

**Retirement Plan Choice – 90 Day Selection Period, Chose Plan 3**

**PA30**

**Change History**

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

<b>Date</b>	<b>Name</b>	<b>Change Description</b>
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 record the Public Employee's Retirement System (PERS) Plan 3 choice after the initial enrollment process has been completed.

**Trigger**

The **Plan Choice Code** must be manually entered when the employee has submitted a Member Information Form designating their plan choice and/or contribution rate.

**Prerequisites**

- Employee qualifies for plan enrollment.
- Member has select PERS Plan 3 as their Retirement plan during the 90-day choice period.

**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
3C	P3	Employee is a new PERS member.	Employee chooses Plan 3.
3D	P3	Employee is a new PERS member.	Employee doesn't choose within the 90-day window and is defaulted to Plan 3.

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 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 proceed.

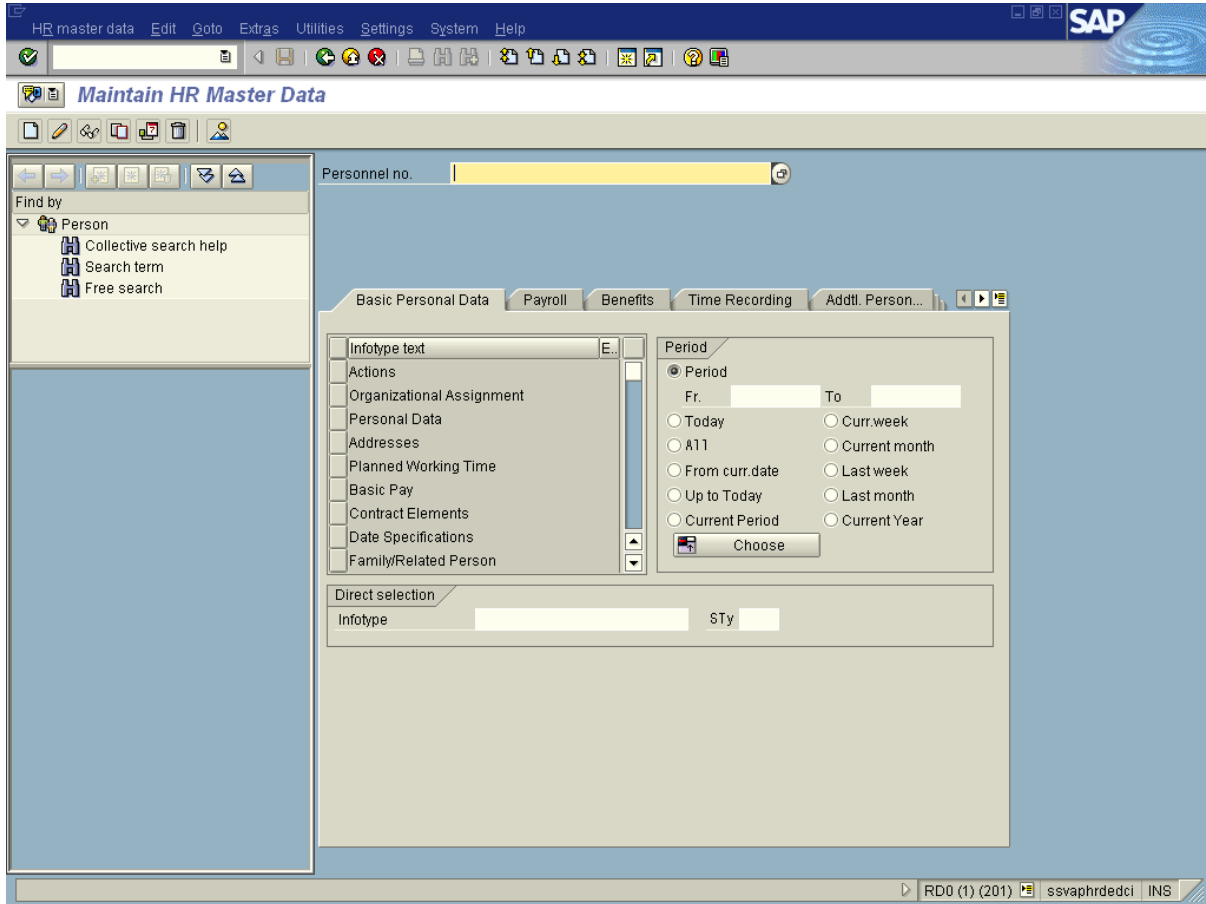
Message Type	Description
<b>Confirmation</b>  or 	<b>Example:</b>  Save your entries. <b>Action:</b> Perform the required action to proceed.

