PA30 (IT0015) Education Reimbursement - Taxable - Change...

Purpose

Use this procedure to reimburse an employee for Educational expenses that are not job related. This amount is an accountable plan and as such is taxable to the employee.

Trigger

Perform this procedure when the labor contract allows for such reimbursement.

Prerequisites

- The employee meets all criteria for the reimbursement
- The manager approves the reimbursement
- The approval documents are forwarded to Central Payroll for validation and unlocking. Central Payroll must receive the completed and approved documents in order to unlock the Wage Type for processing

Menu Path

Use the following menu path to begin this transaction:

N/A

Transaction Code

PA30

Helpful Hints

- R/O/C column in tables represents Required, Optional, or Conditional entry
- To change the Account Assignment, enter **only one** Cost Object
    - Cost Center
    - WBS Element
    - Order
- **Do not** key over the **** fields. They do not transfer with your data. If you do key over them, click the Trash Can and start over. Not starting over results in an error message and inability to transfer the entry
- If you transfer the Cost and need to change it back, open the *Maintain Cost Assignment* , click the trash can, reopen the *Maintain Cost Assignment* , re-enter and transfer the correct information. Click the radio button to save your changes

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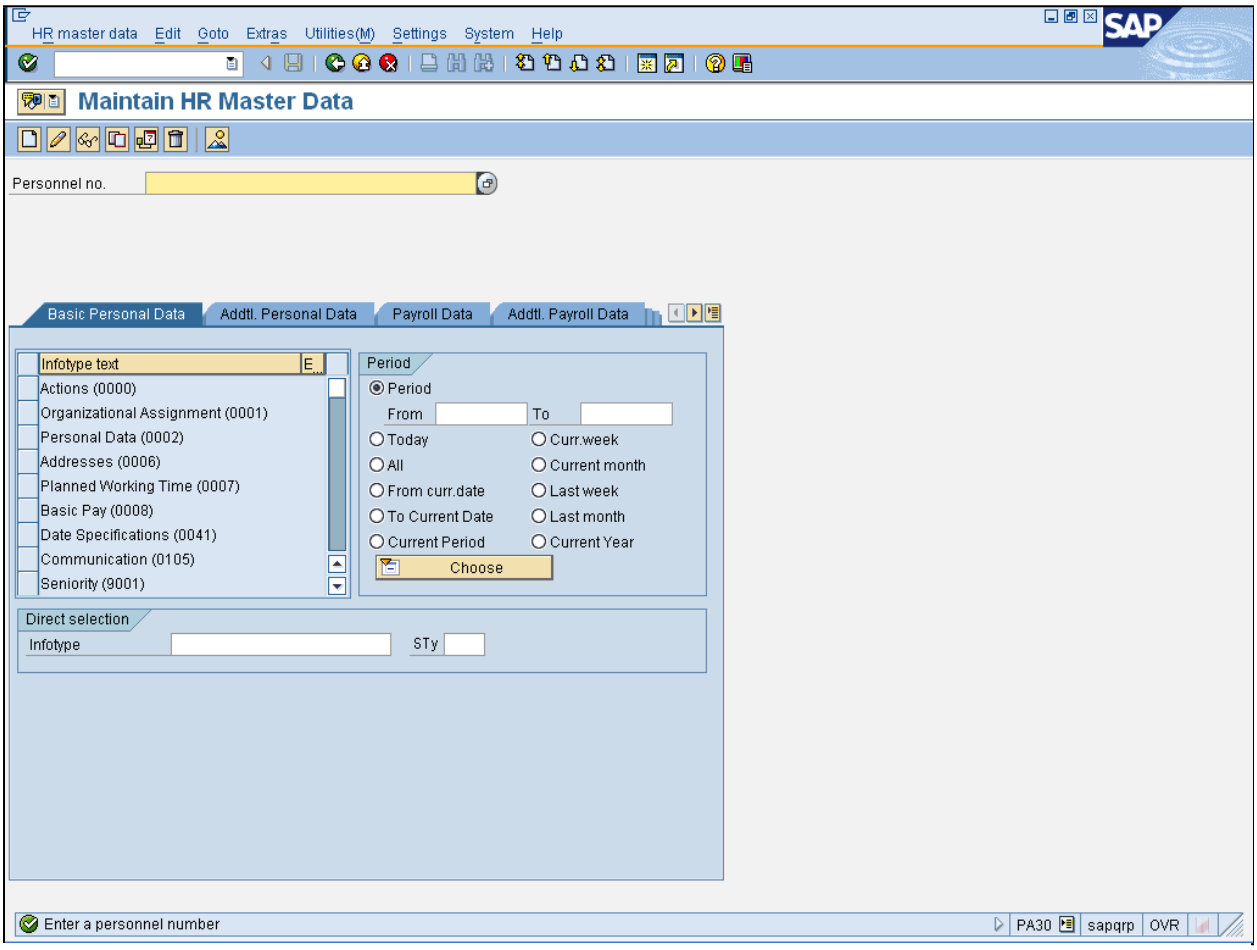
Procedure

