

**Retirement – Employee Enrolled into Incorrect Plan**

**Purpose** Use this procedure to correct the employee’s record when they have been enrolled into the wrong retirement plan.

**Trigger** Perform this procedure when an employee’s past work history requires them to be reported in another retirement plan or when the employee has been mistakenly enrolled into the wrong retirement plan.

**Prerequisites**

- Employee qualifies for the plan enrollment.
- Identify the *Savings Plans* (0169) records that will need to be corrected along with the impacted effective dates.

**Example:** *The employee is enrolled in Plan 2, but should have been enrolled in Plan 1. Due to the Plan 2 contribution rate changes in 2008, the employee now has several Plan 2 records created from 09/01/2006. Since the rate has not changed for Plan 1, it will only require 1 Savings Plan (0169) record with the date 09/01/2006 to 12/31/9999 to replace the incorrect records.*

**End User Roles** In order to perform this transaction you must be assigned the following role:  
Benefits Processor










Change History	
Date	Change Description
7/27/2009	Update Trigger and Prerequisites section. Placed procedure in new template and updated screenshots.

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

**Transaction Code** PA30

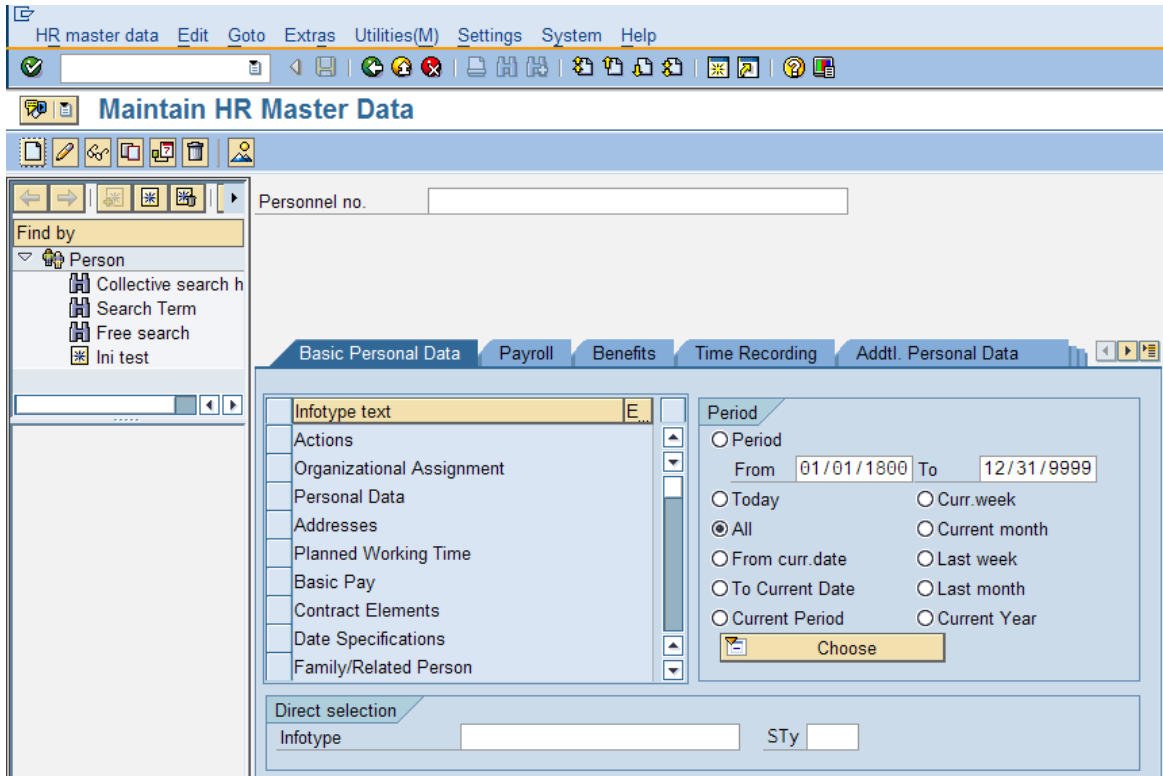
<b>Helpful Hints</b>	<ul style="list-style-type: none"> <li>• n/a</li> </ul>
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The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

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


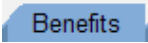

**Procedure**

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



2. 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. <b>Example:</b> 4000452

