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Overview

The purpose of this Job Aid is to provide guidelines for the creation of a Mini Master for Retirees. This process is specifically related to recipients of After Service Health Insurance under the UN Medical Insurance Plan (ASHI MIP).

Objectives

This Job Aid provides the steps necessary to create a Mini Master for Retirees participating in the After Service Health Insurance under the UN Medical Insurance Plan (ASHI MIP), and view the resulting Personnel Action.

Enterprise Roles

BN.03: Benefits Insurance Administrator LS

PA.01: HR Partner All

Mini Master Requirements

- Valid index number
- Current mailing address
- Email address

Process

1. Enter the **T-code PA40** in the **Command** field
2. Enter the Personnel Number in the **Personnel No.** field
3. Enter the Start Date (effective date of ASHI) in the **Start** field
4. Select **Enter Benefits Admin. Retiree** in the **Personnel Actions** pane

The screenshot shows the SAP Personnel Actions (PA40) interface. The 'Personnel No.' field is populated with '10000053' and the 'Start' date is '01.01.2017'. The 'Personnel Actions' list on the right includes various actions, with 'Enter Benefits Admin. Retiree' highlighted in yellow. A red box highlights the 'Copy' icon in the top left of the screen.

Action Type	Personn...	EE group	EE subg...
*** NON STAFF ***			
Pre Boarding Non Staff			
Enter Non-Staff no PY/External			
Enter Military/Police Person			
Enter Non-Staff on PY			
Enter Separated s/m			
Maintain All Non-Staff			
MSA Rate Type			
Exit All Non-Staff			
Enter Benefits Admin. Retiree			
Enter Benefits Admin. Surv/Oth			
Maintain Benefits Admin. Prsn			
Exit Benefits Admin. Person			

5. Select the  icon to execute

The **Copy Actions (0000)** screen is displayed:

Copy Actions (0000)

Execute info group Change info group

Pers.No. 10000053 Pers.Assgn 99999999 10000053 (1)

Name Mip ASHI TEST 5 Emp. Stat Inactiv...

EE Group ☒ Non Staff no Payroll HT00 Port-au-Prince

EE Subgrp ☒ Create Index Number

Start 01.01.2017 to 31.12.9999

Personnel action

Action Type Enter Benefits Admin. Retiree

Reason for Action

Status

Customer-specific ASHI/ASLI

Employment Retiree

Organizational assignment

Position 99999999 Integration: default posi

Personnel area HT00 Haiti

Employee group ☒ Non Staff no Payroll

Employee subgroup ☒ Create Index Number

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action

6. In the **Personnel Actions** section, click on the **Reason for Action** match code icon and select the **CP** action to enter the **Benefits Admin Retiree**

Reason for Action (1) 1 Entry found

Restrictions

Act. Name of Action Type ActR Name of reason for action

CP	Enter Benefits Admin. Retiree 01	Enter Benefits Admin. Person
----	----------------------------------	------------------------------



7. Select the  icon to enter
8. the **Organizational assignment** section, the **Employee group** and **Employee subgroup** fields must be changed

Organizational assignment		
Position	99999999	Integration: default posi
Personnel area	HT00	Haiti
Employee group	2	Non Staff no Payroll
Employee subgroup	GS	Create Index Number

The Organization assignment section review:

- The Position field defaults to 99999999
- The Personnel area is the country of residence
- The Employee group is **2** - Category assigned upon retirement
- Employee subgroup is **GS** - Grade assigned upon retirement

9. Either select **2 Local Staff** option from the match code icon drop down list for the **Employee group** field or type **2** and select the  icon to continue



- The **Employee subgroup** field must be changed to **NO** for the National Officer (*in this example*).

10. Either select the relevant option from the match code icon drop down list for the **Employee subgroup** field or type **NO** and select the  icon to continue

The following screen is displayed:

EEGrp	Name of EE group	ESGrp	Name of EE subgrp
2	Local Staff	GS	General Service
2	Local Staff	LT	Language Teacher
2	Local Staff	NO	National Officer
2	Local Staff	PI	Public Info. Asst.
2	Local Staff	SS	Security Service
2	Local Staff	TC	Trades & Craft

11. Select the  icon to enter

A message is displayed at the bottom of the screen:



12. Select the  icon to save

The **Copy Personnel Data (0002)** screen is displayed:

Copy Personal Data (0002)

Pers. No. Pers.Assgn 

Name Emp. Stat

EE Group ☒ Non Staff no Payroll Port-au-Prince

EE Subgrp ☒ Create Index Number

Start To

Name

Title

Last name Birth name

First name

Middle Name

HR Data

Date of Birth

UN National ☒ Othr/Birth

Marital Status Since

Additional Fields

City of Birth

Country of Birth

Gender

☒ Record created

13. Update the required fields

Copy Personal Data (0002)