1. Start the transaction using the menu path or transaction code. The *Maintain HR Master Data* screen displays.

Maintain HR Master Data



2. Click **Personnel no.** field .

3. Click **Personnel no.** matchcode . The *Personnel Number (XXXX)* dialog box displays.

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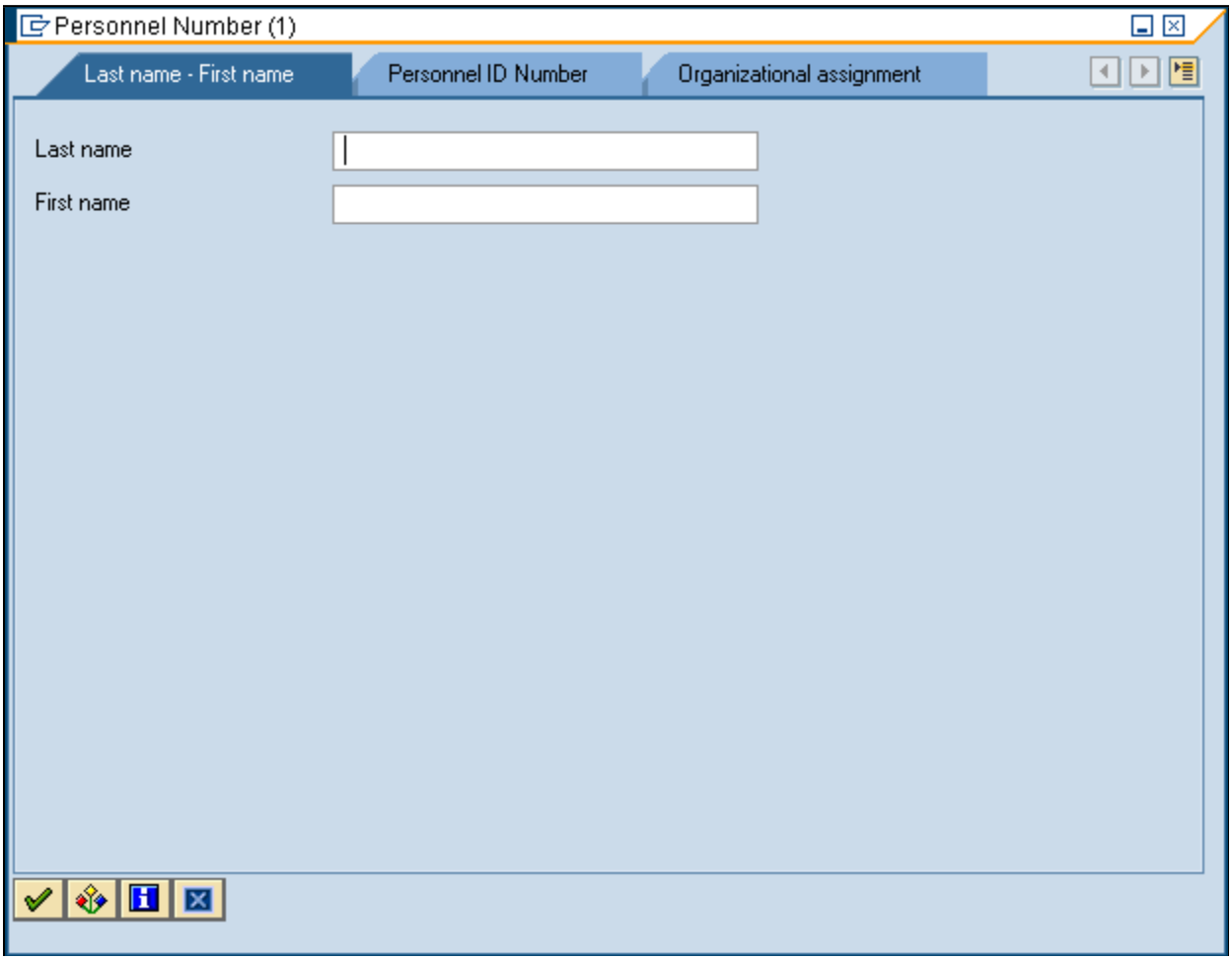
Personnel Number (XXXX)