3. Click  (Enter) to validate the information.
4. Click  to select.
5. Click to box to the left of  to select

6. Click the radio button  All in the **Period** area.

HR master data Edit Goto Extras Utilities(M) Settings System Help

**Maintain HR Master Data**

Personnel no. 40000100

Name John Doe 40000100

PersArea 3000 DSHS Headquarters EEGroup 0 Permanent

PSubarea 00JE Econ/Social Svcs EESubgroup 01 Monthly(M) OT Exempt Status Active

Basic Personal Data Payroll Benefits Time Recording Addtl. Personal Data

Infotype text E... Health Plans Savings Plans Miscellaneous Plans General Benefits Information

Period

Period From 01/01/1800 To 12/31/9999

Today  Curr. week

All  Current month

From curr. date  Last week

To Current Date  Last month

Current Period  Current Year

Choose

7. Click (Overview) for an overview of all actions associated with the *Savings Plan* (0169).

Infotype Edit Goto Extras System Help

**List Savings Plans (0169)**

Personnel No. 40000100 Name John Doe 40000100

PersArea 3000 DSHS Headquarters EEGroup 0 Permanent

PSubarea 00JE Econ/Social Svcs EESubgroup 01 Monthly(M) OT Exempt Status Active

Choose 01/01/1800 to 12/31/9999 STY.

Start Date	End Date	Type	Text	Plan	Text
01/15/2009	12/31/9999	401A	401(a)	T3CS TRS 3 - Rate C - Self	
07/01/2008	07/14/2009	401A	401(a)	P2	PERS 2
07/01/2007	06/30/2008	401A	401(a)	P2	PERS 2
07/01/2006	06/30/2007	401A	401(a)	P2	PERS 2
06/01/2006	06/30/2006	401A	401(a)	P2	PERS 2
06/01/2006	12/31/9999	D1	Deferred Comp	D1	Deferred Compensation




The employee is currently enrolled in Teachers' Retirement System (TRS) Plan 3 – Rate C – Self and should have been enrolled in Public Employee's Retirement System (PERS) 3 –Rate C –

Self during Open Enrollment.

8. Click 

01/15/2009	12/31/9999	401A	401(a)	T3CS	TRS 3 - Rate C - Self
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 to select.

9.  (Change) to change the record. In most cases, use Copy rather than Change to maintain an audit trail.

Change Savings Plans (0169)

Personnel No. 40000100 Name John Doe 40000100

PersArea 3000 DSHS Headquarters EEGroup 0 Permanent

PSubarea 00JE Econ/Social Svcs EESubgroup 01 Monthly(M) OT Exempt Status Active

Start 01/15/2009 to 12/31/9999 Chng 07/27/2009 JANETP

Plan P3CS PERS 3 - Rate C - Self

Plan data Administration Regular contrib. Bonus contribution Beneficiaries

General plan data

Benefit area US USA

Plan type 401A 401(a)

Benefit plan P3CS PERS 3 - Rate C - Self

Planning Parameters

EE Contr. Variant PR3C PERS 3 - Option C

ER Contr. Variant PR3C PERS 3





Vesting rule


Investment Group

Additional fields

Plan Choice Code 3X TRANSFER FROM PLAN 2


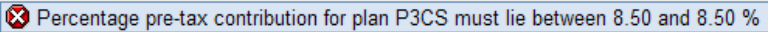
10. Complete the following fields:




R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Benefit Plan	R	This is a specific benefit offered by the company with defined providers, benefit levels, and payments.  Use the  (matchcode) to open selection list. <b>Example:</b> P3CS (PERS 3 – RATE C – SELF)
Plan Choice Code	R	Defines the associated Benefit Plan.  Use the  (matchcode) to open selection list. This selection corresponds with the selected Benefit Plan along with Plan Choice Code text of 'Transfer from Plan 2'. <b>Example:</b> 3X (P3CS 3X Transfer from Plan 2)

11. Click  to select.

12.  
 13. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
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Field Name	R/O/C	Description
Percentage	R	<p>This is a field used to store a percentage amount.</p> <p> If the rate is unknown, enter a random number in the field and the error message will tell you what percentage needs to be entered.</p> <p> Percentage pre-tax contribution for plan P3CS must lie between 8.50 and 8.50 %</p> <p><b>Example:</b> 8.50%</p>

14. Click  (Enter) to validate the information.
15. Click  (Save) to save. You will be taken back to *List Savings Plans (0169)*.
16. You have completed this transaction. Click  (Back) to return to the previous screen.



Repeat the process for each Savings Plan (0169) record that will need to be corrected.

<b>Results</b>
You have enrolled the employee into the correct savings plan.
<b>Comments</b>
None.