Pers. No. 10000053 Pers. Assgn 99999999 10000053 (2) Emp. Stat Retiree

Name Mip ASHI TEST 5

EE Group X Non Staff no Payroll HT00 Port-au-Prince

EE Subgrp XA Create Index Number

Start 01.01.2017 To 31.12.9999

Name

Title Mr

Last name ASHI TEST 5 Birth name

First name Mip

Middle Name

HR Data

Date of Birth 12.05.1955

UN National Haitian Othr/Birth

Marital Status Marr&R Since

Additional Fields

City of Birth

Country of Birth

Gender Male

Record created

14. Click on the icon to enter**Note**

Fields with check marks must be completed or IT0002 will not be saved.

A message is displayed at bottom of the screen:

 Record valid from 12.05.1955 to 31.12.9999 delimited at end

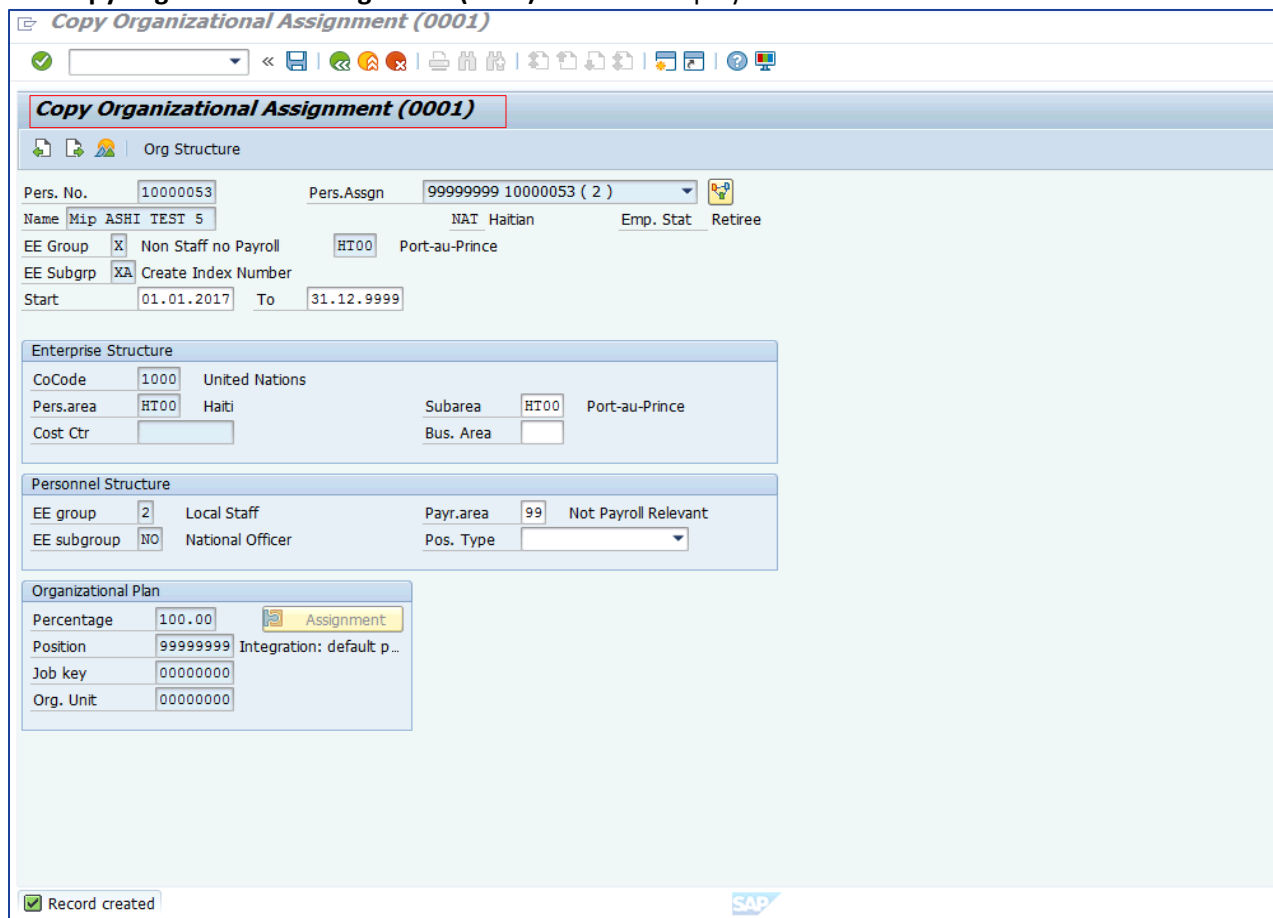
15. Click on the  icon to enter

A message is displayed at bottom of the screen:

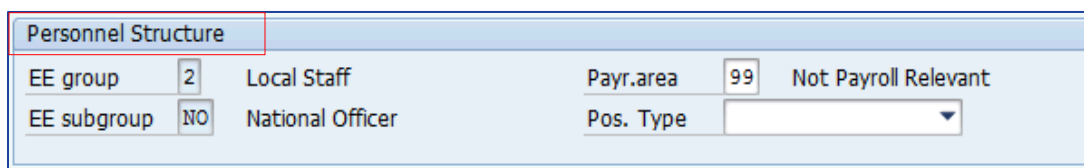


16. Select the  icon to save the document

The **Copy Organizational Assignment (0001)** screen is displayed:

The screenshot shows the SAP "Copy Organizational Assignment (0001)" screen. At the top, there's a title bar with the text "Copy Organizational Assignment (0001)" and a toolbar with various icons. Below the title bar, the screen is divided into several sections. The "Enterprise Structure" section contains fields for "CoCode" (1000), "United Nations", "Pers.area" (HT00), "Haiti", "Subarea" (HT00), "Port-au-Prince", and "Cost Ctr". The "Personnel Structure" section contains fields for "EE group" (2), "Local Staff", "Payr.area" (99), "Not Payroll Relevant", "EE subgroup" (NO), "National Officer", and "Pos. Type". The "Organizational Plan" section contains fields for "Percentage" (100.00), "Position" (99999999), "Job key" (00000000), and "Org. Unit" (00000000). At the bottom left, there is a status bar that says "Record created". At the bottom right, there is a SAP logo.

- Do not change any information in the **Personnel Structure** section

A close-up of the "Personnel Structure" section from the SAP screen. It shows the following fields: "EE group" with value "2", "Local Staff", "Payr.area" with value "99", "Not Payroll Relevant", "EE subgroup" with value "NO", "National Officer", and "Pos. Type" with a dropdown arrow.

17. Select the  icon to enter and a message is displayed at the bottom of the screen

 Record valid from 31.12.2016 to 31.12.9999 delimited at end

18. Select the  icon to enter and the message to save the record is displayed at bottom of the screen

 Save your entries

19. Select the  icon to save the document

The **Create Basic Pay (0008)** screen is displayed .

Create Basic Pay (0008)

Pers. No. 10000053 Pers. Assign 99999999 10000053 (2)

Name Mip ASHI TEST 5 NAI Haitian Emp. Stat Retiree

EE Group 2 Local Staff HT00 Port-au-Prince

EE Subgrp NO National Officer

Start 01.01.2017 To 31.12.9999

Object ID

Next increase 31.12.9999

Pay scale

Type NO National Officers

Area HT Haiti

Group 01 Level 01

Further Information

Capacity Util. Level 100.00 % PER

Work hours/period 174.00 Monthly

Ann. salary 0.00 USD

W...	Wage Type Long Text	O. Amount	Curr...	I...	A.	Number/Unit	Unit
9010	Benefits Flag		HTG				
			HTG				
			HTG				

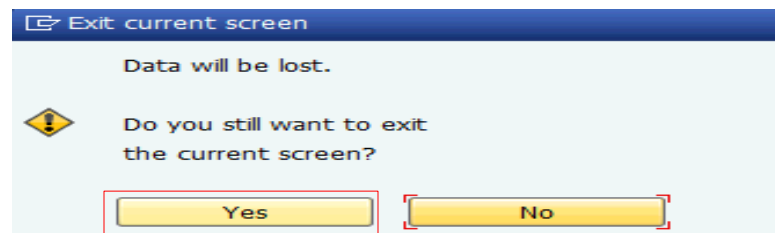
IV 01.01.2017 - 31.12.9999 0.00 HTG Payroll Simulation

Increment Information

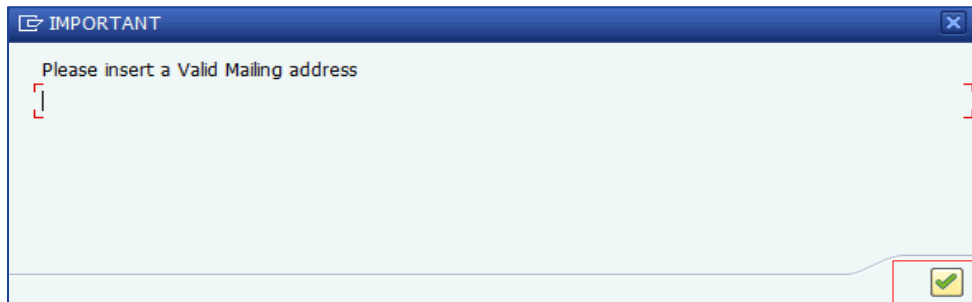
No entry in table T510 for the key UNNOHT301 01 on 01.01.2017