4. As required, complete/review the following fields:

Field	R/O/C	Description
Last name	R	Surname; the name used to identify the individual. **Example:** *ments

5. Click **Start Search** button . The *Personnel Number (XXXX)* list displays.

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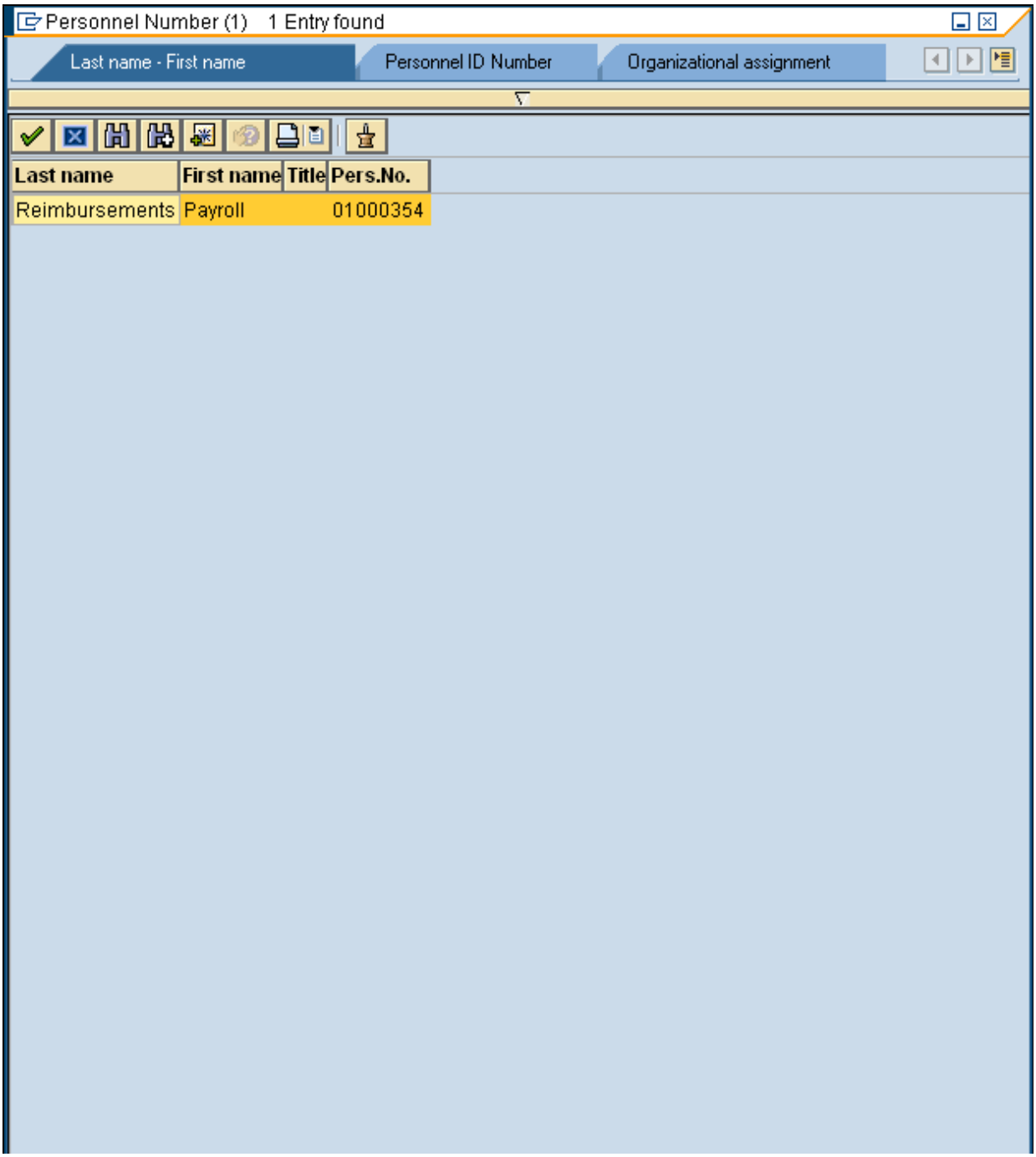
Personnel Number (XXXX) YYYY Entry found



