



## **PA30 (IT0015/STy5R34) Process Coppea Taxable Professional Development Fund Reimbursement**

### **Purpose**

Use this procedure to process COPPEA employee professional development fund reimbursements. Amounts reimbursed above the IRS limit become taxable.

### **Trigger**

Perform this procedure when you have received approved reimbursement documents.

### **Prerequisites**

COPPEA employee education reimbursements have been reviewed and approved by the education committee

### **Menu Path**

Use the following menu path to begin this transaction:

N/A

### **Transaction Code**

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### **Helpful Hints**

R/O/C column in tables represents Required, Optional, or Conditional entry.



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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

The screenshot shows the SAP 'Maintain HR Master Data' interface. At the top, there is a menu bar with 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities(M)', 'Settings', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'Maintain HR Master Data' and contains a 'Personnel no.' field. On the left, there is a 'Find by' sidebar with options: 'Person', 'Collective search help', 'Search Term', and 'Free search'. The main content area has tabs for 'Basic Personal Data', 'Addtl. Personal Data', 'Payroll Data', and 'Addtl. Payroll Data'. The 'Basic Personal Data' tab is active, showing a list of infotypes on the left and a 'Period' selection area on the right. The 'Period' area includes radio buttons for 'Today', 'All', 'From curr.date', 'To Current Date', 'Current Period', 'Curr.week', 'Current month', 'Last week', and 'Current Year', along with 'From' and 'To' date fields and a 'Choose' button. At the bottom, there is a 'Direct selection' section with an 'Infotype' field and an 'STy' field.

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



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#### Personnel Number (XXXX)

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

Field	R/O/C	Description
Last name	R	Surname; the name used to identify the individual. <b>Example:</b> pay*

4. Click **Enter (continue)** button  .



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Personnel Number (XXXX) YYYY Entry found

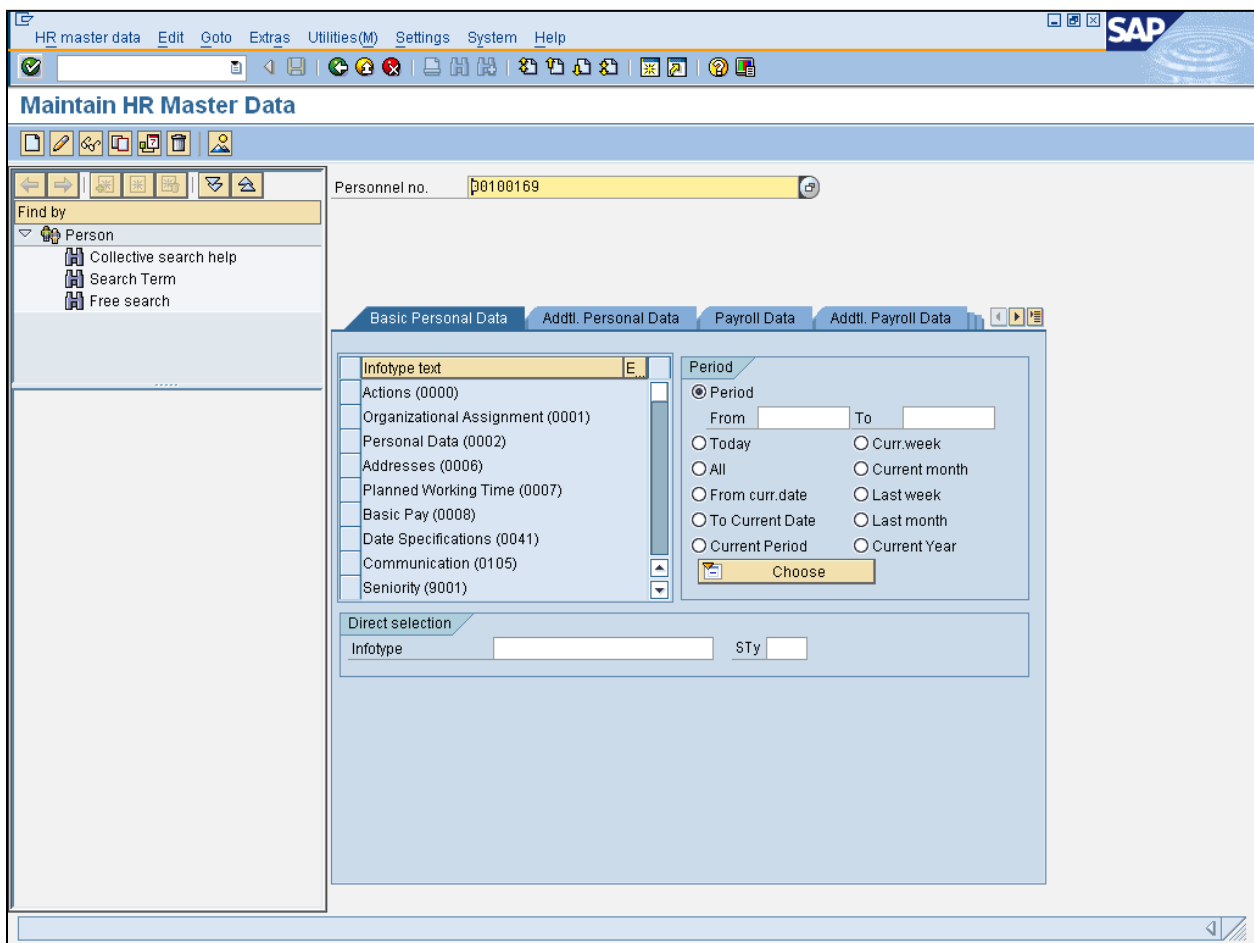
Personnel Number (1) 1 Entry found			
Last name - First name	Personnel ID Number	Organizational assignment	
Last na...	First name	Title	Pers.No.
Pay Test	BTS Coppea		00100169





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- 5. Select **Pay Test BTS Coppea** list item **Pay Test** **BTS Coppea** .
- 6. Click **Enter (continue)** button  .