**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. <b>Example: 40000482</b>

## 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 divided into several sections:

- Personnel no.:** 40000482
- Name:** Fournier Criss
- PersArea:** 1500 General Administration
- EEGroup:** 0 Permanent
- PSubarea:** 0001 Non Represented
- EESubgroup:** 01 Monthly(M) OT Exem...
- Status:** Withdrawn

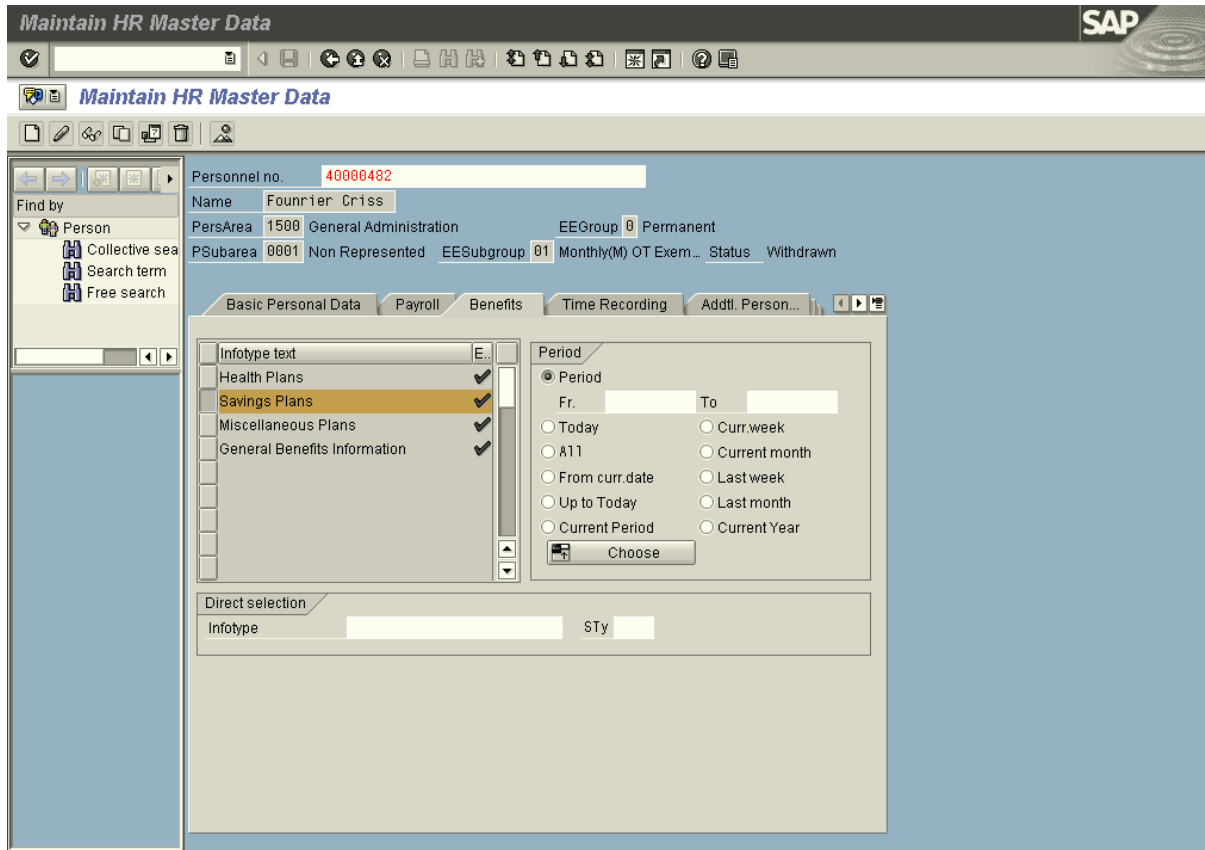
Below these fields are tabs for 'Basic Personal Data', 'Payroll', 'Benefits', 'Time Recording', and 'Addtl. Person...'. The 'Benefits' tab is currently selected. In this tab, there are two main sections:


- Infotype text:** A list of infotypes with checkboxes. 'Actions', 'Organizational Assignment', 'Personal Data', 'Addresses', 'Planned Working Time', 'Basic Pay', 'Contract Elements', 'Date Specifications', and 'Family/Related Person' are all checked.
- Period:** A section for selecting a period. It includes a 'Period' radio button, a 'Fr.' (From) field, and a 'To' (To) field. There are 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 also present.