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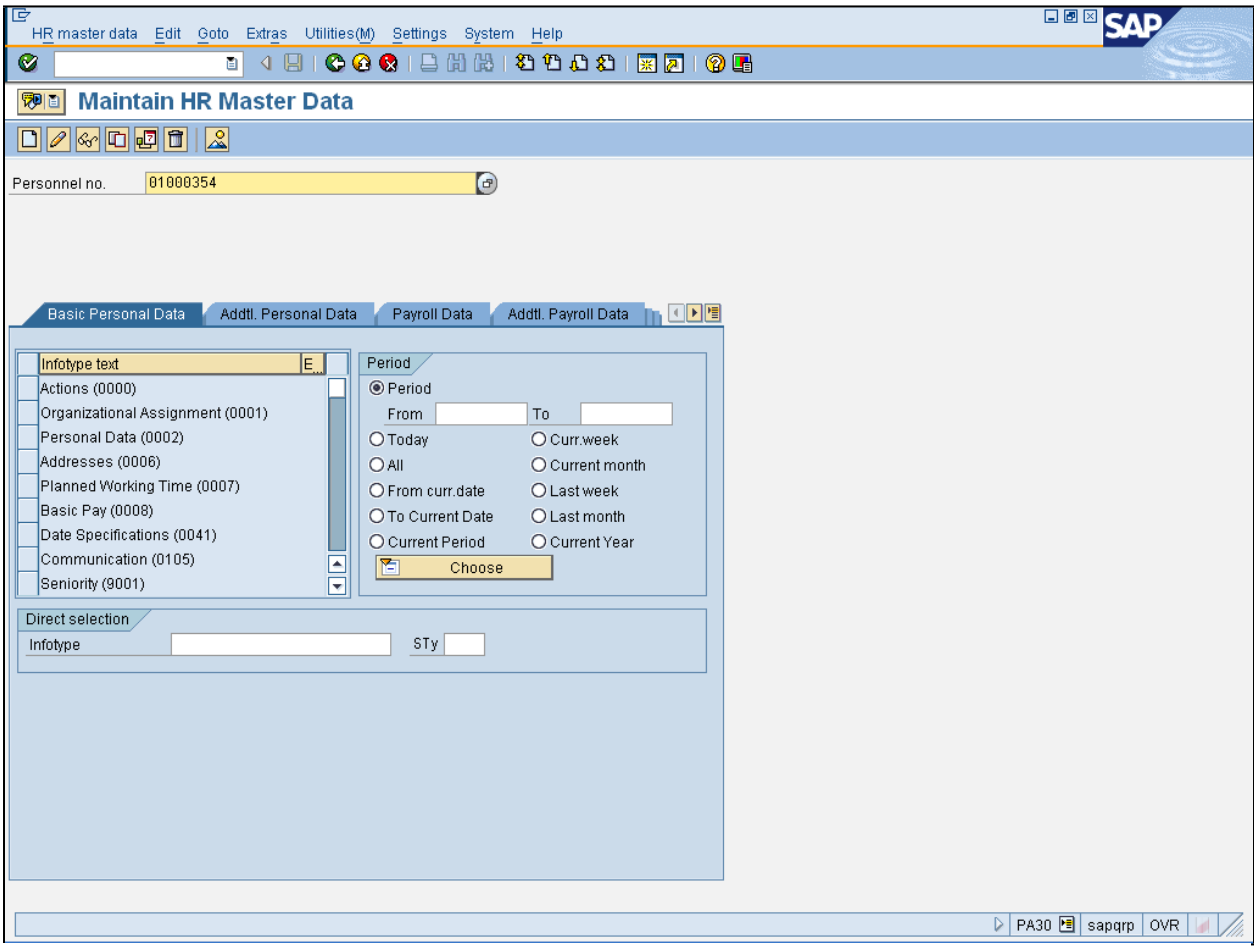
6. Select the appropriate employee Reimbursements Payroll 01000354 .