20. Select the next record icon  located on top left corner

The message below is displayed:

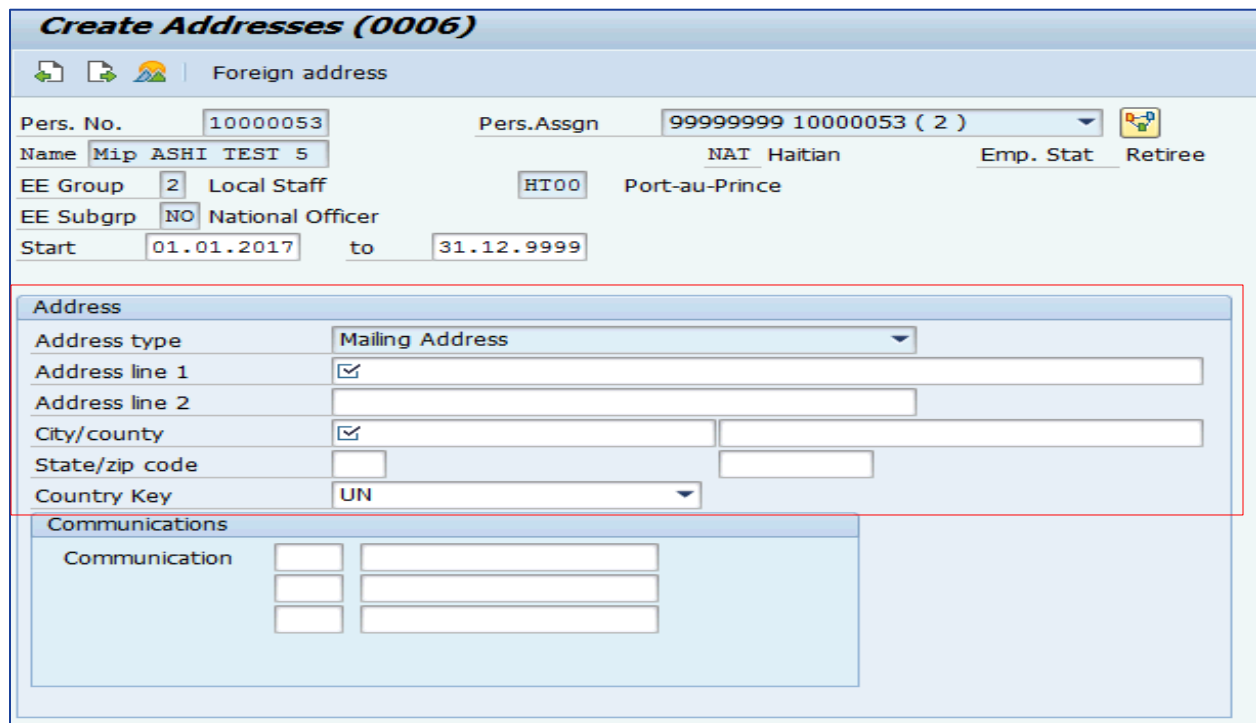


21. Select **Yes** and the message below is displayed:



22. Select the  icon

The **Create Addresses (0006)** screen is displayed.

The "Create Addresses (0006)" screen displays a form for entering address information. The form includes fields for "Pers. No." (10000053), "Pers. Assgn" (99999999 10000053 (2)), "Name" (Mip ASHI TEST 5), "NAT" (Haitian), "Emp. Stat" (Retiree), "EE Group" (2 Local Staff), "HT00", "Port-au-Prince", "EE Subgrp" (NO National Officer), "Start" (01.01.2017), and "to" (31.12.9999). The "Address" section is highlighted with a red box and contains fields for "Address type" (Mailing Address), "Address line 1" (with a checkmark), "Address line 2", "City/county" (with a checkmark), "State/zip code", and "Country Key" (UN). Below the address section is a "Communications" section with a table for "Communication" data.

**Note**

Fields with check marks must be completed or IT0006 will not be saved.

