Confirmation Form [Red Box] Error List

Plan Attributes	Plan Details	Further Details
▼ NC Flex Accident Plan	01/01/2023 - 12/31/9999	
Option	NC Flex Accident Plan Low	
Dependent coverage	Employee Only	
EE pre-tax	USD 6.94 Monthly	
▼ NC Flex Cancer Insurance	01/01/2023 - 12/31/9999	
Option	Cancer High Option	
Dependent coverage	Employee + Family	
EE pre-tax	USD 23.90 Monthly	
▼ Dependents		

SAP

Step 7. Click the **Costs** tab.

Step 8. Click the **Expand All** button.

The Costs tab will provide an overview of the costs and contributions an employee is making each payroll cycle to their benefit plans. It provides details for both the employee and the employer costs. The total expected contributions per plan year will be available if the employee is enrolled in either the Health or Dependent Day Care Flexible Spending Accounts.

Image

General Overview of Benefit Plan Data

Menu

Direct selection Selection set

Personnel no.

ID number

Select

▲ Pers.No. Name

80001036	Jean Leach
----------	------------

Display

Name on

Plans **Costs** Master Data Overview

Period 1 Monthly

Costs / Contributions Overview	Employee costs	Employer costs
▼ Cost overview (ER credits)	198.96 USD	0.00 USD
NC Flex Accident Plan	6.94 USD	0.00 USD
NC Flex Cancer Insurance	23.90 USD	0.00 USD
NC Flex Critical Illness Plan	15.90 USD	0.00 USD
NC Flex Dental Plan	122.24 USD	0.00 USD
NC Flex Vision Plan	0.00 USD	0.00 USD
NC Flex Core AD&D Insurance	0.00 USD	0.00 USD
NC Flex AD&D Insurance	1.30 USD	0.00 USD
NC Flex Life Insurance	28.00 USD	0.00 USD

Step 9. Click the **Master Data** tab.

The Master Data tab provides a general overview of the data contained on several infotypes, such as SSN, Benefit Groupings, Payroll Cycles or Dependents in one place for easy reference.

Image

General Overview of Benefit Plan Data

Menu



Direct selection

Selection set

Personnel no.

ID number

Select



Pers.No.	Name
80001036	Jean Leach

Display

Name

Jean Leach

on

09/10/2025



Plans

Costs

Master Data

Overview



Maintain HR Master Data



Error List

Personal Data

Personnel Number

80001036

Entry Date

01/01/2008

ID

640-98-0399

Date of Birth

05/13/1968

General Benefits Information

Benefit area

NC

State of NC

1st Program Grouping

FULL

Full Benefits Elg

2nd Program Grouping

B014

Reg State Employees

Organizational Data

Personnel area

4601

Natural and Cultural Resources

Personnel subarea

NC01

7day Norm

Employee group

A

SPA Employees

Step 10. Click the **Plans** tab again.

Step 12. Click **Option** under any plan. (For purposes of this exercise, select the Option under the NC Flex Cancer Insurance).

General Overview of Benefit Plan Data

Menu

Direct selection
Selection set

Personnel no.
ID number
Select

Pers.No. Name
80001036 Jean Leach

Display
Name Jean Leach on 06/24/2021

Plans
Costs
Master Data
Overview

Display
Change
Confirmation Form
Error List

Plan Attributes	Plan Details	Further Details
NC Flex Accident Plan Option Dependent coverage EE pre-tax	01/01/2021 - 12/31/2021 NC Flex Accident Plan Low Employee Only USD 6.94 Monthly	
NC Flex Cancer Insurance Option Dependent coverage EE pre-tax Dependents	01/01/2021 - 12/31/2021 Cancer High Option Employee + Family USD 25.16 Monthly	

Image

Display Health Plans (0167)

Menu ▾



Personnel No

80001036

Name

Jean Leach

EEGroup

A

SPA Employees

PersA

4601

Natural and Cultural Resources

EESubgroup

A1

FT N-FLSAOT Perm

Statu

Active

Start

01/01/2021

to

12/31/2021

Chng

01/21/2022

01928036

Plan

ACCT

NC Flex Accident Plan

Plan data

Administration

Costs

Dependents

Additional data

General plan data

Benefit area

NC

State of NC

Plan type

ACCT

Accident Plan

Benefit plan

ACCT

NC Flex Accident Plan

Health Plan Option

ACCT

NC Flex Accident Plan Low

Dependent Coverage

EE

Employee Only

Planning Parameters

Cost Rule Variant

ACT1

ACCT Cost EE Only Low

Note: To display additional details behind a line item, highlight the line and click Display.

Important: Do not use the Change button to make any changes to an employee's benefits. This may cause inaccurate data to be passed to the benefit vendors. Change the record using the PA30 transaction.

Step 14. Click the **Back (F3)** button.

Step 15. Click the **Exit (F3)** button.

The system task is complete.

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