7. Click **Copy** button .

Maintain HR Master Data



8. Click **From** field .

Always use the pay period beginning date in the **From** field.

9. As required, complete/review the following fields:

Field	R/O/C	Description

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Field	R/O/C	Description
From	R	Beginning value to be entered when specifying a range. **Example:** 091709
Infotype	R	A set of data that is grouped together according to subject matter. Infotypes can be identified by their four-digit keys. **Example:** 0015
STy	R	An extension of the infotype indicating a relationship or plan type specific to the infotype. **Example:** 5r35

10. Click **Create** button . The *Create Additional Payments (0015)* screen displays.

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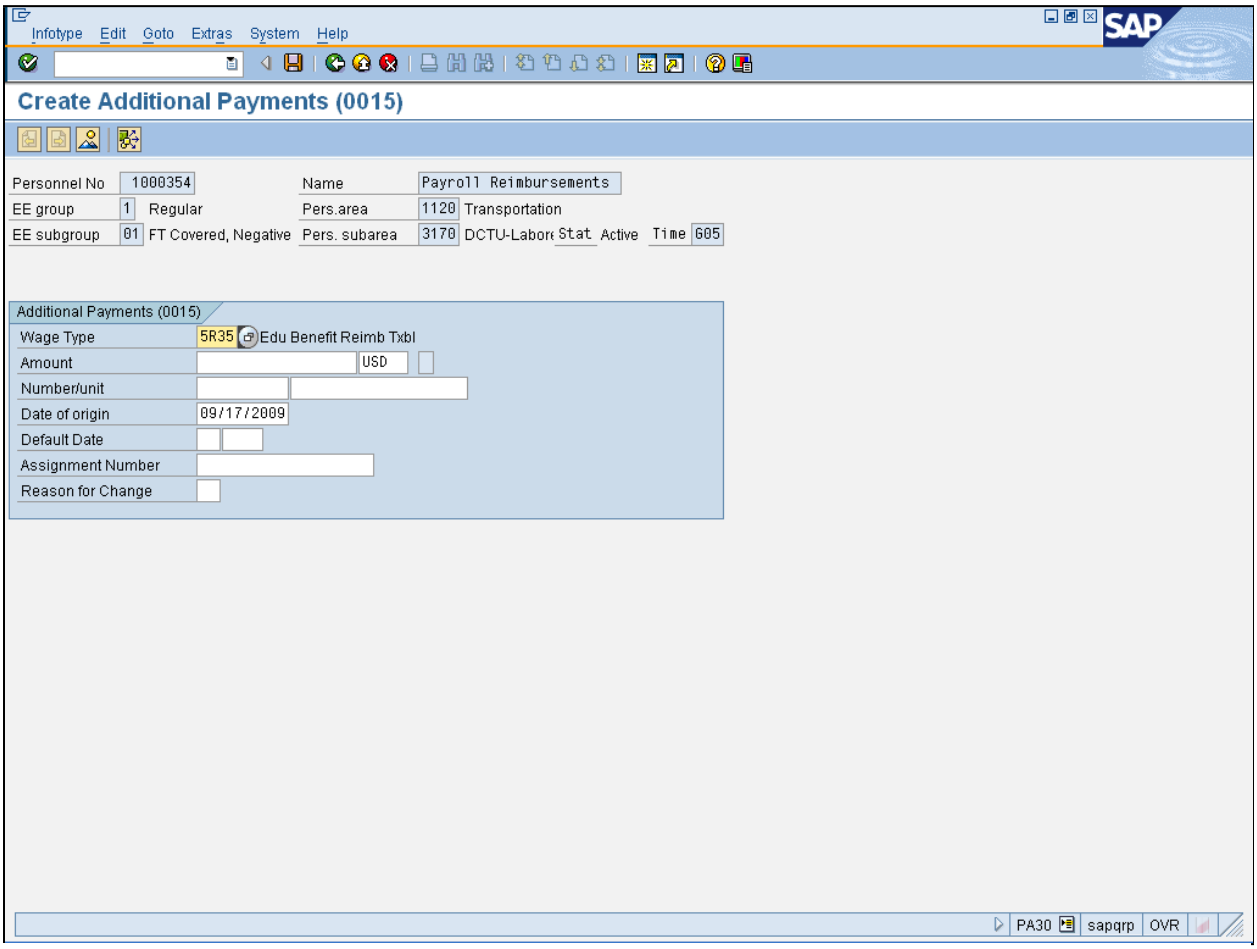
Create Additional Payments (0015)