23. Update the Address section as follows:

- **The Address type** is Mailing Address
- Enter the street name in the **Address line 1** field
- Enter the apartment number (if applicable) in **Address line 2** field
- Enter the city in the **City/county** field
- Enter the state and zipcode (if applicable) in the **State/zip code** fields
- Select the country from the drop down list in the **Country Key** field
- The updated **Create Addresses (0006)** screen is displayed below

Create Addresses (0006)

Foreign address

Pers. No. 10051214 Pers. Assgn 99999999 10051214 (2)

Name Mip ASHI TEST5 NAT Haitian Emp. Stat Retiree

EE Group B Benefits HT00 Port-au-Prince

EE Subgrp BB Local UNCS Retiree 01 01

Start 01.10.2016 to 31.12.9999

Address

Address type Mailing Address

Address line 1 12 Ramsey Place

Address line 2

City/county Port-au-Prince

State/zip code

Country Key Haiti

Communications

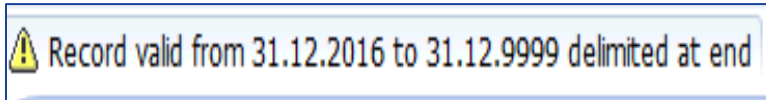
Communication

Record created

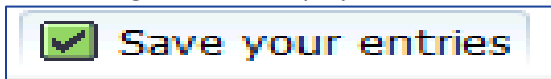
SAP

MP000600 | unsapri2e | OVR

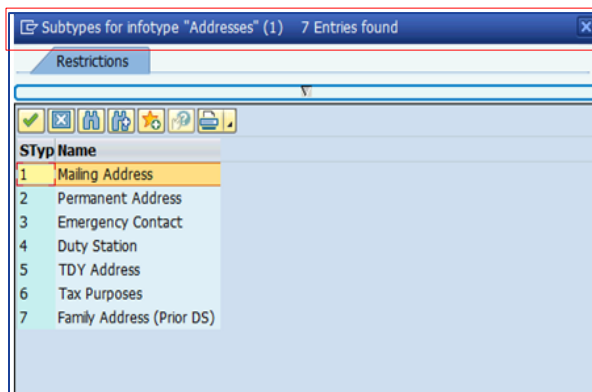
24. Select the  icon to enter
A message is displayed at the bottom of screen



25. Click on the  icon
The message below is displayed



26. Select the  icon and save the record
The **Subtypes for infotype "Addresses"** options are displayed



27. If there are no other addresses to input, select the  icon
The **Copy Planned Working Time (0007)** screen is displayed

Copy Planned Working Time (0007)

Work schedule

Pers. No. 10000053 Pers.Assgn 99999999 10000053 (2)

Name Mip ASHI TEST 5 NAT Haitian Emp. Stat Retiree

EE Group 2 Local Staff HT00 Port-au-Prince

EE Subgrp NO National Officer

Start 01.01.2017 To 31.12.9999

Work schedule rule

Work schedule rule NORM Haiti Normal 8hr

Time Mgmt status 0 - No time evaluation

Working time

Weekly working hours 40.00

28. Select the  icon
A message is displayed at the bottom of screen

 Record valid from 31.12.2016 to 31.12.9999 delimited at end

29. Click on the  icon to enter
This action should generate the **Create Basic Pay (0008)** screen

The **Create Basic Pay (0008)** screen is displayed below

Create Basic Pay (0008)

Pers. No. 10000053 Pers. Assgn 99999999 10000053 (2)

Name Mip ASHI TEST 5 NAT Haitian Emp. Stat Retiree

EE Group 2 Local Staff HT00 Port-au-Prince

EE Subgrp NO National Officer

Start 01.01.2017 To 31.12.9999

Object ID

Next increase 31.12.9999

Pay scale

Type NO National Officers

Area HT Haiti

Group ☒ Level

Further Information

Capacity Util. Level 100.00 \$ PER

Work hours/period 174.00 Monthly

Ann. salary 0.00 USD

W...	Wage Type Long Text	O.	Amount	Curr...	I...	A..	Number/Unit	Unit
1100	Gross Salary		0.00	HTG	I	☐		
1113	Net Base Salary		0.00	HTG	I	☒		
4127	Pensionable Base		0.00	HTG	I	☐		

IV 01.01.2017 - 31.12.9999 0.00 HTG Payroll Simulation

Increment Information

☒ Record created

30. Select the next record icon  located on the top left corner
The **Create Date Specifications (0041)** screen is displayed

Create Date Specifications (0041)

Pers. No. 10000053 Pers. Assgn 99999999 10000053 (2)

Name Mip ASHI TEST 5 NAT Haitian Emp. Stat Retiree

EE Group 2 Local Staff HT00 Port-au-Prince

EE Subgrp NO National Officer

Start 01.01.2017 to 31.12.9999

Date Specifications

Date type	Date	Date type	Date
U1 EOD UN Common System		U2 EOD UN Secretariat	
U4 Seniority in Grade		U5 Retirement Date	

31. Update the **U2 EOD UN Secretariat** field with the retiree's EOD date at the relevant entity – this is a mandatory field.