At the bottom of the 'Benefits' tab, there is a 'Direct selection' section with an 'Infotype' field containing 'STy'.

3. Click the **Benefits** tab.

## Maintain HR Master Data



4. Click the gray box to the left of the Savings Plans selection.
5. Click  (Copy) to copy and continue.

## Copy Savings Plans (0169)

Personnel No. 40000482 Name Fournier, Criss  
PersArea 1500 General Administration EEGroup 0 Permanent  
PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Withdrawn  
Start 07/01/2005 to 12/31/9999  
Plan P2 PERS 2

Plan data Administration Regular contrib. Bonus contribution Benefic...

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

6. Enter the begin date in the **Start** field of the plan choice plan.

## Copy Savings Plans (0169)



The screenshot shows the SAP HRMS interface for 'Copy Savings Plans (0169)'. The top bar includes the SAP logo and standard menu options (Infotype, Edit, Goto, Extras, System, Help). The main area displays employee information for Personnel No. 40000482, Name Fournier, Criss, and Plan P2 (PERS 2). The 'General plan data' section is expanded, showing fields for Benefit area (US USA), Plan type (401A 401 (a)), and Benefit plan (P2 PERS 2). The 'Planning Parameters' section shows EE Contr. Variant (PRS2 PERS 2), ER Contr. Variant (PRS2 PERS 2), Vesting rule, and Investment Group. The 'Additional fields' section shows Plan Choice Code.

7. In the **General Plan Data** group, in the **Benefit plan** field, click on the  (matchcode) to open the selection list and choose the Benefit Plan the employee chose.



## Benefit Plan

Plan	Text
E3FS	SERS 3 - Rate F - Self
E3FW	SERS 3 - Rate F - WSIB
J1	Judges Retirement System
L1	Law Enf. Off. & Firefighters 1
L2	Law Enf. Off. & Firefighters 2
P0	PERS 0
P1	PERS 1
P1M	Marine Retirement
P2	PERS 2
P30	PERS 3 - Option 0
<b>P3AS</b>	<b>PERS 3 - Rate A - Self</b>
P3AW	PERS 3 - Rate A - WSIB
P3BS	PERS 3 - Rate B - Self
P3BW	PERS 3 - Rate B - WSIB
P3CS	PERS 3 - Rate C - Self
P3CW	PERS 3 - Rate C - WSIB
P3DS	PERS 3 - Rate D - Self
P3DW	PERS 3 - Rate D - WSIB
P3ES	PERS 3 - Rate E - Self

8. Click to highlight the selected plan.
9. Click  (Continue)
10. In the **Additional fields** group, in the **Plan Choice Code** field, click on the  (Matchcode) to open the selection list and select the applicable code.

## Copy Savings Plans (1069)

The screenshot shows the SAP 'Copy Savings Plans (0169)' interface. At the top, the title bar reads 'Copy Savings Plans (0169)' and the SAP logo is visible. Below the title bar is a toolbar with various icons. The main area is divided into several sections:

- Personnel Data:**
  - Personnel No.: 40000482
  - Name: Fournier, Criss
  - PersArea: 1500 General Administration
  - EEGroup: 0 Permanent
  - PSubarea: 0001 Non Represented
  - EESubgroup: 01 Monthly(M) OT Exem...
  - Status: Withdrawn
  - Start: 09/16/2005 to 12/31/9999
  - Plan: P2 PERS 2
- Plan Data:**
  - General plan data:
    - Benefit area: US USA
    - Plan type: 401A 401 (a)
    - Benefit plan: P3AS PERS 2
  - Planning Parameters:
    - EE Contr. Variant: PRS2 PERS 2
    - ER Contr. Variant: PRS2 PERS 2
    - Vesting rule: [empty]
    - Investment Group: [empty]
  - Additional fields:
    - Plan Choice Code: [empty]



Refer to the Plan Choice Codes table in the **Helpful Hints** section of this procedure for choice definitions.