11. As required, complete/review the following fields:

Field	R/O/C	Description
Amount	R	Figure within the pricing procedure that determines how the system calculates a condition value. **Example:** 750

12. Click **Assignment Number** field .

Use this field for reference information.

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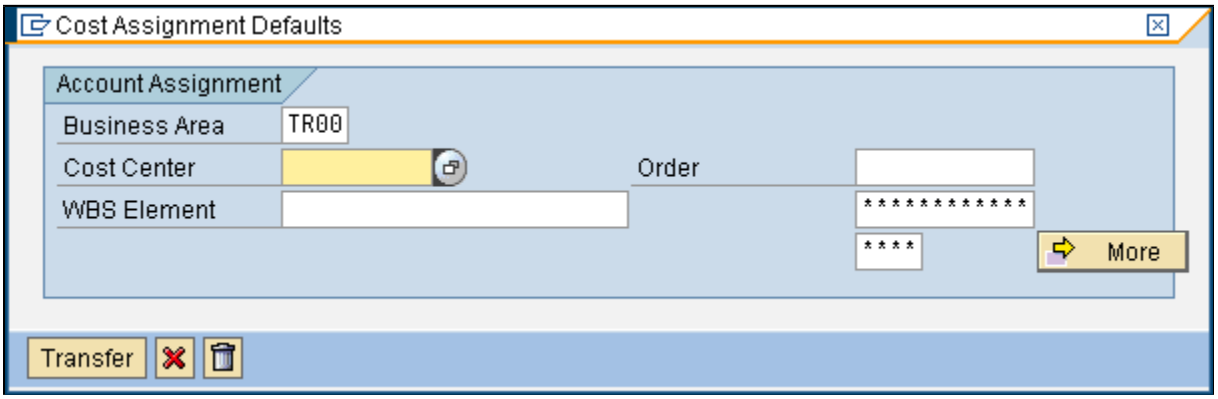
13. As required, complete/review the following fields:

Field	R/O/C	Description
Assignment Number	R	The numeric format of the claim number and the dates covering the payment. **Example:** 12 Credits Summer 09

14. Click **Edit** option Edit from the main menu.

15. Select **Maintain cost assignment** Maintain cost assignment .

Cost Assignment Defaults



16. As required, complete/review the following fields:

Field	R/O/C	Description
Cost Center	R	Organizational unit(s) that represents a revenue or cost collector. **Example:** trmn000012

17. Click **Transfer** button Transfer .

If you need to change the Account Assignment, enter **only one** Cost Object. **Do not** key over the **** fields.