32. Under **Date type**, select **UD** from the match code

Date type (2) 12 Entries found

Restrictions

DT Date type

U1	EOD UN Common System
U2	EOD UN Secretariat
U4	Seniority in Grade
U5	Retirement Date
U6	OVR EOD D/S
U7	OVR Mobility Ef Date
U8	Pension Particip Dt
U9	OVR D/S Arvl-Rental
UA	Declaration Date
UB	Waiver Signed Date
UD	ASHI - UNCS EOD
UL	AL Accrual

33. Update the **Date** field with the same date as the **U2 EOD UN Secretariat** Date field

Create Date Specifications (0041)

Pers. No. 10000053 Pers. Assgn 99999999 10000053 (2)

Name Mip ASHI TEST 5 NAT Haitian Emp. Stat Retiree

EE Group 2 Local Staff HT00 Port-au-Prince

EE Subgrp NO National Officer

Start 01.01.2017 to 31.12.9999

Date type	Date	Date type	Date
U1 EOD UN Common System		U2 EOD UN Secretariat	01.01.1980
U4 Seniority in Grade		U5 Retirement Date	
		UD	01.01.1980

34. Select the  icon and a message is displayed at the bottom of screen

 Caution: Date types without date specification will be deleted when saved

35. Select the  icon and a message to save record is displayed

 Save your entries

36. Select the  icon to save
The **Create Cost Distribution (0027)** screen is displayed

Create Cost Distribution (0027)

Org. Management info

Pers. No. 10000053 Pers. Assgn 99999999 10000053 (2)

Name Mip ASHI TEST 5 EOD UN 01.01.1980 NAT Haitian Emp. Stat Retiree

EE Group 2 Local Staff HT00 Port-au-Prince

EE Subgrp NO National Officer

Start 01.01.2017 To 31.12.9999

Distrib. 01 Wage/salary

Master cost center

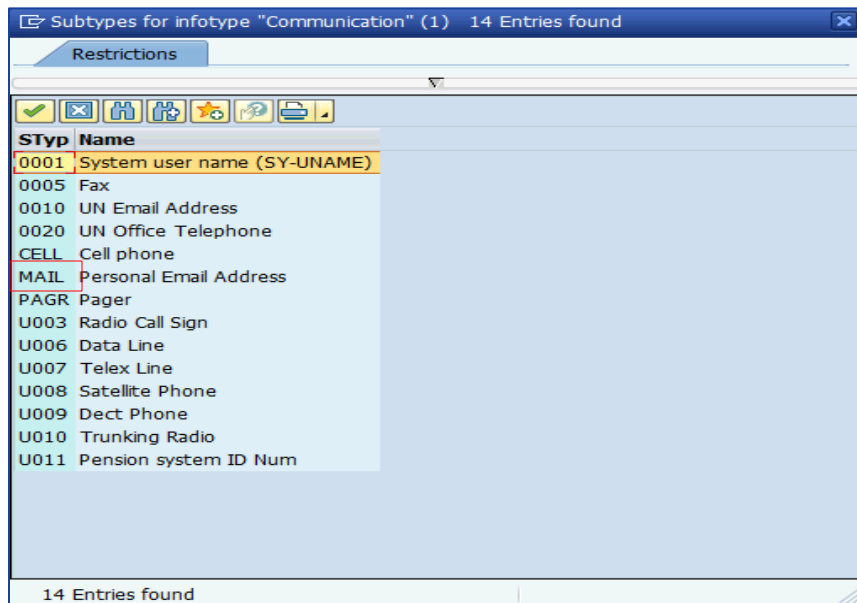
CoCd	Cost ctr	Order	WBS element	Name	Pct.	Name of