#### Maintain HR Master Data



- 7. Click **Enter** button  .
- 8. Click the **From** field  .  
 Enter the beginning date of the pay period.



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

Field	R/O/C	Description
From	R	Beginning value to be entered when specifying a range. <b>Example:</b> 020509

10. Click **To** field .



Enter the beginning date of the Pay Period.

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

Field	R/O/C	Description
To	R	Upper limit of the range of time covered in the report. <b>Example:</b> 020509
Infotype	R	A set of data that is grouped together according to subject matter. Infotypes can be identified by their four-digit keys. <b>Example:</b> 15

12. Click **Enter** button

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




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### Create Additional Payments (0015)

Personnel No	100169	Name	BTS Coppea Pay Test		
EE group	1 Regular	Pers.area	1250	OMF-BTS	
EE subgroup	01 FT Covered, Negative	Pers.subarea	3110	COPPEA	Stat Active

Additional Payments (0015)	
Wage Type	<input type="text"/>
Amount	<input type="text"/> USD
Number/unit	<input type="text"/>
Date of origin	02/05/2009
Default Date	<input type="text"/>
Assignment Number	<input type="text"/>
Reason for Change	<input type="text"/>


14. Click **Wage Type** matchcode  . The *Wage Types for Infotype "Additional Payments (0015)"* (XXXX) dialog box displays.



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Wage Types for Infotype "Additional Payments (0015)" (XXXX) YYYY Entries found

WT	Wage Type Long Text	Start Date	End Date
5R10	Moving Expense Taxable	01/01/1900	12/31/9999
5R11	Moving Expense Non Tax	01/01/1900	12/31/9999
5R13	Misc Employee Reim	01/01/1900	12/31/9999
5R30	WC - Stmt via Emp Rel Tx	01/01/1900	12/31/9999
5R31	WC - Misc Stmt Rel - Tax	01/01/1900	12/31/9999
5R32	WC - Stmt via CDA - Tax	01/01/1900	12/31/9999
5R33	WC - Stmt via DCS - Tax	01/01/1900	12/31/9999
5R34	COPPEA Prof Dev Reim Txbl	01/01/1900	12/31/9999
5R35	Edu Benefit Reimb Txbl	01/01/1900	12/31/9999
5R36	FPDR Buy Back	01/01/1900	12/31/9999
5R37	Bureau Buy Back	01/01/1900	12/31/9999
5R40	remove	01/01/1900	12/31/9999
6A00	Admin Fee	01/01/1900	12/31/9999
6A01	Admin Self Insured Plan	01/01/1900	12/31/9999
6A02	CityCore	01/01/1900	12/31/9999
6A03	CityNet Admin	01/01/1900	12/31/9999
6A04	CityNet Med S	01/01/1900	12/31/9999
6A07	Economy High Ded Plan	01/01/1900	12/31/9999
6A11	KPNW Dental	01/01/1900	12/31/9999

15. Select **5R34 COPPEA Prof Dev Reim Txbl** list item 5R34 COPPEA Prof Dev Reim Txbl
16. Click **Enter (continue)** button 





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## Create Additional Payments (0015)

Personnel No 100169 Name BTS Coppea Pay Test  
 EE group 1 Regular Pers.area 1250 OMF-BTS  
 EE subgroup 01 FT Covered, Negative Pers. subarea 3110 COPPEA Stat Active

**Additional Payments (0015)**  
 Wage Type 5R34  
 Amount  USD  
 Number/unit   
 Date of origin 02/05/2009  
 Default Date   
 Assignment Number   
 Reason for Change

17. Click **Amount** field



Type the taxable amount to reimburse that is above the current IRS limit.




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

Field	R/O/C	Description
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Field	R/O/C	Description
Amount	R	Figure within the pricing procedure that determines how the system calculates a condition value. <b>Example:</b> 500.00

19. Click **Enter** button  to validate.
20. Click **Save** button  . The *Maintain HR Master Data* screen displays.  
 The system displays the message, "*Enter data for payroll past (retroactive accounting)*".



## PA30 (IT0015/STy5R34) Process Coppea Taxable Professional Development Fund Reimbursement

### Maintain HR Master Data

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

**Maintain HR Master Data**

Personnel no. 00169

Name BTS Coppea Pay Test

EE group 1 Regular Pers.area 1250 OMF-BTS

EE subgroup 01 FT Covered, Negative Pers. subarea 3110 COPPEA Status Active

Basic Personal Data Addtl. Personal Data Payroll Data Addtl. Payroll Data

Infotype text E...

Actions (0000)	✓
Organizational Assignment (0001)	✓
Personal Data (0002)	✓
Addresses (0006)	✓
Planned Working Time (0007)	✓
Basic Pay (0008)	✓
Date Specifications (0041)	✓
Communication (0105)	✓
Seniority (9001)	

Period

From 02/05/2009 To 02/05/2009

Today Curr.week

All Current month

From curr.date Last week

To Current Date Last month

Current Period Current Year


Choose

Direct selection

Infotype Additional Payments (0015) STy

Record created

21. Click **Exit** button  .

 The system displays the message, "Record created".



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Work Instruction

## **PA30 (IT0015/STy5R34) Process Coppea Taxable Professional Development Fund Reimbursement**

### **Result**

You have successfully processed a COPPEA employee professional development fund reimbursement.