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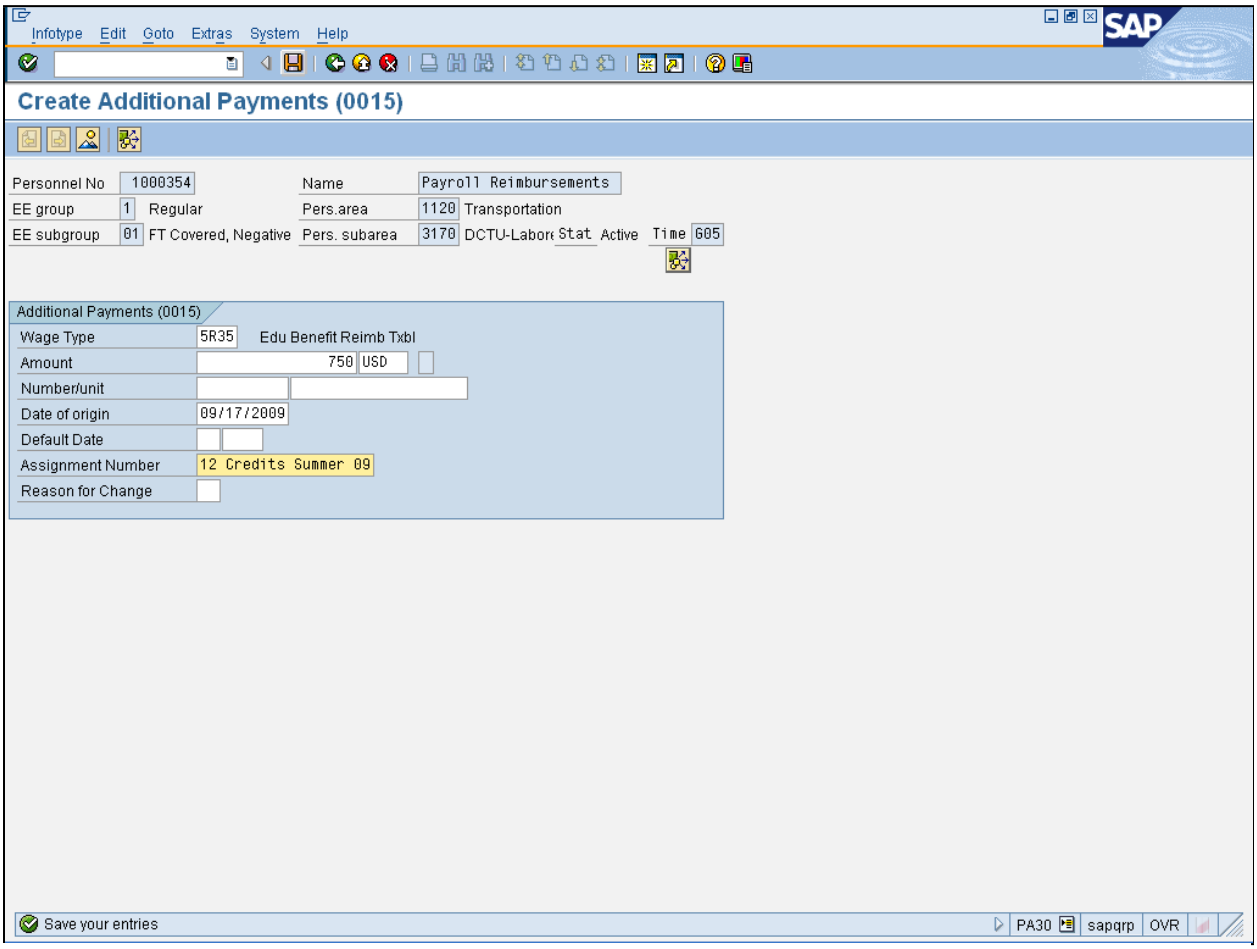
Create Additional Payments (0015)