New entries Entry 1 / 0

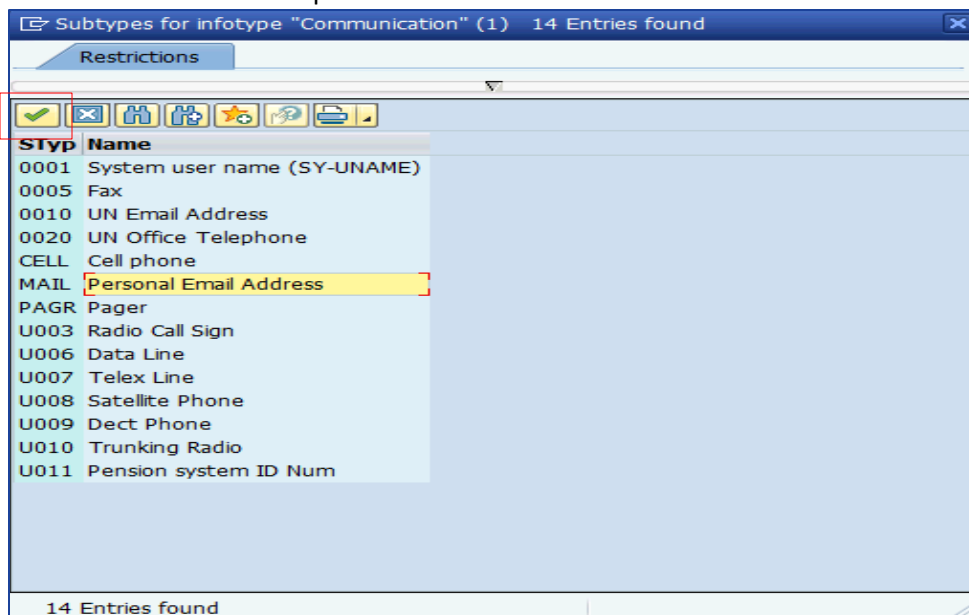
 Record created

SAP

37. Select the next record icon  located on top left corner of the screen.
The **Subtypes for infotype "Communication"** options are displayed



38. Select the **MAIL** option to create the **Personal Email Address**



39. Select the  icon to enter
The **Create Communications (0105)** screen is displayed

40. Enter the email address of the retiree in **ID/number** field

Create Communication (0105)

Pers. No. 10000053 Pers. Assgn 99999999 10000053 (2)

Name Mip ASHI TEST 5 EOD UN 01.01.1980 NAT Haitian Emp. Stat Retiree

EE Group 2 Local Staff HT00 Port-au-Prince

EE Subgrp NO National Officer

Start 01.01.2017 to 31.12.9999

Communication

Type MAIL Personal Email Address

ID/number MIPASHITEST5@gmail.com

41. Select the  icon to save

The Subtypes for infotype "Communication" options are displayed

Subtypes for infotype "Communication" (1) 14 Entries found

Restrictions

✓ ✕ ⏏ ⏏ ⏏ ⏏ ⏏ ⏏ ⏏

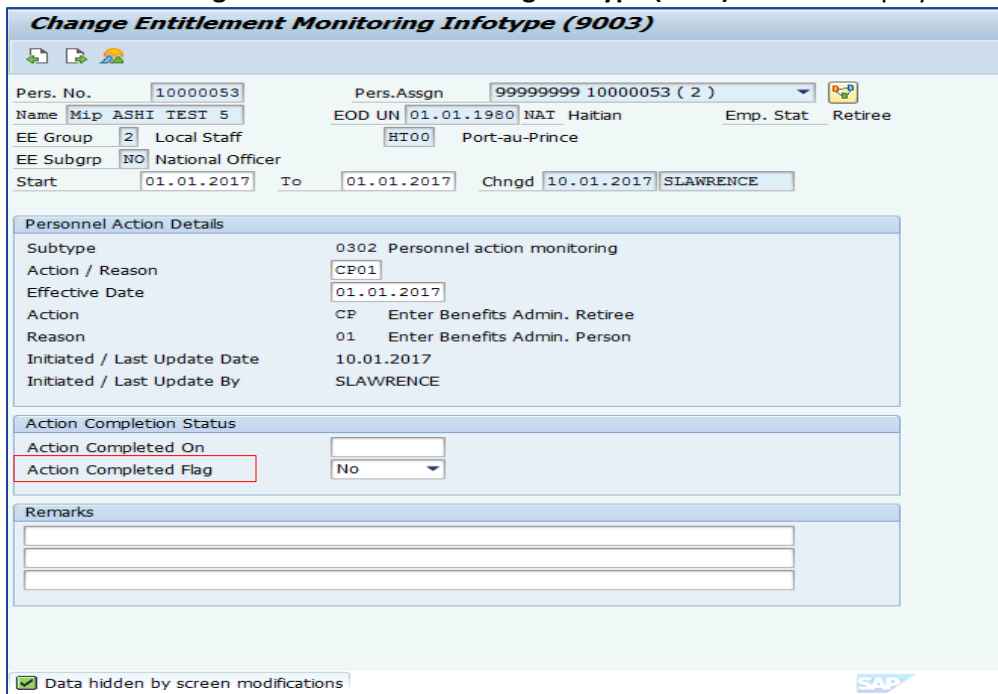
STyp	Name
0001	System user name (SY-UNAME)
0005	Fax
0010	UN Email Address
0020	UN Office Telephone
CELL	Cell phone
MAIL	Personal Email Address
PAGR	Pager
U003	Radio Call Sign
U006	Data Line
U007	Telex Line
U008	Satellite Phone
U009	Dect Phone
U010	Trunking Radio
U011	Pension system ID Num