Plan	PlnChoiceC	Plan Choice Code txt
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
P3BW		
P3BW	3C	CHOSE PLAN 3
P3BW	3D	DEFAULT FROM PLAN 2
P3BW	3X	TRANSFER FROM PLAN 2
P3CS		
P3CS	3C	CHOSE PLAN 3
P3CS	3D	DEFAULT FROM PLAN 2
P3CS	3X	TRANSFER FROM PLAN 2
P3CW		
P3CW	3C	CHOSE PLAN 3

11. Click to highlight the correct plan.



Note: in this example the employee chose **PERS 3 – Rate A – Self** in Step 7. The HRMS plan code for this plan is **P3AS**. When selecting the corresponding **Plan Choice Code**, find the corresponding choice of **P3AS** in the **Plan** column of the selection list.

12. Click  (Continue)


## Copy Savings Plans (0169)

The screenshot shows the SAP HRMS interface for the transaction 'Copy Savings Plans (0169)'. The search criteria are as follows:

Personnel No.	40000482	Name	Fournier Criss
PersArea	1500	General Administration	EEGroup 0 Permanent
PSubarea	0001	Non Represented	EESubgroup 01 Monthly(M) OT Exem... Status Withdrawn
Start	09/16/2005	to	12/31/9999
Plan	P2	PERS 2	

The 'Additional fields' section shows:

Plan Choice Code	30
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13. Click  (Enter) to validate the information.

## Copy Savings Plans (1069)

Personnel No. 40000482 Name Fournier, Criss  
PersArea 1500 General Administration EEGroup 0 Permanent  
PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Withdrawn  
Start 09/16/2005 to 12/31/9999  
Plan P2 PERS 2

Plan data Administration Regular contrib. Bonus contribution Benefic...

Pre-tax contribution		Post-tax contribution	
Amount	0.00 USD	Amount	0.00 USD
Percentage	2.25	Percentage	0.00
Units	0	Units	
<input type="checkbox"/> Pre-Tax Rollover		<input type="checkbox"/> Start Post-Tax Contributions Immediately	

Reference period for contributions  
Period 2 Semi-monthly


Additional fields  
Plan Choice Code

Percentage pre-tax contribution for plan P3AS must lie between 5.00 and 5.00 % RT0 (1) (517) ssvaphtr3e OVR



An **Error message** will display in the status bar telling you that the new Plan Choice does not match the retirement contribution percent that is mandated by the plan. You will be prompted to enter the correct percent in the **Percentage** field. The error message will also prompt you with the correct percent for the Plan chosen.

14. Enter the percentage for the plan choice in the **Percentage** field.

15. Click  (Enter) to validate the information.

## Copy Savings Plan (0169)

The screenshot shows the SAP HRMS interface for the 'Copy Savings Plans (0169)' transaction. The main window displays the following data:

- Personnel No.:** 40000482
- Name:** Fournier Criss
- PersArea:** 1500 General Administration
- EEGroup:** 0 Permanent
- PSubarea:** 0001 Non Represented
- EESubgroup:** 01 Monthly(M) OT Exem...
- Status:** Withdrawn
- Start:** 09/16/2005
- To:** 12/31/9999
- Plan:** P3AS PERS 3 - Rate A - Self

The 'Pre-tax contribution' section shows:

- Amount: 0.00 USD
- Percentage: 5.00
- Units: 0
- Pre-Tax Rollover

The 'Post-tax contribution' section shows:

- Amount: 0.00 USD
- Percentage: 0.00
- Units: 0
- Start Post-Tax Contributions Immediately

The 'Reference period for contributions' section shows:

- Period: 2 Semi-monthly



The 'Additional fields' section shows:

- Plan Choice Code:

The status bar at the bottom indicates: Record valid from 07/01/2005 to 12/31/9999 delimited at end. RT0 (1) (517) ssvaphtr3e OVR



An Information warning message will display in the status bar telling you that the previous plan was delimited.

16. Click  (Enter) to validate the information.
17. Click  (Save) to save.
18. You have completed this transaction.

### Result

You have entered the employee's choice election for Plan 3 during the 90-day choice period.

### Comments