18. Click **Save** button .

The system returns the message, *"Save your entries".*

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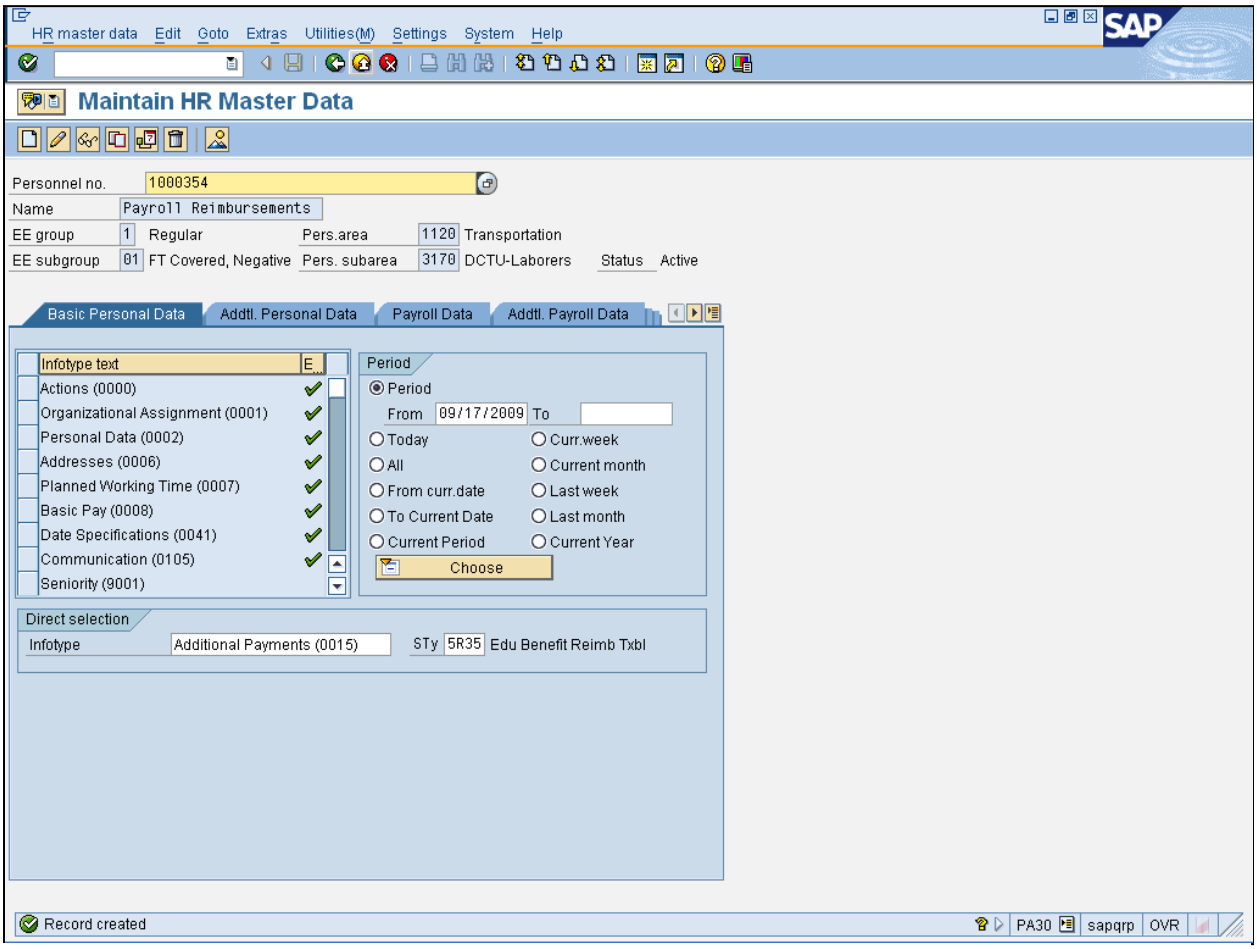
Maintain HR Master Data



19. Click **Exit** button .

The system returns the message, *"Record created".*

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Result

You have successfully reimbursed an employee for Educational expenses that are not job related.