14 Entries found



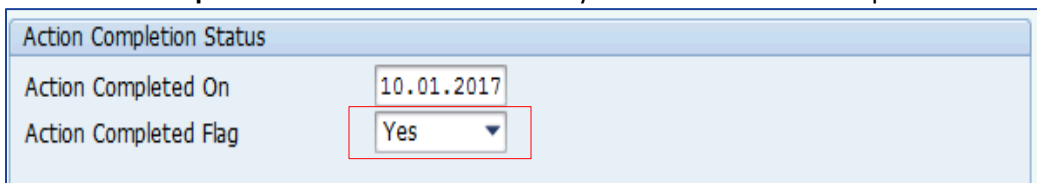
42. Select the  icon as only one email address is required.

The **Change Entitlement Monitoring Infotype (9003)** screen is displayed



43. To update the **Action Completion Status** section, select **YES** from the drop down list in the **Action Complete Flag** field.

The **Action Completed On** field will automatically reflect the date of completion of the PA.



44. Select the  icon to save the document

The **Personnel Actions** screen is displayed

Personnel Actions

Find by
 Person
 • Collective search help
 • Search Term
 • Free search

Personnel No. 10000053 Pers.Assgn 99999999 10000053 (2)
 Name Mip ASHI TEST 5 EOD UN 01.01.1980 NAT Haitian Emp. Stat Retiree
 EE Group 2 Local Staff HI00 Port-au-Prince
 EE Subgrp NO National Officer
 Start

Action Type	Personn...	EE group	EE subg...
Separation / Termination			
Separation / Misconduct			
Special Separation w/o break			
Separation Payments			
Separation Pre Reinstatement			
Change Org Unit			
*** NON STAFF ***			
Pre Boarding Non Staff			
Enter Non-Staff no PY/External			
Enter Military/Police Person			
Enter Non-Staff on PY			
Enter Separated s/m			
Maintain All Non-Staff			
MSA Rate Type			
Exit All Non-Staff			
Enter Benefits Admin. Retiree			
Enter Benefits Admin. Surv/Oth			
Maintain Benefits Admin. Prsn			

To view the Personnel Action:

1. Enter the **T-code PA20** in the **Command** field
2. Enter the Personnel Number in the **Personnel No.** field
3. Highlight the **Actions** option in the **Basic Data** tab
4. Select the **Overview**  icon

Display HR Master Data

Overview (Shift+F8)

Find by

- Person
- Collective search help
- Search Term
- Free search

Personnel No. 10000053 Pers.Assgn 99999999 10000053 (2)

Name Mip ASHI TEST 5 EOD UN 01.01.1980 NAT Haitian Emp. Stat Retiree

EE Group 2 Local Staff HT00 Port-au-Prince

EE Subgrp NO National Officer

Basic Data Contract Data Payroll Data Time Data Benefits Data S...

Infotype text S...

Actions

Organizational Assignment

Personal Data

Family Member/Dependents

Documents on Dependents

Addresses

Bank Details

Contract Elements

Monitoring of Tasks

Period

Period

From To

Today Curr.week

All Current month

From curr.date Last week

To Current Date Last month

Current Period Current Year

Choose

Direct selection

Infotype Actions STy

The **Overview Actions (0000)** screen is displayed

Overview Actions (0000)

Find by

- Person
- Collective search help
- Search Term
- Free search

Pers. No. 10000053 Pers.Assgn 99999999 10000053 (2)

Name Mip ASHI TEST 5 EOD UN 01.01.1980 NAT Haitian Emp. Stat Retiree

EE Group 2 Local Staff HT00 Port-au-Prince

EE Subgrp NO National Officer

Choose 01.01.1800 to 31.12.9999

Start Date	End Date	Act.	Action Type	ActR	Reason for action	C...	E
01.01.2017	31.12.9999	CP	Enter Benefits Admin. Re..01	01	Enter Benefits Admin. Pe..2	2	2
31.12.2016	31.12.2016	04	Create Index Number	01	Create Index Number	1	1

Entry 1 of 2

This indicates that the Personnel Action (PA) is created